Survey on Inbound & Outbound Tourists

2024 - 2025

MDF

Australian Aid

SRI LANKA TOURISM DEVELOPMENT AUTHORITY

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Preface

Tourism stands as one of Sri Lanka's most vital economic pillars, and understanding the behavior, preferences, and experiences of both inbound and outbound travelers is key to shaping the future of the industry. It is with this conviction that the Research and International Relations Division of the Sri Lanka Tourism Development Authority (SLTDA) undertook a comprehensive Survey on Inbound and Outbound Tourists over a one-year period from July 2024 to June 2025.

The survey was conducted at Bandaranaike International Airport, the nation's principal international gateway capturing firsthand data from travelers arriving in and departing from Sri Lanka. By engaging directly with tourists at this critical point of entry and exit, the survey sought to collect accurate and meaningful information on tourist profiles, travel motivations, spending patterns, length of stay, and overall satisfaction with their Sri Lankan experience.

The findings presented in this report are intended to serve as a valuable reference for policymakers, tourism planners, marketers, and industry stakeholders. It is our sincere hope that the data and analysis contained herein will contribute to more informed decision making, stronger destination branding, and the continued growth of Sri Lanka's tourism sector in a sustainable and inclusive manner.

The Research and International Relations Division expresses its sincere gratitude to all travelers who participated in the survey, as well as to the airport authorities and field staff whose dedication made this study possible.

INTRODUCTION

01

Introduction

1.1. Background and rationale

Tourism holds a pivotal position in Sri Lanka's socio-economic fabric, playing a vital role in generating foreign exchange, creating employment opportunities, and driving regional development. Recognizing its strategic significance, the accurate and timely collection of tourism data is not a mere administrative exercise but an indispensable foundation for sound policymaking. The Research and International Relations Division of the SLTDA is the principal authority entrusted with this task, producing statistical evidence that shapes Sri Lanka's tourism planning and strategy.

While SLTDA has historically carried out surveys targeting inbound foreign travelers, generating useful data on visitor characteristics and travel behavior, the need for a broader, more integrated perspective became increasingly apparent. This gap in knowledge provided the central motivation for expanding the survey scope to simultaneously capture the experiences and patterns of both inbound and outbound tourists.

Beyond informing tourism policy, the data collected through this survey will make a critical contribution to the preparation of Sri Lanka's **Tourism Satellite Accounts (TSA)**, a globally accepted statistical tool used to measure tourism's precise economic footprint. By capturing detailed expenditure and behavioural data, the TSA enables a robust quantification of tourism's contribution to GDP, employment, and national investment, reinforcing the importance of high-quality survey data in national economic accounting.

1.2 Objectives of the survey

The primary objective of this survey is to generate comprehensive, reliable, and up-to-date data on both inbound and outbound tourists, thereby supporting evidence-based decision-making within Sri Lanka's tourism sector. Sri Lanka's tourism industry has long been a cornerstone of national economic development, contributing meaningfully to GDP and foreign exchange earnings, making systematic data collection an institutional priority.

1.3 Survey on Inbound Tourists in Sri Lanka

Main Objective:

To assess the travel behaviour, experiences, satisfaction levels, and economic contributions of inbound tourists visiting Sri Lanka in order to support evidence-based tourism planning and policy development.

Specific objectives:

- To analyse the demographic and travel profile of inbound tourists visiting Sri Lanka.
- To examine tourists' motivations for choosing Sri Lanka as a destination.
- To evaluate visitor satisfaction with key tourism products, services, and facilities.
- To identify spending patterns and economic contribution of inbound tourists.
- To assess destination image and likelihood of revisit intention.
- To identify challenges and areas for improvement in tourism service delivery.

1.4 Survey on Outbound Tourists in Sri Lanka

Main Objective:

To understand the travel behaviour, destination preferences, and decision-making patterns of Sri Lankan outbound tourists in order to inform tourism market trends and international travel dynamics.

Specific objectives:

- To identify socio-demographic characteristics of outbound tourists.
- To examine preferred international destinations and influencing factors.
- To analyse travel purposes, duration, and expenditure patterns.
- To understand booking behaviour and travel arrangement preferences.
- To identify trends and motivations influencing international travel choices.

METHODOLOGY

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Methodology

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2.1 Sampling strategy

A stratified random sampling method was employed to ensure proportional representation across key tourist source markets. This approach guarantees that every member of the target population has an equal probability of selection, enhancing the reliability and validity of findings. A total of **11,731 inbound tourists** and **5,282 outbound tourists** were successfully surveyed over the one-year data collection period from July 2024 to June 2025.

2.2 Data collection

Data were collected by trained enumerators fluent in key foreign languages, enabling effective communication with tourists of diverse nationalities. Digital tablets were utilized for real-time data entry, minimizing manual errors and improving data quality and efficiency.

2.3 Data processing and analysis

All collected data was processed and analyzed using SPSS (Statistical Package for the Social Sciences), enabling robust statistical analysis including frequency distributions, cross-tabulations, and descriptive statistics to derive meaningful insights from the survey responses.

2.4 Limitations

While this survey was designed to be as comprehensive and representative as possible, several limitations must be acknowledged. As with any self-reported survey, responses may be subject to recall bias, where tourists may not accurately remember specific details such as precise expenditure amounts. Although enumerators were trained and multilingual, language barriers with tourists speaking fewer common languages may have occasionally affected the accuracy and completeness of certain responses. Furthermore, the voluntary nature of participation means that some tourist groups may be underrepresented, as travelers under time constraints may have declined to participate, potentially introducing a degree of non-response bias.

Finally, it should be noted that the survey was conducted only at Bandaranaike International Airport, the country's primary international gateway. As a result, tourists entering or departing through alternative entry points, such as the Mattala Rajapaksa International Airport or designated seaports, were not covered by this study.

Notwithstanding these limitations, the scale, methodological rigor, and geographic coverage of this survey ensure that the findings remain highly valuable and broadly representative, providing a solid empirical foundation for informed tourism policy, planning and decision making.

GENERAL PROFILE

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PROFILE

3.1. Distribution by country of residence

No	Country	Number of respondents	% Share
1	United Kingdom	1,254	10.69
2	India	1,104	9.41
3	Germany	1,057	9.01
4	Russian Federation	801	6.83
5	Australia	704	6.00
6	France	594	5.06
7	China	575	4.90
8	Netherlands	466	3.97
9	Poland	395	3.37
10	Spain	372	3.17
11	Italy	337	2.87
12	Switzerland	289	2.46
13	United States	289	2.46
14	Japan	276	2.35
15	Belgium	207	1.76
16	United Arab Emirates	207	1.76
17	Israel	200	1.70
18	Austria	199	1.70
19	Canada	188	1.60
20	Czech Republic	159	1.36
21	Denmark	136	1.16
22	Sweden	134	1.14
23	Malaysia	102	0.87
24	Republic of Ireland	100	0.85
25	New Zealand	90	0.77
26	Portugal	90	0.77
27	Singapore	85	0.72

No	Country	Number of respondents	% Share
28	Norway	81	0.69
29	Thailand	78	0.66
30	Turkey	74	0.63
31	Kazakhstan	72	0.61
32	Maldives	70	0.60
33	Hungary	60	0.51
34	South Korea	59	0.50
35	Saudi Arabia	57	0.49
36	Belarus	56	0.48
37	Slovakia	51	0.43
38	South Africa	51	0.43
39	Finland	44	0.38
40	Romania	44	0.38
41	Greece	41	0.35
42	Ukraine	40	0.34
43	Egypt	38	0.32
44	Bangladesh	35	0.30
45	Iran	34	0.29
46	Lithuania	34	0.29
47	Philippines	28	0.24
48	Taiwan	27	0.23
49	Jordan	22	0.19
50	Lebanon	20	0.17
51	Kuwait	9	0.08
52	Others	196	1.67
	Grand Total	**11,731**	**100.00**

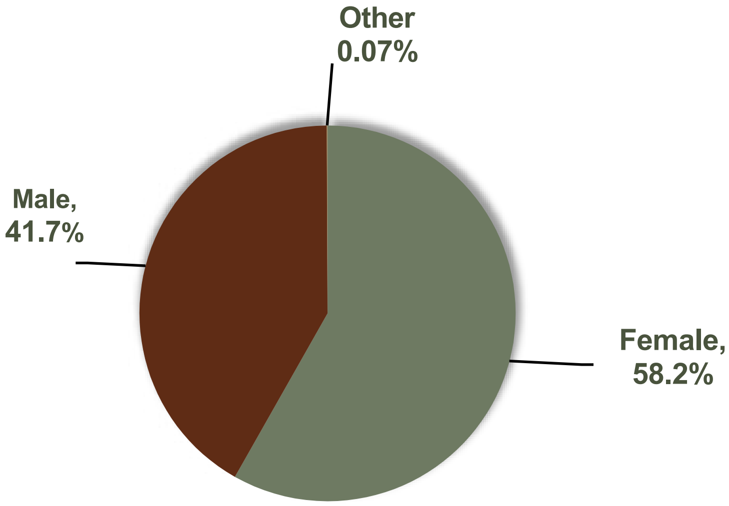
The survey achieved a wide geographical reach, with a total of **11,731 respondents** across 53 distinct countries and territories. The sample selection demonstrates a strong representation from Europe, with the **United Kingdom** (1,254 respondents, 10.69%) and **Germany** (1,057 respondents, 9.01%) forming the largest national cohorts. This is complemented by significant participation from **India** (1,104 respondents, 9.41%), indicating a robust sample from the Asia-Pacific region as well.

The distribution reflects a focus on major outbound tourism markets. Other notable sources include the **Russian Federation** (6.83%), **Australia** (6.00%), **France** (5.06%), and **China** (4.90%).

Beyond the top contributors, the sample includes a long tail of nations, ensuring diversity. Countries from the Middle East (e.g., United Arab Emirates, Israel, Saudi Arabia), other parts of Asia (e.g., Japan, Malaysia, Thailand), and additional European nations (e.g., Poland, Spain, Italy) are all represented, each with shares generally below 3.5%. This extensive coverage, down to smaller cohorts like **Kuwait** (0.08%) and **Lebanon** (0.17%), helps capture a variety of perspectives from different regional and cultural backgrounds, enhancing the comprehensiveness of the inbound tourist survey data.

3.2. Gender distribution

Gender	Number of respondents	Percentage
Female	6,827	58.20
Male	4,896	41.73
Other	8	0.07
Total	11,731	100.0



Female respondents make up a clear majority at 58.2%, compared to 41.7% male and a negligible 0.07% identifying as other. This contrasts with official Emigration and Immigration Department data, which indicate a nearly balanced gender distribution of 51% male and 49% female among all tourists. The discrepancy could suggest a sampling bias in the survey, possibly arising from factors such as higher female willingness to participate.

3.2.a. Gender by country

Country	Female	Male	Female (%)	Male (%)	Number of respondents
Australia	423	280	60	40	704
Austria	123	76	62	38	199
Bangladesh	20	15	57	43	35
Belarus	35	21	63	38	56
Belgium	120	87	58	42	207
Canada	102	86	54	46	188
China	373	202	65	35	575
Czech Republic	97	62	61	39	159
Denmark	87	49	64	36	136
Egypt	15	23	39	61	38
Finland	29	15	66	34	44
France	364	230	61	39	594
Germany	661	396	63	37	1057
Greece	28	13	68	32	41
Hungary	38	22	63	37	60
India	423	681	38	62	1104
Iran	12	22	35	65	34
Israel	103	97	52	49	200
Italy	205	131	61	39	337
Japan	162	114	59	41	276
Jordan	15	7	68	32	22
Kazakhstan	41	31	57	43	72
Kuwait	5	4	56	44	9
Lebanon	8	12	40	60	20
Lithuania	23	11	68	32	34
Malaysia	54	48	53	47	102
Maldives	41	28	59	40	70
Netherlands	289	177	62	38	466
New Zealand	49	41	54	46	90
Norway	39	42	48	52	81
Philippines	20	7	71	25	28
Poland	229	166	58	42	395
Portugal	58	32	64	36	90

Country	Female	Male	Female (%)	Male (%)	Number of respondents
Republic of Ireland	67	33	67	33	100
Romania	27	17	61	39	44
Russian Federation	485	313	61	39	801
Saudi Arabia	32	25	56	44	57
Singapore	52	33	61	39	85
Slovakia	30	21	59	41	51
South Africa	27	24	53	47	51
South Korea	29	30	49	51	59
Spain	232	140	62	38	372
Sweden	82	52	61	39	134
Switzerland	186	103	64	36	289
Taiwan	21	6	78	22	27
Thailand	56	22	72	28	78
Turkey	39	35	53	47	74
Ukraine	24	16	60	40	40
United Arab Emirates	99	108	48	52	207
United Kingdom	800	453	64	36	1254
USA	145	144	50	50	289
Other	103	93	53	47	196

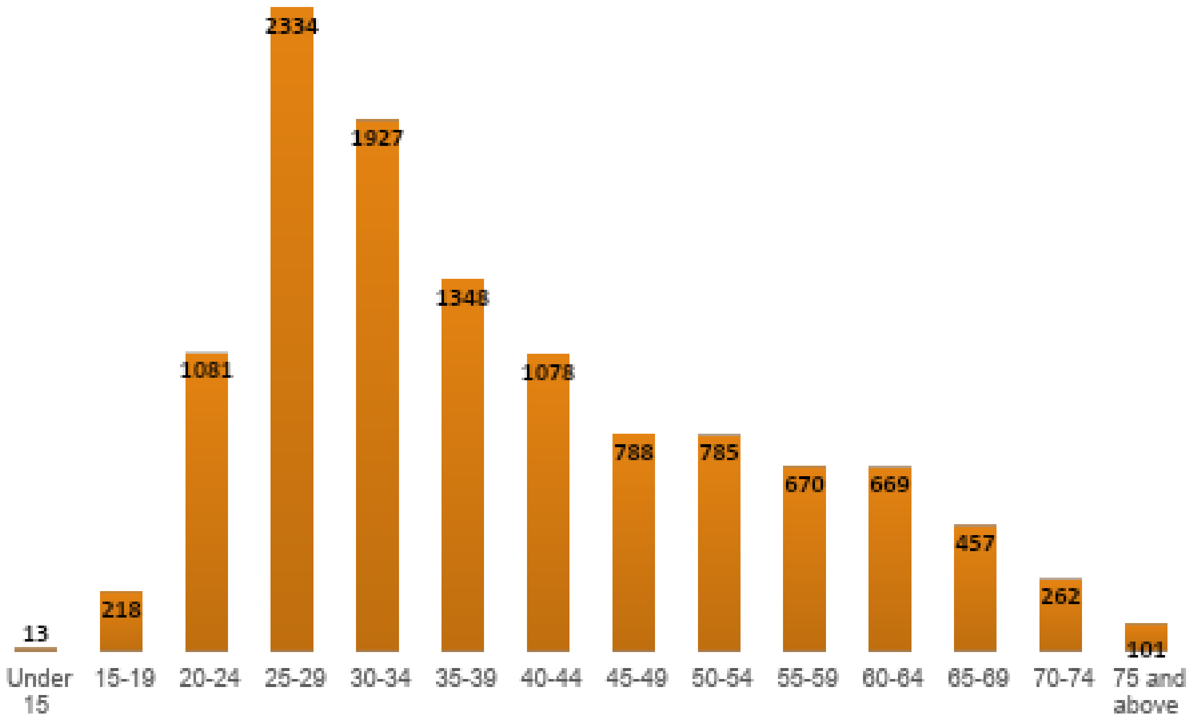
An analysis of the gender distribution of inbound tourist respondents by country of residence reveals distinct patterns of gender dominance across different source markets. While female tourists accounted for more than 60% of respondents from a broad range of countries including Australia, Austria, Belarus, China, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Italy, Jordan, Lithuania, Netherlands, Philippines, Portugal, Ireland, Romania, Russian Federation, Singapore, Spain, Sweden, Switzerland, Taiwan, Thailand, Ukraine, and the United Kingdom the pattern is notably reversed for several other markets.

In contrast, male tourists constituted more than 60% of respondents from Egypt, India, Iran, and Lebanon, reflecting culturally and socially distinct travel patterns prevalent in these source markets.

Taken together, these findings highlight the importance of gender-sensitive analysis in understanding the composition of Sri Lanka's inbound tourist base and underscore the need for tailored marketing strategies that effectively engage both male and female traveler segments across diverse source markets.

3.3. *Age distribution*

Age Range	Number of respondents	Percentage
Under 15	13	0.1
15-19	218	1.9
20-24	1,081	9.2
25-29	2,334	19.9
30-34	1,927	16.4
35-39	1,348	11.5
40-44	1,078	9.2
45-49	788	6.7
50-54	785	6.7
55-59	670	5.7
60-64	669	5.7
65-69	457	3.9
70-74	262	2.2
75 and above	101	0.9
Grand Total	**11,731**	**100.0**



The age distribution of the survey respondents reveals a strong concentration of travelers within the younger and middle-aged brackets. The dominant group is 25–29 years (19.9%), with the 20-39 age range collectively accounting for over 58% of all respondents. This aligns with global tourism trends identified in major industry reports and offers critical insights for destination strategy. The overrepresentation of this demographic is not merely a survey artifact but reflects their status as the core engine of contemporary international tourism. As noted in the WTM Global Travel Report (2024) millennials and younger Gen Z travelers exhibit the highest propensity for frequent travel, driven by digital savviness, a strong preference for experiential and transformative travel, a higher reliance on online reviews and social media for travel planning, peer connections and social media. This suggests that the surveyed inbound tourism flows are likely highly digitally influenced, with products and marketing focused on authentic experiences, adventure, and Instagram-worthy moments performing particularly well.

Furthermore, the pattern strongly resonates with the actual tourist arrival data from the Department of Immigration and Emigration. WTM Global Travel Report (2024) highlights that the 20-39 cohort is not only a volume driver but also the primary adopters of new tourism trends, such as sustainable travel, leisure (business + leisure), and demand for local immersion. This convergence indicates that destinations successful in attracting this age group are effectively tapping into the most dynamic and future-oriented segment of the global market.

Conversely, the notable decline in respondents over 65 (approximately 7%), presents a strategic consideration. While this demographic is smaller in this survey sample, studies emphasize that the global population is aging, and the "silver economy" represents a high-value segment characterized by greater disposable income, longer trip durations, and travel during off-peak seasons.

The findings confirm that Sri Lanka’s inbound tourism is currently aligned with the most dynamic global traveler segment, but future competitiveness will depend on how effectively destinations leverage digital influence, deepen experiential offerings, and strategically expand into high-value older markets.

3.3.a. Age group by country of residence

Country	Under 15	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75 and above	
Australia	2	4	62	116	81	61	36	36	51	49	79	66	41	20	**704**
Austria	0	4	22	50	37	17	12	12	11	10	9	10	3	2	**199**
Bangladesh	0	1	9	6	8	5	3	2	1	0	0	0	0	0	**35**
Belarus	0	0	3	18	16	9	4	2	2	0	0	2	0	0	**56**
Belgium	1	1	23	62	42	19	6	8	15	12	8	5	4	1	**207**
Canada	0	1	12	33	25	24	18	13	7	23	14	8	7	3	**188**
China	1	16	26	64	85	92	91	54	45	30	36	22	11	2	**575**
Czech Republic	0	1	17	41	23	22	17	9	14	7	3	5	0	0	**159**
Denmark	0	8	22	31	22	11	5	6	11	7	8	5	0	0	**136**
Egypt	0	0	3	14	12	5	3	1	0	0	0	0	0	0	**38**
Finland	0	1	6	10	10	7	1	4	3	0	2	0	0	0	**44**
France	0	15	46	149	78	55	57	41	45	36	39	21	12	0	**594**
Germany	0	28	160	255	161	91	79	59	58	70	45	37	13	1	**1,057**
Greece	0	0	2	11	7	5	6	4	5	1	0	0	0	0	**41**
Hungary	0	0	4	14	6	9	6	6	4	4	6	1	0	0	**60**
India	1	10	50	100	147	138	153	121	106	88	89	49	36	16	**1,104**
Iran	0	0	0	5	11	5	4	4	1	4	0	0	0	0	**34**
Israel	0	5	47	43	28	16	16	8	12	8	6	7	3	1	**200**
Italy	0	6	24	89	91	47	21	12	19	6	8	13	0	1	**337**
Japan	0	5	39	53	36	27	25	20	18	20	16	7	8	2	**276**
Jordan	0	0	2	6	5	5	2	2	0	0	0	0	0	0	**22**
Kazakhstan	0	4	11	22	14	13	6	1	1	0	0	0	0	0	**72**
Kuwait	0	0	1	2	3	1	1	0	0	1	0	0	0	0	**9**
Lebanon	0	0	1	5	4	5	2	1	1	0	1	0	0	0	**20**
Lithuania	0	0	2	11	8	2	4	5	1	1	0	0	0	0	**34**
Malaysia	0	2	9	17	28	11	5	10	9	3	2	3	3	0	**102**
Maldives	0	2	4	19	9	12	14	3	6	0	1	0	0	0	**70**
Netherlands	0	11	78	140	79	28	26	17	24	18	24	12	5	4	**466**
New Zealand	0	2	6	9	12	6	5	6	9	8	8	7	7	5	**90**
Norway	0	3	9	18	10	6	6	7	6	6	5	1	1	3	**81**

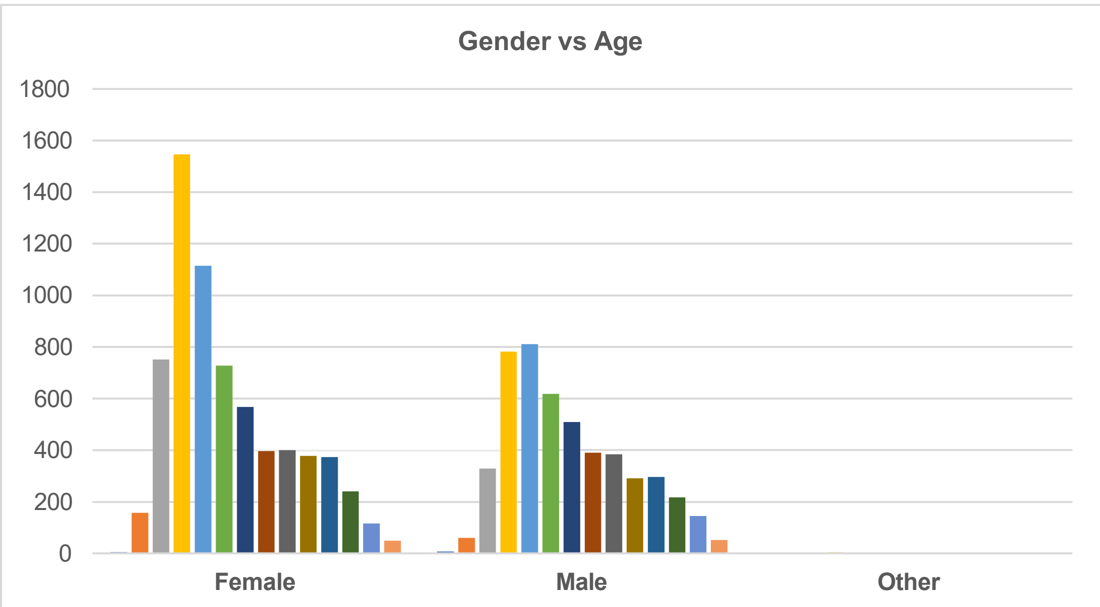
Country	Under 15	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75 and above	
Other	0	5	17	47	31	21	25	13	19	10	4	2	1	1	**196**
Philippines	0	0	2	8	9	4	1	1	2	1	0	0	0	0	**28**
Poland	1	10	21	73	63	68	58	36	30	15	8	9	3	0	**395**
Portugal	0	0	9	19	21	9	10	10	5	2	2	2	1	0	**90**
Republic of Ireland	0	1	12	33	23	7	4	5	3	5	0	3	4	0	**100**
Romania	0	0	2	10	12	9	2	2	3	1	0	2	1	0	**44**
Russian Federation	3	12	56	151	156	159	126	58	35	28	12	4	1	0	**801**
Saudi Arabia	0	0	4	14	7	14	5	5	2	3	3	0	0	0	**57**
Singapore	0	1	6	15	7	6	11	11	8	7	3	5	4	1	**85**
Slovakia	0	0	3	11	8	12	3	5	4	1	2	1	1	0	**51**
South Africa	0	1	6	13	7	6	5	1	3	2	3	2	2	0	**51**
South Korea	0	2	1	8	8	11	3	4	8	5	4	5	0	0	**59**
Spain	1	6	36	99	81	46	28	24	22	9	13	6	1	0	**372**
Sweden	0	4	33	17	28	10	6	5	4	13	7	5	2	0	**134**
Switzerland	0	5	34	58	52	25	26	12	16	19	22	9	8	3	**289**
Taiwan	0	0	1	3	6	4	1	3	3	2	1	3	0	0	**27**
Thailand	0	0	6	16	17	6	8	8	4	2	8	1	1	1	**78**
Turkey	0	2	4	14	19	8	7	8	5	3	3	0	1	0	**74**
Ukraine	0	1	1	13	10	7	2	3	2	1	0	0	0	0	**40**
United Arab Emirates	0	3	3	44	42	46	29	18	13	2	6	0	1	0	**207**
United Kingdom	3	31	104	217	168	87	57	61	90	104	140	97	67	28	**1,254**
USA	0	4	20	38	54	29	27	21	19	23	19	20	9	6	**289**
Total	**13**	**218**	**1,081**	**2,333**	**1,927**	**1,348**	**1,078**	**788**	**784**	**670**	**669**	**457**	**262**	**101**	**11,731**

An analysis of country of residence by age distribution shows that, for many nations including the United Kingdom, Ukraine, Switzerland, Spain, South Africa, Singapore, Saudi Arabia, Ireland, Portugal, Poland, Norway, the Netherlands, Maldives, Lithuania, Kazakhstan, Jordan, Japan, Hungary, Greece, Germany, France, Finland, Egypt, Denmark, the Czech Republic, Canada, Belgium, Belarus, Austria, Poland and Australia the dominant age group is 25–29.

In contrast, Sweden and Israel have a higher concentration in the 20–24 age group, while countries such as the UAE, South Korea, Slovakia, Russia, Lebanon, and China show a majority in the 35–39 category. For India, the dominant age group is 40–44. Meanwhile, tourists from countries like the USA, Turkey, Thailand, Taiwan, Romania, New Zealand, Malaysia, Italy, Iran, Philippines, Kuwait and Bangladesh primarily fall within the 30–34 age range.
However, this pattern differs from official data from the Department of Immigration and Emigration for countries such as the United Kingdom and France, where most visitors belong to the 60+ age group. This discrepancy may be due to a higher response rate among younger individuals in the survey sample.

3.4. Gender vs age

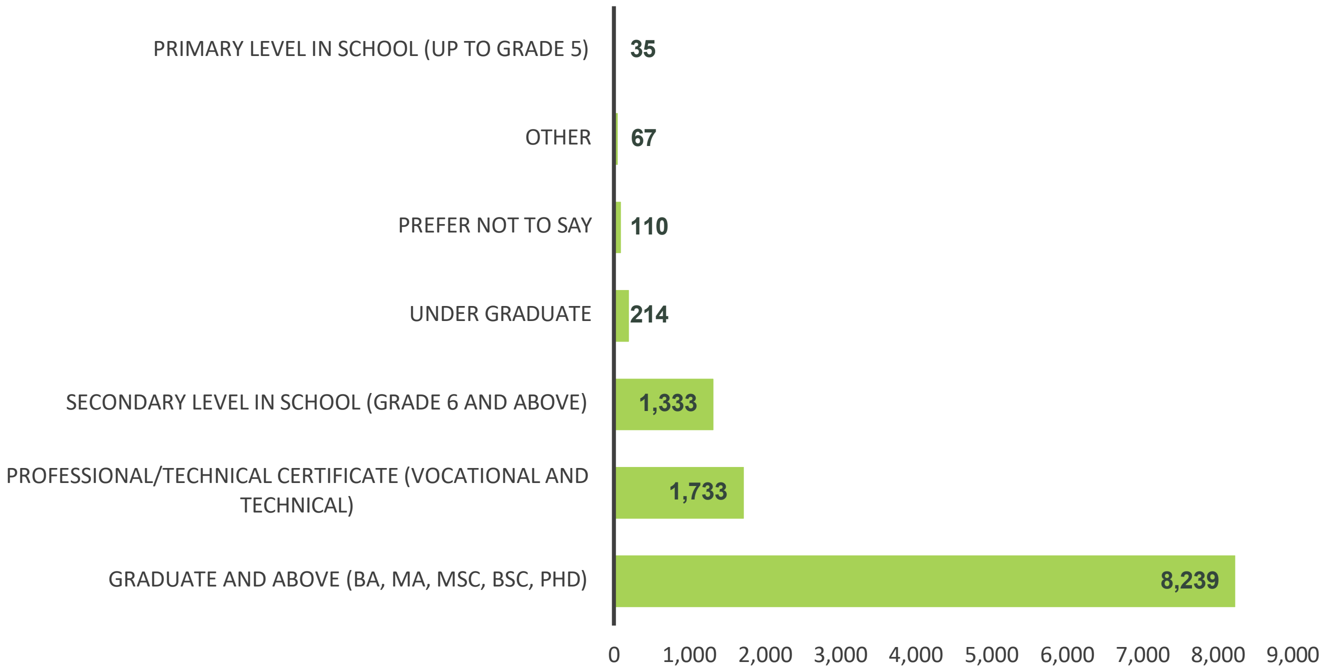
Gender	Under 15	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75 and above	Total
Female	5	157	752	**1,547**	1,115	728	568	397	401	378	373	240	117	49	**6,827**
Male	8	61	329	782	**811**	619	510	391	384	292	296	217	145	52	**4,897**
Other	0	0	0	**5**	1	1	0	0	0	0	0	0	0	0	**8**
	13	**218**	**1,081**	**2,334**	**1,927**	**1,348**	**1,078**	**788**	**785**	**670**	**669**	**457**	**262**	**101**	**11,731**



The analysis of age distribution by gender reveals that most female respondents are concentrated in the 25–29 age group, whereas male respondents are primarily represented in the 30–34 age category. Additionally, those identifying under the “other” gender category also largely fall within the 25–29 age group. This pattern suggests relatively higher participation among younger females, indicating stronger engagement or responsiveness from this segment, while the slightly older concentration among males may reflect differences in life stage, availability, or survey engagement levels. The alignment of the “other” category with the 25–29 age group further indicates that younger individuals across diverse gender identities are more actively represented in the sample.

3.5. Level of education

Education Category	Number of respondents	Percentage
Graduate and above (BA, MA, MSc, BSc, PhD)	8,239	70.23
Professional/technical certificate (Vocational and technical)	1,733	14.77
Secondary level in school (Grade 6 and above)	1,333	11.36
Undergraduate	214	1.82
Prefer not to say	110	0.94
Other	67	0.57
Primary level in school (up to Grade 5)	35	0.30
Grand Total	**11,731**	**100.00**



The survey data from 11,731 tourists visiting Sri Lanka reveals a predominantly highly educated demographic. The largest group, representing 70.2% of respondents, holds a graduate or postgraduate degree (BA, MA, MSc, BSc, or PhD). This strong majority suggests that Sri Lanka attracts travelers who are likely motivated by cultural, historical, and nature-based experiences and who may possess higher disposable income for curated and premium tourism offerings.

Previous studies indicate that higher educational attainment is strongly associated with demand for experiential, heritage, and learning-oriented travel (UN Tourism, 2018; OECD, 2020).

A significant portion of tourists (14.8%) hold professional or technical certificates, indicating strong appeal among skilled professionals and vocationally trained travelers. This segment is often attracted to niche and skill-related tourism products such as wildlife photography, scuba diving, wellness and Ayurveda programs, and industry-linked experiences including tea, gem, and textile tourism. Research shows that professionally qualified travelers demonstrate higher interest in special-interest and activity-based tourism (UN Tourism, 2019).

Another 11.4% of tourists have completed secondary education (Grade 6 and above), a group that likely includes younger budget travelers, backpackers, and adventure seekers. This aligns with Sri Lanka’s positioning as an affordable, experiential destination offering surfing, hiking, wildlife, and cultural immersion. Studies on youth and backpacker tourism highlight the importance of affordability and authenticity for this segment (Richards & Wilson, 2004; UN Tourism, 2016).

Smaller segments include undergraduate students (1.8%), presenting opportunities for educational tourism, study tours, volunteering, and exchange programs. A very small proportion of respondents reported only primary education or selected “other” (together less than 1%), which may indicate barriers related to accessibility, travel costs, awareness, or targeted marketing. Additionally, about 0.9% of respondents preferred not to disclose their education level, reflecting ethical survey practices and respect for respondent privacy.

Sri Lanka’s inbound tourism profile is strongly skewed toward well-educated travelers. This underscores the need for strategies that prioritize high-value, experiential, knowledge-driven, and sustainable tourism products. At the same time, there is scope to strategically nurture niche segments such as student travel, vocational tourism, and inclusive tourism offerings to broaden market reach and enhance resilience in the tourism sector.

3.5.a. Country of residence vs level of education

Country	Primary level in school (up to Grade 5)	Secondary level in school (Grade 6 and above)	Professional/technical certificate (Vocational and technical)	Undergraduate	Graduate and above (BA, MA, MSc, BSc, PhD)	Other	Prefer not to say	*Number of Respondents*
Australia	0.14	16.34	14.77	2.27	65.34	0.28	0.85	*704*
Austria	0.50	12.56	9.55	4.02	71.36	0.50	1.51	*199*
Bangladesh	0.00	8.57	2.86	2.86	85.71	0.00	0.00	*35*
Belarus	0.00	5.36	23.21	0.00	71.43	0.00	0.00	*56*
Belgium	0.48	7.25	10.14	1.45	80.19	0.48	0.00	*207*
Canada	0.53	9.04	10.64	0.00	78.72	0.53	0.53	*188*
China	0.52	12.17	12.17	1.39	73.04	0.35	0.35	*575*
Czech Republic	0.00	16.98	6.92	1.26	74.21	0.00	0.63	*159*
Denmark	0.00	13.97	12.50	5.88	63.97	0.74	2.94	*136*
Egypt	0.00	5.26	13.16	0.00	81.58	0.00	0.00	*38*
Finland	0.00	6.82	6.82	2.27	84.09	0.00	0.00	*44*
France	1.18	7.58	20.71	1.01	68.01	0.84	0.67	*594*
Germany	0.09	10.79	12.87	2.37	72.00	0.95	0.95	*1057*
Greece	0.00	7.32	12.20	0.00	80.49	0.00	0.00	*41*
Hungary	0.00	13.33	11.67	1.67	71.67	0.00	1.67	*60*
India	0.63	16.58	10.60	1.27	69.84	0.91	0.18	*1104*
Iran	2.94	2.94	8.82	0.00	85.29	0.00	0.00	*34*
Israel	1.00	17.50	7.50	2.50	67.50	1.00	3.00	*200*
Italy	0.00	13.35	10.68	0.59	74.48	0.30	0.59	*337*
Japan	0.36	7.61	8.70	5.80	75.00	0.72	1.81	*276*
Jordan	0.00	9.09	9.09	0.00	81.82	0.00	0.00	*22*
Kazakhstan	0.00	6.94	22.22	8.33	61.11	1.39	0.00	*72*

Country	Primary level in school (up to Grade 5)	Secondary level in school (Grade 6 and above)	Professional/technical certificate (Vocational and technical)	Undergraduate	Graduate and above (BA, MA, MSc, BSc, PhD)	Other	Prefer not to say	*Number of Respondents*
Kuwait	0.00	0.00	22.22	11.11	66.67	0.00	0.00	*9*
Lebanon	0.00	0.00	10.00	0.00	85.00	5.00	0.00	*20*
Lithuania	0.00	5.88	14.71	2.94	76.47	0.00	0.00	*34*
Malaysia	0.00	14.71	14.71	3.92	65.69	0.00	0.98	*102*
Maldives	0.00	28.57	4.29	4.29	61.43	1.43	0.00	*70*
Netherlands	0.64	6.87	13.09	1.72	76.39	0.21	1.07	*466*
New Zealand	0.00	14.44	15.56	0.00	67.78	0.00	2.22	*90*
Norway	2.47	11.11	11.11	1.23	74.07	0.00	0.00	*81*
Philippines	0.00	10.71	14.29	0.00	75.00	0.00	0.00	*28*
Poland	0.25	6.84	17.47	1.52	71.90	1.27	0.76	*395*
Portugal	0.00	7.78	6.67	1.11	84.44	0.00	0.00	*90*
Republic of Ireland	0.00	6.00	13.00	1.00	80.00	0.00	0.00	*100*
Romania	0.00	0.00	11.36	0.00	88.64	0.00	0.00	*44*
Russian Federation	0.00	5.24	38.95	1.87	52.18	0.87	0.87	*801*
Saudi Arabia	0.00	24.56	10.53	0.00	64.91	0.00	0.00	*57*
Singapore	0.00	12.94	14.12	1.18	71.76	0.00	0.00	*85*
Slovakia	0.00	7.84	5.88	0.00	86.27	0.00	0.00	*51*
South Africa	0.00	13.73	11.76	3.92	68.63	0.00	1.96	*51*
South Korea	0.00	10.17	13.56	0.00	76.27	0.00	0.00	*59*
Spain	0.00	5.38	19.89	2.15	71.24	0.27	1.08	*372*
Sweden	0.00	14.18	9.70	2.99	71.64	0.75	0.75	*134*
Switzerland	0.35	9.34	16.96	1.73	70.24	0.69	0.69	*289*
Taiwan	0.00	22.22	3.70	7.41	66.67	0.00	0.00	*27*

Country	Primary level in school (up to Grade 5)	Secondary level in school (Grade 6 and above)	Professional/technical certificate (Vocational and technical)	Undergraduate	Graduate and above (BA, MA, MSc, BSc, PhD)	Other	Prefer not to say	*Number of Respondents*
Thailand	0.00	19.23	7.69	1.28	70.51	0.00	1.28	*78*
Turkey	1.35	4.05	6.76	1.35	85.14	0.00	1.35	*74*
Ukraine	0.00	10.00	15.00	0.00	75.00	0.00	0.00	*40*
United Arab Emirates	0.00	7.25	11.11	0.48	80.68	0.00	0.48	*207*
United Kingdom	0.08	17.22	14.19	1.52	64.35	0.72	1.91	*1254*
USA	0.00	4.50	9.34	2.08	82.35	0.00	1.73	*289*
Other	0.00	8.25	14.43	0.52	74.23	0.00	2.58	196

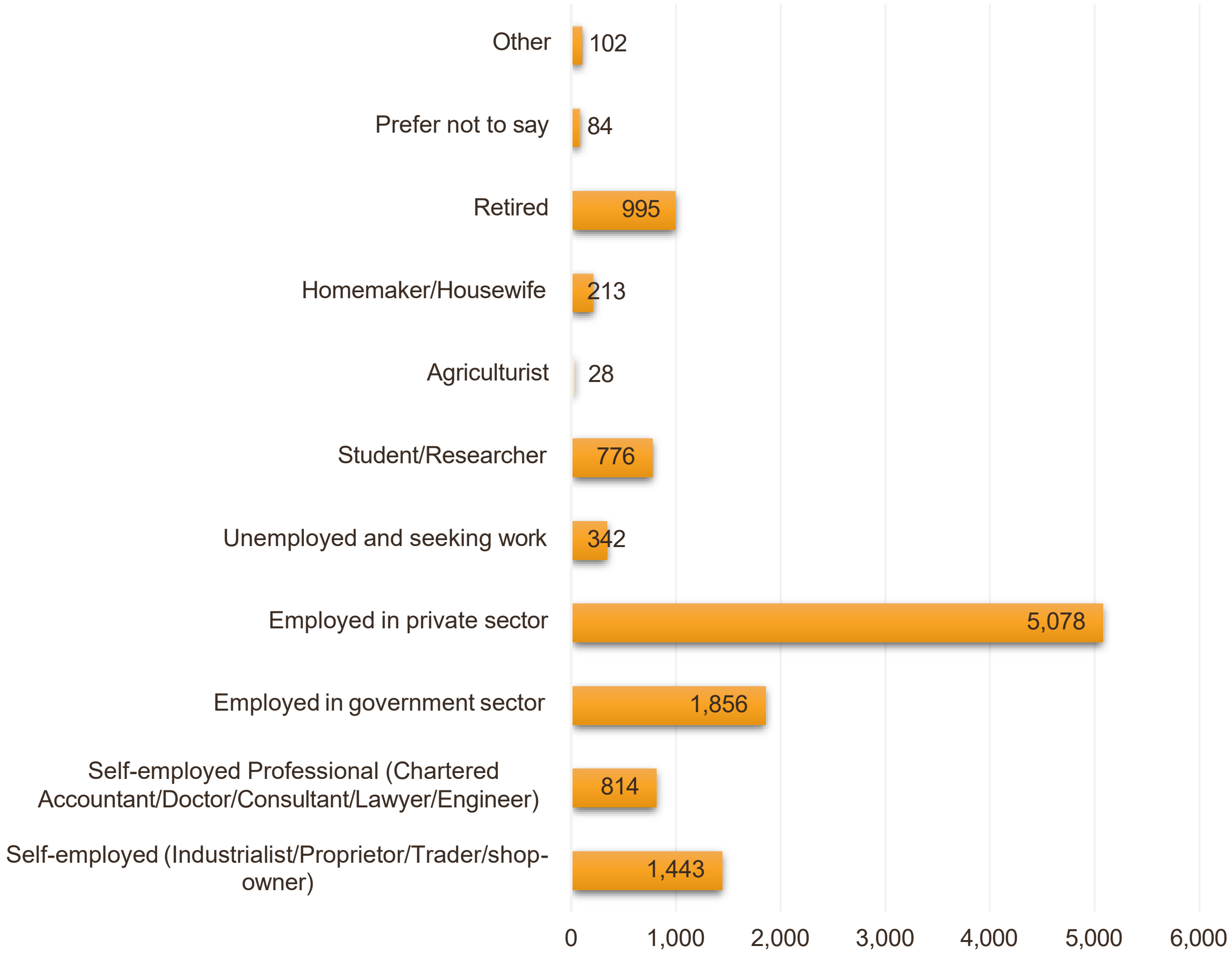
An examination of the educational profiles of inbound tourists by country of residence reveals notable variations across source markets. A highly educated tourist base with more than 80% holding graduate-level qualifications or above was recorded from USA, UAE, Turkey, Slovakia, Romania, Ireland, Portugal, Lebanon, Jordan, Iran, Greece, Finland, Egypt, Belgium, and Bangladesh, reflecting the predominance of well-educated, professional travelers from these markets.

In contrast, tourists from Belarus, France, Kazakhstan, Kuwait, and the Russian Federation stood out for their relatively higher representation of technically and professionally qualified travelers, with more than 20% holding such credentials. Meanwhile, a secondary school. education level was more prevalent among tourists from Australia, Czech Republic, India, Israel, Maldives, Thailand, and the United Kingdom, where more than 15% of respondents fell within this educational category.

At the primary education level, Iran and Norway recorded the highest proportions, with more than 2% of tourists from these countries reporting primary schooling as their highest educational attainment. Overall, these findings underscore the diverse educational backgrounds of Sri Lanka's inbound tourist base, with graduate-level travelers forming the dominant segment across the majority of source markets.

3.6. Employment status

Primary employment status	Number of respondents	Percentage
Self-employed (Industrialist/Proprietor/Trader/shop-owner)	1,443	12.30
Self-employed Professional (Chartered Accountant/Doctor/Consultant/Lawyer/Engineer)	814	6.94
Employed in government sector	1,856	15.82
Employed in private sector	5,078	43.29
Unemployed and seeking work	342	2.92
Student/Researcher	776	6.61
Agriculturist	28	0.24
Homemaker/Housewife	213	1.82
Retired	995	8.48
Prefer not to say	84	0.72
Other	102	0.87
Grand Total	**11,731**	**100.00**



The employment profile of tourists visiting Sri Lanka, reveals a strong dominance of formally employed individuals. The largest segment consists of private sector employees, accounting for 43.3% (5,078 respondents), followed by government sector employees at 15.8% (1,856 respondents). Collectively, these two groups represent 59.1% of total tourists, indicating that Sri Lanka predominantly attracts a stable, salaried demographic with access to paid leave and predictable disposable income. Global tourism studies consistently show that salaried employees are the primary drivers of international leisure travel, particularly for cultural, family oriented, and relaxation-based holidays (UN Tourism, 2019; OECD, 2022).

A notable 19.2% of tourists are self-employed, comprising self-employed professionals such as doctors, engineers, and accountants (6.9%), and self-employed business operators including traders, industrialists, and shop owners (12.3%). This segment is typically characterized by greater autonomy over travel timing and relatively higher spending power. The literature highlights those self-employed travelers are more inclined toward premium, tailor-made, and business-leisure (leisure) tourism products, which combine leisure with professional interests (UN Tourism, 2020; Deloitte, 2021).

Retirees account for 8.5% of respondents, representing an important and growing market segment. Retired travelers are known for longer lengths of stay, preference for wellness, cultural immersion, and off-peak travel, and lower sensitivity to seasonality. This aligns with global trends identifying senior tourism as a key opportunity for destinations offering safety, healthcare access, and experiential depth (UN Tourism, 2018; OECD, 2020).

Smaller but strategically relevant segments include students and researchers (6.6%), highlighting Sri Lanka’s attractiveness for educational tourism, volunteering, research-based travel, and budget tourism. Youth and student travelers are globally recognized for their longer stays, higher local engagement, and contribution to community-based tourism, despite lower daily spending (UN Tourism, 2016).

Unemployed individuals seeking work make up 2.9% of respondents, potentially reflecting gap-year travelers or individuals traveling between employment phases. Homemakers represent 1.8%, suggesting opportunities for family-focused, wellness-oriented, or women-centric tourism products. Agriculturalists account for only 0.2% of tourists, indicating either limited international travel participation from this group or an untapped opportunity for agritourism and learning opportunities. A small proportion of respondents selected “other” or preferred not to disclose their employment status, reflecting ethical survey design and respect for privacy.

The findings demonstrate that Sri Lanka’s tourism demand is strongest among economically active and financially stable individuals, reinforcing its positioning within mid to high-end leisure tourism markets. At the same time, there are clear strategic opportunities to deepen engagement with self-employed and retired travelers through flexible, high-value experiences, while nurturing niche segments such as students, researchers, and homemakers through targeted product development and inclusive marketing strategies.

3.6.a. Employment status by country

country	Self- employed	Self- employed Professional	Employed in government sector	Employed in private sector	Unemployed and seeking work	Student/Researcher	Agriculturist	Homemaker/Housewife	Retired	Prefer not to say	Other	No. of Responses
Australia	78	35	133	250	22	36	2	4	138	3	3	704
Austria	15	12	42	81	3	24		2	16	2	2	199
Bangladesh	8	1	2	21		1		1		1		35
Belarus	10	6	7	32		1						56
Belgium	18	17	42	91	13	11		1	13		1	207
Canada	20	11	28	82	8	10	1	3	24	1		188
China	64	53	111	202	17	38	3	20	60	5	2	575
Czech Republic	18	8	26	86	1	16		1	3			159
Denmark	7	8	23	74	6	13			5			136
Egypt	7		6	23	1	1						38
Finland	6		7	18	1	10			1		1	44
France	63	47	94	264	28	38	1	3	48	4	4	594
Germany	80	61	196	477	34	142	2	4	47	4	10	1057
Greece	5	6	4	21	3	1			1			41
Hungary	8	3	9	29	2	3			5		1	60
India	267	78	98	417	11	37	2	79	103	6	6	1104
Iran	7	2	2	21		1				1		34
Israel	29	12	18	78	11	28	1	4	14	4	1	200
Italy	40	38	45	169	9	17	2	1	12	1	3	337
Japan	39	15	37	116	6	18		6	19	11	9	276
Jordan	3	1	1	15				2				22
Kazakhstan	10	9	5	34	1	8		1	1	2	1	72
Kuwait	3		1	5								9
Lebanon	1	3	2	14								20
Lithuania	6	2	4	20		2						34
Malaysia	14	8	13	49	1	8		3	4	2		102

country	Self Employed	Self Employed Professional	Employed in government sector	Employed in private sector	Unemployed and seeking work	Student/Researcher	Agriculturist	Homemaker/Housewife	Retired	Prefer not to say	Other	No. of Respondents
Maldives	9	2	14	27	3	6		9				70
Netherlands	35	25	106	199	19	50	1	1	20	2	8	466
New Zealand	7	6	13	39	1	4			19	1		90
Norway	8	3	17	33	3	9		1	6		1	81
Philippines	4	5	2	16				1				28
Poland	64	33	51	194	5	23		1	21	2	1	395
Portugal	11	6	12	52	1	3		1	3		1	90
Republic of Ireland	8	9	28	37	6	4		1	6		1	100
Romania	5	4	10	22		1			2			44
Russian Federation	116	86	117	377	19	26	6	17	14	15	8	801
Saudi Arabia	15	3	7	23		1		6	1	1		57
Singapore	16	8	6	36	1	5	2	3	7		1	85
Slovakia	4	3	12	27		3			2			51
South Africa	7	3	5	23	1	5			7			51
South Korea	8	7	5	23	1	5		4	6			59
Spain	25	37	83	176	10	28			8	2	3	372
Sweden	7	5	27	60	5	15	2	1	10		2	134
Switzerland	24	13	66	123	9	24		1	26	1	2	289
Taiwan	5	2	2	11	3	1		2	1			27
Thailand	14	2	5	35	3	1		3	10		5	78
Turkey	6	5	18	35	2	4		1	2		1	74
Ukraine	8	3	5	20	3				1			40
United Arab Emirates	43	7	15	117		5		10	3	5	2	207
United Kingdom	102	67	209	472	63	57	2	9	257	4	12	1254
USA	35	22	31	127	5	17			47	3	2	289
Other	31	12	34	85	1	15	1	6	2	1	8	196
Total	**1,443**	**814**	**1856**	**5078**	**342**	**776**	**28**	**213**	**995**	**84**	**102**	**11,731**

The distribution of respondents by employment status indicates that the majority of tourists are employed in the private sector, making it the largest group across most countries. This is followed by individuals employed in the government sector, as well as self-employed professionals, highlighting that economically active individuals form the main segment of tourists.

Self-employed tourists are predominantly from India, Russia, and the United Kingdom, while self-employed professionals are mainly represented by visitors from Germany, India, Russia, and the United Kingdom. This suggests that Sri Lanka attracts a substantial number of economically active and employed travellers. This segment is likely to have stable disposable incomes and may contribute significantly to tourism expenditure. Tourists employed in the government sector are largely from Australia, China, Germany, the Netherlands, Russia, and the United Kingdom. Similarly, private-sector employees constitute a significant proportion of visitors from Australia, China, France, Germany, Russia, and the United Kingdom.

The United Kingdom appears prominently across several occupational categories, including self-employed individuals, professionals, government employees, private-sector employees, unemployed travellers, and retirees. This indicates a diverse visitor base from the UK and highlights the market's importance to Sri Lanka's tourism sector.

Among unemployed visitors actively seeking employment, the highest representation is observed from France, Germany, and the United Kingdom. Students and researchers are primarily from Germany, and this suggests opportunities to promote educational tourism, research collaborations, academic exchanges, and study related travel. Retired tourists are mainly from Australia, India, and the United Kingdom. This indicates potential for developing products tailored to senior travellers, such as wellness tourism, cultural experiences, nature-based tourism, and longer-duration stays.

India is the only country with “homemakers” as a distinct category. This reflects cultural and demographic realities many married Indian women who do not work outside the home travel as part of family groups. Marketing to this segment should emphasize safety, comfort, group tours, and activities suitable for multi-generational travel.

The occupational diversity across source markets suggests that targeted marketing strategies could be more effective than a uniform approach. For example, business and professional travellers may be attracted by premium experiences and connectivity, while retirees may respond better to wellness, cultural, and slow-travel offerings.

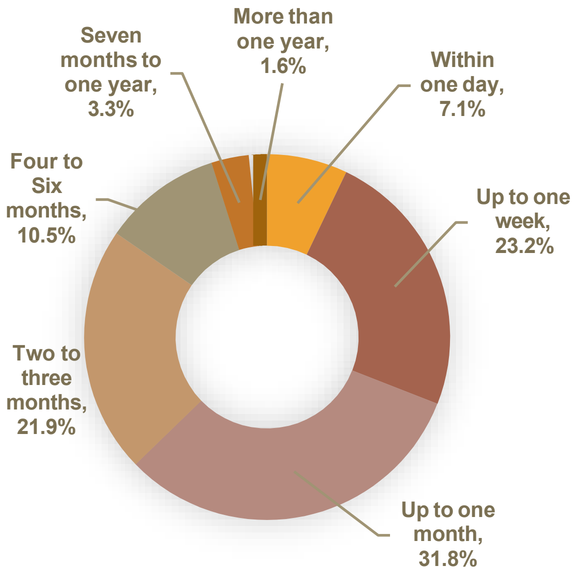
TRAVEL CHARACTERISTICS

04

TRAVEL CHARACTERISTICS

4.1. Trip lead time after selecting the destination

Trip lead time after selecting the destination	Number of respondents	Percentage
Within one day	835	7.12
Up to one week	2,794	23.82
Up to one month	**3,733**	**31.82**
Two to three months	2,563	21.85
Four to Six months	1,231	10.49
Seven months to one year	389	3.32
More than one year	186	1.59
Grand Total	**11,731**	**100.00**



The distribution of trip planning lead times reflects broader patterns found in tourism research. A substantial share of visitors finalizes their arrangements within a relatively short period before travel with the largest group (3,733 respondents or 31.8%) completing planning within one month, and a combined total of over 63% doing so within one month or less when including those planning within one day (835) and up to one week (2,794). This aligns with external findings indicating that modern travellers often **book trips close to departure**, with many booking within the month preceding travel as part of a shift toward shorter planning windows in the digital age. For example, a consumer survey by Expert Market Research found that nearly **45% of travellers prefer to book within one month** of departure, with a notable portion booking within a week as well (Market, 2024).

Such tendencies toward medium and short-term decision making are also consistent with behavioural research showing that tourists' temporal booking decisions are influenced by uncertainty and framing effects; travellers may delay commitment until closer to travel dates, especially when flexible digital booking platforms and last-minute deals lower the perceived risk of late booking (Chan & Law, 2017). Moreover, digital content consumption and research behaviour in the weeks leading up to a booking illustrate how travellers engage intensively with online information before purchase, often within a condensed timeframe prior to committing to their itinerary (Hauser et al., 2022).

At the same time, a significant minority (approximately 36%) plan two months or more ahead, including a small segment that plans over a year in advance. This reflects patterns noted in tourism lead time research, where long-term planning persists among segments focused on complex or special occasion trips, or travellers who perceive higher risk or greater value in early commitment (Chan & Law, 2017). Such longer planning horizons are frequently associated with factors like risk aversion, travel intentions for major events, or extended multi-destination itineraries.

For destination marketers and service providers, these findings underscore the need for a dual track engagement strategy. On one hand, visibility and competitive offerings should be maintained in late booking and real-time channels to capture spontaneous or short-lead travellers who are influenced by dynamic pricing and rapid decision-making. On the other hand, presence in advance-booking channels remains crucial to attract planners who secure bookings months ahead, particularly for peak seasons or high-demand experiences. This balanced approach aligns with academic recommendations that marketing timing and messaging be tailored to observed booking behaviour to maximize conversion across different traveller segments.

4.1.a. Trip lead time by age

Age (in years)	Within one day	Up to one week	Up to one month	Two to three months	Four to Six months	Seven months to one year	More than one year	Total
Under 15	1	0	4	**7**	1	0	0	**13**
15-19	22	49	**72**	42	22	4	7	**218**
20-24	97	258	**369**	214	113	22	8	**1,081**
25-29	161	**609**	**778**	**526**	201	45	14	**2,334**
30-34	135	**525**	**637**	**414**	162	37	17	**1,927**
35-39	82	370	**461**	287	103	29	16	**1,348**
40-44	70	273	**351**	241	108	28	8	**1,079**
45-49	61	181	**229**	186	85	29	17	**788**
50-54	56	160	**226**	192	93	41	17	**785**
55-59	52	126	**189**	133	110	42	18	**670**
60-64	46	105	**200**	136	107	47	28	**669**
65-69	27	82	**121**	101	70	32	24	**457**
70-74	19	41	**72**	62	32	27	6	**262**
75 and above	6	15	**25**	22	21	6	6	**101**
Total	**835**	**2,794**	**3,734**	**2,563**	**1,228**	**389**	**186**	**11,731**
Percentage	**7.12**	**23.82**	**31.83**	**21.85**	**10.47**	**3.32**	**1.59**	**100.00**

Young adults between 25 and 34 years old dominate short-lead travel. They show a strong preference for booking trips within one day to one month, indicating spontaneity or flexibility due to work, study schedules, or last-minute deals. For instance, the 25–29 age group has

609 trips planned up to one week and 778 up to one month, with much smaller numbers for longer lead times. The 20–24 age group follows a similar pattern. Even the 15–19 age group, though smaller in total numbers (218 trips), prefers up to one month (72 trips) or up to one week (49 trips), with only few in long-term planning.

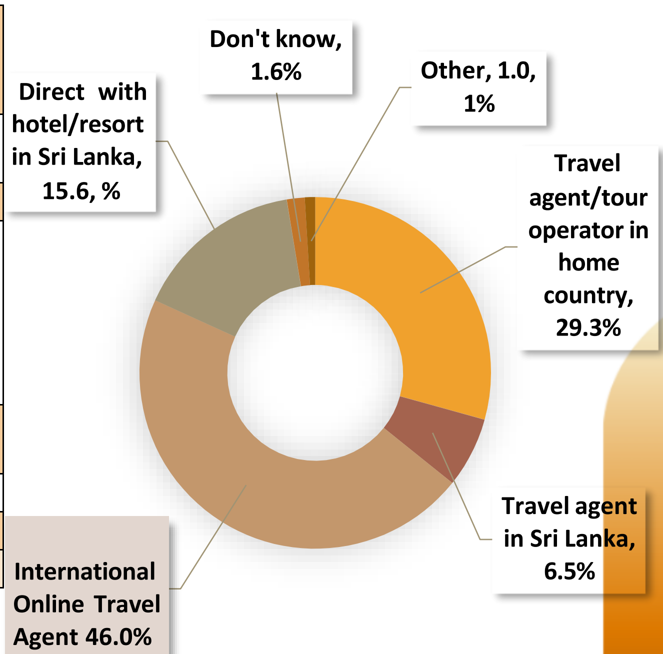
As age increases into the middle years (35–49), travel volumes remain substantial but begin to decline gradually. These groups still prefer lead times of up to one month or one week, though the gap between short and medium lead times narrows slightly. For example, the 35–39 age group recorded 370 trips up to one week and 461 up to one month, but also 287 trips for two to three months. This suggests that family or work constraints may encourage slightly more advance planning compared to younger adults.

A notable shift appears among older adults aged 50 to 69. While they still favour lead times of up to one month, they show a higher propensity for longer term planning, particularly four to six months and even seven months to a year. For instance, the 55–59 age group recorded 110 trips with a lead time of four to six months, and the 60–64 age group had 107 trips in that category. Interestingly, the 60–64 group also has the highest number of trips planned more than one year in advance (28 trips), likely reflecting retirement planning, bucket-list journeys, cruises, or family reunions that require significant advance booking.

The data clearly shows that younger adults drive short-lead, spontaneous travel, while older adults increasingly plan further ahead. Very long lead times remain uncommon across all ages, but when they do occur, they are most associated with the 55–64 age bracket. These insights can help travel marketers tailor their messaging and offer timing such as last-minute deals for younger groups and early bird packages for older travelers.

4.1.b. Main method of travel arrangement

Main Method of travel arrangement	Number of respondents	Percentage
Travel agent/tour operator in home country	3,436	29.29
Travel agent in Sri Lanka	759	6.47
International Online Travel Agent (OTA), e.g., Expedia, Booking.com, Agoda, Airbnb, Trip Advisor etc.	5,398	46.01
Direct with hotel/resort in Sri Lanka	1,834	15.63
Don't know	192	1.64
Other	112	0.95
Grand Total	**11,731**	**100.00**



This indicates the distribution of main travel arrangement methods. The highest number of respondents (5,398) arranged their travel through International Online Travel Agent (OTA), indicating a strong preference for online platforms. 3,436 tourists arranged their travel through travel agents or tour operators in their home country, showing that traditional booking methods still play a significant role. A notable number of tourists (1,834) also arrange their trips directly with hotels or resorts in Sri Lanka, reflecting a growing trend toward direct bookings. However, fewer tourists (759) rely on travel agents within Sri Lanka. Only a small number of respondents selected “Don’t know” (192) or “Other” (112). Overall, these results indicate that most travel arrangements are made before arrival.

The findings highlight the growing dominance of digital booking channels among international tourists visiting Sri Lanka. The fact that International Online Travel Agents (OTAs) account for the largest share of travel arrangements suggests that travellers increasingly prefer the convenience, flexibility, and transparency offered by online platforms. This trend reflects broader global tourism patterns, where tourists are using digital channels to compare prices, read reviews, customize itineraries, and make bookings independently. As a result, maintaining a strong presence on major online booking platforms has become essential for Sri Lankan tourism businesses seeking to attract international visitors.

Despite the rise of digital platforms, traditional travel agents and tour operators in tourists' home countries continue to play an important role in influencing travel decisions. This highlights the continued importance of maintaining strong relationships with international tour operators and travel trade partners in key source markets. The significant number of tourists arranging their trips directly with hotels or resorts in Sri Lanka points to an increasing preference for direct booking channels. This may be driven by travellers seeking better rates, exclusive offers, greater flexibility, or more personalized communication with accommodation providers. The trend presents an opportunity for hotels and resorts to strengthen their direct marketing efforts, improve their online booking systems, and enhance customer engagement through their websites and digital platforms.

In contrast, the relatively low number of tourists using travel agents within Sri Lanka suggests that local intermediaries have a more limited role in the initial trip-planning process. Since most visitors appear to finalize their travel arrangements before arriving in the country, local travel agents may need to focus more on providing specialized in destination services, excursions, transportation solutions, and niche experiences rather than acting as primary booking channels.

Overall, the results indicate that travel decisions are predominantly made before arrival in Sri Lanka, with international digital platforms and overseas travel intermediaries playing the most influential roles. This underscores the importance of strengthening Sri Lanka's digital tourism presence, enhancing destination marketing on global online platforms, and maintaining strong partnerships with international travel trade networks to remain competitive in the global tourism market.

4.2 Travel pattern (individual, family, group)

Travel Pattern	Number of respondents	Percentage
Individual	4,161	35.47
Family	4,817	41.06
Group	2,753	23.47
Grand Total	**11,731**	**100.00**

The data on travel patterns indicates that family travel is the most common form of tourism to Sri Lanka, with 4,817 respondents (41.1%) visiting as a family unit. This is followed closely by individual travel (4,161 respondents, 35.5%), suggesting Sri Lanka appeals strongly to both independent solo or couple travelers and those on family vacations.

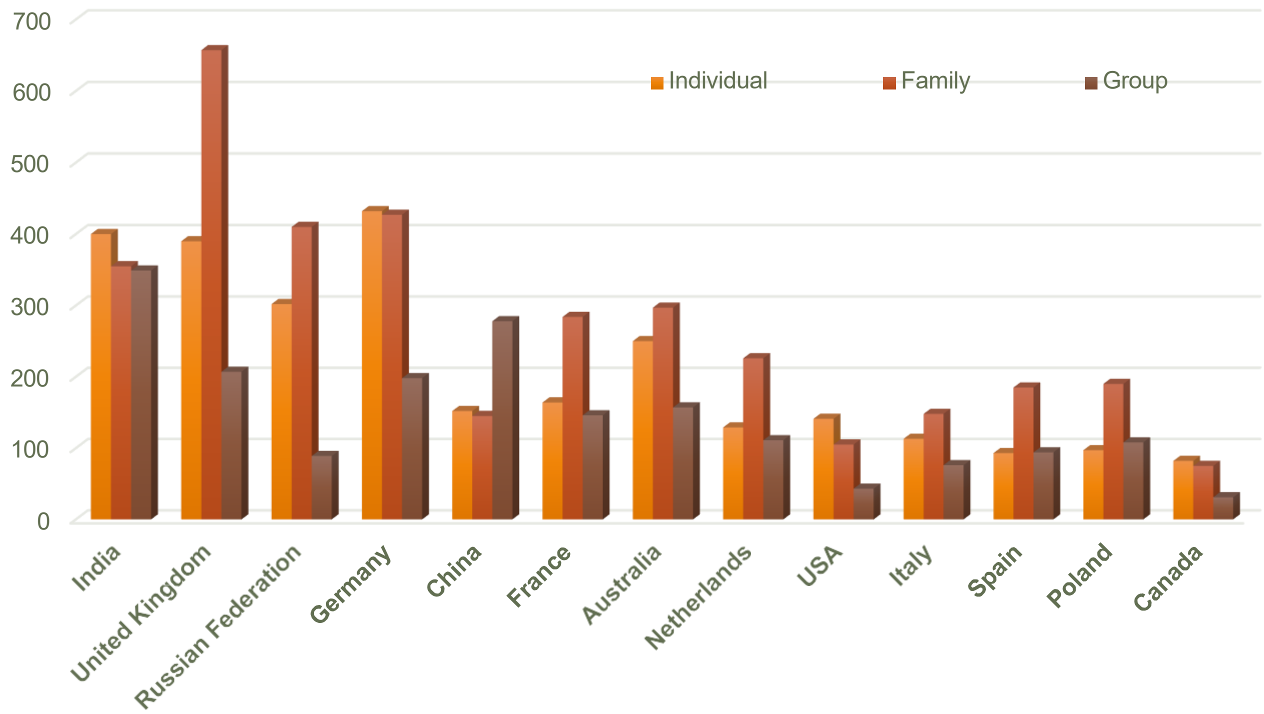
Global tourism studies highlight family travel as a leading market segment in destinations perceived as safe, with suitable amenities and attractions for all ages (Wise Guy Reports, 2023). Group travel (2,753 respondents, 23.5%) constitutes the smallest segment but still represents a significant portion of the market.

This distribution highlights Sri Lanka's broad appeal across different traveler types. The strong showing for family travel suggests the destination is perceived as safe, offers suitable amenities, and has attractions catering to varied age groups. The prominence of individual travel aligns with global trends in solo travel, backpacking, and flexible itineraries, often motivated by cultural exploration, adventure, or wellness experiences (Grand View Research, 2024). The group travel component likely includes organized tours, pilgrimage travel, and business or incentive groups (TGM Research, 2023).

For tourism stakeholders, this implies a need for diversified marketing and service offerings. Promoting family-friendly packages, accommodations, and activities is crucial, while also maintaining infrastructure and services that support independent travelers (e.g., transport, information centers, flexible tours). The group travel segment requires coordination with tour operators and facilities for larger parties. Balancing promotion across these three segments can help stabilize tourist arrivals throughout the year.

4.2.a. Travel pattern by country

Country of residence	Individual	Family	Group	Total
Australia	250	297	157	704
Austria	87	71	41	199
Bangladesh	10	12	13	35
Belarus	18	30	8	56
Belgium	59	106	42	207
Canada	82	75	31	188
China	152	145	278	575
Czech Republic	54	65	40	159
Denmark	40	46	50	136
Egypt	17	6	15	38
Finland	25	14	5	44
France	164	284	146	594
Germany	432	427	198	1,057
Greece	12	21	8	41
Hungary	20	23	17	60
India	400	355	349	1,104
Iran	6	15	13	34
Israel	90	56	54	200
Italy	113	148	76	337
Japan	170	51	55	276
Jordan	4	16	2	22
Kazakhstan	29	30	13	72
Kuwait	2	3	4	9
Lebanon	4	11	5	20
Lithuania	10	11	13	34
Malaysia	45	27	30	102
Maldives	27	31	12	70
Netherlands	129	226	111	466
New Zealand	26	50	14	90
Norway	27	25	29	81
Other	67	72	57	196
Philippines	20	3	5	28
Poland	97	190	108	395
Portugal	18	33	39	90
Republic of Ireland	42	41	17	100
Romania	9	19	16	44
Russian Federation	302	410	89	801
Saudi Arabia	25	27	5	57
Singapore	37	32	16	85
Slovakia	15	17	19	51
South Africa	27	15	9	51
South Korea	27	10	22	59
Spain	93	185	94	372
Sweden	54	46	34	134
Switzerland	108	133	48	289
Taiwan	14	2	11	27
Thailand	26	16	36	78
Turkey	33	23	18	74
Ukraine	22	14	4	40
United Arab Emirates	90	90	27	207
United Kingdom	390	657	207	1,254
USA	141	105	43	289
Total	**4,161**	**4,817**	**2,753**	**11,731**



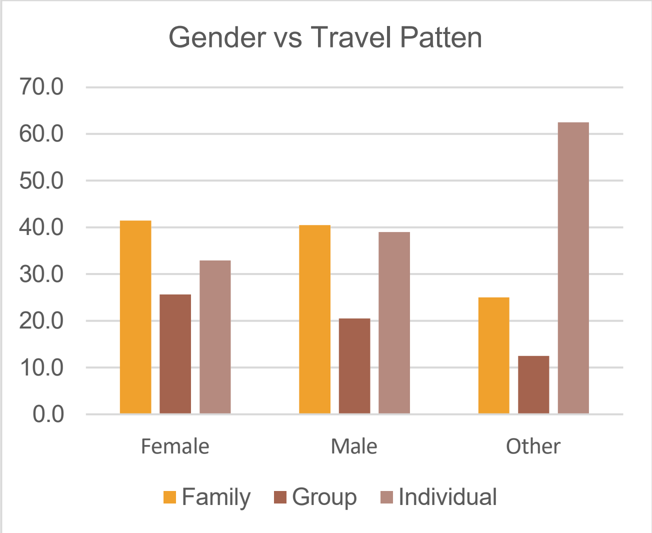
The cross-tabulation between country of residence and travel pattern indicates clear variations in travel behaviour across different source markets. Individual travel is more dominant among tourists from countries such as the USA, UAE, Turkey, Taiwan, Sweden, South Korea, South Africa, Singapore, Ireland, the Philippines, Malaysia, Japan, Israel, India, Germany, Ukraine, Maldives, Finland, Egypt, Canada, and Austria. This suggests a strong preference for independent travel experiences, likely driven by higher digital confidence, flexible itineraries, and a desire for personalised travel among these markets.

In contrast, family travel is more prevalent among visitors from the United Kingdom, UAE, Switzerland, Greece, Spain, Saudi Arabia, Russia, Romania, Poland, New Zealand, the Netherlands, Lebanon, Kazakhstan, Jordan, Italy, Iran, Hungary, France, the Czech Republic, Belgium, Belarus, and Australia. This pattern reflects a stronger inclination towards shared leisure experiences, often associated with holiday-based or multi-generational travel.

Group travel is comparatively more common among tourists from Bangladesh, Thailand, Slovakia, Portugal, Norway, Lithuania, Kuwait, Denmark, and China, indicating a preference for organised tours, structured itineraries, and cost-sharing travel arrangements.
Overall, the findings highlight distinct cultural and market driven travel preferences, suggesting the need for differentiated tourism marketing strategies ranging from customized independent travel products to family-oriented packages and structured group tour offerings.

4.2.b. Travel pattern by gender

	Family	Group	Individual	*Total*
Female	41.48	25.62	32.90	*6,827*
Male	40.50	20.49	39.01	*4,896*
Other	25.00	12.50	62.50	*8*
	41.06	**23.47**	**35.47**	***11,731***



Among female tourists (n=6,827), the travel pattern distribution shows a clear preference for Family travel, which constitutes 41.48% of female travelers. Individual travel follows at 32.90%, while Group travel is the least preferred at 25.62%. The high proportion of family travel among females is noteworthy, as it may reflect cultural norms where women travel primarily within family units for safety, social acceptability, or caregiving responsibilities. Alternatively, it may indicate that women are more likely to be the organizers or decision-makers for family holidays.

The substantial individual travel segment (nearly one-third of female tourists) also suggests a growing market of independent female travelers, though still lower than male solo travel rates.

Male tourists (n=4,896) exhibit a notably different distribution. While Family travel remains the largest category at 40.50%, it is slightly lower than for females. However, individual travel among males is significantly higher at 39.01%, representing the second largest segment and considerably exceeding the female individual travel rate (32.90%). Group travel is the least preferred among males at 20.49%, which is substantially lower than both their family and individual travel figures and also lower than the female group travel rate (25.62%).

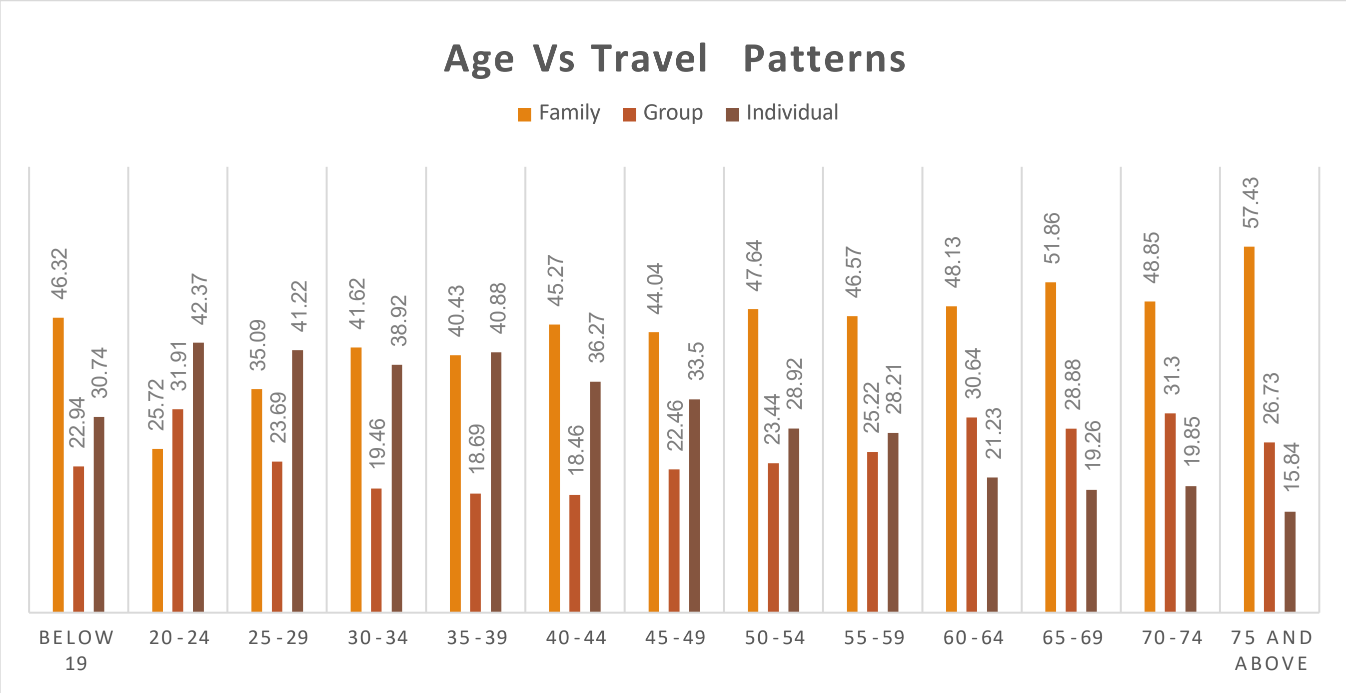
The higher proportion of male individual travel may reflect several factors: greater prevalence of business travel among men, higher propensity for solo adventure or leisure travel, fewer safety concerns traveling alone, or less constrained schedules due to caregiving or family obligations. The lower male participation in group travel could indicate that men prefer more autonomous or independent travel experiences rather than structured package tours.

The category labeled "Other" (n=8) shows a distinct pattern, with Individual travel dominating at 62.50%, followed by Family at 25.00% and Group at only 12.50%. While the sample size is too small for robust statistical generalization, the strong preference for individual travel is notable and may suggest that travelers who do not identify within the binary gender categories prefer the autonomy and privacy of solo travel, possibly to avoid potential discomfort or discrimination in group or family settings.

The key insights are family travel is a stable, gender-shared market; solo travel is male dominated but represents a growth opportunity for female focused safety interventions; group travel is disproportionately female, suggesting demand for women only or women led group experiences; and the "Other" category, though under sampled, signals a need for inclusive infrastructure. They highlight the need for differentiated marketing approaches, tailored product offerings, and inclusive destination strategies that recognize and respond to the distinct travel motivations, behaviors, and preferences of all traveler segments.

4.2.c. Travel pattern by age

Age group	Family	Group	Individual	*Number of Respondents*
Below 19	46.32	22.94	30.74	231
20-24	25.72	31.91	42.37	1,081
25-29	35.09	23.69	41.22	2,334
30-34	41.62	19.46	38.92	1,927
35-39	40.43	18.69	40.88	1,348
40-44	45.27	18.46	36.27	1,078
45-49	44.04	22.46	33.50	788
50-54	47.64	23.44	28.92	785
55-59	46.57	25.22	28.21	670
60-64	48.13	30.64	21.23	669
65-69	51.86	28.88	19.26	457
70-74	48.85	31.30	19.85	262
75 and above	57.43	26.73	15.84	101
Grand Total	**41.06**	**23.47**	**35.47**	**11,731**



Travel behaviour varies systematically across age groups, with family, individual, and group travel each following distinct life-course trajectory.

Family travel is the dominant mode across almost all ages. It is high among the youngest travelers (below 19) who travel as dependents, dips sharply among 20–24-year-olds as young adults assert independence, then rises steadily through middle age peaking at 57.43% among travelers aged 75 and above who rely on family for companionship and assistance.

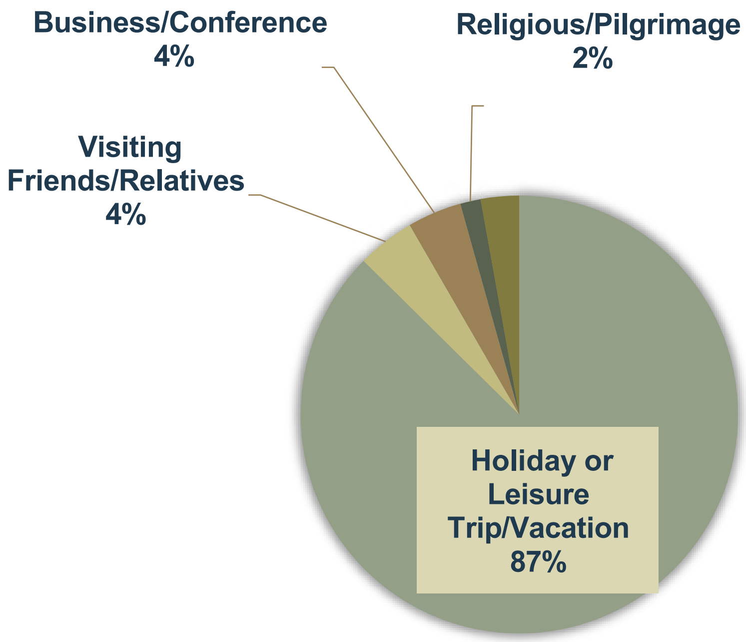
Individual (solo) travel peaks in young adulthood, reaching its highest point among 20–24-year-olds (42.37%), when travelers enjoy maximum freedom from family and caregiving obligations. It declines gradually from age 30 onward as life responsibilities accumulate, falling to just 15.84% among the oldest travelers.

Group travel displays a bimodal pattern peaking first among 20–24-year-olds (peer-based and university group travel) and again among travelers aged 60–74 (organized senior tours and cultural excursions) with its lowest point in the 40–44 bracket, when nuclear family travel dominates.

Overall, young adulthood (20–29) represents the golden age of independent and peer group travel, middle age (30–49) is dominated by nuclear family travel, and older age (60+) sees a dual resurgence of multi-generational family and organized group travel. These findings highlight the critical importance of age segmented tourism products and marketing strategies to effectively serve travelers at each distinct life stage.

4.3 Purpose of visit

Principal purpose of visit	Number of respondents	Percentage
Holiday or Leisure Trip/Vacation	10,251	87.38
Visiting Friends/Relatives	499	4.25
Business/Conference	470	4.01
Religious/Pilgrimage	177	1.51
Health/Medical Care	94	0.80
Sport participation	53	0.45
Education	38	0.32
Training and research	24	0.20
Sport spectating	11	0.09
Shopping	8	0.07
Other	106	0.90
Grand Total	**11,731**	**100.00**



The data clearly demonstrates that Sri Lanka functions predominantly as a leisure and holiday destination, with 10,251 respondents (87.4% of total tourists) indicating holiday, leisure, trip, or vacation as their primary purpose of visit. This overwhelming dominance of leisure as the core motivation aligns with broader patterns observed in official tourism statistics, from the Department of Immigration & Emigration, where pleasure and vacation travel consistently constitute the largest share of visitor purposes in Sri Lanka's tourism market.

In contrast, secondary purposes such as Visiting Friends/Relatives (499), Business/Conference (470), and Religious/Pilgrimage (177) together make up a relatively small fraction of the total, underscoring the sector's heavy reliance on discretionary holiday travel. This reliance on the traditional vacation market highlights a lack of diversification in purpose-driven tourism, a challenge noted in destination analyses that call for expansion into emerging and niche segments such as MICE (Meetings, Incentives, Conferences, and Exhibitions), wellness, and specialized activities.

Although Sri Lanka has potential in areas like wellness tourism, a rapidly growing global market that integrates health, mindfulness, and holistic experiences current volumes remain minimal relative to leisure travel, reflecting untapped opportunity for strategic product development (Lai, 2024).

The heavy concentration on leisure travel can make the industry more susceptible to seasonal fluctuations and global disruptions that impact discretionary spending, as seen in tourism research highlighting how destinations with narrow market focus may experience greater volatility. To build a more resilient, year-round visitor economy, strategic emphasis on growing segments such as MICE, wellness, religious, and cultural tourism alongside the successful core leisure appeal could help diversify Sri Lanka's tourism portfolio without diluting its primary strength.

4.3.a. Purpose of visit by country

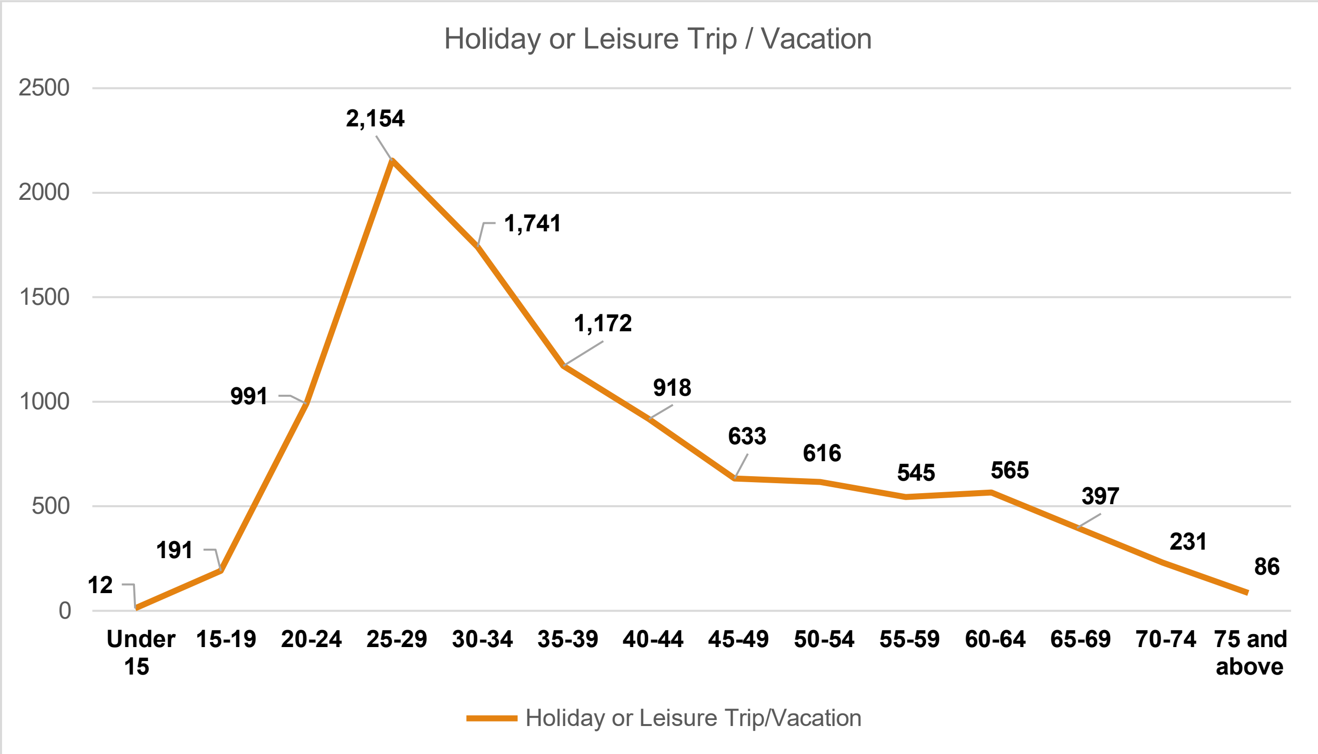
Country	Holiday Or Leisure Trip /Vacation	Visiting Friends/ Relatives	Business/Conference	Education	Training and Research	Health /Medical Care	Religious /Pilgrimage	Shopping	Sport- Participation	Sport -Spectating	Other	No. of Respondents
Australia	89.63	5.68	1.7	0.28	0.14	0.14	1.14	0	0.14	0.57	0.57	704
Austria	90.45	2.51	0.5	0.5	0	5.03	0	0	0	0	1.01	199
Bangladesh	48.57	5.71	11.43	0	0	0	0	0	34.29	0	0	35
Belarus	98.21	1.79	0	0	0	0	0	0	0	0	0	56
Belgium	97.1	1.45	0.97	0	0	0	0	0	0	0	0.48	207
Canada	73.94	17.02	2.66	0	0.53	0	3.19	0	0	0	2.66	188
China	86.78	1.57	9.39	1.22	0.17	0	0.87	0	0	0	0	575
Czech Republic	92.45	1.89	1.26	0	0	1.26	0	0	1.89	0	1.26	159
Denmark	95.59	0.74	2.94	0	0.74	0	0	0	0	0	0	136
Egypt	86.84	2.63	7.89	0	0	0	0	0	0	0	2.63	38
Finland	97.73	0	0	0	0	0	2.27	0	0	0	0	44
France	96.3	1.68	1.18	0.17	0	0	0	0	0	0	0.67	594
Germany	92.62	1.8	0.85	0.28	0.09	3.69	0	0	0	0	0.66	1057
Greece	97.56	0	0	0	0	0	0	0	2.44	0	0	41
Hungary	96.67	1.67	1.67	0	0	0	0	0	0	0	0	60

Country	Holiday Or Leisure Trip /Vacation	Visiting Friends/ Relatives	Business/Conference	Education	Training and Research	Health /Medical Care	Religious /Pilgrimage	Shopping	Sport- Participation	Sport -Spectating	Other	No. of Respondents
India	60.33	10.51	15.58	0.18	0.18	0.45	9.06	0.09	1.09	0.18	2.36	1104
Iran	85.29	2.94	5.88	0	0	0	2.94	0	0	0	2.94	34
Israel	95.5	2	1.5	0	0.5	0	0	0	0	0.5	0	200
Italy	91.69	5.04	1.19	0	0.89	0.3	0.3	0	0	0	0.59	337
Japan	81.52	4.71	6.88	2.17	1.09	1.09	0.72	0	0	0.36	1.45	276
Jordan	90.91	0	4.55	0	0	0	0	0	0	0	4.55	22
Kazakhstan	94.44	0	1.39	1.39	0	1.39	0	0	1.39	0	0	72
Kuwait	77.78	0	11.11	0	0	11.11	0	0	0	0	0	9
Lebanon	80	5	10	0	0	0	0	0	0	0	5	20
Lithuania	100	0	0	0	0	0	0	0	0	0	0	34
Malaysia	57.84	10.78	15.69	0	0	0.98	3.92	0	3.92	0	6.86	102
Maldives	58.57	7.14	5.71	4.29	2.86	7.14	1.43	7.14	1.43	0	4.29	70
Netherlands	95.71	1.5	1.5	0	0.21	0.43	0	0	0	0	0.64	466
New Zealand	90	3.33	2.22	0	0	0	0	0	4.44	0	0	90
Norway	88.89	3.7	2.47	0	1.23	0	3.7	0	0	0	0	81
Philippines	89.29	0	7.14	0	0	0	0	0	0	0	3.57	28
Poland	96.2	2.03	0.51	0.25	0	0.25	0	0	0.25	0	0.51	395
Portugal	94.44	2.22	2.22	0	1.11	0	0	0	0	0	0	90
Republic of Ireland	100	0	0	0	0	0	0	0	0	0	0	100
Romania	90.91	4.55	2.27	0	0	0	0	0	0	0	2.27	44
Russian Federation	98	1.12	0.12	0	0.12	0.25	0	0.12	0	0	0.25	801
Saudi Arabia	85.96	8.77	3.51	0	0	0	0	1.75	0	0	0	57
Singapore	67.06	14.12	9.41	0	0	0	7.06	0	0	0	2.35	85
Slovakia	94.12	0	0	0	0	5.88	0	0	0	0	0	51
South Africa	84.31	1.96	11.76	0	0	0	0	0	1.96	0	0	51
South Korea	66.1	1.69	23.73	0	0	1.69	3.39	0	3.39	0	0	59
Spain	99.19	0.54	0	0	0	0	0	0	0	0	0.27	372
Sweden	93.28	3.73	1.49	0	0	0.75	0	0	0	0	0.75	134
Switzerland	92.39	4.15	0.69	0	0	2.08	0	0	0	0	0.69	289
Taiwan	66.67	3.7	22.22	0	0	0	7.41	0	0	0	0	27
Thailand	55.13	5.13	6.41	0	0	1.28	30.77	0	0	0	1.28	78
Turkey	89.19	2.7	1.35	0	0	2.7	1.35	0	2.7	0	0	74
Ukraine	87.5	0	7.5	0	2.5	2.5	0	0	0	0	0	40
United Arab Emirates	77.29	9.18	10.14	0	0.48	0.97	0	0	0	0	1.93	207
United Kingdom	91.07	5.34	0.96	0.72	0.08	0.16	0.24	0	0.24	0.08	1.12	1254
USA	79.93	9.69	8.3	0	0	0.35	1.38	0	0	0.35	0	289
Other	79.59	5.61	8.16	1.02	0.51	0	1.53	0	2.55	0.51	0.51	196
Grand Total	**87.38**	**4.25**	**4.01**	**0.32**	**0.2**	**0.8**	**1.51**	**0.07**	**0.45**	**0.09**	**0.9**	**11,731**

The distribution of percentages indicates that, for most countries, a single main purpose of visit strongly dominates, with values generally ranging between 80% and 100%. This suggests that tourists from many countries tend to visit Sri Lanka for leisure or holiday purposes. Several countries such as Lithuania, Ireland show extremely high-values close to 100%, indicating a very strong concentration. Tourists from Canada, India, Malaysia, and Singapore frequently visit for visiting friends and relatives (VFR), likely due to established diaspora connections. South Korea, Taiwan, Malaysia and India, also show notable shares for business travel. Tourists from the Maldives tend to visit Sri Lanka primarily for education, shopping, training, and research purposes. Additionally, Thailand and India stand out for a significant segment traveling for religious and pilgrimage reasons, beyond holiday and leisure. Sports participation is popular among tourists from Bangladesh. while leisure tourism remains the backbone of Sri Lanka's inbound travel, the presence of multiple distinct secondary purposes across different source markets presents opportunities for targeted marketing, product diversification, and deeper bilateral engagement.

4.3.b. Purpose of visit by age group

Principal purpose of visit	Under 15	15-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70-74	75 and above	Total
Holiday or Leisure Trip/Vacation	12	191	991	2,154	1,741	1,172	918	633	616	545	565	397	231	86	10,252
Visiting Friends/Relatives	0	8	32	74	74	49	45	45	48	43	33	27	13	8	499
Business/Conference	0	1	10	54	76	75	66	67	58	29	18	8	5	3	470
Education	1	2	12	9	1	6	5	1	0	0	1	0	0	0	38
Training and research	0	2	4	4	1	7	3	2	0	0	0	0	0	1	24
Health/Medical Care	0	1	2	5	2	5	10	9	19	18	10	7	4	2	94
Religious/Pilgrimage	0	2	4	5	15	18	21	20	25	24	29	10	3	1	177
Shopping	0	0	0	1	2	1	2	0	2	0	0	0	0	0	8
Sport- participation	0	4	14	9	2	3	6	3	5	3	2	1	1	0	53
Sport- spectating	0	0	2	3	2	0	0	1	0	1	0	1	1	0	11
Other	0	7	10	16	11	9	3	7	12	7	11	6	4	0	103
	13	**218**	**1,081**	**2,334**	**1,927**	**1,348**	**1,079**	**788**	**785**	**670**	**669**	**457**	**262**	**101**	**11,731**


Holiday or Leisure Trip / Vacation
2500
2000
1500
1000
500
0
2,154
1,741
1,172
991
918
633
616
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397
231
191
86
12
Under 15
15-19
20-24
25-29
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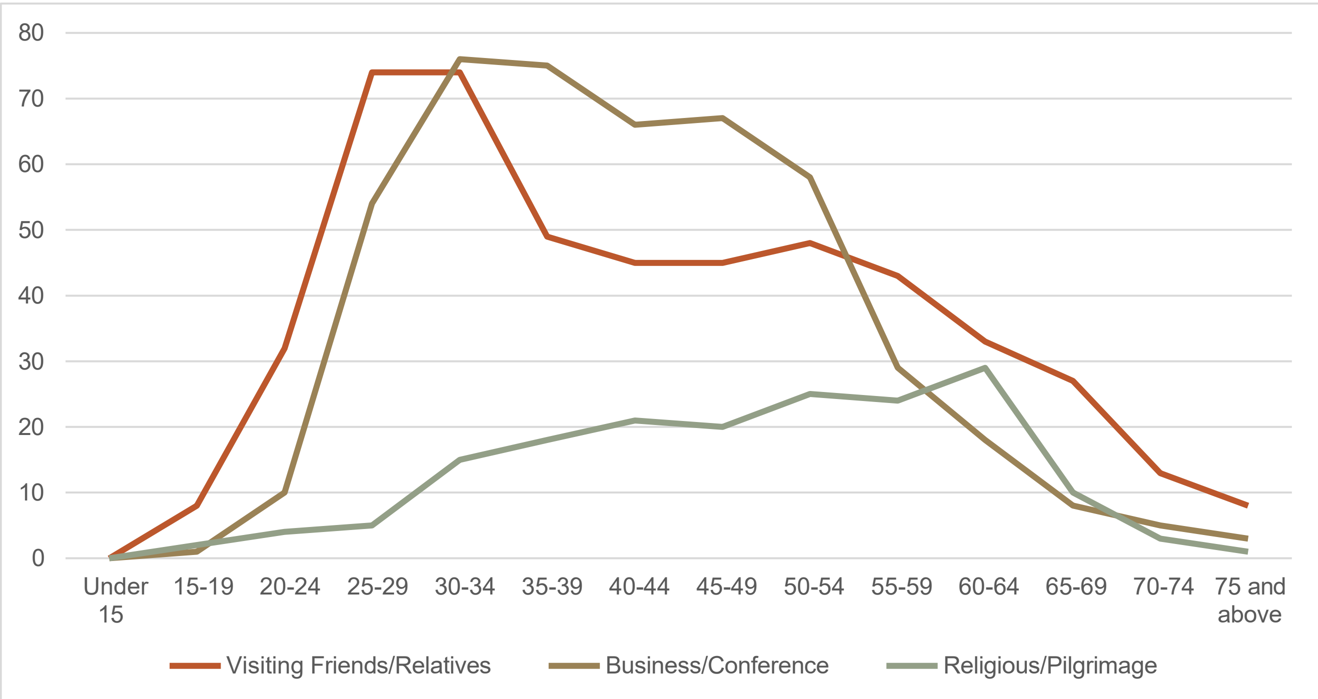
70-74
75 and above
Holiday or Leisure Trip/Vacation


80
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50-54
55-59
60-64
65-69
70-74
75 and above
Visiting Friends/Relatives
Business/Conference
Religious/Pilgrimage

The table clearly shows that holiday, leisure, or vacation travel is the dominant reason for visiting across all age groups, accounting for 10,252 out of 11,731 total respondents (over 87%). This purpose peaks sharply among young and middle-aged adults: the 25–29 age group has the highest absolute number of holiday trips (2,154), followed closely by 30–34 (1,741), 20–24 (991), and 35–39 (1,172). Even among older travelers, holiday remains the primary motive, with 565 trips by those aged 60–64 and 397 by those 65–69.

Visiting friends and relatives (VFR) is the second most common purpose, but far behind holidays, with 499 trips total. VFR is most frequent among those aged 25–29 and 30–34 (74 trips each), and remains modestly present across all adult age groups up to 75 and above. This suggests that social travel is relatively consistent across adulthood but never becomes a primary driver.

Business and conference travel accounts for 470 trips, with a distinct age profile. It is most common between 30 and 49 years, peaking at 76 trips for 30–34, 75 for 35–39, and 67 for 45–49. Business travel drops noticeably after age 55, falling to just 18 trips for 60–64 and 8 for 65–69, which is expected given retirement patterns.

Health and medical care as a purpose is relatively rare overall (94 trips), but it shows a clear increase with age. From only 2 trips in the 20–24 group, it rises steadily to 19 trips in 50–54 and 18 in 55–59. This indicates that older travelers are more likely to travel specifically for medical reasons, though the numbers remain small compared to holidays.

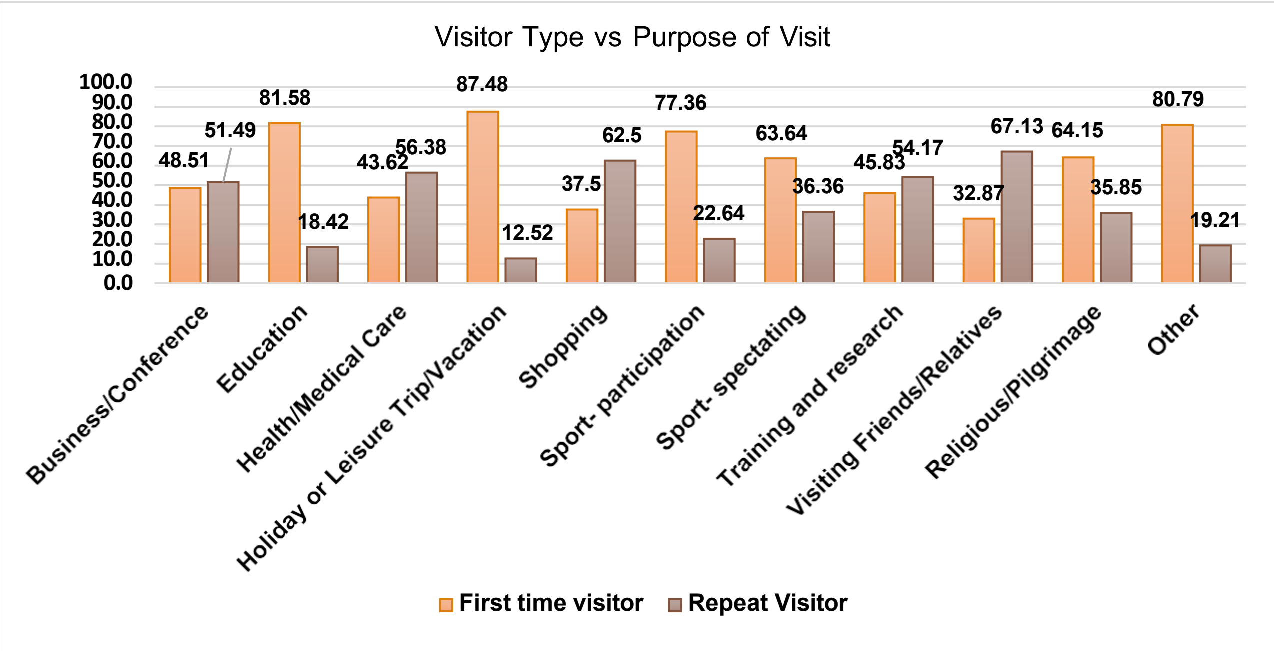
Religious or pilgrimage travel totals 177 trips and also becomes more common in older age groups. The highest numbers appear in the 60–64 age group (29 trips), followed by 50–54 (25) and 55–59 (24). This suggests that religious travel is often undertaken later in life, possibly after retirement or as part of senior group tours.

Education, training and research, shopping, and sports-related purposes (both participation and spectating) are all very minor categories, together accounting for fewer than 150 trips. Education-related travel (38 trips) is mostly seen in younger groups (under 15 to 25–29), while sports participation (53 trips) is scattered across ages but slightly more common among 20–24 and 25–29.

Leisure dominates travel at every age, but secondary purposes vary meaningfully: younger adults occasionally travel for education or sports, middle-aged adults for business, and older adults for health or religious reasons. Visiting friends and relatives remains a steady but secondary motive across most adult years. These patterns can help travel businesses tailor their offerings for example, promoting family holiday packages to younger groups, medical tourism to older segments, and pilgrimage circuits to seniors.

4.3.c. Purpose of visit vs visitor type

Purpose	First time visitor	Repeat visitor	Total
Business/Conference	48.51	51.49	470
Education	81.58	18.42	38
Health/Medical Care	43.62	56.38	94
Holiday or Leisure Trip/Vacation	87.48	12.52	10,251
Shopping	37.50	62.50	8
Sport participation	77.36	22.64	53
Sport spectating	63.64	36.36	11
Training and research	45.83	54.17	24
Visiting Friends/Relatives	32.87	67.13	499
Religious/Pilgrimage	64.15	35.85	177
Other	80.79	19.21	106
Total	**82.73**	**17.27**	**11,731**



An analysis of visitation patterns by travel purpose reveals that the overwhelming majority of inbound tourists 82.73% overall are first-time visitors, with repeat visitation varying significantly across travel purpose categories.

Holiday and leisure travel dominates the sample (87.4%) yet records one of the lowest repeat visitation rates at just 12.52%, suggesting that Sri Lanka is perceived largely as a "new discovery" destination rather than one that generates strong return leisure visits. In contrast, Visiting Friends and Relatives (VFR) records the highest repeat visitation rate at 67.13%, driven by ongoing personal and family ties to the destination.

Business and medical travelers show near-balanced distributions, with repeat visitors slightly outnumbering first-timers reflecting the recurring nature of corporate travel and follow-up medical care. Similarly, shopping-related travel is dominated by repeat visitors, suggesting that travellers who have previously visited Sri Lanka are more likely to return for shopping purposes, possibly due to familiarity with local products, favourable prices, and established purchasing preferences. Education, sports, and other purpose categories are predominantly first-time visitor dominated, similar to leisure travel.

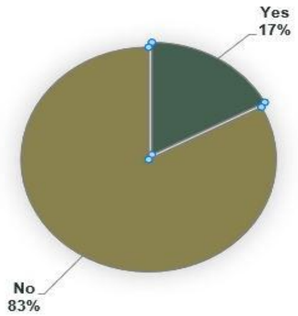
These findings carry important strategic implications. The low repeat rate among leisure tourists presents both a challenge and an opportunity converting even a modest proportion of first-time visitors into repeat travelers could yield significant economic returns. Meanwhile, VFR and business segments offer stable, predictable demand that complement seasonal leisure flows and supports long-term destination resilience.

4.4. Repeat visitors

Have you visited Sri Lanka in the past	Number of respondents	Percentage
Yes	2,026	17.27
No	9,705	82.73
Grand Total	**11,731**	**100.00**

The visitation pattern among tourists to Sri Lanka reveals a significant challenge regarding tourist retention and repeat visitation. Only 2,026 respondents (17.3% of the total) are repeat visitors, while a vast majority 9,705 respondents (82.7%) are first-time visitors. This indicates that while Sri Lanka is successful at attracting new tourists, it has a notably low rate of return visits.

This pattern suggests that the destination may be perceived as a "one-time" or "checklist" location for many, or that the overall visitor experience may not consistently encourage repeat tourism. Potential factors could include limited variety in tourist offerings for subsequent visits, perceived shortcomings in service quality or value, or strong competition from other emerging destinations for travelers' return trips.



For sustainable tourism growth, this insight highlights a critical need for strategies aimed at enhancing visitor satisfaction and loyalty. Efforts could include developing deeper, more diversified regional itineraries, promoting off-season attractions, creating loyalty programs, and fostering stronger emotional connections through curated experiences that encourage tourists to return for different aspects of Sri Lanka's culture, nature, or activities. Improving the repeat visitor rate is essential for building a more stable and resilient tourism economy.

4.5. Duration of Stay

4.5.a. Duration of stay by country

Country	Average of duration in Sri Lanka (Number of days)
Australia	13.2
Austria	14.8
Bangladesh	5.3
Belarus	14.0
Belgium	15.6
Canada	14.3
China	8.2
Czech Republic	13.7
Denmark	14.5
Egypt	7.7
Finland	14.2
France	13.8
Germany	15.9
Greece	12.3
Hungary	11.0
India	6.9
Iran	9.1
Israel	15.0
Italy	12.9
Japan	7.8
Jordan	8.3
Kazakhstan	8.6
Kuwait	12.7
Lebanon	8.8
Lithuania	12.7
Malaysia	8.4
Maldives	8.4
Netherlands	**17.9**
New Zealand	13.6
Norway	14.3
Philippines	11.6

Country	Average of duration in Sri Lanka (Number of days)
Poland	12.0
Portugal	11.5
Republic of Ireland	14.1
Romania	10.7
Russian Federation	11.3
Saudi Arabia	10.5
Singapore	8.6
Slovakia	12.2
South Africa	13.1
South Korea	8.5
Spain	13.0
Sweden	15.5
Switzerland	15.7
Taiwan	8.9
Thailand	9.3
Turkey	9.9
Ukraine	12.5
United Arab Emirates	7.4
United Kingdom	14.2
USA	11.9
Other	11.0
	12.4

The findings indicate that the average duration of stay in Sri Lanka is approximately 12 days, suggesting that most tourists spend close to two weeks in the country. However, official Immigration data reports a lower average stay of around 8.2 to 8.4 nights. This discrepancy may be attributed to sampling bias in the survey, potentially reflecting a higher representation of long-stay visitors.

Country level patterns show that tourists from the Netherlands record the longest average stay (17.9 days), followed by Germany (15.9 days), Switzerland (15.7 days), Belgium (15.6 days), and Sweden (15.5 days), indicating a strong preference for extended holidays among these markets. In contrast, visitors from nearby countries such as India (6.9 days) and Bangladesh (5.3 days) tend to have shorter stays. Meanwhile, long-haul markets like Australia (13.2 days), the United Kingdom (14.2 days), and the United States (11.9 days) also demonstrate relatively longer durations, often influenced by travel for visiting friends and relatives (VFR) in addition to leisure.

The clear distinction between long-haul and regional markets reinforces typical travel behavior patterns. Long-haul visitors, facing higher travel costs and longer journey times, are more likely to extend their stay and engage in comprehensive, multi-destination itineraries. This creates opportunities to promote bundled experiences, regional circuits, and higher-value tourism offerings that maximize per-visitor revenue.

Shorter stays among regional markets point to demand for quick, convenient travel options such as short breaks, business trips, or family visits. This suggests the need for tailored strategies, including compact itineraries, improved connectivity, and targeted promotions for weekend or short-duration travel.

The relatively longer stays from markets like the UK, USA, and Australia also underline the significance of VFR tourism, which often leads to extended visits and more geographically dispersed spending. Strengthening diaspora engagement and encouraging add-on leisure components could further enhance this segment.

Overall, while Sri Lanka benefits from strong long-stay segments, there is an opportunity to balance growth by enhancing experiences that encourage regional visitors to extend their stay, promoting high-value, longer itineraries for long-haul markets and leveraging these insights can help optimize both visitor experience and economic returns from tourism.

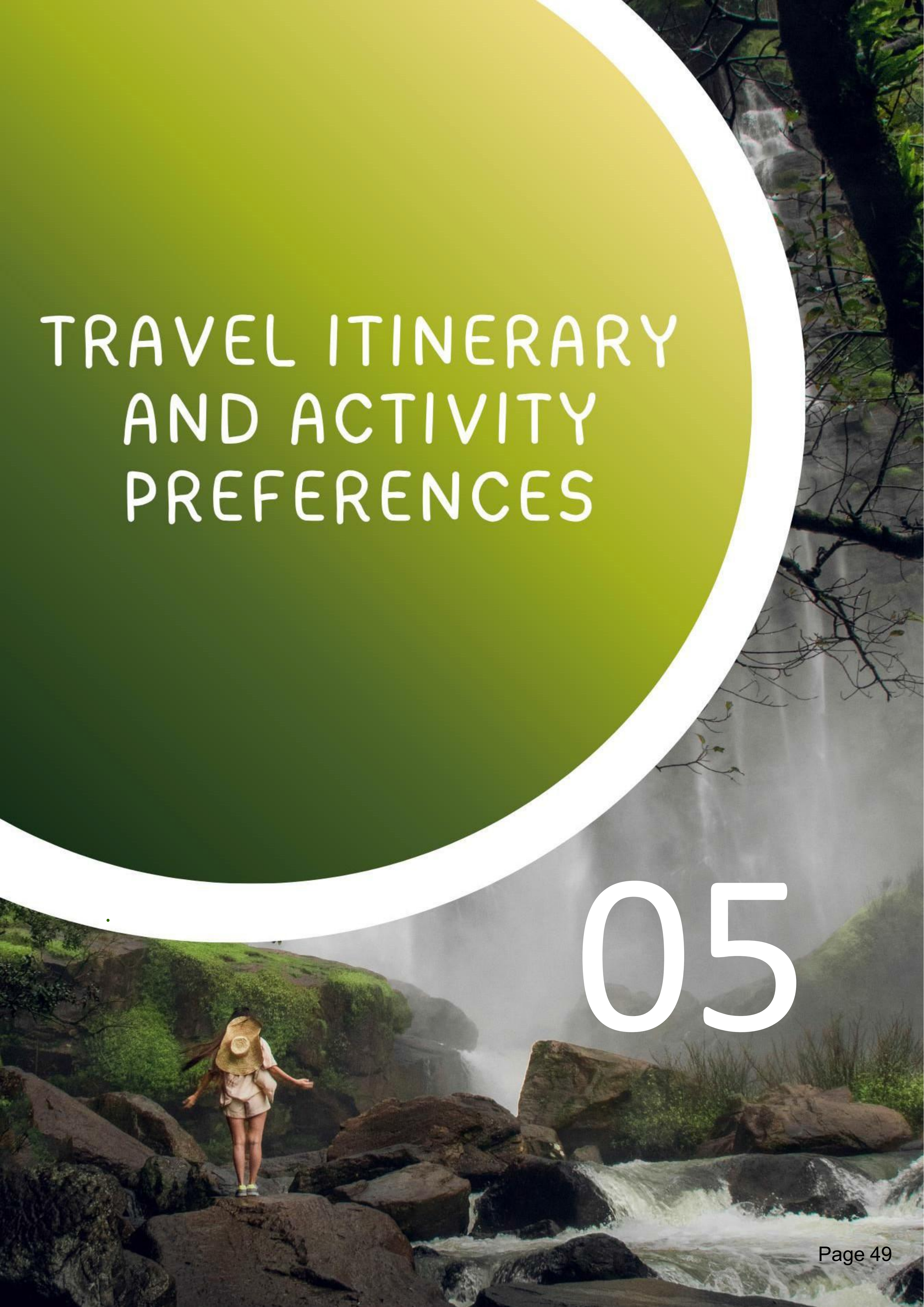
4.5.b. Duration of stay by gender

Gender	Average duration of stay in Sri Lanka
Female	12.8
Male	11.8
Other	12.8
	12.4

The data presents the average duration of stay in Sri Lanka by gender, showing only slight variations across groups. Female tourists and those identifying as "other" record the highest average stay at 12.8 days, while male tourists have a marginally lower average of 11.8 days. Overall, the differences are minimal, indicating that gender does not play a significant role in determining the length of stay.

The relatively uniform duration across gender groups suggests that travel behavior in terms of trip length is influenced more by other factors such as purpose of visit, country of origin, travel distance, and income level rather than gender.

TRAVEL ITINERARY AND ACTIVITY PREFERENCES

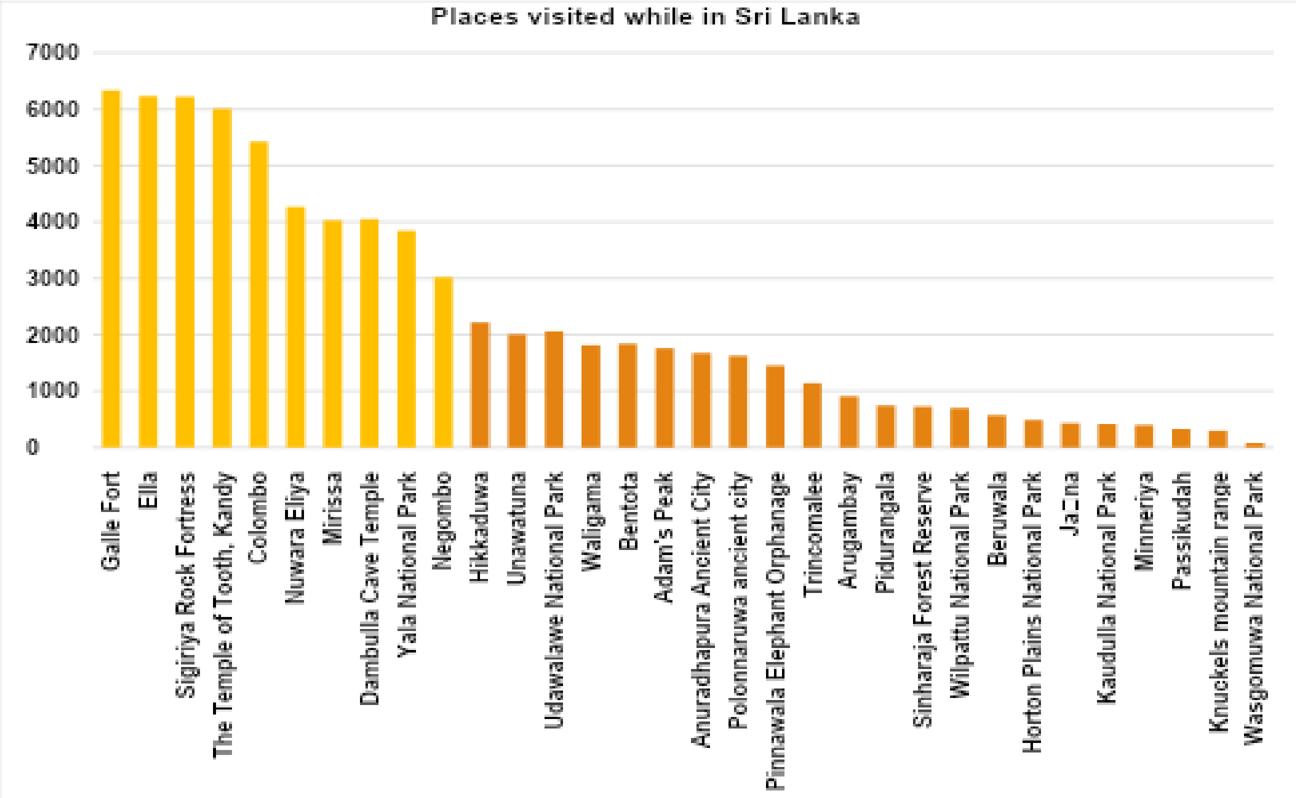


05

5.1. Tourist destination/attraction site Visited

Rank	Place visited while in Sri Lanka	Number of responses	% Share
1	Galle Fort	6,340	54.04
2	Ella	6,227	53.08
3	Sigiriya Rock Fortress	6,225	53.06
4	The Temple of Tooth, Kandy	6,014	51.27
5	Colombo	5,424	46.24
6	Nuwara Eliya	4,269	36.39
7	Mirissa	4,033	34.38
8	Dambulla Cave Temple	4,054	34.56
9	Yala National Park	3,848	32.80
10	Negombo	3,020	25.74
11	Hikkaduwa	2,221	18.93
12	Unawatuna	2,005	17.09
13	Udawalawe National Park	2,065	17.60
14	Weligama	1,813	15.45
15	Bentota	1,837	15.66
16	Adam's Peak	1,761	15.01
17	Anuradhapura Ancient City	1,671	14.24
18	Polonnaruwa ancient city	1,625	13.85
19	Pinnawala Elephant Orphanage	1,451	12.37
20	Trincomalee	1,139	9.71
21	Arugam bay	908	7.74
22	Pidurangala	743	6.33
23	Sinharaja Forest Reserve	727	6.20
24	Wilpattu National Park	700	5.97
25	Beruwala	570	4.86
26	Horton Plains National Park	488	4.16
27	Jaffna	429	3.66
28	Kaudulla National Park	415	3.54
29	Minneriya	397	3.38
30	Passikudah	330	2.81
31	Knuckles mountain range	293	2.50
32	Wasgomuwa National Park	76	0.65
	Total	**11,731**	**100.00**

Multiple responses were permitted.



The top five sites Galle Fort, Ella, Sigiriya Rock Fortress, the Temple of the Tooth in Kandy, and Colombo form the undisputed core circuit, each attracting over 5,000 respondents. This highlights the enduring appeal of Sri Lanka's cultural triangle (Sigiriya, Kandy) its colonial heritage (Galle), scenic hill country (Ella), and its primary urban hub (Colombo). (SLTDA, 2018). The dominance of this circuit suggests that most tourist itineraries are heavily concentrated in the southwestern and central regions of the country.

A second tier of highly popular destinations includes Nuwara Eliya, Mirissa, Dambulla, and Yala National Park, indicating strong demand for beach tourism, wildlife safaris, and temperate hill station experiences. Notably, the data shows a steep drop-off in visitation after the top 10-15 sites. While places like Adam's Peak, the ancient cities of Anuradhapura and Polonnaruwa, and Trincomalee are culturally and historically significant, they attract fewer visitors, suggesting they are niche or logistically challenging inclusions (SLTDA, 2018).

The very low visitation to destinations in the north (Jaffna), east (Passikudah), and some national parks (Wilpattu, Knuckles) points to a significant geographic imbalance in tourism distribution. This presents both a challenge and an opportunity. It indicates over-tourism pressure on the classic circuit and under-utilization of other regions. For sustainable development, there is a strong case for infrastructure investment and targeted marketing to disperse tourists to the north, east, and lesser-visited interior regions, thereby alleviating pressure on hotspots and spreading economic benefits more widely across the country (SLTDA, 2019).

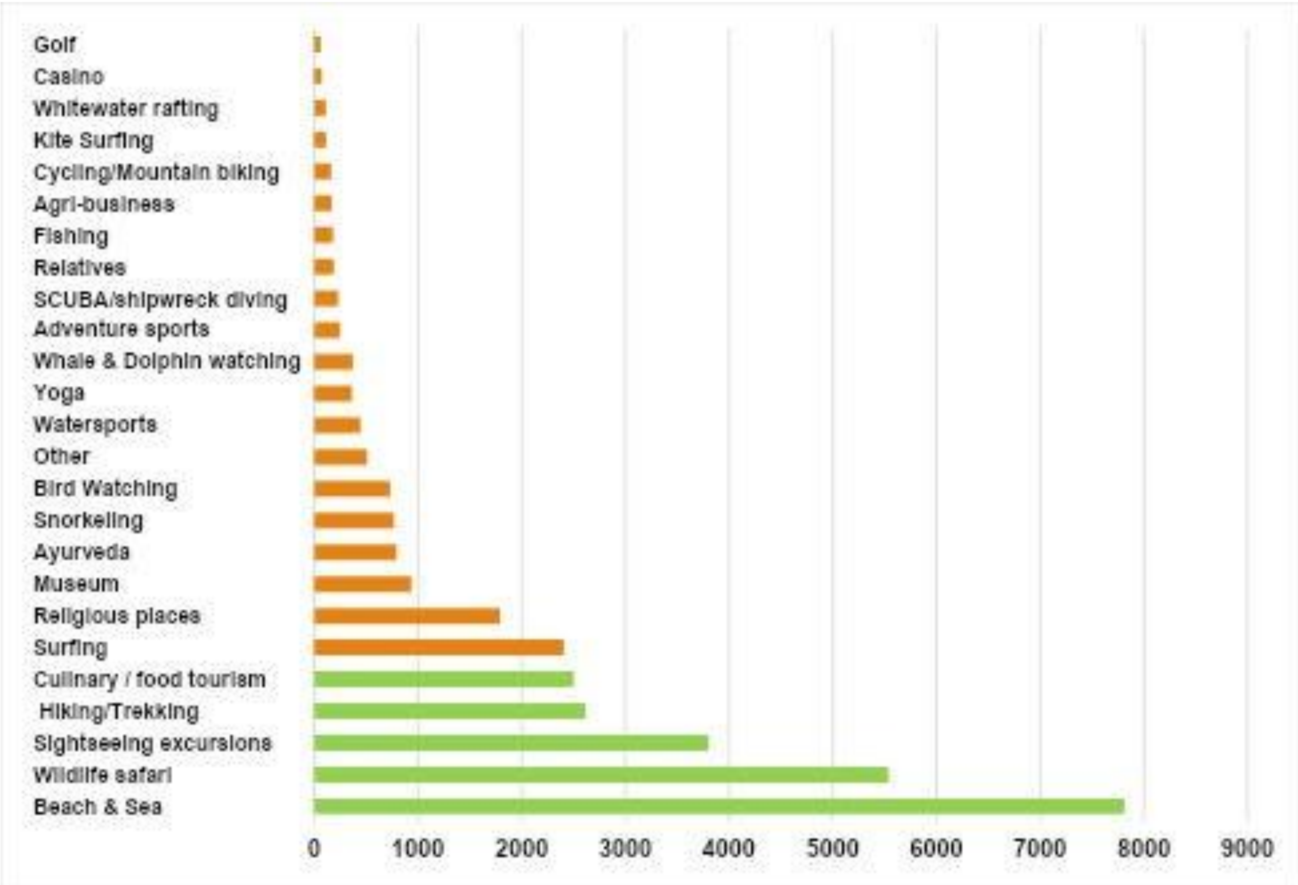
A comparison of the 2018 SLTDA Survey of Departing Foreign Tourists and the recent visitor survey highlights both continuity and emerging trends in Sri Lanka's tourism patterns. The top five sites Sigiriya Rock Fortress, Galle Fort, Kandy (Temple of the Tooth), Ella, a Colombo consistently attract the highest number of visitors, confirming the enduring appeal of the cultural triangle, colonial heritage, scenic hill country, and urban hubs (SLTDA, 2018).

While Sigiriya remains a core heritage attraction with high global recognition, Galle continues to draw visitors for its coastal and colonial charm, and Kandy maintains its cultural and spiritual significance. Colombo also remains a major urban gateway and city destination. A second tier of destinations, including Nuwara Eliya, Mirissa, Dambulla, and Yala National Park, has seen growing interest, reflecting an expansion in demand for nature, wildlife, beach, and hill country experiences beyond the classical heritage circuit. In contrast, historically and culturally significant sites such as Anuradhapura, Polonnaruwa, Adam's Peak, Jaffna, and Trincomalee continue to attract fewer visitors, suggesting niche demand, logistical challenges, or lower visibility in itineraries. Both surveys indicate a geographic imbalance, with the southwestern and central regions receiving the majority of tourism flows, while northern, eastern, and some interior destinations remain under-visited. This pattern underscores the opportunity for strategic infrastructure investment, targeted marketing, and development of alternative tourism circuits to alleviate pressure on core sites and promote a more balanced distribution of tourists across the country (SLTDA, 2018).

5.2 Activities pursued

Rank	Activity	Number of responses	Percentage
1	Beach & Sea	7,812	67
2	Wildlife safari	5,538	47
3	Sightseeing excursions	3,803	32
4	Hiking/Trekking	2,614	22
5	Culinary / food tourism	2,501	21
6	Surfing	2,404	20
7	Religious places	1,790	15
8	Museum	935	8
9	Ayurveda	793	7
10	Snorkeling	767	7
11	Bird Watching	731	6
12	Other	509	4
13	Watersports	444	4
14	Yoga	361	3
15	Whale & Dolphin watching	370	3
16	Adventure sports	248	2
17	SCUBA/shipwreck diving	230	2
18	Relatives	187	2
19	Fishing	180	2
20	Agri-business	167	1
21	Cycling/Mountain biking	161	1
22	Kite Surfing	111	1
23	Whitewater rafting	109	1
24	Casino	70	1
25	Golf	61	1
	Total	11,731	100

Multiple responses were permitted



Survey findings on inbound tourism to Sri Lanka highlight the continued dominance of beach and sea-based experiences, reinforcing the island's strong positioning as a leading coastal destination. Complementing this, wildlife safaris, sightseeing, hiking and trekking, and culinary tourism emerge as key activities, illustrating a balanced mix of nature, culture, and experiential travel preferences. These patterns are consistent with broader tourism trends, where nature-based and adventure offerings significantly enhance destination competitiveness, particularly in island contexts.

Research by Mastercard further supports this shift toward experience-driven travel, with a large majority of travelers prioritizing spending on tourism-related activities, signalling growing demand for immersive and diverse experiences (Tourism Economics, 2024). In Sri Lanka, this is reflected in the expansion of niche segments such as wellness tourism (Ayurveda and yoga), marine activities (surfing, snorkeling, whale watching), and cultural and spiritual tourism, all of which leverage the country's natural and cultural assets. Wildlife and eco-tourism offerings are widely recognized as major attractions that strengthen the country's appeal.

5.3. Visited destinations/sites by country

The distribution of visitors across Sri Lanka's attractions highlights notable geographic preferences. Lithuanian travellers appear most frequently, visiting seven distinct sites ranging from cultural landmarks (Sigiriya, Temple of the Tooth) to wildlife parks (Sinharaja, Udawalawe) and coastal towns (Jaffna, Beruwala). This suggests a strong and diverse interest in Sri Lanka among Lithuanian tourists. Similarly, Lebanon is well-represented, with visitors recorded at Wasgomuwa, Pinnawala, Minneriya, Nuwara Eliya, and Bentota – a mix of national parks, hill country, and beach destinations.

Western European countries also show clear patterns. Belgium and the Netherlands often appear together, visiting Wilpattu, Negombo, Trincomalee, Horton Plains, and Ella, indicating a preference for nature reserves, colonial-era towns, and scenic train routes. Ireland features prominently at Sigiriya, Kaudulla, Adam's Peak, Negombo, Ella, and Unawatuna, suggesting Irish travellers enjoy both cultural and coastal experiences. New Zealanders are notably drawn to Kaudulla, Wasgomuwa, Galle Fort, and Horton Plains – all sites offering open landscapes and wildlife.

Middle Eastern and South Asian visitors have more focused itineraries. Kuwaiti tourists appear at Sinharaja, Knuckles, Minneriya, and Piduruthalagala (mountain), favouring nature and highland areas. Iranian visitors are recorded only at Pinnawala and Bentota, while Saudi Arabia appears solely at Wasgomuwa. South Asian neighbors (Maldives, India, Bangladesh) are present mainly in Colombo and Jaffna, likely reflecting travel for business, shopping, and casino-related activities. East Asian visitors from Taiwan and Thailand concentrate on the Cultural Triangle (Colombo, Polonnaruwa, Anuradhapura), while Japan is notably absent.

Beach and surf destinations attract specific nationalities: Weligama (Sweden, Israel, Finland), Arugam Bay (Israel, South Africa), Hikkaduwa (Belarus, Russia, Sweden), Mirissa (Greece, Romania, Denmark), and Passikudah (Portugal, Egypt, Denmark). This indicates that coastal Sri Lanka appeals strongly to Northern and Eastern European, Israeli, and South African travellers. Eastern European countries (Belarus, Romania, Czech Republic, Slovakia) are scattered across several sites but without a single dominant destination.

Finally, some locations show surprising diversity: Galle Fort attracts visitors from New Zealand, Australia, and Romania a long-haul mix. Ella draws Belgium, Denmark, and Ireland all from Western Europe. The overall pattern suggests that Sri Lanka's marketing and travel infrastructure successfully cater to a wide range of source markets, with Europeans showing the broadest geographic spread, while Middle Eastern and Asian visitors tend to cluster around specific parks, pilgrimage sites, or urban centers.

1

5.3.a. Visited destinations/sites by country

Country	No. of Responses	1.Sigiriya Rock fortress	2.Temple of Tooth Kandy	3. Sinharaja Forest Reserve	4. Knuckles Mountain	5. Yala National Park	6. Kaudulla National Park	7. Udawalawa National Park	8. Wilpattu National Park	9. Wasgamuwa National Park	10. Galle Fort	11.Adam's Peak	12. Pinnawala Elephant Orphanage	13.Dambulla Cave Temple	14. Anuradhapura Ancient City	15. Polonnaruwa Ancient City	16. Horatian Plains National Park	17. Bentota	18. Mirissa	19. Hikkaduwa	20. Beruwala	21. Unawatuna	22. Arugam bay	23.Passikudah	24.Trincomalee	25. Ella	26. Nuwara Eliya	27. Jaffna	28. Colombo	29. Negombo	30. Minneriya	31. Weligama	32. Pidurangala
Australia	704	60.2	55	7	4.4	41	5.1	19	7.5	0.4	67	12.4	12	36.6	14.8	18.6	5.3	11.5	34.1	17.3	2	158	72	1.4	6	60	39.2	4	51	34.2	5.3	15	4.1
Austria	199	50.3	48	6	0.5	31	3	20	5.5	0	57	14.1	8	35.2	12.1	11.6	4	16.1	38.2	24.1	8	221	141	4	11.6	55	33.7	1.5	40	18.6	25	20	6
Bangladesh	35	5.7	23	2.9	2.9	8.6	0	5.7	0	0	29	0	14	8.6	2.9	0	2.9	8.6	8.6	11.4	0	29	29	0	2.9	14	14.3	0	69	28.6	0	2.9	0
Belarus	56	55.4	29	1.8	0	38	0	18	1.8	0	61	21.4	14	23.2	8.9	7.1	0	19.6	46.4	51.8	5	46.4	125	7.1	10.7	75	41.1	0	48	17.9	1.8	27	25
Belgium	207	71.5	65	10.1	7.2	41	4.8	24	22.2	0	64	27.1	12	56.5	27.1	25.1	9.2	13	40.6	19.3	3	203	140	4.3	21.7	83	52.2	2.4	38	41.1	2.4	14	13
Canada	388	46.8	44	3.7	3.2	29	2.1	12	6.9	5	43	10.6	6.9	27.1	10.6	10.6	4.3	9.6	24.5	13.3	3	133	101	3.7	12.8	44	42.6	12.2	56	28.2	5.3	17	6.4
China	575	63.5	66	6.1	1.6	40	3.5	6.8	2.3	7	61	2.8	8.3	19.5	4.7	3.3	5	8	21.6	12.5	3	6.4	2.4	0.5	1.4	26	17.4	0.7	59	20.5	1.4	5.4	0.7
Czech Republic	159	60.4	62	5	0.6	41	1.3	29	5.7	0	64	14.5	15	45.9	17.6	14.5	3.1	30.2	49.7	29.6	9	15.1	75	0.6	5.7	65	30.2	0	49	29.6	3.8	28	12
Denmark	136	69.1	60	7.4	2.2	53	2.9	13	1.5	0	61	16.2	8.1	45.6	16.9	11	3.7	14	50	16.2	7	19.9	88	7.4	11.8	79	25	1.5	39	26.5	5.1	23	11
Egypt	38	18.4	32	0	2.6	13	2.6	5.3	0	0	37	13.2	26	7.9	0	2.6	0	15.8	50	7.9	3	26	13.2	7.9	7.9	42	39.5	0	40	15.8	0	11	0
Finland	44	40.9	34	4.5	2.3	48	2.3	27	6.8	0	47	4.5	9.1	25	6.8	4.5	2.3	13.6	47.7	27.3	2	227	68	2.3	9.1	61	27.3	0	57	20.5	0	34	6.8
France	594	72.2	70	10.4	4	30	5.9	27	7.2	1	58	17.7	16	56.1	25.9	27.9	4.4	15.7	39.7	15.8	7	173	88	2.9	13.1	61	41.9	3.4	46	34	5.1	13	9.3
Germany	1057	53.6	49	8.6	2.8	34	3.7	31	5.9	6	56	19.7	6.7	37.4	13.1	11.3	4.4	14.7	44.7	22.2	8	223	120	3.8	11.4	65	34	2.6	37	30	3.5	20	7.6
Greece	41	75.6	59	0	4.9	46	2.4	17	2.4	0	44	9.8	17	61	4.9	9.8	2.4	9.8	63.4	14.6	12	220	98	0	7.3	76	43.9	0	54	29.3	2.4	20	7.3
Hungary	60	68.3	70	5	1.7	37	8.3	12	5	17	55	16.7	28	51.7	26.7	35	3.3	11.7	50	21.7	8	28.3	67	1.7	3.3	50	45	0	58	31.7	5	13	15
India	1104	25.1	46	3.5	0.6	12	1.1	3.2	1.2	5	32	6.3	15	16.9	9.6	5.3	1	25	10.8	8.6	3	53	22	1.2	15.3	21	36.1	12	56	11.4	0.9	2.8	1
Iran	34	50	50	2.9	2.9	15	2.9	0	5.9	0	53	8.8	35	17.6	8.8	2.9	5.9	64.7	29.4	17.6	12	118	29	0	0	38	29.4	0	56	14.7	0	8.8	2.9
Israel	200	41	33	5	1	30	4.5	12	4	15	40	19.5	14	24	8	8.5	8	8.5	43.5	11.5	5	125	245	5	10	62	34.5	1	30	14.5	0.5	37	3.5
Italy	337	71.5	64	6.2	1.5	38	5	18	6.5	9	59	20.5	15	57.6	34.4	34.7	1.2	13.6	43.9	21.4	3	142	8.3	3.6	23.4	65	54	2.7	42	25.2	5.3	13	9.8
Japan	276	59.1	50	2.2	0.7	17	1.1	6.9	3.3	0	34	3.6	6.9	26.1	7.2	6.2	3.6	5.8	8	9.1	0	43	7	0	1.8	15	20.7	0.7	54	11.2	1.4	0.4	1.1

Country	No. of Responses	1.Sigiriya Rock fortress	2.Temple of Tooth Kandy	3. Sinharaja Forest Reserve	4. Knuckles Mountain	5. Yala National Park	6. Kaudulla National Park	7. Udawalawa National Park	8. Wilpattu National Park	9. Wasgamuwa National Park	10. Galle Fort	11.Adam's Peak	12. Pinnawala Elephant Orphanage	13.Dambulla Cave Temple	14. Anuradhapura Ancient City	15. Polonnaruwa Ancient City	16. Horatian Plains National Park	17. Bentota	18. Mirissa	19. Hikkaduwa	20. Beruwala	21. Unawatuna	22. Arugam bay	23.Passikudah	24.Trincomalee	25. Ella	26. Nuwara Eliya	27. Jaffna	28. Colombo	29. Negombo	30. Minneriya	31. Weligama	32. Pidurangala
Jordan	22	59.1	46	0	4.5	14	4.5	9.1	4.5	0	46	9.1	9.1	13.6	45	0	0	27.3	27.3	27.3	14	45	45	0	4.5	32	18.2	0	64	13.6	4.5	4.5	0
Kazakhstan	72	30.6	22	4.2	0	25	0	5.6	1.4	1.4	46	6.9	6.9	9.7	1.4	4.2	0	18.1	38.9	33.3	4	26.4	1.4	5.6	2.8	47	16.7	0	28	5.6	1.4	19	5.6
Kuwait	9	44.4	33	11.1	2.9	22	0	22	0	0	33	0	22	11.1	0	0	0	22.2	33.3	22.2	0	11.1	0	0	0	56	22.2	0	33	11.1	11.1	22	22
Lebanon	20	75	55	10	0	15	5	15	5	5	25	0	46	35	5	5	5	35	15	0	5	15	50	0	5	30	60	0	55	10	15	5	0
Lithuania	34	85.3	71	20.6	2.9	50	2.9	41	0	0	62	11.8	35	50	26.5	17.6	5.9	32.4	35.3	11.8	18	29.4	14.7	0	0	59	44.1	14.7	65	20.6	0	27	12
Malayasia	102	35.3	42	0	0	27	1	2.9	1	0	46	9.8	3.9	23.5	8.8	5.9	0	12.7	25.5	15.7	3	98	5.9	2	6.9	36	26.5	4.9	63	18.6	0	12	2.9
Maldives	70	27.1	30	2.9	0	13	0	11	1.4	0	33	2.9	8.6	17.1	5.7	43	1.4	18.6	17.1	15.7	1	86	8.6	0	1.4	27	21.4	0	73	22.9	1.4	14	4.3
Netherland	466	64.8	54	9	4.5	38	4.9	25	30	6	64	23.4	11	45.7	33.5	15.5	9	8.6	41.6	19.5	3	225	16.5	3.2	19.5	78	51.1	4.1	37	51.1	3.4	18	15
New Zeland	90	66.7	51	4.4	5.6	43	12.2	18	5.6	33	67	12.2	13	42.2	16.7	24.4	8.9	11.1	40	12.2	3	18.9	14.4	2.2	11.1	58	41.1	3.3	41	36.7	3.3	13	6.7
Norway	81	48.1	46	6.2	2.5	36	3.7	21	4.9	0	53	16	4.9	33.3	14.8	9.9	7.4	11.1	46.9	24.7	5	123	25	1.2	12.3	64	21	2.5	54	27.2	0	33	0
Philippines	28	46.4	61	21.4	0	43	0	11	0	0	57	17.9	0	28.6	17.9	10.7	3.6	17.9	39.3	17.9	11	107	36	0	3.6	36	32.1	0	54	25	7.1	14	11
Poland	395	63.8	60	9.6	2.3	40	5.6	22	3.5	13	52	18	21	43.5	15.9	15.7	3.5	17.2	37.7	25.1	5	13.4	53	4.1	8.6	64	38	3.3	51	25.8	5.3	14	10
Portugal	90	72.2	69	3.3	1.1	40	5.6	13	3.3	11	51	15.6	8.9	50	17.8	25.6	2.2	12.2	40	11.1	2	200	67	11	8.9	66	44.4	1.1	61	30	8.9	21	20
Republic of Ireland	100	77	58	7	2	37	8	30	5	10	65	27	7	48	10	11	6	9	52	21	5	320	130	4	6	76	52	5	49	43	6	27	13
Romania	44	59.1	59	2.3	0	55	2.3	27	2.3	0	66	11.4	34	52.3	45	13.6	4.5	15.9	54.5	20.5	9	25	45	2.3	9.1	75	43.2	0	46	25	9.1	9.1	2.3
Russian Federation	801	37.1	28	4.4	0.7	28	2.6	11	1.6	2	64	21.7	16	15.2	5.4	4.9	1.5	24.5	36.6	42.2	8	38.2	55	4.7	4.7	54	25	0.4	31	13	0.7	17	3.6
Saudi Arabia	57	26.3	33	5.3	5.3	28	1.8	7	0	35	44	12.3	14	15.8	5.3	1.8	3.5	28.1	22.8	17.5	9	10.5	53	0	1.8	37	43.9	0	61	24.6	1.8	23	5.3
Singapore	85	23.5	27	3.5	0	19	2.4	8.2	0	0	44	7.1	4.7	14.1	5.9	12.9	3.5	9.4	20	16.5	1	9.4	59	2.4	1.2	28	27.1	2.4	60	16.5	3.5	5.9	1.2
Slovakia	51	70.6	59	9.8	2	47	0	28	3.9	0	39	27.5	33	54.9	3.9	15.7	7.8	11.8	41.2	19.6	2	17.6	39	0	11.8	49	39.2	3.9	55	33.3	5.9	14	5.9
South Africa	51	51	39	7.8	3.9	24	3.9	3.9	5.9	0	39	13.7	2	21.6	7.8	5.9	7.8	13.7	25.5	19.6	2	13.7	21.6	2	7.8	49	33.3	0	39	17.6	3.9	18	3.9
South Korea	59	44.1	51	5.1	0	10	0	6.8	0	0	44	11.9	15	20.3	10.2	11.9	8.5	8.5	18.6	8.5	2	5.1	3.4	1.7	0	42	32.2	0	68	20.3	5.1	8.5	8.5

Country	No. of Responses	1.Sigiriya Rock fortress	2.Temple of Tooth Kandy	3. Sinharaja Forest Reserve	4. Knuckles Mountain	5. Yala National Park	6. Kaudulla National Park	7. Udawalawa National Park	8. Wilpattu National Park	9. Wasgamuwa National Park	10. Galle Fort	11.Adam's Peak	12. Pinnawala Elephant Orphanage	13.Dambulla Cave Temple	14. Anuradhapura Ancient City	15. Polonnaruwa Ancient City	16. Horatian Plains National Park	17. Bentota	18. Mirissa	19. Hikkaduwa	20. Beruwala	21. Unawatuna	22. Arugam bay	23.Passikudah	24.Trincomalee	25. Ella	26. Nuwara Eliya	27. Jaffna	28. Colombo	29. Negombo	30. Minneriya	31. Weligama	32. Pidurangala
Spain	372	79	69	9.1	2.2	51	4.6	20	7.8	13	63	24.7	13	61.8	31.7	32	4.8	13.2	51.9	16.1	4	26.1	9.1	4	17.7	79	59.4	1.3	40	29	7.8	23	15
Sweden	134	38.8	37	5.2	0.7	40	0.7	18	3	0	58	5.2	8.2	23.1	13.4	7.5	7.5	19.4	44	33.6	7	26.1	127	2.2	6	60	42.5	1.5	52	32.1	3	47	7.5
Switzerland	289	57.4	50	5.2	1	36	2.8	22	12.1	7	57	17.6	8.7	41.9	18	16.6	5.2	18.3	45.7	23.2	5	18.7	10.4	6.2	17.3	64	39.1	9.7	42	32.2	3.1	22	9.3
Taiwan	27	44.4	48	3.7	0	19	0	3.7	0	0	37	11.1	11	44.4	33.3	33.3	0	7.4	11.1	0	0	37	0	0	0	26	33.3	0	70	11.1	7.4	11	3.7
Thailand	78	35.9	58	2.6	0	19	1.3	5.1	1.3	0	40	6.4	3.8	38.5	41	37.2	1.3	16.7	21.8	7.7	3	115	5.1	0	3.8	27	35.9	0	64	20.5	2.6	13	2.6
Turkey	74	62.2	61	1.4	2.7	39	5.4	11	4.1	0	54	10.8	20	35.1	14.9	8.1	2.7	21.6	47.3	27	5	16.2	108	0	0	50	25.7	0	54	14.9	1.4	24	6.8
Ukraine	40	37.5	43	0	7.5	33	2.5	23	2.5	25	48	25	20	22.5	5	7.5	2.5	17.5	35	20	5	17.5	75	2.5	0	46	25	5	45	20	0	23	5
United Arab Emirates	207	23.2	32	1.4	1	30	2.9	8.7	1	0	42	9.2	9.7	14.5	3.4	2.4	1.4	23.7	28.5	15.9	3	126	77	1	1.9	33	28	0	53	17.4	1	17	2.4
United Kingdom	1257	57.5	56	6.1	4.1	39	4.4	26	6.9	7	59	17.5	12	40.4	10.7	18.7	5.9	13.4	35.1	16.5	5	16.7	55	2.9	7.8	59	40.5	4.6	40	32.7	4.6	16	5.9
USA	289	47.8	46	8	5.2	33	2.4	15	5.9	1.4	53	10.4	10	30.4	14.9	12.1	3.8	11.4	26.6	11.4	4	90	59	1.7	4.5	46	30.4	3.5	54	24.6	3.8	15	2.1
Other	196	46.4	42	5.7	3.6	26	3.1	14	6.2	15	45	18	20	34.5	8.2	10.3	3.6	13.4	36.1	17	5	149	82	2.1	7.2	49	34.5	3.1	51	19.6	5.7	16	4.6

2

5.3.a Activities by country of residence

Beach and sea experiences serve as the universal drawcard for visitors across nearly all nationalities, cementing Sri Lanka's identity as a premier coastal destination. Beyond this shared preference, distinct activity clusters emerge when analysed by traveller origin.

Adventure & Nature Pursuits attract a strong Western and Antipodean cohort. Hiking and trekking draws visitors from Ireland, Netherlands, Belgium, Kuwait, Spain, the Philippines, and Japan, while wildlife safaris appeal to tourists from Australia, Belgium, Lebanon, Netherlands, New Zealand, Spain, and the UK suggesting that Europeans and Commonwealth travellers are particularly motivated by ecological experiences. Bird watching follows a similar pattern, with Jordan, Japan, Iran, and UK tourists among its followers.

Cultural & Spiritual Tourism shows a clear regional pattern. Visiting religious sites is concentrated among neighboring and culturally proximate nations Thailand, China, India, Iran, and South Korea reflecting the spiritual significance of Sri Lanka's Buddhist, Hindu, and Islamic heritage to Asian visitors. Museum visits are similarly popular among Thai and Japanese tourists.

Wellness & Holistic Tourism is a standout niche. Ayurveda draws guests from Kuwait, Turkey, Japan, and Maldives, positioning Sri Lanka as a recognised wellness retreat. Yoga attracts Israeli and Ukrainian visitors, while culinary tourism one of the broadest clusters includes tourists from South Africa, Singapore, Slovakia, Lebanon, Jordan, Australia, Canada, and Portugal, indicating strong crossover interest in Sri Lankan cuisine globally.

Water Sports & Marine Activities reveal a layered market. Snorkeling is popular among Russian, Spanish, Kuwaiti, Italian, Belarusian, and Belgian tourists. Scuba diving and shipwreck diving draw Egyptian and Greek visitors. Surfing appeals to Israeli, South African, and Swedish travellers, while kite surfing is niche among Lebanese and Jordanian tourists. White water rafting and whale/dolphin watching attract Egyptian, Greek, and Lithuanian visitors.

Social & Recreational Tourism rounds out the picture. Visiting friends and relatives is a key motivation for Canadians, Saudi Arabians, Malaysians, and Singaporeans largely diaspora or business-connected markets. Casino tourism is notable among Indian, Maldivian, Ukrainian, and Egyptian visitors. Golf draws South Koreans, New Zealanders, and Japanese tourists, while cycling and mountain biking appeal to Kuwaiti and Iranian visitors. Fishing is concentrated among Taiwanese and Chinese tourists, and sightseeing is the primary draw for Taiwanese visitors.

Beach and sea are the universal foundation, but niche activities define the visitor. Virtually every tourist nationality lists beach and sea as their primary draw. However, secondary

activities Ayurveda, wildlife safaris, religious sites, water sports reveal the true diversity of Sri Lanka's tourism product and the distinct motivations each market brings. Regional and cultural proximity strongly shapes activity preference. Asian neighbors (India, China, Thailand, South Korea, Iran) gravitate toward religious and cultural sites, reflecting shared heritage. Meanwhile, Western and Antipodean visitors lean toward adventure, wildlife, and marine activities, pointing to two very different value propositions Sri Lanka must market simultaneously. Wellness and culinary tourism represent high growth, high value niches. Ayurveda, yoga, and food tourism attract visitors from a wide and geographically dispersed set of countries. These activities tend to drive longer stays and higher spending, making them strategic priorities for destination development and targeted promotion.

5.4. Duration of stay in tourist sites/destinations

Attraction area	Duration of Stay (Number of days)
Sigiriya	**1.63**
Kandy	**1.71**
Sinharaja Forest Reserve	**1.25**
Knuckles	**1.51**
Yala	**1.31**
Kaudulla National Park	**1.00**
Udawalawe National Park	**1.17**
Wilpattu National Park	**1.28**
Wasgomuwa National Park	**1.45**
Galle	**1.63**
Adams Peak	**1.16**
Pinnawala	**0.86**
Dambulla	**1.06**
Anuradhapura	**1.40**
Polonnaruwa	**1.00**
Horton Places	**1.04**
Bentota	**2.19**
Mirissa	**2.14**
Hikkaduwa	**2.35**
Beruwala	**2.08**
Unawatuna	**2.32**
Arugam bay	**3.88**
Passikudah	**2.83**
Trincomalee	**2.62**
Ella	**1.89**
Nuwara Eliya	**1.36**
Jaffna	**3.61**
Colombo	**2.04**
Negombo	**1.60**
Minneriya	**0.81**
Weligama	**3.15**
Pidurangala	**0.74**

The data on the average number of days tourists spent across Sri Lankan destinations reveals a clear and consistent pattern: beach and surf destinations command the longest stays, while most cultural, wildlife, and monument sites are treated as brief day trips or single-night stops. The longest average stays are observed in Arugam bay (3.88 days), Jaffna (3.61 days), Weligama (3.15 days), Passikudah (2.83 days), and Trincomalee (2.62 days). Arugam bay and Weligama are renowned surf destinations, attracting travelers who stay for multiple days to ride waves, take lessons, and enjoy beachside leisure. Passikudah and Trincomalee, known for calm bays and diving opportunities, similarly draw longer stays. The notable exception among non-beach destinations is Jaffna, where tourists stay nearly four days on average. This reflects a dedicated cultural tour of the Northern Province, which requires more travel time and includes multiple historical and religious sites spread across the peninsula. Visiting friends and relatives could also be a reason for this longer duration of stay. Together, these figures suggest that when tourists come for a specific activity (surfing, diving, or deep cultural exploration) or to a region with dispersed attractions, they commit longer durations.

In contrast, most of Sri Lanka’s famous Cultural Triangle and hill country destinations see only moderate stays of 1.5 to 1.9 days. Hikkaduwa (2.35 days) remains a beach outlier, but Ella (1.89 days), Kandy (1.71 days), Sigiriya (1.63 days), Galle (1.63 days), and Negombo (1.60 days) all fall into this middle range. Colombo (2.04 days) sits slightly higher, likely serving as an arrival and departure hub with a day of city exploration. These figures indicate that most tourists spend just one night at heritage cities or hill country viewpoints: they arrive midday, see the main attraction the following morning, and leave by evening. While this allows efficient coverage of many sites, it also limits spending on accommodation, dining, and local experiences.

The shortest stays often less than 1.5 days are overwhelmingly concentrated among national parks, nature reserves, and individual monuments. Minneriya (0.81 days), Pidurangala (0.74 days), Pinnawala Elephant Orphanage (0.86 days), Dambulla (1.06 days), Polonnaruwa (1.00 days), Kaudulla National Park (1.00 days), Udawalawa National Park (1.17 days), Adams Peak (1.16 days), Sinharaja Forest Reserve (1.25 days), and Wilpattu National Park (1.28 days) all fall into this category. These numbers confirm that travelers treat these sites as day trips or half-day excursions rather than overnight destinations. For example, Minneriya and Kaudulla are typically visited as a few-hour safari from Sigiriya or Habarana; Pidurangala is climbed alongside Sigiriya in a single morning; and Pinnawala is a two-to-three hour stop between Colombo and Kandy. Even the renowned Sinharaja rainforest and Wilpattu National Park receive barely more than one day on average, suggesting that multi-day eco-tourism experiences remain underdeveloped.

From a strategic tourism planning perspective, this data offers both opportunities and warnings. The greatest opportunity lies in converting day-trip destinations into overnight stays. Currently, a tourist visiting Dambulla (1.06 days), Sigiriya (1.63 days), Polonnaruwa (1.00 days), and Anuradhapura (1.40 days) might rush through all four in three nights. A curated three-to-four-day heritage circuit with better accommodation, evening cultural performances, and guided tours could easily push that to five or six nights. Similarly, national parks currently average just one day; offering multi-day safari packages, night drives, and eco-lodges within or adjacent to parks could double those stays. The hill country (Ella, Nuwara Eliya, Adams Peak) averages only 1.2–1.9 days, yet with scenic train rides, tea plantation stays, and hiking circuits, it could easily support two-to-three-night packages.

The data also strengthens the case for beach-plus circuits. Since beach destinations already achieve stays of two to four days (Hikkaduwa 2.35, Unawatuna 2.32, Bentota 2.19, Beruwala 2.08, Mirissa 2.14), combining them with nearby attractions could extend stays even further. For example, Weligama (3.15 days) sits close to Galle Fort (1.63 days) and Mirissa whale watching; a “beach + culture + marine” package could easily become a five-to-seven day stay. Similarly, Jaffna’s 3.6 days shows that the Northern Province has successfully carved out a longer-stay cultural niche, which could be expanded with better transport links and accommodation.

Colombo (2.04 days) and Negombo (1.60 days) are largely used as transit hubs; improving walkability, curated city tours, and nightlife could lift stays. And Minneriya (0.81 days) and Pidurangala (0.74 days) are extreme cases where tourists spend less than a full day effectively using them as add-ons rather than primary destinations.

Sri Lanka exhibits a “short stay, high turnover” problem at most cultural and wildlife sites, while beach destinations successfully retain tourists for three to four days. To increase tourism revenue without necessarily attracting more arrivals, the strategic focus should shift toward: converting day-trip destinations like Minneriya and Pinnawala into overnight experiences; creating multi-day heritage passes linking Sigiriya, Polonnaruwa, Anuradhapura, and Dambulla; extending hill country stays via adventure and tea tourism; and developing Jaffna and the East Coast as longer-stay cultural-beach circuits. Addressing these patterns would allow Sri Lanka to extract more economic value from each tourist while also improving visitor satisfaction through less rushed, more immersive travel.

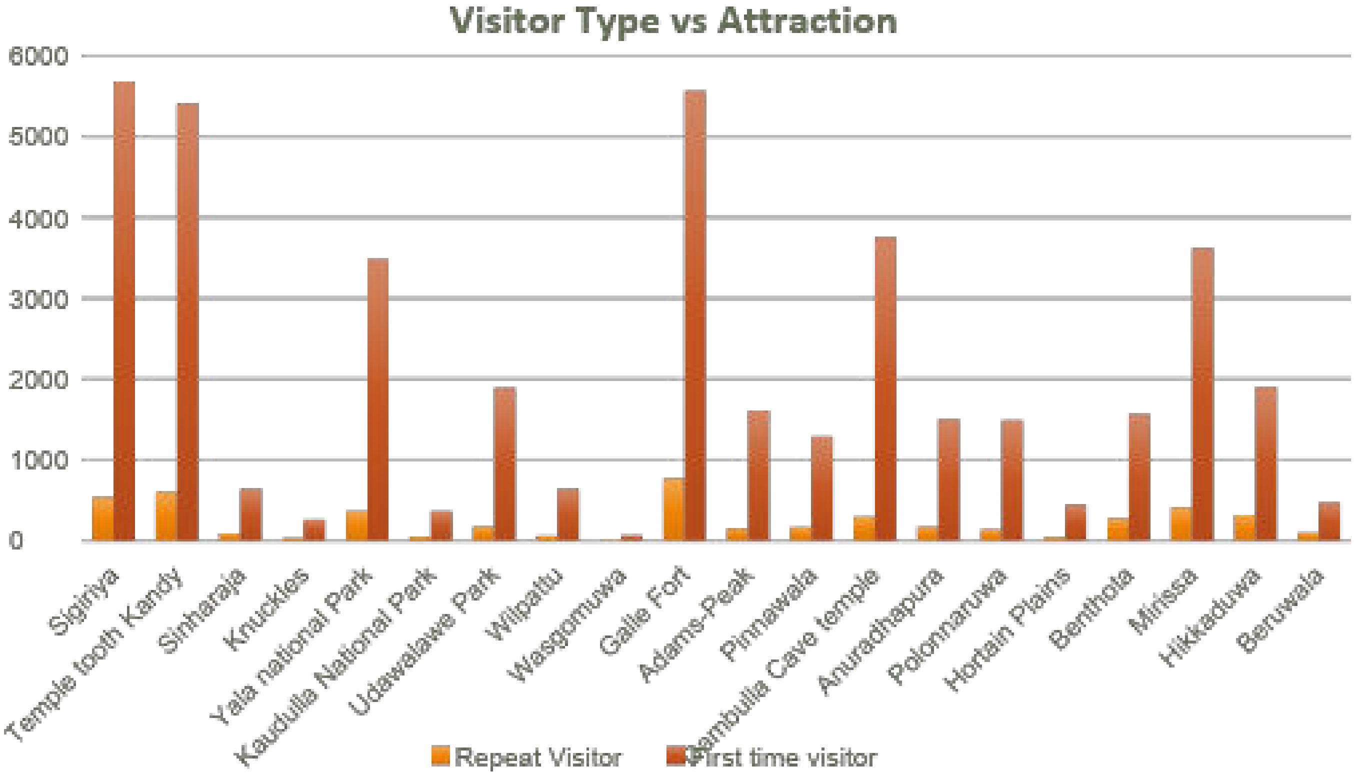
5.5. Visitor type vs tourist sites/destinations visited

	Attraction	Repeat visitors	First-time visitors
1	Sigiriya	539	5,685
2	Temple tooth Kandy	604	5,409
3	Sinharaja	87	640
4	Knuckles	34	259
5	Yala national Park	365	3,483
6	Kaudulla National Park	52	363
7	Udawalawe Park	172	1,893
8	Wilpattu	60	640
9	Wasgomuwa	10	66
10	Galle Fort	772	5,567
11	Adams-Peak	150	1,611
12	Pinnawala	164	1,287
13	Dambulla Cave temple	297	3,757
14	Anuradhapura	170	1,501
15	Polonnaruwa	136	1,489
16	Hortn Plains	44	444
17	Bentota	273	1,564
18	Mirissa	411	3,622
19	Hikkaduwa	320	1,901
20	Beruwala	97	473

The distribution of visits to major tourist attractions shows a clear dominance of first-time visitors across all locations, indicating that most sites in Sri Lanka are primarily attracting new tourists rather than repeat visitors. Popular attractions such as Sigiriya, Temple of the Tooth, and Galle Fort record the highest number of visitors overall, with significantly larger counts of first-time visitors compared to repeat visitors, highlighting their strong appeal as must-visit destinations. Similarly, well-known wildlife and coastal destinations like Yala National Park, Mirissa, and Hikkaduwa also attract large numbers of first-time tourists, reinforcing Sri Lanka's strength in nature and beach tourism.

However, certain locations such as Galle Fort, Mirissa, Temple of Tooth and Sigiriya show relatively higher repeat visitor numbers compared to other sites, suggesting that these destinations offer experiences that encourage tourists to revisit. In contrast, less-visited attractions like Wasgomuwa and Knuckles record very low numbers for both first-time and repeat visitors, indicating lower awareness or accessibility.

Overall, the findings suggest that Sri Lanka’s key attractions are highly successful in attracting new visitors, but there is comparatively lower repeat visitation, emphasizing the need to enhance visitor experience, promote diversified activities, and improve destination engagement to encourage more repeat tourism.



5.6 Comparison of tourist sites/destinations in 2018/2019 and 2024/2025

Rank	Tourist site/destination	No of respondents	% Share 24/25	% Share 18/19
1	Galle Fort	6,340	54.0	48.9
2	Ella	6,227	53.1	41.7
3	Sigiriya Rock Fortress	6,225	53.1	44.9
4	The Temple of Tooth, Kandy	6,014	51.3	64.9
5	Colombo	5,424	46.2	68.3
6	Nuwara Eliya	4,269	36.4	30.7
7	Dambulla Cave Temple	4,054	34.5	27.6
8	Mirissa	4,033	34.4	32.6
9	Yala National Park	3,848	32.8	17.5
10	Negombo	3,020	25.8	27.1
11	Hikkaduwa	2,221	18.9	21.0
12	Udawalawe National Park	2,065	17.6	22.2
13	Unawatuna	2,005	17.1	14.8
14	Bentota	1,837	16.2	13.1
15	Weligama	1,813	15.7	17.6
16	Adam's Peak	1,761	15.0	11.0
17	Anuradhapura Ancient City	1,671	14.24	16.5
18	Polonnaruwa ancient city	1,625	13.8	17.4
19	Pinnawala Elephant Orphanage	1,451	12.3	14.4
20	Trincomalee	1,139	9.7	-
21	Arugam bay	908	7.7	11.4
22	Pidurangala	743	6.3	-
23	Sinharaja Forest Reserve	727	6.2	-
24	Wilpattu National Park	700	5.9	2.0
25	Beruwala	570	4.9	-
26	Horton Plains National Park	488	4.1	-
27	Jaffna	429	3.6	3.8
28	Kaudulla National Park	415	3.5	4.6
29	Minneriya	397	3.4	6.5
30	Passikudah	330	2.8	-
31	Knuckels mountain range	293	2.5	-
32	Wasgomuwa National Park	76	0.7	-
	Total	**11,731**	**100**	

A ranking of Sri Lanka's most visited tourist attractions reveals notable shifts in popularity over time. In 2024/25, Galle Fort, Ella, and Sigiriya Rock Fortress claimed the top three spots, each attracting more than half of all tourists. While Kandy's Temple of the Tooth Relic and Colombo continue to draw large crowds, both destinations have seen their visitor share decline compared to earlier years.

Several attractions have grown in popularity since 2018/19, including Yala National Park, Nuwara Eliya, Dambulla, and Mirissa. Among beach destinations, Unawatuna and Bentota have attracted growing visitor interest, whereas Weligama has seen a decline. Meanwhile, the historic ancient cities of Anuradhapura and Polonnaruwa have experienced a drop in overall visitor popularity compared to previous periods.

Shift toward experiential and Instagram-worthy destinations

The rise of Ella, Galle Fort, and Sigiriya all highly photogenic, easily accessible, and rich in “Instagrammable” moments suggests that modern travelers prioritize visual appeal and shareable experiences. Ella’s train journey, Galle’s colonial architecture, and Sigiriya’s iconic rock fortress offer distinct backdrops for social media, which may drive their top rankings. The decline of ancient cities like Anuradhapura and Polonnaruwa, while historically significant, may indicate that younger or independent tourists prefer shorter, more visually striking visits over extensive heritage explorations.

Wildlife and hill country gaining traction

Yala National Park and Nuwara Eliya have both increased in visitor share. This points to a growing appetite for nature-based tourism that combines adventure (safaris) with scenic landscapes (hills). Mirissa’s rise further reinforces marine wildlife interest (whale watching). These destinations offer active, outdoor experiences that align with global post-pandemic trends favoring open-air, socially distanced activities.

Mixed performance among beach destinations

While Unawatuna and Bentota have become more popular, Weligama has declined. Bentota is known for water sports and river safaris. Weligama, famous for surfing, may be losing visitors to other surf spots or suffering from overcrowding or infrastructure issues. Alternatively, surfers might be shifting to less crowded breaks, or the decline could reflect changing preferences among the under-15 and 15–19 age groups (key surf demographics) revealed in earlier survey data.

Decline of established cultural hubs

The falling popularity of Kandy’s Temple of the Tooth and Colombo both long-standing highlights suggest possible saturation, perceived overcrowding, or a shift toward lesser-known alternatives. Colombo, as a transit hub, may see shorter stays as tourists rush to “destination” attractions. Kandy might be losing share to Ella or Nuwara Eliya, which offer cooler climates and more varied activities. This does not mean these sites are unimportant; rather, their relative share has dropped as other.

5.7. Activities by age

Age Group	Beach & sea	Wildlife Safari	Sightseeing Excursions	hiking /Trekking	Culinary / Food Tourism	Surfing	Religious Places	Museum	Ayurveda	Snorkeling	Bird Watching	Other	Watersports	Whale & Dolphin Watching	Yoga	Adventure Sports	SCUBA/Shipwreck Diving	Relatives	Fishing	Agri-Business	Cycling / Mountain Biking	Kite Surfing	Whitewater Rafting	Casino	Golf	No. of Responses
Under 15	85	62	23.1	30.77	0	15.4	0	23.08	0	7.69	7.69	0	7.69	15.4	0	7.69	7.69	0	7.69	0	0	0	0	0	0	**13**
15-19	67	53	29.8	22.94	21	31.7	9.17	5.96	0.92	11.01	3.67	3.21	5.5	3.21	1.83	3.21	5.5	1.83	3.21	0.46	0.46	2.29	0.92	0	0	**218**
20-24	69	44	22.1	34.97	22	40.4	9.44	5.83	2.78	7.4	2.78	3.7	3.7	2.78	4.72	1.57	2.87	1.3	1.2	0.65	1.85	0.83	1.2	0.19	0.37	**1081**
25-29	67	50	26.9	31.23	22	34.9	9.55	4.46	6.43	8.01	3.98	3.34	3.43	2.66	3.26	2.44	2.83	0.73	1.16	1.16	1.11	0.56	0.99	0.43	0.34	**2334**
30-34	69	50	29.2	27.4	20	23.6	12.9	6.28	5.66	7.68	4.51	3.53	4.41	4.15	3.01	2.54	1.71	1.25	1.35	1.09	0.93	0.88	0.93	0.47	0.31	**1927**
35-39	72	43	30.9	20.77	21	17.7	15.1	9.94	6.82	6.31	6.23	4.53	4.3	2.97	2.97	2.97	1.85	1.34	1.71	1.34	1.11	0.74	1.11	0.45	0.45	**1348**
40-44	71	42	31.2	15.49	19	16.1	17.1	8.91	6.86	7.14	6.68	2.97	4.73	3.62	2.32	1.95	2.69	1.76	2.13	1.48	1.76	1.48	0.74	1.3	0.56	**1078**
45-49	69	41	37.1	13.96	22	11.6	17.9	9.77	7.36	4.82	6.22	5.2	5.71	2.79	2.41	2.66	1.65	3.05	2.03	1.27	0.76	1.52	0.89	1.27	1.14	**788**
50-54	65	47	40.1	13.63	22	6.62	17.5	10.06	8.41	6.37	8.15	6.11	3.69	3.18	3.06	1.4	1.02	2.17	1.91	1.78	1.91	1.15	0.89	1.02	0.25	**785**
55-59	59	47	38.7	14.33	24	5.52	23.4	8.96	11.5	4.33	8.21	5.82	2.09	3.88	3.88	1.64	1.04	3.13	1.64	2.69	2.24	1.19	1.19	0.9	1.04	**670**
60-64	58	51	43.2	13	22	3.14	24.4	12.86	8.97	3.74	10.8	6.13	2.54	2.24	3.44	0.45	0.45	2.39	1.05	2.24	1.49	0.75	0.75	0.6	1.35	**669**
65-59	57	53	48.1	10.72	22	1.97	23.6	11.38	8.1	3.5	11.6	7.22	2.41	1.75	2.63	1.09	0.22	1.31	1.75	1.97	2.63	0.88	0.44	0.22	0.22	**457**
70-74	50	51	50.8	8.4	19	0.76	28.6	13.74	11.1	1.91	18.7	3.44	0.38	2.29	1.15	1.15	0.38	1.53	0	3.05	0.76	0.76	0.38	0	0.38	**262**
75 and above	44	54	43.6	5.94	22	1.98	27.7	10.89	8.91	1.98	13.9	11.9	0	7.92	0	1.98	0	2.97	2.97	2.97	1.98	0.99	0	0	1.98	**101**
Total	**67**	47	32.4	22.27	21	20.5	15.3	7.97	6.76	6.54	6.23	4.34	3.78	3.15	3.08	2.11	1.96	1.59	1.53	1.42	1.37	0.95	0.93	0.6	0.52	**11,731**

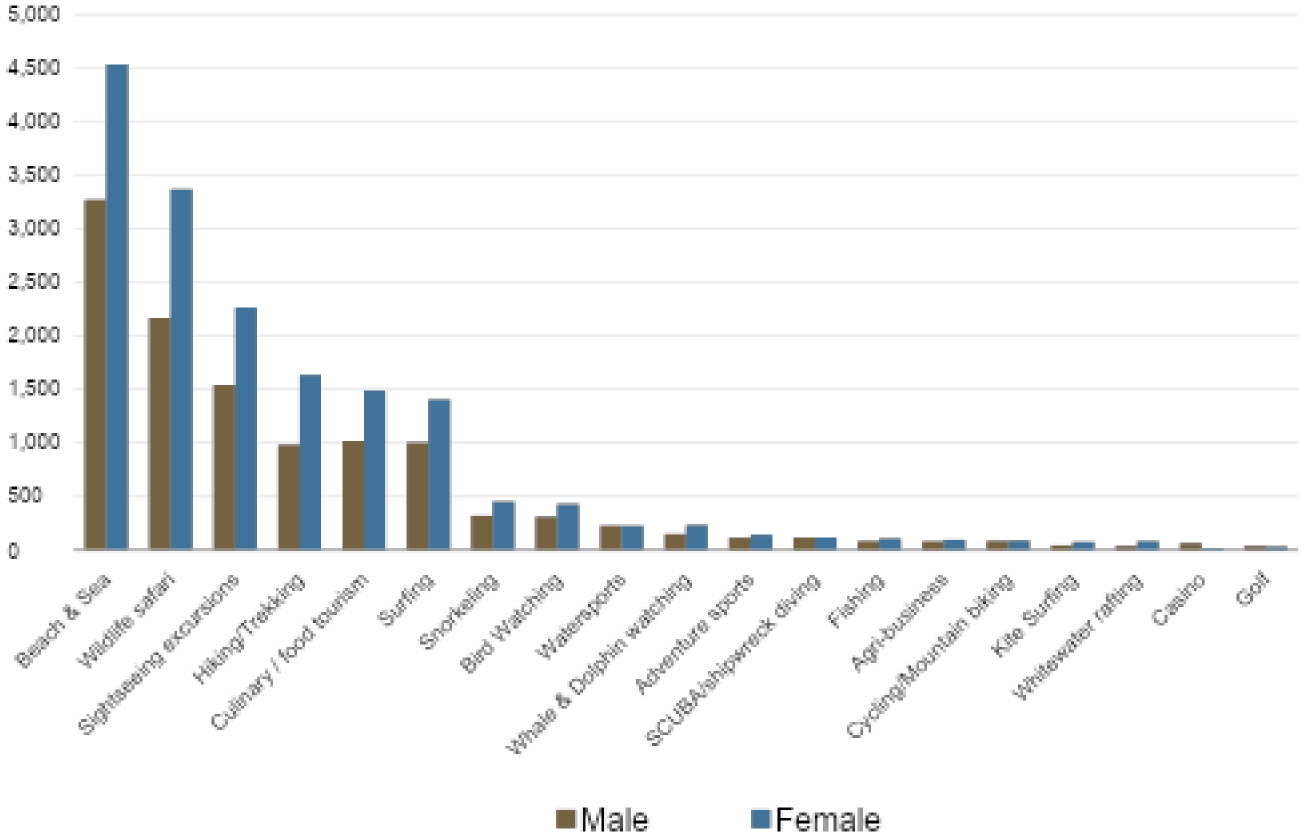
The survey data reveals clear age-based preferences among tourists visiting Sri Lanka, with distinct clusters of activities appealing to younger, middle aged, and older travelers. Unsurprisingly, adrenaline-fueled and water-based experiences are dominated by the youngest cohort (under 15). This group shows strong engagement with beach and wildlife safaris, museums, water sports, whale and dolphin watching, adventure sports, scuba diving, and fishing. Their enthusiasm for exploration and marine life suggests family-oriented travel, where children are active participants in nature and adventure.

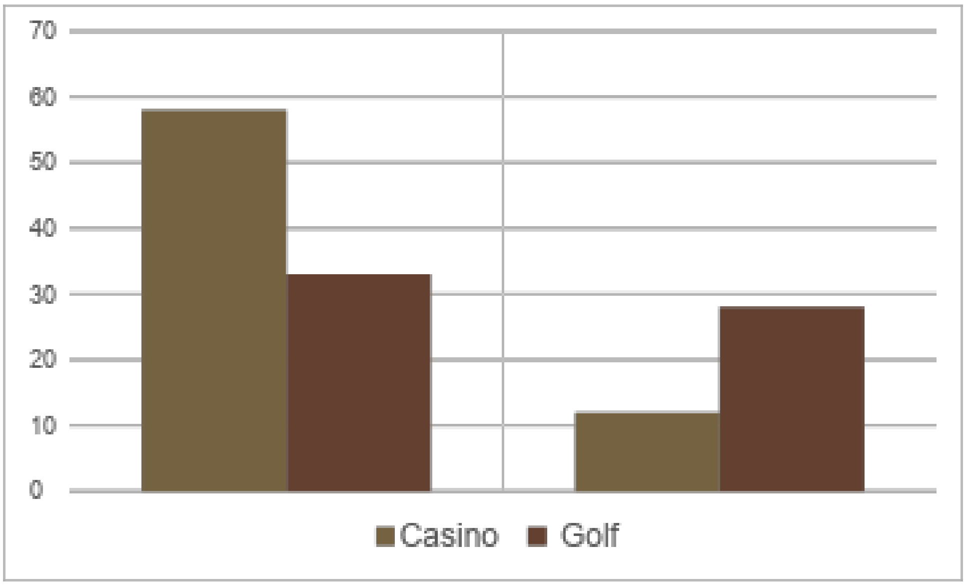
The late teen and early twenties segments (15–19 and 20–24) continue the trend toward active pursuits but with slightly more specialized interests. Snorkeling and kite surfing attract the 15–19 age bracket, while hiking, surfing, and yoga are popular among 20–24-year-olds, indicating a shift toward skills-based recreation and physical challenges. In contrast, middle-aged travelers (40–44, 55–59) gravitate toward cultural, culinary, and wellness experiences. The 40–44 group is uniquely associated with casinos, suggesting a niche leisure preference. The 55–59 cohort displays a broader range, including culinary tourism, Ayurveda, visiting friends and relatives (VFR), and whitewater rafting — an interesting blend of relaxation, social connection, and mild adventure.

Older tourists (65–69, 70–74, and 75+) focus on sedentary, contemplative, or leisurely activities. Cycling and mountain biking appeal to the 65–69 group, indicating active seniors. Sightseeing, visiting religious places, bird watching, and agri-business are strongly associated with the 70–74 category, reflecting interests in culture, spirituality, nature observation, and rural livelihoods. Finally, golf is the sole activity for those aged 75 and above, underscoring a preference for low-impact, socially paced recreation. Overall, the data highlights a lifecycle pattern: youth-driven adventure gives way to cultural and wellness pursuits in midlife, while later years emphasize gentle sightseeing and nature-based leisure

5.7.a. Activities by gender

	Activity	Gender	
		Male	Female
1	Beach & Sea	3,268	4,534
2	Wildlife safari	2,166	3,366
3	Sightseeing excursions	1,538	2,263
4	Hiking/Trekking	978	1,633
5	Culinary / food tourism	1,013	1,487
6	Surfing	1,000	1,402
9	Snorkeling	317	448
10	Bird Watching	305	425
11	Watersports	222	221
13	Whale & Dolphin watching	143	227
14	Adventure sports	112	136
15	SCUBA/shipwreck diving	115	115
16	Fishing	77	103
17	Agri-business	75	92
18	Cycling/Mountain biking	79	82
19	Kite Surfing	41	70
20	Whitewater rafting	33	76
21	Casino	58	12
22	Golf	33	28


5,000
4,500
4,000
3,500
3,000
2,500
2,000
1,500
1,000
500
0
Beach & Sea
Wildlife safari
Sightseeing excursions
Hiking/Trekking
Culinary / food tourism
Surfing
Snorkeling
Bird Watching
Watersports
Whale & Dolphin watching
Adventure sports
SCUBA/shipwreck diving
Fishing
Agri-business
Cycling/Mountain biking
Kite Surfing
Whitewater rafting
Casino
Golf
Male
Female


70
60
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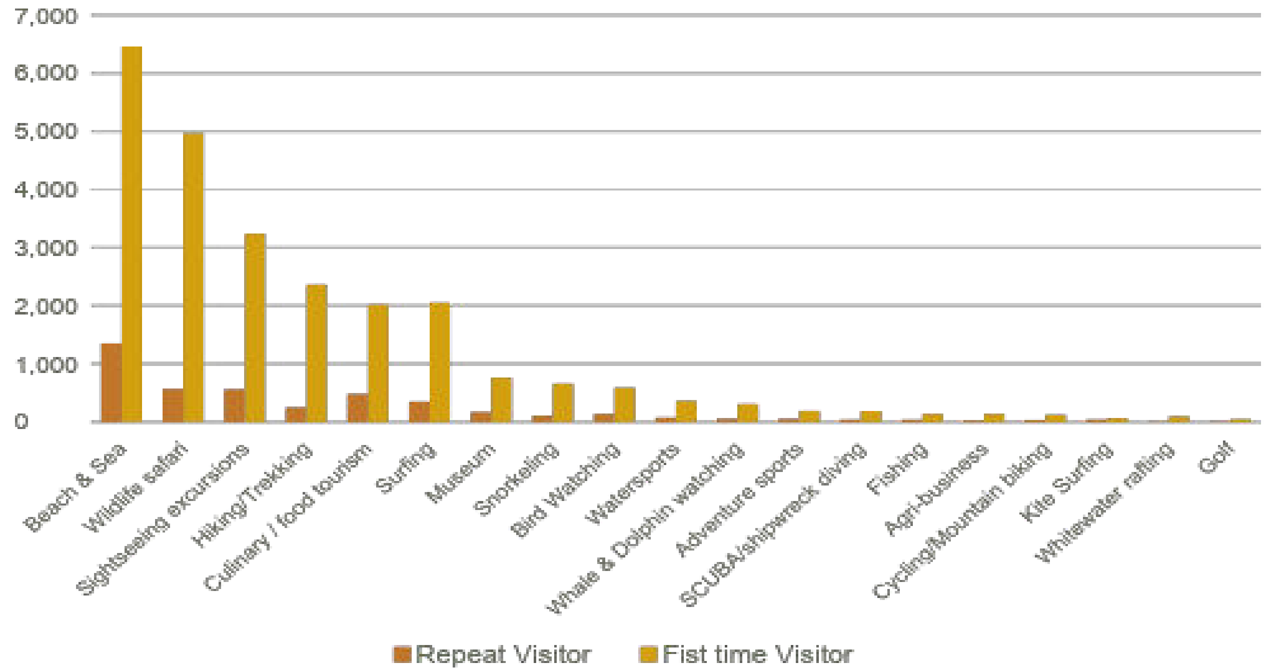
Casino
Golf

The comparison of tourism activity preferences by gender reveals several clear patterns. Overall, female tourists show higher participation across most activities, particularly in popular segments such as beach and sea, wildlife safari, sightseeing excursions, and hiking/trekking, indicating a stronger overall engagement in tourism activities. Beach and sea remain the most preferred activity for both genders, followed by wildlife safari and sightseeing excursions, highlighting the universal appeal of nature based and scenic experiences. Female tourists also show relatively higher interest in activities such as culinary/food tourism, surfing, snorkeling, and bird watching, suggesting a broader and more diverse range of preferences. In contrast, male participation is slightly higher in more niche or specific activities such as casino and golf, where the gender gap reverses compared to other activities. Additionally, participation levels in activities like watersports, adventure sports, and scuba diving are relatively similar between males and females, indicating balanced interest in moderate adventure activities. Overall, the findings suggest that while core tourism activities appeal to both genders, female tourists tend to participate more actively across a wider range of experiences, whereas male tourists show relatively stronger preference in a few specialized or leisure-oriented activities such as casino and golf.

5.7.b Activities by visitor type

	Activity	**Repeat Visitor**	**First time visitor**
1	Beach & Sea	1,351	6,460
2	Wildlife safari	566	4,971
3	Sightseeing excursions	561	3,241
4	Hiking/Trekking	250	2,364
5	Culinary / food tourism	481	2,020
6	Surfing	350	2,054
8	Museum	170	765
9	Snorkeling	106	661
10	Bird Watching	139	592
11	Watersports	79	365
13	Whale & Dolphin watching	58	312
14	Adventure sports	56	192
15	SCUBA/shipwreck diving	42	188
16	Fishing	41	139
17	Agri-business	28	139
18	Cycling/Mountain biking	35	126
19	Kite Surfing	44	67
20	Whitewater rafting	13	96
21	Golf	12	49



The chart shows clear differences among activities between repeat visitors and first-time visitors. First time visitors participate much more in almost all activities. The most preferred activity is Beach & Sea, followed by wildlife safari and sightseeing excursions, indicating that new tourists mainly focus on key attractions in Sri Lanka.

Activities such as hiking/trekking, culinary tourism, and surfing also attract a good number of first-time visitors, but participation is still lower compared to the top activities. In contrast, repeat visitors show lower participation across all activities, although they still engage most in beach related and nature-based experiences.

Less popular activities for both groups include adventure sports, diving, fishing, golf, and whitewater rafting, which have very low participation. This suggests that these niche activities attract only a small segment of tourists.

Overall, the results highlight that first time visitor are more active and interested in exploring a wide range of attractions, while repeat visitors participate less and may prefer selective or familiar experiences.

5.8. Activities while in Sri Lanka - 2018/2019 Vs. 2024/2025

Rank	Activity	No of responds	% Share (24/25)	% Share (18/19)
1	Beach & Sea	7,812	66.59	77.2
2	Wildlife safari	5,538	47.21	43.1
3	Sightseeing excursions	3,803	32.42	47
4	Hiking/Trekking	2,614	22.28	31.1
5	Culinary / Food tourism	2,501	21.32	10.3
6	Surfing	2,404	20.49	18.6
7	Religious places	1,790	15.26	-
8	Museum	935	7.97	-
9	Ayurveda	793	6.76	-
10	Snorkeling	767	6.54	-
11	Bird watching	731	6.23	-
12	Other	509	4.34	-
13	Watersports	444	3.78	-
14	Whale & dolphin watching	370	3.33	-
15	Yoga	361	3.08	-
16	Adventure sports	248	2.11	-
17	SCUBA/Shipwreck diving	230	1.96	-
18	Relatives	187	1.59	-
19	Fishing	180	1.53	-
20	Agri-business	167	1.42	-
21	Cycling/Mountain biking	161	1.37	-
22	Kite Surfing	111	0.95	-
23	Whitewater rafting	109	0.93	-
24	Casino	70	0.6	-
25	Golf	61	0.52	-
	Total	**11,731**	**100**	

An examination of tourist activity trends in Sri Lanka highlights both enduring preferences and emerging shifts in visitor behaviour.

Beach & Sea remains the most favoured activity in 2024/25, with 66.59% participation, though this marks a decline from 77.2% recorded in 2018/19. Wildlife safari has climbed to second place at 47.21%, up from 43.1% in 2018, reflecting growing enthusiasm for nature-based experiences.

Conversely, traditional pursuits such as sightseeing excursions and hiking/trekking have seen a decline compared to earlier periods. Meanwhile, culinary/food tourism and surfing have gained noticeable momentum, signalling a broader shift toward experience-driven and adventure-oriented travel.

Overall, while beach tourism continues to dominate, the data points to a clear and growing diversification in tourist preferences, with visitors increasingly seeking immersive, activity-rich, and culturally engaging experiences beyond conventional attractions.

EXPENDITURE PATTERNS

06

EXPENDITURE PATTERNS

6.1. Nature of the trip: Package vs. Non-Package tourists

Whether Package Trip	Number of respondents	Percentage
Package	4,406	37.56
Non - Package	7,325	62.44
Grand Total	**11,731**	**100.00**

The distribution of 7,325 non-package (62.4%) and 4,406 package tourists (37.6%) arriving in Sri Lanka highlights a clear preference for independent travel, while still preserving a meaningful role for organized tours. This split reflects a broader shift in global travel behaviour, where a majority of tourists prefer to plan their own itineraries rather than relying on pre-arranged packages. According to the *TGM Global Travel Insights 2025* report, over half of global travellers now choose to arrange their own travel, emphasizing flexibility and personal control over trip design, a pattern seen across regions including Asia, Europe, and the Americas (MARKET, 2025).

In the context of Sri Lanka, this trend is not new. Historical airport survey data from 2018–2019 reveals that even then, around 60% of tourists were non-package (independent) travellers, with package tours constituting only about 17–18% of arrivals a strong indication that the preference for FIT (Free Independent Travel) has been gaining traction for many years.(SLTDA, 2018) This longstanding shift is largely driven by younger, tech-savvy tourists who rely on online resources, mobile apps, and digital platforms to research, book, and customize travel experiences. Research on trip planning behaviour globally shows similar patterns, where the majority of travellers prefer self-planning enabled by digital tools and internet access, often influenced by social media, peer reviews, and real-time information sources. (Market, 2024).

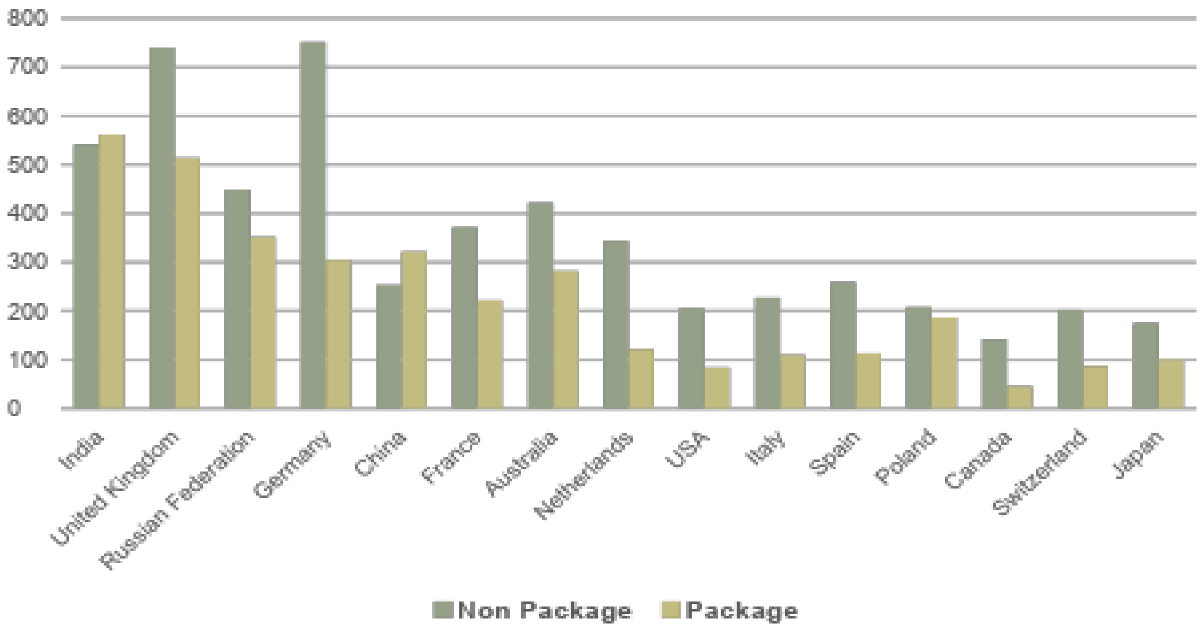
The dominance of independent travel suggests that Sri Lanka appeals strongly to visitors seeking authentic, flexible, and personalised experiences such as cultural immersion, nature exploration, adventure activities, and off-the-beaten-path journeys rather than rigidly structured itineraries. This aligns with broader *world travel trends* that associate independent travel with experiential motivations and deeper engagement with destinations.

At the same time, the persistence of a sizeable package tour segment (37.6%) underscores the continued relevance of organized travel. Package tourism remains particularly attractive for first-time visitors, long-haul markets, families, older age groups, and tourists from countries where inclusive tour arrangements are culturally preferred or offer assurance and convenience. In Sri Lanka's case, this is reinforced by promotional activity in key source markets; for example, travel agency promotions in India highlight tour packages as an accessible option for Indian travellers seeking easy-to-book experiences. (Reddit, 2023)

6.2. Nature of the trip by country

Country	Non-Package	Package	Number of Respondents
Australia	422	282	704
Austria	147	52	199
Bangladesh	13	22	35
Belarus	38	18	56
Belgium	140	67	207
Canada	142	46	188
China	253	322	575
Czech Republic	110	49	159
Denmark	80	56	136
Egypt	26	12	38
Finland	35	9	44
France	372	222	594
Germany	752	305	1,057
Greece	35	6	41
Hungary	34	26	60
India	541	563	1,104
Iran	11	23	34
Israel	142	58	200
Italy	227	110	337
Japan	175	101	276
Jordan	10	12	22
Kazakhstan	42	30	72
Kuwait	6	3	9
Lebanon	6	14	20
Lithuania	20	14	34
Malaysia	72	30	102
Maldives	53	17	70
Netherlands	344	122	466
New Zealand	45	45	90
Norway	58	23	81
Philippines	19	9	28
Poland	208	187	395
Portugal	50	40	90

Country	Non-Package	Package	Number of Respondents
Republic of Ireland	64	36	100
Romania	28	16	44
Russian Federation	449	352	801
Saudi Arabia	47	10	57
Singapore	69	16	85
Slovakia	28	23	51
South Africa	39	12	51
South Korea	38	21	59
Spain	259	113	372
Sweden	104	30	134
Switzerland	202	87	289
Taiwan	12	15	27
Thailand	40	38	78
Turkey	52	22	74
Ukraine	26	14	40
United Arab Emirates	160	47	207
United Kingdom	740	514	1254
USA	205	84	289
Other	134	62	196
Grannd Total	**7,324**	**4,407**	**11,731**
Share (%)	**62.43**	**37.57**	**100.00**



Out of a total of 11,731 responses, 62.43% of tourists opted for non-package travel, while 37.57% chose package tours. This indicates a clear preference among the majority of visitors to plan their trips independently rather than relying on organized tour packages.

A closer look at country wise patterns shows that non-package travel is particularly dominant among tourists from Western countries, with the highest numbers recorded from Germany (752) and the United Kingdom (740). In contrast, tourists from countries such as India (563), China (322), Bangladesh (22), Iran (23), Taiwan (15), Lebanon (14), and Jordan (12) demonstrate a stronger inclination toward package tours. Meanwhile, certain markets like New Zealand (45 vs. 45) and Portugal (50 vs. 40) exhibit relatively balanced preferences, with tourists almost evenly split between independent and package travel options.

This pattern suggests a strong correlation between source market characteristics and travel behaviour. Tourists from Western countries tend to be more experienced, digitally savvy, and confident in organizing their own itineraries, often seeking flexibility, personalized experiences, and deeper engagement with destinations. This aligns with the growing global trend toward independent and experiential travel.

On the other hand, tourists from emerging and regional markets show a higher preference for package tours, likely driven by factors such as convenience, language barriers, perceived safety, and the appeal of structured itineraries. Package tours may also provide better value and ease of access to key attractions for first-time or short-haul travelers.

Markets with balanced preferences, such as New Zealand and Portugal, present an opportunity for a dual strategy offering both customizable independent travel options and well-curated package experiences.

From a strategic perspective, these findings highlight the need for targeted marketing and product development: Strengthening digital platforms, self-planning tools, and flexible booking options for independent travelers, enhancing partnerships with tour operators and developing attractive, value-driven packages for markets that prefer organized travel, promoting hybrid models (e.g., modular packages or guided experiences within independent travel) to cater to mixed-preference markets.

Overall, aligning tourism offerings with the distinct preferences of each source market can significantly enhance visitor satisfaction and optimize market performance.

6.3 Expenditure per day – non-Package tourists (without Air fare)

	Country	Average of total expenses incurred by a tourist per day (USD) [Non - Package tourists]
1	Australia	152.20
2	Austria	149.28
3	Bangladesh	136.45
4	Belarus	149.65
5	Belgium	146.61
6	Canada	165.53
7	China	155.17
8	Czech Republic	148.53
9	Denmark	144.83
10	Egypt	177.11
11	Finland	155.44
12	France	146.81
13	Germany	142.27
14	Greece	133.39
15	Hungary	149.65
16	India	154.60
17	Iran	150.18
18	Ireland	167.07
19	Israel	158.94
20	Italy	147.55
21	Japan	166.43
22	Jordan	189.69
23	Kazakhstan	160.86
24	Kuwait	170.52
25	Lebanon	130.86
26	Lithuania	148.23
27	Malaysia	172.56
28	Maldives	175.32
29	Netherlands	143.93
30	New Zealand	158.97
31	Norway	134.94
32	Philippines	155.64
33	Poland	147.89
34	Portugal	162.45
35	Romania	138.65
36	Russia	163.84
37	Saudi Arabia	151.69

	Country	Average of total expenses incurred by a tourist per day (USD) [Non - Package tourists]
38	Singapore	154.83
39	Slovakia	149.48
40	South Africa	151.48
41	South Korea	147.94
42	Spain	138.87
43	Sweden	143.15
44	Switzerland	154.73
45	Thailand	155.26
46	Turkey	183.58
47	Ukraine	162.88
48	United Arab Emirates	195.23
49	United Kingdom	154.82
50	USA	165.99
51	Other	166.78
	Average	**148.26**

Among tourists who opted out of packaged tours, and excluding airfare, the average daily expenditure was recorded at USD 148.26. All five top-spending nationalities, UAE (USD 195.23), Jordan (USD 189.69), Turkey (USD 183.58), Egypt (USD 177.11), and Maldives (USD 175.32) are from the Middle East and surrounding regions (including North Africa and South Asia). This suggests that travelers from these markets are not only visiting Sri Lanka in significant numbers but are also willing to spend considerably above the average daily rate. Their expenditure patterns may be driven by preferences for premium accommodations, private transport, curated dining, or guided excursions rather than budget or package travel.

The highest spenders (UAE at USD 195.23) spend roughly 32% more per day than the overall non-package tourist average of USD 148.26. Even the lowest among the top five (Maldives at USD 175.32) spend about 18% above average. This indicates a distinct luxury or comfort seeking segment within the non-package category. Tourism service providers could benefit from tailoring premium offerings such as boutique villas, exclusive safari experiences, or private charters specifically to these nationalities.

Since these high-spending tourists are avoiding packaged tours, they are likely independent travelers seeking flexibility, authenticity, or higher customization. Marketing campaigns targeting UAE, Jordan, Turkey, Egypt, and Maldives should emphasize unique, high value experiences (e.g., private wildlife safaris, luxury coastal stays, Ayurvedic wellness retreats) rather than all-inclusive group deals. Additionally, partnerships with regional airlines or luxury travel agents in these countries could help capture this lucrative segment
Travelers from Gulf countries often prefer family-oriented travel, with a tendency to spend on better dining, guided cultural tours, and comfortable transport. The high daily expenditure may also reflect longer stays or off-peak season travel where premium services are more accessible. Maldives, despite being a small island nation, shows strong spending power

possibly due to higher disposable income from its tourism driven economy and a preference for diverse experiences in Sri Lanka.

6.4. Expenditure per day –Package tourists – 2024/25 Survey

	Country	Average of Total expenses incurred by a tourist per day (USD) [Package tourists]
1	Australia	214.78
2	Austria	231.60
3	Bangladesh	129.28
4	Belarus	230.05
5	Belgium	227.41
6	Canada	253.86
7	China	190.55
8	Czech Republic	196.48
9	Denmark	214.19
10	Egypt	309.00
11	Finland	300.71
12	France	218.37
13	Germany	222.82
14	Greece	262.32
15	Hungary	198.71
16	India	176.49
17	Iran	164.35
18	Ireland	241.93
19	Israel	177.94
20	Italy	245.58
21	Japan	261.49
22	Jordan	235.50
23	Kazakhstan	200.73
24	Kuwait	182.30
25	Lebanon	218.07
26	Lithuania	194.36
27	Malaysia	146.98
28	Maldives	171.17
29	Netherlands	210.62
30	New Zealand	230.25
31	Norway	191.01
32	Philippines	202.24
33	Poland	181.24
34	Portugal	182.32
35	Romania	181.54
36	Russia	201.95
37	Saudi Arabia	269.38
38	Singapore	213.38
39	Slovakia	188.64
40	South Africa	212.04
41	South Korea	240.79

	Country	Average of Total expenses incurred by a tourist per day (USD) [Package tourists]
42	Spain	221.69
43	Sweden	214.97
44	Switzerland	232.37
45	Thailand	122.14
46	Turkey	207.23
47	UAE	228.86
48	Ukraine	259.43
49	United Kingdom	263.38
50	USA	223.21
51	Other	200.58
	Average	**214.90**

For the package tourists the average expenditure per day recorded as per the responses was USD 214.90. The highest spenders are tourists Egypt (USD309), Finland (USD 300.71), Saudi Arabia (USD 269.38), United Kingdom (USD 263.38) and Greece (USD 262.32).

The average daily expenditure of USD 214.90 among package tourists indicates a relatively high value segment, reflecting structured travel arrangements that often include accommodation, transport, and guided experiences. Package tourists typically demonstrate predictable spending patterns, with expenditures influenced by pre-arranged itineraries and service bundles, which tend to elevate overall daily spending.

The top-spending markets Egypt (USD309), Finland (USD 300.71), Saudi Arabia (USD 269.38), United Kingdom (USD 263.38) and Greece (USD 262.32) suggest distinct underlying drivers. Higher spending from Finland and the UK may be linked to stronger purchasing power and longer-haul travel behavior, where tourists tend to spend more per day for comfort. Similarly, tourists from Saudi Arabia often exhibit higher discretionary spending, especially on premium accommodation and services.

The variation across nationalities highlights the role of socio-economic characteristics, travel purpose, and destination costs in shaping expenditure patterns. These insights suggest opportunities for targeted marketing strategies, focusing on high yield markets and tailoring premium experiences to maximize revenue from package tourists.

6.5. Time to trip arrangement by package type

Time taken to arrange the trip	Trip type	
	Package	Non -Package
Within one day	**238.1**	**163.6**
Up to one week	**228.6**	**157.1**
Up to one month	**236.1**	**158.6**
Two to three months	**214.8**	**147.2**
Four to Six months	**218.8**	**144.6**
Seven months to one year	**224.6**	**201.7**
More than one year	**232.2**	**142.2**

The data reveals a striking and consistent pattern: tourists who book package tours spend significantly more across every single trip arrangement timeframe compared to non-package travelers. For example, among those who arranged their trip within one day, package tourists spent 238.1 USD versus 163.6 for non-package, a difference of nearly 75 USD or about 45% higher. This premium holds across all categories, from last-minute planners (within one day) to those who planned more than a year in advance. The gap is smallest among those who took seven months to one year to arrange their trip (224.6 for package vs. 201.7 for non-package, a difference of 23 USD), but even there, package travelers outspend their independent counterparts. This suggests that packaged travelers either have higher overall budgets, spend more on accommodation and guided services, or are more willing to pay for convenience and inclusions.

Another notable insight is the relative stability of package tourist expenditure across all planning horizons. Package travelers who planned within one day spent 238.1; those who planned up to one week spent 228.6; up to one month spent 236.1; two to three months spent 214.8; four to six months spent 218.8; seven months to one year spent 224.6; and more than one year spent 232.2. The range is remarkably narrow from a low of 214.8 to a high of 238.1. In other words, whether a package tourist plans at the last minute or a full year in advance, their spending remains almost flat. This implies that package tours have a fixed or semi-fixed cost structure that is not heavily discounted for early booking, nor does last-minute planning force budget cuts. Package travelers appear to be a segment with predetermined budgets who spend consistently regardless of planning lead time.

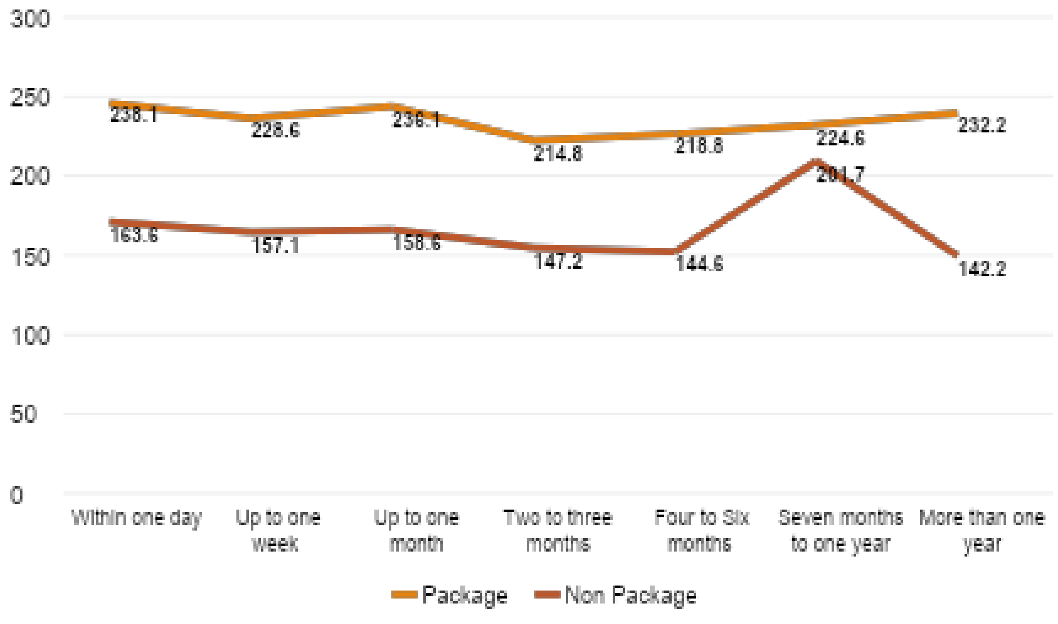
In contrast, non-package tourists show much greater variation, with a noticeable upward spike among those who took seven months to one year to plan (201.7 units). For all other planning periods, non-package expenditure ranges from 142.2 (more than one year) to 163.6 (within one day). The seven-month to one-year group stands out as spending nearly

60 USD more than the lowest group (142.2) and significantly closing the gap with package tourists (201.7 vs. 224.6). This suggests that the small subset of independent travelers who engage in extended, deliberate planning perhaps researching flights, comparing accommodation options, and building complex itineraries end up spending considerably more than casual independent travelers. They may be booking high-end boutique hotels, private drivers, and unique experiences rather than budget hostels and public transport.

A key finding is that non-package tourists who plan more than a year in advance spend the least of all (142.2 USD). This could reflect two possible explanations: either these are extreme budget travelers who plan far ahead to lock in the cheapest flights and accommodation, or the sample size for this category is small. Similarly, those who plan within one day (163.6) spend more than those who plan up to one week (157.1) or up to one month (158.6), This may indicate that last-minute non-package travelers are often regional or repeat visitors who need little planning and keep costs low.

From a destination marketing perspective, the data strongly supports targeting package tourists as higher-spending visitors regardless of when they book. It also suggests that efforts to convert non-package travelers into higher spenders should focus on the segment that plans seven months to a year in advance because they have already demonstrated willingness to spend more. Conversely, the very-long-lead (more than one year) non-package segment may be a budget-conscious group unlikely to increase expenditure without significant upselling.

The key insights are: (1) package tourists consistently outspend non-package tourists across all planning timeframes, with a premium of roughly 30–45%; (2) package tourist spending is highly stable regardless of whether they book last minute or far in advance; (3) non-package tourists who plan seven months to one year ahead spend substantially more than other non-package travelers,; and (4) non-package tourists who plan more than a year ahead are the lowest spenders, suggesting a distinct budget-traveler segment. For Sri Lanka’s tourism industry, this implies that promoting package tours especially flexible, high-value packages is an effective strategy to increase per-tourist revenue without requiring longer stays. Additionally, interventions aimed at upselling independent travelers should focus on the seven-month to one-year planning cohort, as they are already engaged and willing to invest more in their trip.



6.6 Gender by package type

Gender	Package	Non - package
Female	**225.7**	**161.1**
Male	**228.3**	**151.2**
Other	**170.1**	**158.1**

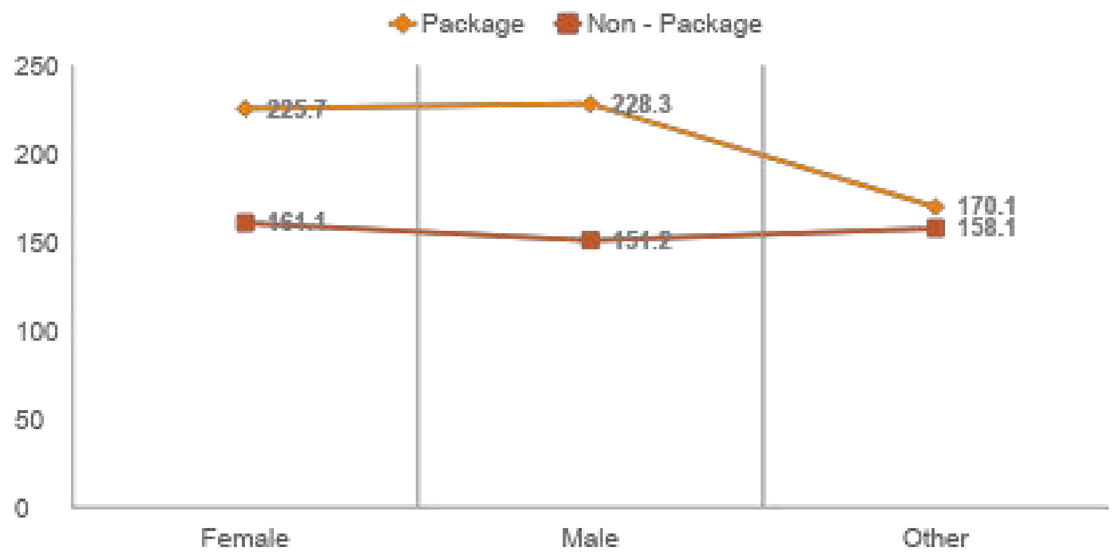
The data reveals clear and consistent gender-based spending patterns, with male package tourists spending the most per day (228.3 USD), closely followed by female package tourists (225.7 USD). Among package travelers, the difference between male and female spending is minimal just 2.6 USD, or about 1%. This suggests that once a tourist opts for a package tour, gender becomes almost irrelevant to daily expenditure; both men and women spend at nearly identical levels. The notable exception is the category labeled "Other," whose package expenditure drops sharply to 170.1 USD significantly lower than both male and female package travelers. This could be due to a small sample size, different travel patterns (e.g., solo travel vs. group travel), or different types of packages chosen. However, the small absolute number of respondents in this category warrants caution before drawing strong conclusions.

Among non-package tourists, a different pattern emerges. Female non-package tourists spend considerably more per day (161.1 USD) than their male counterparts (151.2 USD) a difference of nearly10USD, or about 6.5%. This is a striking reversal of the package trend. While male non-package travelers spend the least of any group except the "Other" package category, female independent travelers spend at levels much closer to package tourists.
One possible explanation is that women traveling independently in Sri Lanka may be more likely to invest in safer, mid range accommodation, private transport, or organized day tours rather than extreme budget options. Men, by contrast, may be more willing to stay in hostels, use public buses, and eat at local roadside eateries, thereby driving down their daily spend. Alternatively, female solo travelers might be more cautious about safety and therefore choose more expensive but reliable services.

The "Other" gender category presents an interesting anomaly. Among non-package travelers, their daily spend (158.1 units) sits between female (161.1) and male (151.2) very close to the female average. However, among package travelers, their spend (170.1 units) is substantially lower than both male and female package tourists. This could indicate that package options available to this demographic are either limited, less expensive, or that they tend to choose different types of packages (e.g., shorter durations, fewer inclusions, or budget-oriented group tours).

From a strategic perspective, these findings offer actionable insights for Sri Lanka's tourism industry. First, women are a high-value segment among independent travelers they already spend 161.1 USD per day, which is close to what package tourists spend. Marketing campaigns targeting female solo travelers or female friendship groups, emphasizing safety, comfort, and curated experiences, could further increase their spend while also converting some of them into package buyers. Second, men present the biggest opportunity for upselling, because they currently spend the least when traveling independently (151.2) but spend the most when on packages (228.3). This suggests that men are price sensitive when booking individual services but willing to spend freely when everything is bundled. Creating adventure focused, activity-rich packages targeted at male travelers such as surfing packages, wildlife photography tours, or trekking circuits could capture this segment effectively.

Finally, the near-identical spending of male and female package tourists (228.3 vs. 225.7) indicates that packages standardize expenditure regardless of gender. This is both a strength and a limitation. The strength is predictability: tour operators can rely on consistent per-day revenue. The limitation is that there may be untapped potential to offer gender-specific add-ons (e.g., spa and wellness for women, extreme sports for men) that could raise spending above the current plateau. Meanwhile, the lower spending of the "Other" category on packages (170.1) suggests either a mismatch between available packages and their preferences, or a smaller budget segment. Inclusive marketing and tailored package designs could help address this gap. The key insights are: (1) male non-package tourists are the lowest spenders but convert into the highest spenders when on packages; (2) female non-package tourists spend significantly more than male non-package tourists, approaching package levels; (3) the package premium is largest for males (51% higher), meaning packaging is a powerful tool to lift male expenditure; and (4) the "Other" gender category spends less on packages than on independent travel, indicating a possible market gap. For Sri Lanka, promoting well-designed packages especially those targeting male adventure travelers and female safety-conscious travelers could yield substantial increases in daily tourist expenditure.



6.7. Employment status vs package type

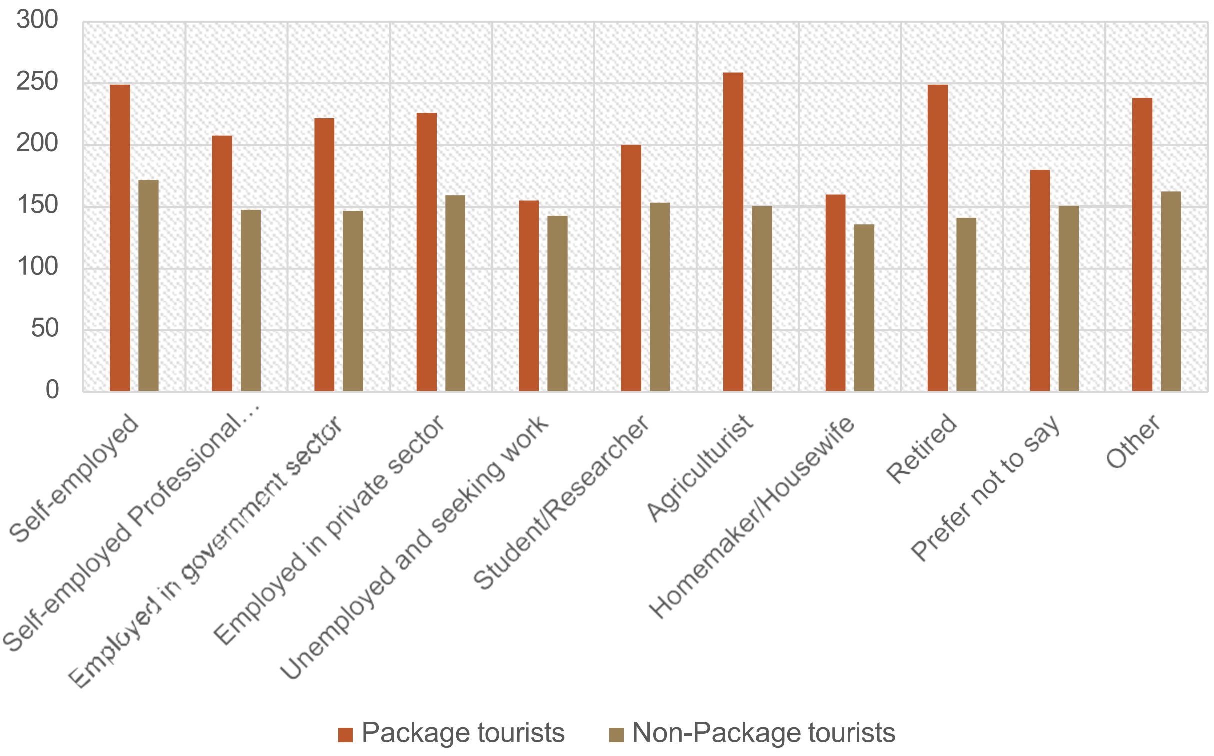
Employment status	Package tourists	Non-package tourists
Self-employed	249.0	171.7
Self-employed Professional (Chartered Accountant/Doctor/Consultant/Lawyer/Engineer)	207.9	147.5
Employed in government sector	221.7	146.6
Employed in private sector	226.3	159.2
Unemployed and seeking work	155.2	142.8
Student/Researcher	200.2	153.2
Agriculturist	259.0	150.5
Homemaker/Housewife	160.1	135.8
Retired	249.1	141.1
Prefer not to say	180.1	150.7
Other	238.4	162.3

The highest spending package tourists are Agriculturists (259.0), followed very closely by Retired (249.1 units) and Self-employed (249.0 units). These three groups represent the top tier of package expenditure, all spending well above 240 USD per day. The high spending by agriculturists may seem surprising at first, but in many contexts, "agriculturist" can include large-scale farmers, agribusiness owners, or landowners from countries like Australia, New Zealand, or parts of Europe where commercial agriculture is highly profitable. Alternatively, this could represent a small but high-income niche segment. Retired tourists spending at very high levels (249.1) aligns with the earlier age-based analysis showing that older package travelers (60-64 and 75+) are the biggest spenders many of whom are retired. Self-employed individuals (249.0) also spend heavily, likely because they have flexible incomes and may combine business with leisure or simply have higher disposable income.

The lowest-spending package tourists are Unemployed and seeking work (155.2 USD) and Homemaker/Housewife (160.1 USD). These groups spend less than all other package categories by a significant margin roughly 90-100 units less than the top spenders. This is entirely expected, as both groups have limited personal disposable income and may be traveling as dependents (e.g., accompanying a working spouse or family member). Their package spending, however, is still higher than most non-package groups, indicating that even budget-conscious or dependent travelers benefit from the cost efficiencies of packages.

Among non-package tourists, the spending pattern is quite different. The highest spenders are Self-employed (171.7 USD), followed by Other (162.3 USD) and employed in private sector (159.2 USD). Notably, Agriculturists, who are the top package spenders, spend only 150.5 units as non-package tourists a massive gap of 108.5 USD. Similarly, retired non-package tourists spend only 141.1 units, which is 108 units less than their package counterparts. This suggests that without the structure of a package, even wealthy retirees and agriculturists spend very conservatively perhaps staying in budget accommodation, eating at local restaurants, and avoiding expensive guided tours. The implication is that packaging is exceptionally effective at unlocking spending from these high-net-worth but frugal segments.

The lowest spending non-package tourists are Homemaker/Housewife (135.8 units) and Unemployed (142.8 units), followed closely by Retired (141.1 units) and employed in government sector (146.6 units). The fact that retired non-package tourists spend only 141.1 USD barely above homemakers is striking. It reinforces the earlier observation that older independent travelers in Sri Lanka are often on tight budgets, perhaps staying in pilgrim guesthouses or with relatives, while retired package travelers spend lavishly on comfort.



6.8. Tourist expenditure distribution by age

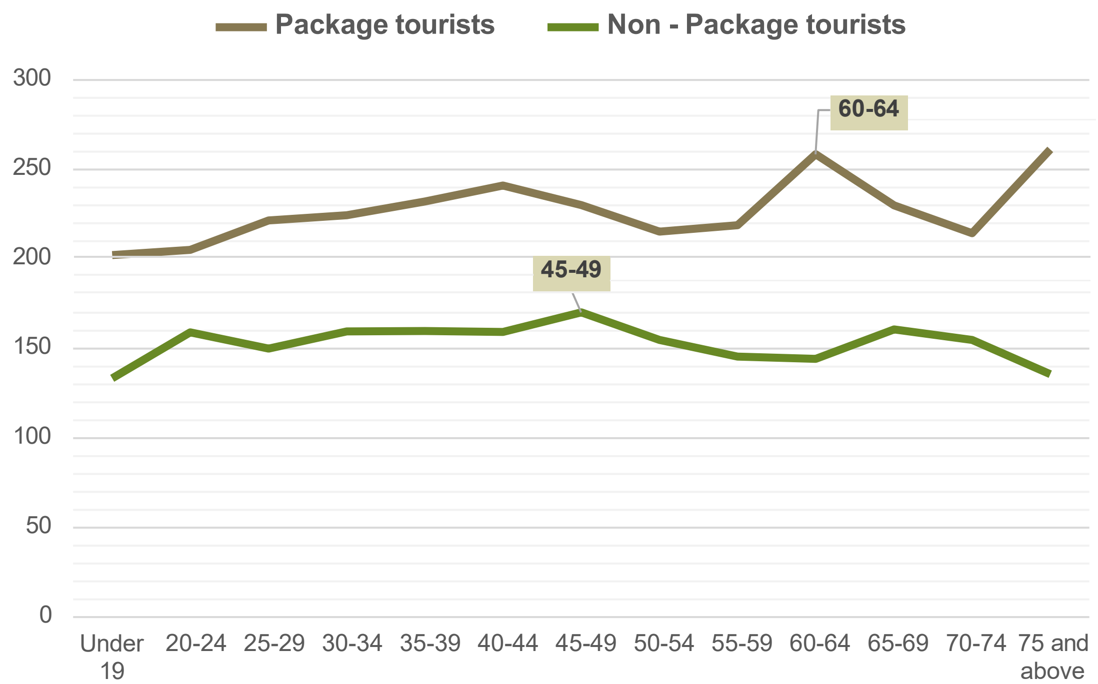
Age	Package tourists	Non - Package tourists
Under 19	202.2	133.4
20-24	205.2	159.1
25-29	221.5	150.0
30-34	224.5	159.6
35-39	232.2	159.8
40-44	241.1	159.3
45-49	230.2	170.2
50-54	215.4	154.7
55-59	218.9	145.5
60-64	**258.5**	144.2
65-69	229.9	**160.7**
70-74	**214.5**	154.7
75 and above	261.2	135.7

The data reveals a clear and consistent pattern: package tourists spend substantially more than non-package tourists across every single age group, with the gap ranging from modest to extremely large. However, older tourists, when they choose packages, become extremely high spenders, whereas older independent travelers spend low amount possibly because they rely on budget accommodation, public transport, or have different travel priorities such as religious pilgrimages rather than commercial tourism experiences.

Non-package tourist spending shows remarkable flatness across most age groups, packaging is most effective at extracting higher spending from older tourists, who would otherwise spend very little if traveling independently. Tour operators should therefore design premium packages specifically for seniors including comfortable transport, guided heritage tours, medical assistance, and accessible accommodation to capture this highly profitable segment.

The 45-49 age group deserves special mention because they are the highest-spending non-package tourists (170.2 USD) and also high-spending package tourists (230.2 USD). This age range likely represents affluent professionals traveling with families, who are willing to spend on quality experiences whether they book independently or via a package. They may be less price-sensitive and more focused on convenience and comfort. For tourism marketers, this group should be targeted with both premium independent travel options (e.g., curated itineraries with private drivers) and luxury packages.

The key insights are: (1) package tourists outspend non-package tourists at every age, with the gap widening dramatically for older travelers (60+), where package spending is nearly double; (2) non-package spending is remarkably flat across ages (roughly 145-170 USD), except for a peak at 45-49 and lows at the youngest and oldest ends; (3) package spending generally increases with age, peaking at 75+ (261.2 units) and 60-64 (258.5 units), making seniors the most valuable package segment; (4) the 20-24 age group has the smallest package premium, suggesting that budget group tours for young adults offer less upselling potential; and (5) the 45-49 age group is the highest-spending independent travelers, indicating a dual opportunity for both premium independent products and luxury packages. For Sri Lanka, prioritizing senior-focused packages and family-oriented premium tours would yield the greatest increase in daily tourist expenditure.



VISITOR SATISFACTION AND PERCEPTIONS

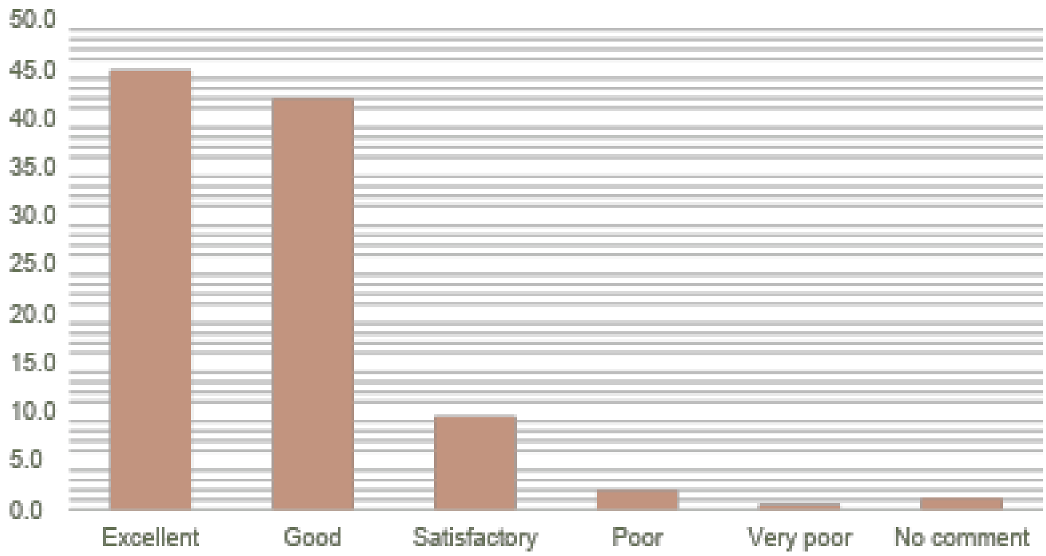
07

VISITOR SATISFACTION AND PERCEPTIONS

7.1. Satisfaction rate by country

Country	Excellent	Good	Satisfactory	Poor	Very poor	No comment	Total
Australia	48.76	41.02	8.03	1.02	0.58	0.58	100.00
Austria	37.44	46.15	13.85	1.54	0.51	0.51	100.00
Bangladesh	54.29	25.71	11.43	2.86	0.00	5.71	100.00
Belarus	37.50	44.64	12.50	1.79	0.00	3.57	100.00
Belgium	42.16	48.53	7.84	1.47	0.00	0.00	100.00
Canada	52.72	37.50	6.52	1.09	1.09	1.09	100.00
China	29.75	53.41	12.37	1.97	0.36	2.15	100.00
Czech Republic	41.29	50.32	5.81	1.94	0.00	0.65	100.00
Denmark	49.63	42.96	5.19	0.00	0.00	2.22	100.00
Egypt	47.37	39.47	5.26	2.63	0.00	5.26	100.00
Finland	59.52	38.10	0.00	2.38	0.00	0.00	100.00
France	46.38	41.90	9.14	1.21	0.34	1.03	100.00
Germany	41.67	46.22	9.59	1.16	0.19	1.16	100.00
Greece	41.46	46.34	12.20	0.00	0.00	0.00	100.00
Hungary	52.54	40.68	6.78	0.00	0.00	0.00	100.00
India	36.99	44.80	11.80	2.97	0.93	2.51	100.00
Iran	32.35	58.82	5.88	0.00	2.94	0.00	100.00
Israel	36.55	39.09	17.26	5.08	0.51	1.52	100.00
Italy	45.57	44.65	6.73	0.92	0.61	1.53	100.00
Japan	24.90	52.87	19.16	2.30	0.38	0.38	100.00
Jordan	45.45	31.82	22.73	0.00	0.00	0.00	100.00
Kazakhstan	27.14	42.86	18.57	4.29	2.86	4.29	100.00
Kuwait	25.00	12.50	62.50	0.00	0.00	0.00	100.00
Lebanon	26.32	31.58	15.79	26.32	0.00	0.00	100.00
Lithuania	50.00	40.63	6.25	0.00	3.13	0.00	100.00
Malaysia	49.50	33.66	12.87	3.96	0.00	0.00	100.00
Maldives	49.28	37.68	8.70	2.90	0.00	1.45	100.00
Netherlands	44.47	44.47	9.07	1.11	0.44	0.44	100.00
New Zealand	52.94	40.00	4.71	0.00	1.18	1.18	100.00
Norway	52.56	37.18	3.85	3.85	1.28	1.28	100.00
Philippines	46.43	39.29	10.71	3.57	0.00	0.00	100.00

Country	Excellent	Good	Satisfactory	Poor	Very poor	No comment	Total
Poland	50.00	39.12	8.03	1.04	1.04	0.78	100.00
Portugal	37.65	43.53	12.94	2.35	0.00	3.53	100.00
Republic of Ireland	61.86	31.96	5.15	1.03	0.00	0.00	100.00
Romania	63.64	20.45	13.64	2.27	0.00	0.00	100.00
Russian Federation	37.95	45.38	10.90	2.82	0.90	2.05	100.00
Saudi Arabia	50.00	39.29	8.93	0.00	1.79	0.00	100.00
Singapore	38.27	46.91	7.41	6.17	0.00	1.23	100.00
Slovakia	39.22	39.22	15.69	1.96	0.00	3.92	100.00
South Africa	52.00	30.00	14.00	2.00	0.00	2.00	100.00
South Korea	27.59	44.83	17.24	8.62	1.72	0.00	100.00
Spain	44.75	41.99	10.22	2.21	0.55	0.28	100.00
Sweden	55.30	38.64	5.30	0.00	0.00	0.76	100.00
Switzerland	51.06	39.72	6.03	2.84	0.00	0.35	100.00
Taiwan	44.44	51.85	3.70	0.00	0.00	0.00	100.00
Thailand	54.55	33.77	7.79	2.60	0.00	1.30	100.00
Turkey	45.95	36.49	9.46	5.41	1.35	1.35	100.00
Ukraine	41.03	43.59	12.82	2.56	0.00	0.00	100.00
United Arab Emirates	54.90	36.27	5.88	1.96	0.98	0.00	100.00
United Kingdom	57.07	33.66	6.75	1.71	0.33	0.49	100.00
USA	63.07	29.13	5.33	0.66	1.37	0.44	100.00
Total	**44.84**	**42.00**	**9.53**	**1.95**	**0.53**	**1.16**	**100.00**



The findings reveal that overall tourist satisfaction is consistently high across all source markets. A significant majority of respondents rated their experience positively, with 44.84% selecting “Excellent” and 42.00% indicating “Good.” This means that nearly 87% of visitors had a favourable experience. In contrast, only a very small share expressed dissatisfaction, with 1.95% rating their experience as “Poor” and just 0.53% as “Very Poor,” highlighting those negative perceptions are minimal.

At a country level, several markets demonstrate particularly strong satisfaction, with a high proportion of “Excellent” ratings reported by tourists from Romania (63.64%), the USA (63.07%), and the Republic of Ireland (61.86%). Meanwhile, some markets such as China (53.41% “Good”) and Japan (52.87% “Good”) tend to cluster more in the “Good” category rather than “Excellent,” indicating generally positive but slightly more moderate evaluations. A few exceptions are also evident: Kuwait records a notably high share of “Satisfactory” responses (62.50%), while Lebanon shows a comparatively higher proportion of “Poor” ratings (26.32%). Similarly, South Korea and Singapore report slightly elevated levels of dissatisfaction relative to other countries, though still within a small overall range.

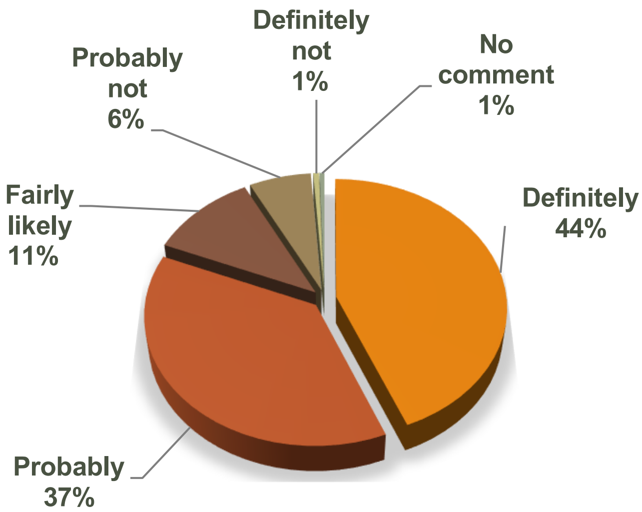
These results reinforce that Sri Lanka delivers a strong and largely consistent visitor experience, contributing to a positive destination image globally. The high concentration of “Excellent” ratings from Western markets may reflect alignment between destination offerings and expectations related to culture, nature, and experiential travel.

Markets with a higher share of “Good” rather than “Excellent” ratings such as China and Japan suggest an opportunity to further enhance service quality, interpretation, language accessibility, and tailored experiences to elevate satisfaction from good to exceptional.

The presence of “Satisfactory” or higher “Poor” ratings in specific markets (e.g., Kuwait and Lebanon) signals the need for more targeted investigation into visitor expectations, service gaps, or cultural preferences. Similarly, slightly higher dissatisfaction levels in markets like South Korea and Singapore may point to issues related to service standards, infrastructure, or value for money perceptions, which are typically more pronounced among travelers from highly developed and service-oriented economies.

7.2. Intentions for repeat visit

Another trip to Sri Lanka	Count	Share (%)
Definitely	5,113	43.6
Probably	4,374	37.3
Fairly likely	1,313	11.2
Probably not	747	6.4
Definitely not	75	0.6
No comment/responded	109	0.9
Total	11,731	100.0



The survey data on tourists' intention to visit Sri Lanka again reveals an overwhelmingly positive sentiment, with 81.3% of respondents indicating they would either "definitely" or "probably" return. The strongest commitment comes from the "definitely" category, which accounts for nearly half of all tourists (43.8%), signaling a high level of destination loyalty and satisfaction. An additional 37.5% are in the "probably" category, suggesting they are open to revisiting but may have minor concerns such as cost, safety, or variety of experiences. A further 11.2% are "fairly likely" to return, representing a group that remains positively inclined but less enthusiastic.

In contrast, only a small fraction of tourists expresses negative intentions. Just 7.0% said they would "probably not" or "definitely not" revisit, with "definitely not" being negligible at 0.6%. The "no comment" group is also minimal at 0.5%, indicating that the data is reliable and representative of tourist opinion.
From a strategic perspective, Sri Lanka is in a strong position, as the challenge is not a lack of interest but rather converting the large "probably" and "fairly likely" segments into committed repeat visitors. To achieve this, it is necessary to address any friction points such as travel ease or safety perceptions, and promote new or lesser-known regions to encourage repeat exploration. Overall, the data paints a very favourable picture of Sri Lanka's ability to retain tourists and generate repeat visits.

7.2.a. Satisfaction with specific attributes

Level of satisfaction	Excellent	Good	Satisfactory	Poor	Very poor	No Comment	Total
General cleanliness of areas visited	19.67	44.40	24.14	7.30	1.87	2.63	100.00
Availability of good quality accommodation	36.69	48.39	10.09	1.37	0.47	2.98	100.00
Availability of good quality food	44.22	40.19	10.30	1.93	0.66	2.70	100.00
Quality of facilities and services available at the international airport	33.77	48.69	11.45	1.92	0.72	3.44	100.00
Quality of facilities and services available at tourist sites	25.85	50.23	14.64	2.16	0.55	6.56	100.00
Availability of transport options to the areas visited	35.83	43.88	10.99	2.08	0.72	6.50	100.00
Value for money as a destination	43.61	41.00	9.33	1.91	0.55	3.60	100.00
General welcome and hospitality	72.13	21.00	3.07	0.38	0.12	3.30	100.00
Personal security and safety	53.81	35.97	6.05	1.07	0.32	2.77	100.00
Sri Lanka's position as a sustainable (durable) destination	29.03	42.26	17.41	4.05	1.27	5.98	100.00
If visited for Business, Meetings, Incentives, Conferences, Events and Exhibitions, your rating of facilities and services	4.73	5.57	2.47	0.49	0.24	86.50	100.00

The satisfaction data reveals that Sri Lanka performs exceptionally well in certain areas, while others show moderate room for improvement. The highest-rated attribute by far is general welcome and hospitality, with an outstanding 72.13% of tourists rating it as “Excellent” and a further 21.00% as “Good.” Only 0.5% rated it poorly. This suggests that the warmth, friendliness, and helpfulness of Sri Lankan people are a major strength and a key reason why visitors leave with a positive impression of the country. Similarly, personal security and safety also scores highly, with 53.81% “Excellent” and 35.97% “Good,” indicating that most tourists feel safe during their travels.

Value for money as a destination is another strong point, with 43.61% “Excellent” and 41.00% “Good,” meaning nearly 85% of tourists are satisfied with what they receive relative to what they spend. This positions Sri Lanka competitively against other regional destinations. Quality of food also performs very well (44.22% “Excellent,” 40.19% “Good”), reflecting the rich culinary heritage and availability of diverse dining options. Accommodation quality is similarly strong, with 36.69% “Excellent” and 48.39% “Good,” indicating a well-developed lodging sector ranging from budget guesthouses to luxury resorts.

Infrastructure-related attributes show solid but slightly lower satisfaction levels. Availability of transport options to visited areas receives 35.83% "Excellent" and 43.88% "Good," suggesting that while transport is generally available, there may be concerns about reliability, comfort, or connectivity to remote sites. Quality of facilities and services at the international airport is rated "Excellent" by 33.77% and "Good" by 48.69%, indicating a broadly positive experience, though the 11.45% "Satisfactory" and nearly 4% "Poor/Very Poor" suggest some scope for improvement in immigration queues, signage, amenities, or ground transport integration.

Quality of facilities and services at tourist sites (e.g., restrooms, signage, paths, information centers) sees 25.85% "Excellent" and 50.23% "Good," but the "Satisfactory" category is higher here (14.64%) compared to most other metrics, and 6.56% gave "No Comment" – possibly indicating indifference or that facilities were not memorable. This suggests that while basic needs are met, there is room to elevate the visitor experience at heritage sites, national parks, and beaches.

The area of greatest concern is general cleanliness of areas visited. Only 19.67% rated it "Excellent," while 44.40% said "Good," 24.14% "Satisfactory," and 7.30% "Poor," with 1.87% "Very Poor." Combined, over 9% of tourists found cleanliness unsatisfactory, making this the lowest-performing core attribute. This points to issues with litter, waste management, beach cleanliness, or sanitation in public areas, which could harm Sri Lanka's reputation if not addressed.

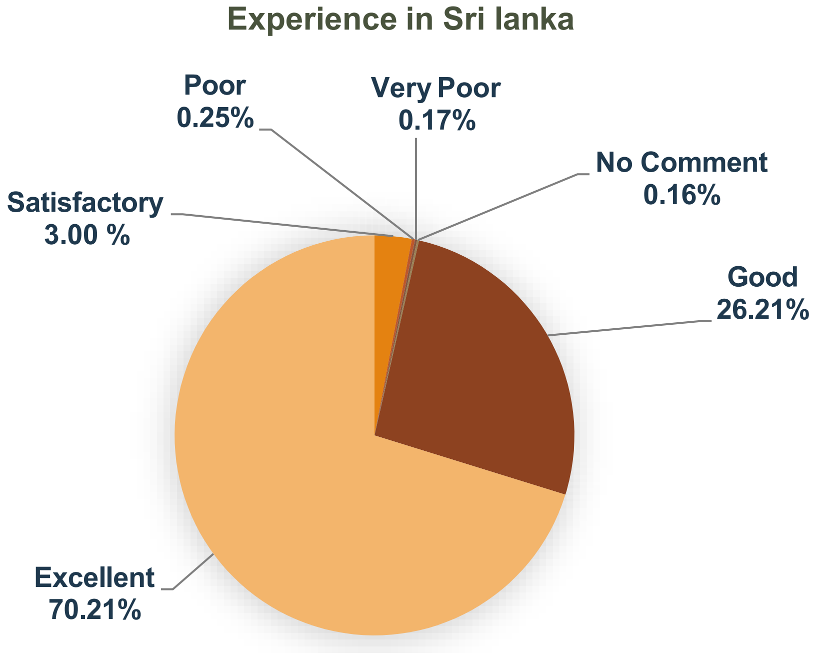
Sri Lanka's position as a sustainable (durable) destination receives moderate ratings: 29.03% "Excellent," 42.26% "Good," but a relatively high 17.41% "Satisfactory" and 5.32% "Poor/Very Poor." This indicates that while many tourists perceive sustainability efforts positively, a significant minority see room for improvement in areas like plastic use, wildlife protection, eco-tourism practices, and carrying capacity management at popular sites.

The key points to be highlighted are:

1. Core strengths to preserve and promote: Hospitality, safety, value for money, food, and accommodation. These are Sri Lanka's competitive advantages and should be central to marketing campaigns.
2. Cleanliness is the weakest link: With over 9% dissatisfied, these risks deterring repeat and high-end tourists. Immediate action on waste management, public bin availability, beach cleaning, and awareness campaigns is recommended.
3. Sustainability perception needs work: The 5.3% poor/very poor rating for sustainability suggests that eco-conscious travelers notice issues like overcrowding at Yala or Sigiriya, plastic pollution, or lack of green certifications. Developing a national sustainable tourism certification could help.
4. Tourist site facilities lag behind other sectors: While not terrible, site facilities (toilets, paths, info boards, shade, seating) are the second-lowest among core attributes after cleanliness. Investing in upgrading visitor infrastructure at key sites would enhance overall satisfaction.

5. Airport and transport are solid but not excellent: Minor improvements to baggage handling, immigration efficiency, taxi counters, and inter-city train/bus comfort could lift ratings significantly.

7.3 Experience in Sri Lanka

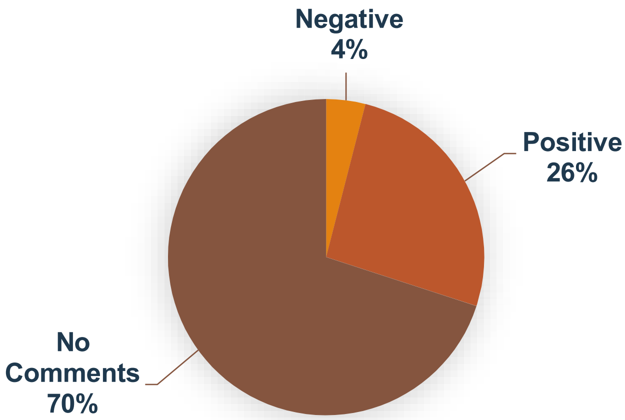


The results demonstrate that Sri Lanka offers a highly positive tourism experience, with the vast majority of visitors expressing strong satisfaction. A significant 70.21% of respondents rated their experience as “Excellent,” while an additional 26.21% described it as “Good.” Combined, this indicates that approximately 96.4% of tourists had a favorable impression of their visit, reflecting the country’s ability to meet or exceed visitor expectations.

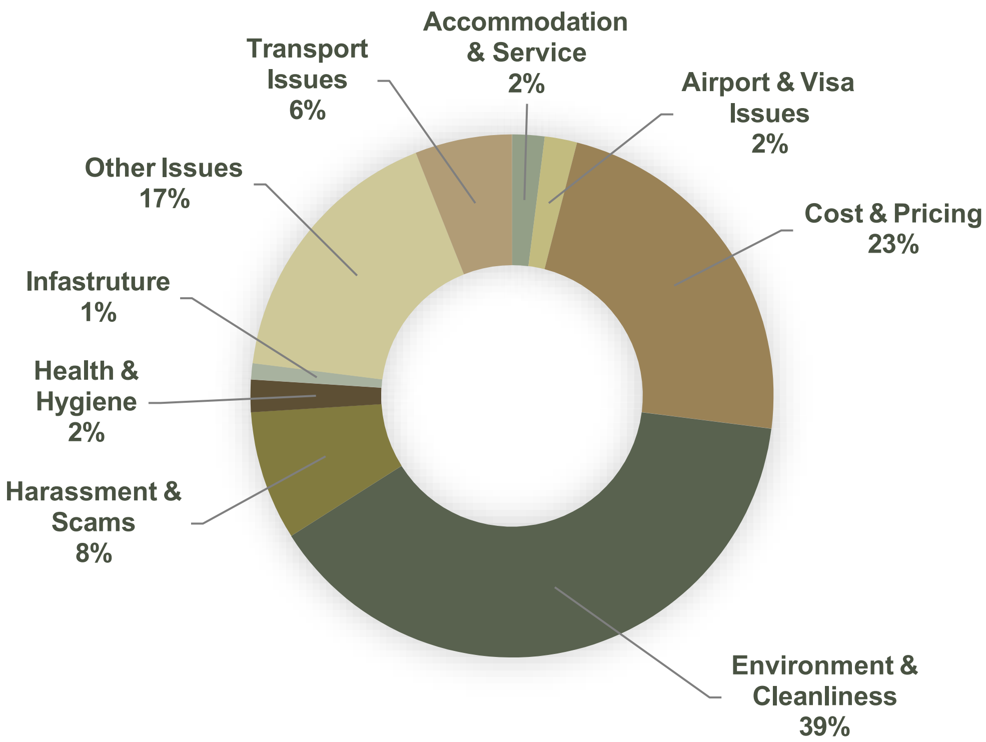
In contrast, negative perceptions are extremely limited. Only 0.25% of respondents rated their experience as “Poor,” and an even smaller proportion, 0.17%, rated it as “Very Poor.” This minimal level of dissatisfaction highlights the consistency in service delivery and the overall quality of the tourism experience.

Overall, these findings underscore Sri Lanka’s strong performance as a tourist destination. The high satisfaction levels suggest that the country’s diverse attractions, hospitality, and tourism services are effectively contributing to a positive visitor experience, while the negligible dissatisfaction points to a well-managed and competitive tourism sector.

7.4 Nature of Comments



7.5 Distribution of negative comments



The distribution of negative comments shows that Environment & Cleanliness (206) is the most critical concern among tourists, followed by Cost & Pricing (122) and Other Issues (89). This indicates that environmental quality and perceived value for money are the main drivers of dissatisfaction. Issues such as Harassment & Scams (44) and Transport (31) also contribute notably, while areas like Infrastructure (4) and Airport & Visa (8) receive comparatively fewer complaints but still reflect important service gaps.

Environmental concerns mainly relate to poor cleanliness, pollution, and degraded beach conditions, which significantly affect the overall destination image. Clean and well-maintained environments are essential for tourist satisfaction, and failures in sanitation can negatively influence visitor perceptions and health standards. These issues suggest a need for stronger waste management systems and enforcement of environmental regulations, especially in high-traffic tourist areas.

In terms of accommodation and services, tourists perceive low standards and lack of sustainability practices, indicating inconsistency in quality across establishments. Meanwhile, high costs of goods, services, and entrance tickets create a mismatch between price and perceived value, which can reduce competitiveness in comparison to other destinations.

Airport-related complaints, such as poor Wi-Fi and unfriendly immigration processes, highlight first-impression challenges. Additionally, harassment and scams, particularly involving tuk-tuks and taxis overcharging tourists, damage trust and overall experience.

Lastly, infrastructure issues, including poor road conditions, heavy traffic, and overcrowding at key attractions, point to inadequate planning and capacity management. Together, these findings emphasize the need for integrated improvements in environmental management, pricing regulation, service quality, and visitor management strategies.

08

OUTBOUND TOURISTS

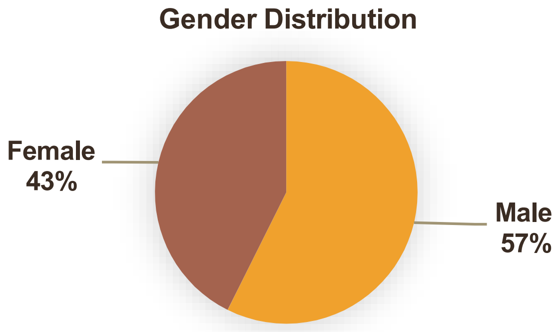
8.1 Outbound tourists from Sri Lanka

Rank	Countries to visit	Number of respondents	Rank	Countries to visit	Number of respondents
1	India	1,637	31	Finland	6
2	United Arab Emirates	631	32	Denmark	5
3	Saudi Arabia	595	33	Kuwait	5
4	Thailand	421	34	Netherlands	5
5	Malaysia	354	35	Egypt	4
6	Australia	303	36	Russia	4
7	Singapore	257	37	Pakistan	4
8	United Kingdom	150	38	Jordan	3
9	China	139	39	Myanmar	3
10	Japan	101	40	South Africa	3
11	Maldives	88	41	Luxembourg	3
12	Italy	56	42	Indonesia	2
13	United States	44	43	Ireland	3
14	Canada	43	44	Lebanon	2
15	Portugal	41	45	Namibia	2
16	New Zealand	26	46	Scotland	2
17	Germany	24	47	Spain	2
18	Qatar	19	48	Sweden	2
19	South Korea	19	49	Ukraine	2
20	France	17	50	Austria	1
21	Israel	14	51	Kazakhstan	1
22	Tajikistan	12	52	Norway	1
23	Switzerland	10	53	Lithuania	1
24	Bangladesh	9	54	Poland	1
25	Nepal	8	55	Oman	1
26	Belarus	7	56	Romania	1
27	Philippines	7	57	Seychelles	1
28	South Korea	7	58	Slovakia	1
29	Vietnam	7	59	Timor Leste	1
30	Turkey	7	60	Other	157
				Total	**5,282**

The sample of outbound tourists from Sri Lanka included 5,282 tourists. The most popular tourist destinations of Sri Lankans are India, UAE, Thailand, Malaysia, Australia and Singapore.

8.2 Gender distribution of Outbound tourists

Gender	Number of respondents	Percentage
Male	3,029	57.35
Female	2,251	42.62
Prefer not to say	2	0.04
Total	**5,282**	**100.00**

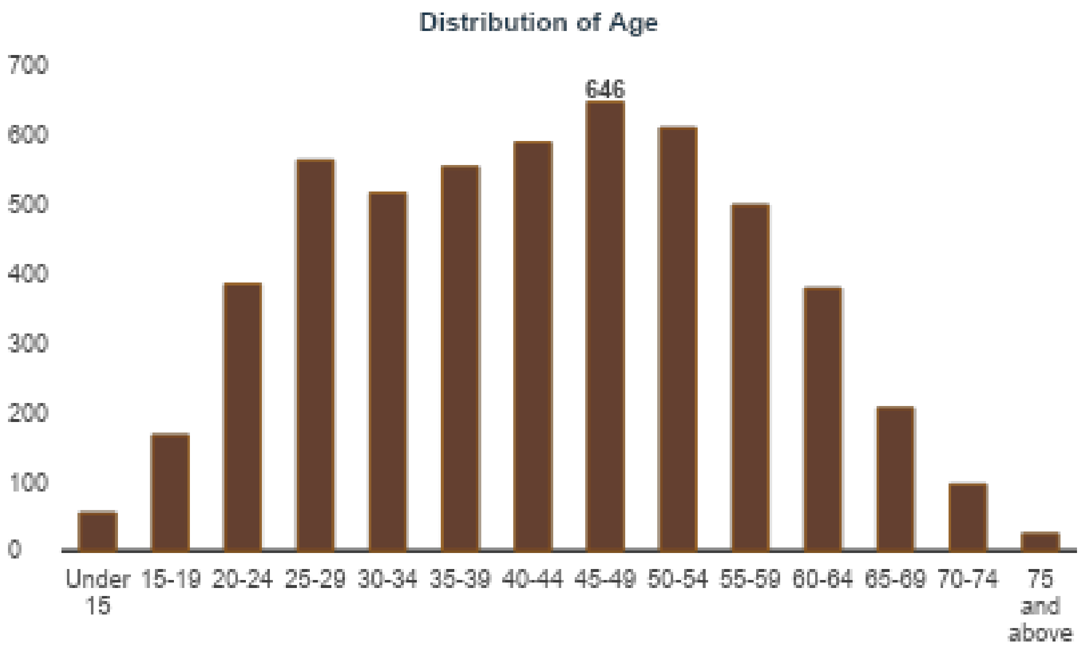


The gender distribution reveals a significant majority of male travelers, with 3,029 male passengers compared to 2,251 female passengers. This indicates that males account for approximately 57.4% of the total outbound tourist traffic, while females represent about 42.6%. The resulting gender gap of nearly 15 percentage points suggests that Sri Lankan men are notably more likely to travel internationally than women from the same country.

Several factors could explain this disparity. Cultural norms, differences in travel purposes (such as business trips, which may be male-dominated), or varying levels of financial independence and leisure time between genders might contribute to the imbalance. Additionally, safety perceptions, family caregiving responsibilities often shouldered by women, or restricted mobility in certain contexts could further suppress female outbound travel.

8.3 Distribution of Age

Age	Number of respondents	Percentage
Under 15	55	1.04
15-19	167	3.16
20-24	384	7.27
25-29	562	10.64
30-34	515	9.75
35-39	553	10.47
40-44	588	11.13
45-49	646	12.23
50-54	609	11.53
55-59	498	9.43
60-64	378	7.16
65-69	206	3.90
70-74	96	1.82
75 and above	25	0.47
Grand Total	**5,282**	



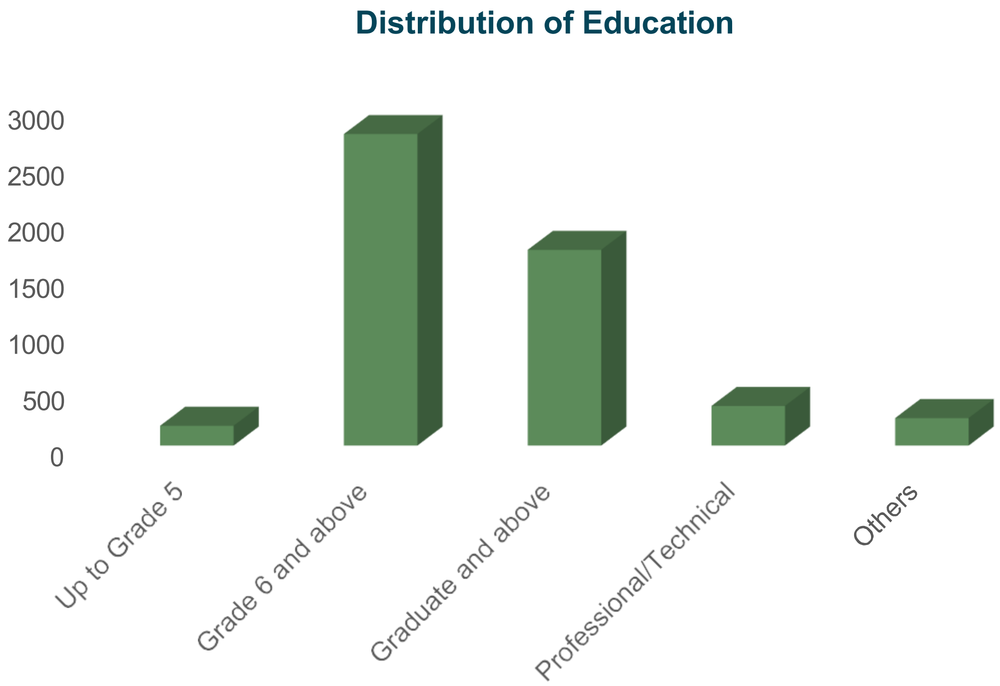
The age profile shows a clear bell-shaped curve that peaks in the 45–49 age bracket (646 passengers), closely followed by the 50–54 group (609) and the 40–44 group (588). This indicates that middle-aged adults, roughly from the late 30s through early 50s, form the backbone of Sri Lanka's outbound tourism market. Passengers aged 35–54 collectively account for over 45% of all travelers. Their dominance likely reflects a combination of peak earning years, greater disposable income, fewer child-care constraints, and perhaps travel for business, leisure, or visiting relatives abroad.

Young adults (20–34) also represent a substantial segment, with 1,461 passengers (about 27.7% of the total). The highest number within this range is the 25–29 group (562), followed by 30–34 (515) and 20–24 (384). This suggests that many Sri Lankans in their late 20s and early 30s are traveling overseas possibly for higher education, or early-career leisure travel. The lower counts for teenagers (15–19: 167) and children under 15 (only 55) are unsurprising, as school schedules, family commitments, and costs likely limit outbound travel for the youngest age groups.

At the older end, the numbers decline steadily from age 55 onward: 498 passengers aged 55–59, then 378 (60–64), 206 (65–69), 96 (70–74), and just 25 for those 75 and above. While senior tourism exists, it drops sharply after age 65 – possibly due to health, mobility, or financial constraints in later retirement. The very small number of travelers over 75 (0.47% of the total) suggests that very elderly outbound travel remains niche.

8.4 Level of Education

Education	Number of respondents	Percentage
Up to Grade 5	176	3.33
Grade 6 and above	2,770	52.44
Graduate and above	1,740	32.94
Professional/Technical	352	6.66
Others	244	4.62
Grand Total	**5,282**	**100.00**



The education level distribution of outbound tourists from Sri Lanka (total 5,282 passengers), reveals a strong correlation between higher educational attainment and international travel.

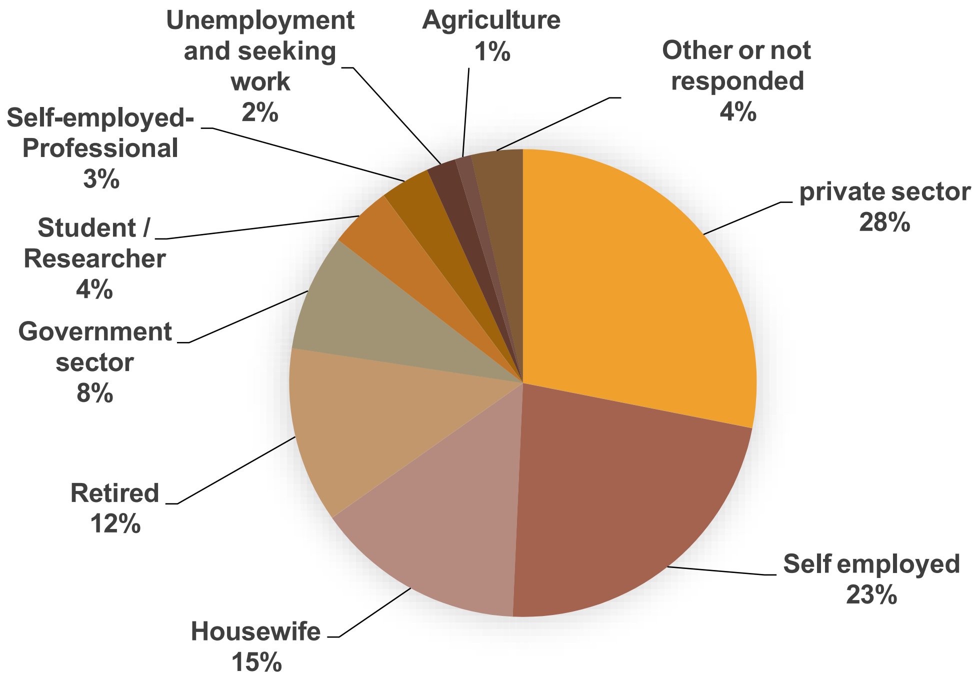
The largest single category is “Grade 6 and above,” which accounts for 2,770 passengers, nearly 52.5% of all outbound tourists. This group represents individuals who have completed at least primary education (beyond Grade 5) up to but not including a university degree. The second largest segment is “Graduate and above” with 1,740 passengers (about 32.9% of the total). Combined, these two categories those with secondary schooling or higher comprise over 85% of Sri Lankan outbound travelers. This overwhelmingly suggests that formal education beyond the elementary level is a strong enabler of overseas travel, likely due to better opportunities, higher disposable incomes, greater awareness of foreign destinations, and possibly English language proficiency.

In contrast, tourists with only “Up to Grade 5” education number just 176, a mere 3.3% of the total. This points to significant barriers financial, informational, or social that limit international travel among the least educated segments of Sri Lankan society. Meanwhile, “Professional/Technical” qualifications account for 352 passengers (6.7%), indicating that professionally and vocationally trained individuals also travel abroad, though at a smaller scale than graduates. The “Others” category (244 passengers, 4.6%) may include unclassified or non-formal education levels.

Taken together, the data strongly supports a positive gradient, higher education levels are associated with higher outbound travel propensities. For tourism policymakers and travel marketers, the implication is that promotional campaigns and travel products should continue targeting educated professionals and graduates. However, there is also latent potential among the 176 low-education travelers and the 352 with technical skills niche segments that might respond to value-focused or group travel packages. Addressing barriers for the least educated (e.g., via simplified visa processes or subsidized group tours) could modestly expand the market, but the dominant driver of Sri Lankan outbound tourism remains educational attainment beyond primary school.

8.5 Employment

Profession	Number of respondents	Percentage
private sector	1,484	28.10
Self employed	1,194	22.60
Housewife	767	14.52
Retired	643	12.17
Government sector	427	8.08
Student / Researcher	230	4.35
Self-employed- Professional	181	3.43
Unemployment and seeking work	108	2.04
Agriculture	59	1.12
Other or not responded	189	3.58
Grand Total	**5,282**	**100.00**



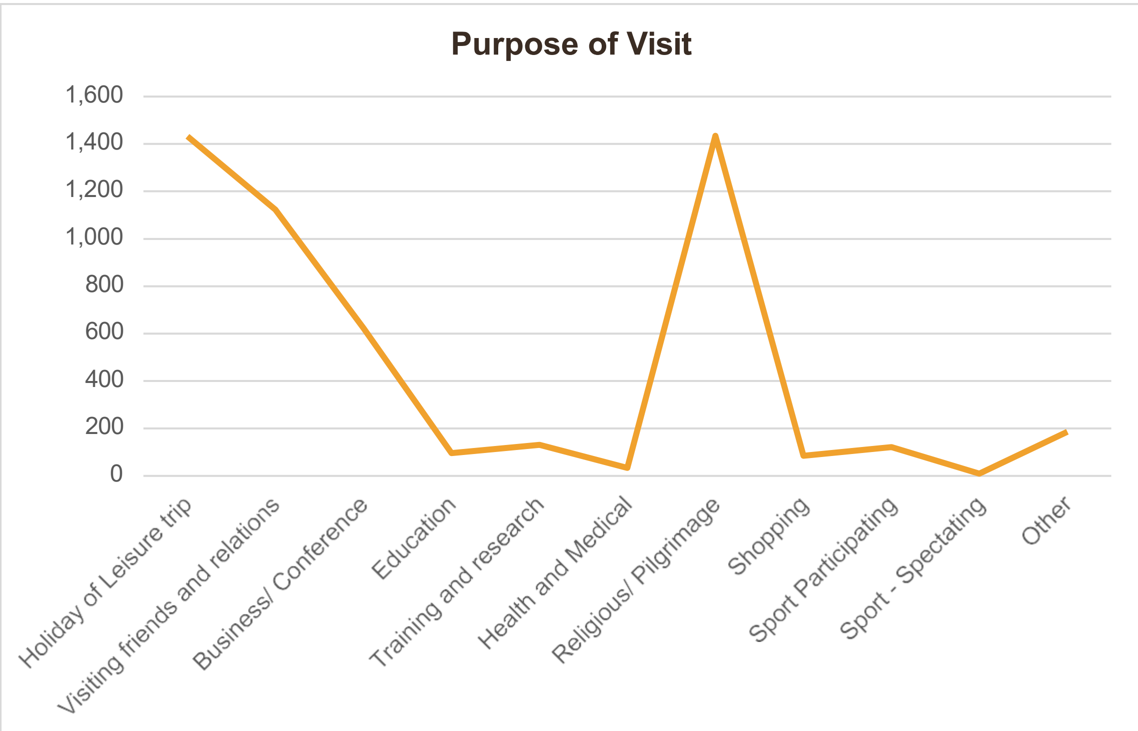
The most significant contributor to outbound tourism is the private sector, with 1,484 tourists (28.1% of the total). Closely following are the self-employed (1,194 passengers, 22.6%). **Responded** Together, these two categories account for more than half of all travelers (50.7%). This dominance reflects that individual engaged in formal private employment or running their own businesses have the financial flexibility, disposable income, and often the independent scheduling ability to undertake international trips. The private sector's lead over government employment (which has only 427 passengers, 8.1%) is particularly notable, suggesting that private employees in Sri Lanka either earn higher incomes, have more generous leave policies, or face fewer bureaucratic hurdles for outbound travel compared to government workers.

A substantial segment consists of housewives, numbering 767 (14.5%). This relatively large figure likely represents women who are not formally employed but travel as part of family groups accompanying working spouses, children, or relatives. Their presence underscores that outbound tourism is often a household or family activity rather than solely individual professional travel. Similarly, retired persons account for 643 passengers (12.2%), indicating a healthy senior travel market among Sri Lankans who have left the workforce and have time and savings for leisure or visiting family abroad.

Smaller but noteworthy groups include students/researchers (230, 4.4%), suggesting educational travel, semester breaks, or academic conferences. The combined category of self-employed professionals (181, 3.4%) likely doctors, lawyers, architects, etc. adds to the broader self-employed segment, further reinforcing that higher-earning independent workers travel frequently. At the lower end, agriculture workers represent only 59 passengers (1.1%), reflecting that those engaged in farming or rural livelihoods have very limited outbound travel, likely due to lower incomes, seasonal constraints, or lack of exposure. Similarly, the unemployment and self-employment category (108, 2.0%) possibly including informal or precarious workers also shows low participation.

8.6 Purpose of visit

Purpose of visit	Number of respondents	Percentage
Holiday/Leisure trip	1,433	27.13
Visiting friends and relations	1,123	21.26
Business/ Conference	624	11.81
Education	97	1.84
Training and research	131	2.48
Health/Medical	34	0.64
Religious/Pilgrimage	1,435	27.17
Shopping	86	1.63
Sport Participating	122	2.31
Sport - Spectating	10	0.19
Other	187	3.54
Grand Total	**5,282**	



Analysis of the purpose of visit for outbound tourists from Sri Lanka (total 5,282 passengers), reveals a near-equal split between two dominant travel motivations: religious/pilgrimage (1,435

passengers) and holiday/leisure trips (1,433 passengers). Together, these two categories account for over 54% of all outbound travel. It suggests that for Sri Lankans, international travel is driven almost equally by spiritual/faith-based journeys (e.g., to India's Buddhist or Haj pilgrimage sites) and by conventional tourism for rest, recreation, and exploration. This pattern is distinctive, reflecting both the country's strong religious traditions and a growing appetite for leisure travel.

The third largest category is visiting friends and relatives (VFR) with 1,123 passengers (21.3%). This indicates that a substantial portion of outbound trips involve family or social networks abroad, likely due to the Sri Lankan diaspora in countries such as the UK, Australia, Canada, and the Middle East. VFR travel often combines personal connection with some tourism activities, but it is clearly a major driver in its own right.

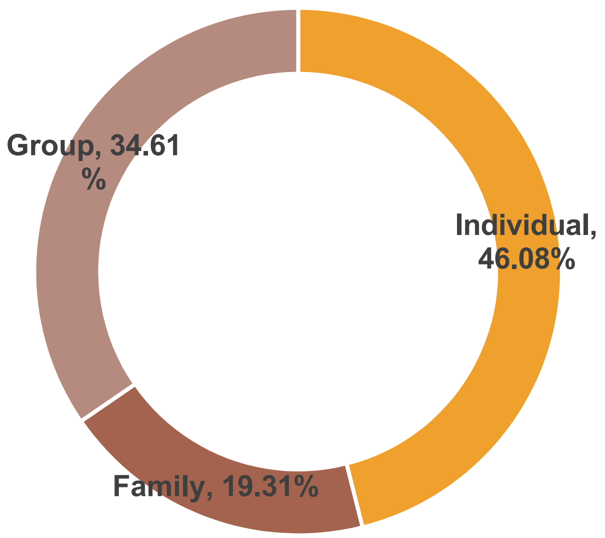
Business/conference travel accounts for 624 passengers (11.8%), pointing to a moderate but significant segment of professional overseas trips. This aligns with earlier findings that private sector and self-employed individuals dominate outbound travel. Meanwhile, education (97), training and research (131), and health/medical (34) are relatively small niches. The low medical tourism figure is somewhat surprising given that Sri Lankans do seek treatment in India or Singapore, but the data suggests it remains a minor purpose compared to leisure or pilgrimage.

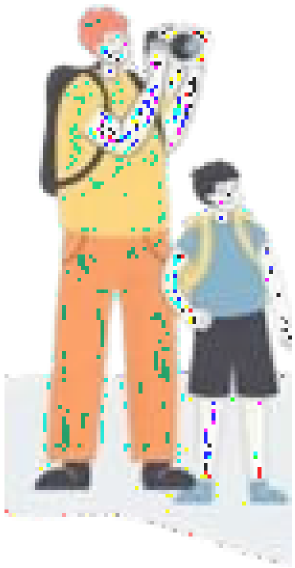
Other niche purposes include shopping (86), sport participating (122), and sport spectating (10). Their small numbers imply that specialized travel for retail or sports events is not yet a mainstream driver for Sri Lankan outbound tourists. The "Other" category (187 passengers, 3.5%) may cover mixed purposes or unclassified reasons.

8.7 Travel pattern

Travel Pattern	Number of respondents	Percentage
Individual	2,434	46.08
Family	1,020	19.31
Group	1,828	34.61
Grand Total	**5,282**	**100.00**

Distribution of travel Pattern





The data on travel patterns shows that individual travel is the most common pattern, with 2,434 passengers (46.1% of the total). This is closely followed by group travel at 1,828 passengers (34.6%), while family travel accounts for 1,020 passengers (19.3%).

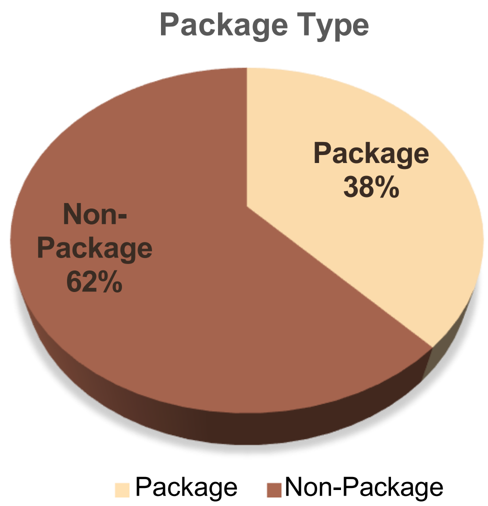
The predominance of individual travel suggests that nearly half of Sri Lankan outbound tourists prefer to arrange their own itineraries, book their own transport and accommodation, and travel alone or perhaps with colleagues rather than in organized groups. This aligns well with earlier findings that the largest occupational segments are private sector employees and self-employed individuals both categories likely to have the confidence, resources, and flexibility to travel independently. Furthermore, the substantial share of holiday/leisure and pilgrimage trips (the two largest purposes) may often be undertaken individually.

Group travel, at 34.6%, is the second most popular pattern. This could include organised tour packages (e.g., pilgrimage groups, corporate outings, or association trips) as well as informal clusters of friends or neighbors travelling together. Given that religious/pilgrimage is a top purpose, many such trips are traditionally taken as group tours. Similarly, holiday leisure trips may be booked through travel agents as group packages for cost savings or convenience.

Family travel, while the smallest category, still represents nearly one-fifth of all outbound tourists (1,020 passengers). This pattern likely involves spouses, children, or extended relatives travelling together. The earlier data showed 767 housewives among travelers many of whom probably accompany family units. Family travel may be more common for visiting friends and relatives (VFR) or for combined leisure/pilgrimage trips. The relatively lower share of family travel compared to individual and group patterns could be due to higher costs (multiple tickets, larger accommodation) and coordination challenges, or perhaps because many Sri Lankans travel for various purposes like education without their families

8.8 Nature of Travel

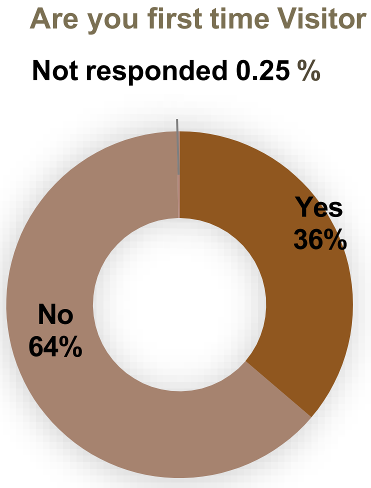
Package Type	Number of respondents	Percentage
Package	2,006	37.98
Non-Package	3,276	62.02
Grand Total	5,282	100.00



Among Sri Lankan outbound tourists (total 5,282 passengers), a clear majority prefer non-package travel arrangements. Specifically, 3,276 passengers (62.0%) opted for independent, non-package trips, while 2,006 passengers (38.0%) chose pre-arranged tour packages. This preference for non-package travel aligns consistently with the travel pattern data which showed that individual travel (46.1%) was the most common, followed by groups (34.6%) and families (19.3%). Non-package travel naturally supports individual and family travelers who wish to design their own itineraries, choose their own accommodation, and control their budgets. Similarly, the dominance of private sector employees and self-employed individuals suggests a cohort that values flexibility and may have the confidence to book flights, hotels, and activities independently, often via online platforms.

The fact that over a third (38%) still choose packages is significant. Group travel (34.6% of travel patterns) closely mirrors this figure, indicating that most group travelers likely use pre-arranged packages. This is especially relevant for the two largest travel purposes: religious/pilgrimage (1,435 passengers) and holiday/leisure (1,433 passengers). Pilgrimage tours, in particular, are often organized as all-inclusive packages by temples, churches, or specialized tour operators, covering transport, accommodation, and guided visits to holy sites. Leisure holiday packages also remain popular for those seeking convenience, safety, or cost predictability particularly among retired persons and housewives, who may prefer hassle-free arrangements.

First visit abroad	Number of Respondents	Percentage
Yes	1,915	36.26
No	3,354	63.50
Not responded	13	0.25
Grand Total	**5,282**	**100.00**



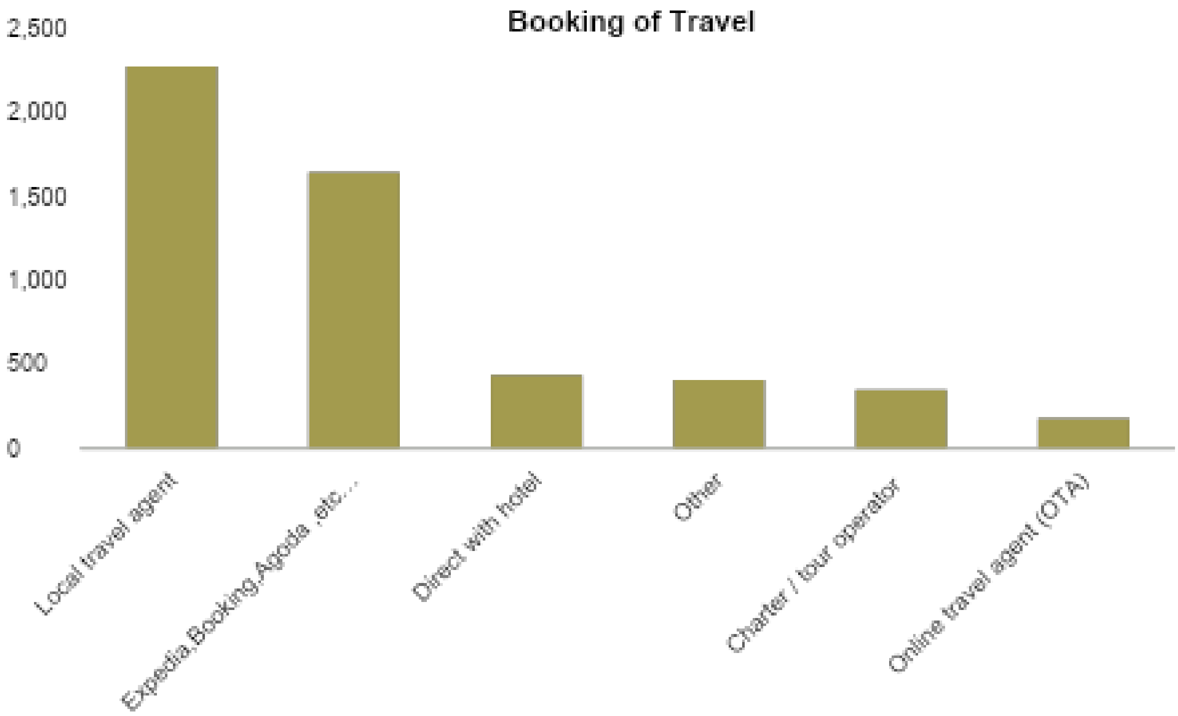
The data indicates that most outbound tourists from Sri Lanka are repeat travelers, with first-time travelers making up a smaller proportion. Specifically, 3,354 passengers (63.5% of the total) indicated that this was not their first visit abroad, while 1,915 passengers (36.3%) confirmed it was their first trip. Only 13 passengers (0.2%) did not respond.

The predominance of repeat visitors (nearly two-thirds) suggests that Sri Lanka's outbound travel market is mature and experienced. Many Sri Lankans who travel internationally do so multiple times over their lifetime likely for recurring purposes such as visiting friends and relatives (VFR) abroad, regular business trips, annual pilgrimages, or frequent leisure holidays. This finding aligns well with insights on the age distribution peaks in the 45–49 bracket, indicating middle-aged travelers who have likely built-up travel experience over the years. Similarly, the high proportion of private sector employees and self-employed individuals (who may have both the means and the need for repeated overseas trips) supports this interpretation.

First-time visitors, while a substantial minority at over one-third, represent a significant and valuable segment. These travelers may be younger adults (e.g., 25–29 age group, which was the largest among young adults) embarking on their first international journey for education, pilgrimage, or a milestone holiday. The existence of 1,915 first-timers also points to continued market expansion, new travelers are entering the outbound stream, offering growth opportunities for destination marketers and travel service providers.

8.9 Booking patterns

Booking of travel	Number of respondents
Local travel agent	2,271
Expedia, Booking.com, Agoda, etc…	1,643
Direct with hotel	437
Other	406
Charter / tour operator	348
Online Travel Agent (OTA)	177
Grand Total	**5,282**



The booking patterns of outbound tourists from Sri Lanka (total 5,282 passengers), reveals a strong preference for traditional, human-mediated booking channels, alongside a significant and growing presence of online platforms.

The most popular booking method is local travel agents, used by 2,271 passengers (43.0% of the total). This near-majority share indicates that despite the global shift toward digital booking, many Sri Lankan travelers still trust and rely on brick-and-mortar travel agencies for their international trips. Local agents likely offer personalized advice, handle complex itineraries (especially for religious pilgrimages or group tours), provide payment flexibility, and cater to travelers who may not be fully comfortable with online booking or who prefer negotiating face to face. This aligns with earlier findings that group travel (34.6%) and package tours (38.0%) are substantial segments both of which are often facilitated by local agents.

The second most common channel is online accommodation platforms such as Agoda, Booking.com, and Expedia, accounting for 1,643 passengers (31.1%). This represents a strong digital footprint, particularly among independent travelers. Given that individual travel is the dominant pattern (46.1%) and non-package travel is the majority (62.0%), many of these passengers are likely booking flights and accommodation themselves via global online travel agencies (OTAs) and metasearch sites.

Direct hotel bookings account for 437 passengers (8.3%). This suggests a smaller but loyal segment that prefers dealing directly with properties, possibly repeat visitors to the same destination, business travelers with corporate rates, or those seeking better cancellation terms. Charter / tour operator bookings (348 passengers, 6.6%) likely correspond to organized group tours or pilgrimage packages that are sold directly by specialized operators, sometimes without a local retail agent as intermediary.

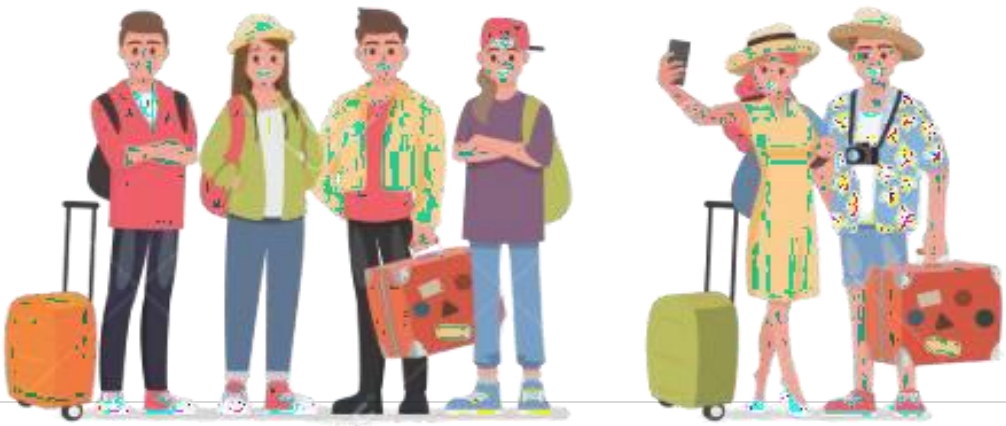
8.10 Purpose of visit by gender

Gender	Holiday or Leisure Trip / Vacation	Visiting Friends/Relatives	Business/ Conference	Incentive reward Education	Training and research	Health / Medical Care	Religious / Pilgrimage	Shopping	Sport- participation	Sport- spectating	Other	Grand Total
Male	**15.83**	9.62	9.69	1.00	1.51	0.34	**14.12**	1.31	1.57	0.15	2.20	57.35
Female	11.40	**11.55**	2.04	0.83	0.93	0.34	**13.03**	0.25	0.74	0.06	1.46	42.62
prefer not to say	0.00	0.02	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.04
Grand Total	**27.22**	**21.19**	11.74	1.84	2.44	0.68	**27.17**	1.55	2.31	0.21	3.65	100.00

An analysis of outbound tourists by gender reveals notable differences in travel motivations. Male tourists primarily travel for holiday and leisure purposes (15.83%), followed by religious pilgrimages (14.12%). In contrast, female tourists show a stronger preference for religious pilgrimages (13.03%), while visiting friends and relatives (11.55%) and holiday and leisure travel (11.40%) are also significant purposes of travel. Tourists categorized under other genders predominantly travel for religious purposes and to visit friends and relatives.

8.11 Purpose of visit by age

Age range	Holiday or leisure Trip /vacation	Visiting friends/ Relatives	Business /Conference	Incentive reward /education	Training and research	Health / medical Care	Religious / pilgrimage	Shopping	Sport- participation	Sport- spectating	Other	Grand Total
Under 15	**0.19**	0.15	0.02	0.04	0.00	0.00	0.08	0.00	0.36	0.00	0.21	**1.04**
15-19	**0.93**	0.49	0.11	0.40	0.04	0.08	0.30	0.00	0.51	0.00	0.30	**3.16**
20-24	**3.26**	1.27	0.72	0.45	0.17	0.04	0.47	0.04	0.45	0.02	0.38	**7.27**
25-29	**4.52**	1.61	1.76	0.34	0.38	0.00	0.98	0.06	0.47	0.04	0.47	**10.64**
30-34	**4.01**	1.61	1.61	0.09	0.49	0.08	1.17	0.13	0.17	0.02	0.36	**9.75**
35-39	**3.48**	1.68	2.04	0.15	0.36	0.02	1.74	0.32	0.09	0.02	0.55	**10.47**
40-44	2.46	1.99	1.86	0.11	0.36	0.13	**3.41**	0.42	0.09	0.02	0.28	**11.13**
45- 49	2.46	2.18	1.76	0.09	0.38	0.08	**4.54**	0.27	0.06	0.08	0.34	**12.23**
50-54	1.95	2.63	1.02	0.08	0.15	0.02	**5.05**	0.19	0.04	0.00	0.40	**11.53**
55-59	1.91	2.29	0.51	0.06	0.08	0.11	**4.13**	0.09	0.04	0.02	0.19	**9.43**
60-64	1.10	2.27	0.17	0.00	0.02	0.09	**3.39**	0.04	0.02	0.00	0.06	**7.16**
65-69	0.66	**1.55**	0.08	0.02	0.02	0.02	1.50	0.00	0.00	0.00	0.06	**3.90**
70-74	0.23	**1.06**	0.08	0.00	0.00	0.02	0.38	0.00	0.00	0.00	0.06	**1.82**
75 and above	0.06	**0.40**	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	**0.47**
Grand Total	**27.22**	**21.19**	**11.74**	**1.84**	**2.44**	**0.68**	**27.17**	**1.55**	**2.31**	**0.21**	**3.65**	**100.00**



Outbound travel patterns show clear age-based differences in purpose of visit. Holiday and leisure travel dominate among younger and early-middle age groups, particularly those aged 20–49, indicating that recreation and experiential tourism are the primary motivators for these cohorts. This reflects higher travel freedom, lifestyle driven consumption, and stronger interest in exploration among younger travelers.

In contrast, older age groups such as 45- 64 are mainly engaged in visiting friends and relatives (VFR) and religious or pilgrimage-related travel. This suggests stronger family ties, cultural obligations, and faith-based motivations become more important with age, while leisure becomes less dominant.

Business and conference travel is more prominent among the working-age groups, particularly 25–39, and 40–44, reflecting career development, professional mobility, and international work engagement. Similarly, the 30–34 age group shows a strong inclination toward training and research purposes, indicating skill development and professional advancement as key drivers.

Specialized travel purposes are also age-specific: incentive and educational travel is more common among the 20–24 group, health and medical travel is concentrated in the 40–44 segment, while shopping is more relevant for 40–44-year-olds. Sports participation is mainly observed among younger travellers aged 15–19, reflecting higher physical activity and youth engagement.

The data highlights a strong life cycle pattern in tourism behavior, where travel motivations shift from education and leisure in youth to career-related travel in mid-age, and finally to family, cultural, and religious purposes in older age groups.

8.12 Travel pattern vs nature of travel

In this your first visit abroad	Local travel agent/tour operator in Sri Lanka	Travel agent in visiting country	Expedia, Booking.com, Agoda, Airbnb, Trip advisor	Direct with hotel/resort visiting country	Others	Do not know	Grand Total
Yes (F)	**19.32**	0.91	9.03	1.92	2.28	2.88	36.34
No	**23.67**	2.45	**22.13**	4.63	5.96	4.82	63.66
Grand Total	42.99	3.36	31.16	6.55	8.24	7.71	100

The overall distribution of booking channels of outbound tourists shows that local travel agents in Sri Lanka are the most frequently used channel, by the first-time outbound travellers accounting for 19.32% of all tourists. International online travel agents (OTAs) such as Expedia, Booking.com, Agoda, Airbnb, and TripAdvisor follow with 9.03%. Direct bookings with hotels or resorts make up 1.92%, Among repeat tourists, OTAs (22.13%) and local agents (23.67%), show similar distribution. Direct hotel bookings (4.63%) and direct bookings with hotels/resorts in the visiting country (4.63%), while accounting for modest shares, are also favoured by some tourists.

First-time outbound tourists from Sri Lanka demonstrate a strong preference for local travel agents, likely due to perceived reliability, lack of travel experience, and the need for personalised assistance. In contrast, repeat tourists shift significantly towards international OTAs, indicating growing digital confidence and a desire for price comparison, flexibility, and loyalty benefits. The fact that local agents still command the largest share among repeat travellers suggests that even experienced tourists value local expertise for certain aspects of their trips. Direct hotel bookings, though modest overall, are more common among repeat visitors, possibly driven by loyalty programmers or previous positive stays. These findings suggest that local travel agents should focus on first-time travellers by emphasizing trust and convenience, while international OTAs and hotels should target repeat tourists with customized offers and loyalty incentives to capture a larger share of this experienced segment.

8.13 Education vs booking method

	Booking method						
Education level	Local travel agent/tour operator in Sri Lanka	Travel agent in visiting country	Expedia, Booking.com, Agoda, Airbnb, Trip advisor	Direct with hotel/resort in Sri Lanka	Others	Do not know	Total
Primary level in school (up to Grade 5)	2.22	0.11	0.49	0.02	0.06	0.44	**3.33**
Secondary level in school (Grade 6 and above)	23.55	1.5	15.77	2.33	4.62	4.68	**52.44**
Graduate and above (BA,MA, MSc,BSc,Phd)	11.68	1.27	11.87	3.31	2.65	2.16	**32.94**
Professional/technical certificate (Vocational	3.54	0.36	1.51	0.64	0.38	0.23	**6.66**
Others	0.04	0	0.04	0.02	0.04	0	**0.13**
Prefer not to say	0.76	0.04	0.32	0.15	0.15	0.02	**1.44**
Undergraduate	1.21	0.08	1.1	0.11	0.38	0.17	**3.05**
Grand Total	**43**	**3.35**	**31.11**	**6.59**	**8.27**	**7.69**	**100**

An analysis of outbound tourist booking behaviour by education level indicates distinct preferences across segments. Tourists with secondary education (Grade 6 and above) tend to book mainly through local travel agents. Similarly, those holding professional or technical qualifications also show a preference for using tour operators in Sri Lanka.

Travellers with graduate-level education and above are more likely to use both Online Travel Agencies (OTAs), accounting for 11.87%, and travel agents at 11.68%. Those with only primary education also predominantly rely on local travel agents for their bookings.

In addition, travel agents in the destination country are most commonly used by tourists with secondary-level education. Meanwhile, direct hotel bookings are primarily preferred by travellers with a degree level of education and higher.

8.14 Average duration of Stay

	Country	Number of tourists	Duration of stay
1	India	1,637	10.3
2	United Kingdom	152	43.3
3	Russian Federation	4	7.5
4	China	139	25.1
5	Germany	24	113.4
6	France	17	39.4
7	Australia	303	36.6
8	United States	44	10.2
9	Netherlands	5	61.1
10	Canada	9	125.4
11	Bangladesh	9	6.0
12	Japan	101	58.9
13	Italy	56	20.1
14	Maldives	86	10.9

The analysis of the average duration of stay of outbound tourists from Sri Lanka reveals notable variations across destinations, reflecting differences in travel purpose, distance, and traveler characteristics. India remains the most popular destination, attracting 1,637 tourists, significantly higher than any other country in the list. Despite this high volume, the average duration of stay is relatively short at 10.3 days, suggesting that travel to India is primarily driven by short-term purposes such as religious pilgrimages, medical treatment, business travel, and leisure trips facilitated by the country's proximity and convenient air connectivity.

Australia records the second-highest number of tourists, with 303 travelers and an average stay of 36.6 days. This comparatively longer duration may be attributed to visits to friends and relatives, educational activities, business engagements, and extended holidays. Similarly, the United Kingdom attracted 152 tourists with an average stay of 43.3 days, while China and Japan recorded 139 and 101 tourists respectively, with average stays of 25.1 and 58.9 days. The significantly longer duration of stay in Japan compared to China may indicate a higher prevalence of educational, professional, or family-related travel.

Several long-haul destinations exhibit exceptionally high average lengths of stay despite attracting relatively small numbers of tourists. Canada records the longest average stay at 125.4 days, followed by Germany at 113.4 days and the Netherlands at 61.1 days. These unusually long durations may reflect extended visits to family members, temporary employment, educational pursuits, or migration-related travel. However, caution should be exercised when interpreting these figures, as the number of respondents for these countries is relatively small, making the averages more susceptible to the influence of a few exceptionally long stays.

Among the destinations listed, Bangladesh and the Russian Federation report the shortest average durations of stay, at 6.0 and 7.5 days respectively. The United States and Maldives also record relatively short stays of 10.2 and 10.9 days. These patterns suggest that travel to these destinations may be driven by specific purposes such as business, official visits, short leisure holidays, or other time-bound activities.

Overall, the data suggests a clear distinction between short-haul and long-haul travel patterns among Sri Lankan outbound tourists. Regional destinations within South Asia, particularly India, attract large volumes of travelers but are associated with shorter stays. In contrast, long-haul destinations in Europe, North America, and Oceania attract fewer travelers but tend to generate substantially longer stays. This indicates that proximity and affordability influence travel volume, while destinations associated with diaspora communities, education, employment, and extended holidays are characterized by longer durations of stay.

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Confidential
The information collected in this survey will be strictly confidential according to the survey ordinance and individual level information will not be divulged to any person or agency

INTERNATIONAL PASSENGER SURVEY, 2022-23

Sri Lanka Tourism Development Authority

Schedule 1: Inbound Tourist

(Visit Period: 24 hrs to 1 year; And not working or having a house in SL) – Yes/No

Identification Number								
Date of survey				Time of survey				

1.

1. **Sample Identification**

101. Date of Entry to SL (DD/MM/YYYY)								
102. Date of Exit from SL (DD/MM/YYYY)								
102. Port of Exit (List of Port Codes)								
103. Mode of Exit	Air=1				Sea=2			

2. Respondent's Details

201. Nationality	
202. Country of normal residence (Country Codes)	
202 a . City of residence	
203. Gender (Put tick)	Male=1 | Female=2 | Prefer not to say=3
204. Age (in years) (Codes)	
205. Education (Codes)	
206. Employment status (Codes)	

Codes for 204: Under 15 - 1; 15-19 – 2; 20-24 -3; 25-29 -4; 30-34 – 5; 35-39 – 6; 40-44 – 7; 45- 49 – 8; 50-54 – 9; 55-59 – 10; 60-64 – 11; 65-69- 12; 70-74 -13 ;75 and above
Codes for 205: Primary level in school (up to Grade 5) – 1; Secondary level in school (Grade 6 and above) - 2; Graduate and above – 3; Professional/technical certificate – 4; Others - 5
Codes for 206: Self-employed (Industrialist/Proprietor/Trader/shop-owner) – 1; Self-employed Professional (Chartered Accountant/Doctor/Consultant/ Lawyer/Engineer) -2; Employed in government sector – 3; Employed in private sector – 4; Unemployed and seeking work – 5; Student/Researcher – 6; Agriculturist – 7; Homemaker/Housewife – 8; Retired – 9.

3. Visit Profile

301. Time taken to make the trip arrangements after selecting the destination	
302. Main Method of travel arrangement	
303. Total Duration of current trip (number of days)	
304. Next destination of the current trip	
305. Duration in Sri Lanka (number of days)	
306. Airline you travelled with	....
307. Travel Pattern	Individual=1 Family=2 Group=3
308. If Group/Family, number of members including the respondent	
309. Principal purpose of visit (Codes)	
310.How did you book your travel arrangements? Please rank the top three methods you used.	Local travel agent/tour operator in Sri Lanka..................... International online travel agent (OTA)/tourism operator - e.g.,......... Expedia, Booking.com, Agoda, Airbnb, Trip advisor, etc......... Charter/Tour operator in my home country..................... Direct with hotel/resort in Sri Lanka......................
311.Whether visited SL in the past	Yes=1 No=2
312.If yes in Q311, how many times	

Codes for 301: Within one day before departure -1; Up to one week before departure – 2; Up to one month before departure – 3; Two to three months before departure – 4; Four to Six months before departure – 5; Seven months to one year before departure – 6; More than one year before departure – 7.

Codes for 302: Local travel agent/tour operator in Sri Lanka – 1; International online travel agent (OTA)/tourism operator - e.g., Expedia, Booking.com, Agoda, Airbnb, Tripadvisor, etc. – 2; Charter/Tour operator in my home country – 3; Direct with hotel/resort in Sri Lanka – 4.

Codes for 309: Holiday or Leisure Trip/Vacation – 1; Visiting Friends/Relatives - 2; Business/Conference: specify

i) Trade Fairs/Shows/Exhibitions;

ii) Meetings;

iii) Conference

iv) Incentive reward

Education-4; Training and research – 5; Health/Medical Care – 6; Religious/Pilgrimage – 7; Shopping - 8; Sport- participation – 9; Sport- spectating – 10; Other - 11

4. Expenditure Details

401. Whether Package Trip	Yes=1 No=2		
402. If Package trip, Total cost for SL trip:			
403. Specify Currency Name:			
If package trip, Components of Package (Put Tick):	404. International travel	Yes=1	No=2
	405. Food	Yes=1	No=2
	406. Accommodation	Yes=1	No=2
	407. Local sightseeing	Yes=1	No=2
	408. Transport	Yes=1	No=2
	409. Others	Yes=1	No=2
410.If non-package, provide the total cost for SL trip:.. and cost of the following components:			
410. A. Specify Currency Name:			
Accommodation			
411. Hotel			
412. Villas			
413. Guest House/Rest house/Inns/Lodges			
414. Hostels			
415. Homestays			
416. Camping			
417. Apartments			
418. Friends' or relatives' place			

419. Others (specify)	
420. **Accommodation Sub-total** (if more than one) (411 to 419)	
421. **Food and Drink**	
Transport within SL	
422. Buses (Public Transport)	
423. Trains (Public Transport)	
424. Hired Vehicles (Car/Van/SUV/Jeep/Coach)	
425. Three-wheeler	
426. Two-wheeler (Scooters/Bikes/Bicycles)	
427. Boat/Catamaran	
428. Air (Domestic flight)	
429. Others (specify)	
430. **Transport Sub-total** (if more than one) (422 to 429)	
431. Travel agencies/tour operators/travel guide services	
Shopping	
431. Clothing & accessories	
432. Homeware	
433. Souvenirs	
434. Batik & Handicraft	
435. Gems & Jewellery	
436. Ceylon Tea	
437. Spices & Local Food	
438. Ayurvedic /Spa products	
439. Others (specify)	
440. Shopping Sub-total (if more than one) (431 to 439)	
Sports, Recreation and Wellness	
441. Water based activities (sum of 441 a to 441 h)	
441 a. Beach & Sea	
441 b. Fishing	
441 c. SCUBA/shipwreck diving	
441 d. Snorkeling	
441 e. Surfing	

441 f. Watersports	
441 g. Whale & Dolphin watching	
441 h. Whitewater rafting	
442. Land & Air based activities (sum of 442a to 442i)	
442 a. Adventure sports	
442 b. Agri-business	
442 c. Wildlife safari	
442 d. Bird Watching	
442 e. Cycling/Mountain biking	
442 f. Golf	
442 g. Hiking/Trekking	
442 h. Museum	
442 i. Sightseeing excursions	
443. Health & Wellness related (sum of 443a to 443b)	
443 a. Ayurveda/spa	
443 b. Other health and medical needs	
444. Cultural activities (Festivals and cultural events)	
445. Other activities (sum of 445a to 445g)	
445 a. Casinos	
445 b. Cookery experience	
445 c. Exhibition/fair	
445 d. Live sports events	
445 e. Nightclubs	
445 f. Volunteer community services	
445 g. Others (specify)	

5. Visitor's satisfaction

501.	How would you rate your overall experience in SL	Excellent=1	Good=2	Satisfactory=3	Poor=4	Very Poor=5	No comment=6
502.	How likely are you take another trip in SL	Definitely=1	Probably=2	Fairly likely=3	Probably not=4	Definitely not=5	No comment=6
Regarding your current trip, your level of satisfaction with respect to:							
503.	General cleanliness of areas you visited	Excellent=1	Good=2	Satisfactory=3	Poor=4	Very Poor=5	No comment=6
504.	Availability of good quality accommodation	Excellent=1	Good=2	Satisfactory=3	Poor=4	Very Poor=5	No comment=6
505.	Availability of good quality food	Excellent=1	Good=2	Satisfactory=3	Poor=4	Very Poor=5	No comment=6

506.	Quality of facilities and services available at international airport	Excellent=1	Good=2	Satisfactory=3	Poor=4	Very Poor=5	No comment=6
507.	Quality of facilities and services available at tourist sites	Excellent=1	Good=2	Satisfactory=3	Poor=4	Very Poor=5	No comment=6
508.	Availability of transport options to the areas you visited	Excellent=1	Good=2	Satisfactory=3	Poor=4	Very Poor=5	No comment=6
509.	Value for money as a destination	Excellent=1	Good=2	Satisfactory=3	Poor=4	Very Poor=5	No comment=6
510.	General welcome and hospitality	Excellent=1	Good=2	Satisfactory=3	Poor=4	Very Poor=5	No comment=6
511.	Personal security and safety	Excellent=1	Good=2	Satisfactory=3	Poor=4	Very Poor=5	No comment=6
512.	Sri Lanka's position as a sustainable destination	Excellent=1	Good=2	Satisfactory=3	Poor=4	Very Poor=5	No comment=6
513.	If visited for MICE, your rating for MIC venue	Excellent=1	Good=2	Satisfactory=3	Poor=4	Very Poor=5	No comment=6

6.

Which of the places/locations you visited while your stay in Sri Lanka? Please specify the number of days spent at each location	
Places/Locations	**Number of days**
601. Sigiriya Rock Fortress	
602. The Temple of Tooth, Kandy	
603. Sinharaja Forest Reserve	
604. Knuckels mountain range	
605. Yala National Park	
606. Kaudulla National Park	
607. Udawalawe National Park	
608. Wilpattu National Park	
609. Wasgomuwa National Park	
610.Galle Fort	
611.Adam's Peak	
612.Pinnawala Elephant Orphanage	
613.Dambulla Cave Temple	
614. Anuradhapura Ancient City	
615.Polonnaruwa ancient city	
616.Horton Plains National Park	
617.Bentota	
618.Mirissa	
619.Hikkaduwa	

620.Beruwala	
621.Unawatuna	
622.Arugambay	
623.Passikudah	
624.Trincomalee	
625.Ella	
626.Nuwara Eliya	
627.Jaffna	
628.Other (specify)	....

620. Please select the top <u>three</u> activities which you found the most enjoyable:

Activities	**Rank** (1-3)
Beach & Sea	
Fishing	
SCUBA/shipwreck diving	
Snorkeling	
Surfing	
Watersports	
Whale & Dolphin watching	
Whitewater rafting	
Adventure sports	
Agri-business	
Wildlife safari	
Bird Watching	
Cycling/Mountain biking	
Golf	
Hiking/Trekking	
Museum	
Sightseeing excursions	
Culinary / food tourism	
Other (please specify) ______________________	

621. Any other comments

....

....

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OUTBOUND PASSENGER SURVEY, 2022-23

Sri Lanka Tourism Development Authority

Schedule 2: Outbound Tourist

(Place of destination outside Sri Lanka; Sri Lankan Resident; Visit Period: 24 hrs to 1 year) – Yes/No

Identification Number								
Date of survey				Time of survey				

1.

1. **Sample Identification**

101. Date of Exit (DD/MM/YYYY)								
102. Expected Date of Return (DD/MM/YYYY)								
102. Port of Exit (List of Port Codes)								
103. Mode of Exit	Air=1				Sea=2			

2. Respondent's Details

201.	Nationality			
202.	Country of destination for travel (Country Codes)			
203.	City of the country of destination			
204.	Gender (Put tick)	Male=1	Female=2	Prefer not to say=3
205.	Age (in years) (Codes)			
206.	Education (Codes)			
207.	Employment status (Codes)			

Codes for 205: Under 15 - 1; 15-19 – 2; 20-24 -3; 25-29 -4; 30-34 – 5; 35-39 – 6; 40-44 – 7; 45- 49 – 8; 50-54 – 9; 55-59 – 10; 60-64 – 11; 65-69- 12; 70-74 -13 ;75 and above

Codes for 206: Primary level in school (up to Grade 5) – 1; Secondary level in school (Grade 6 and above) - 2; Graduate and above – 3; Professional/technical certificate – 4; Others - 5

Codes for 207: Self-employed (Industrialist/Proprietor/Trader/shop-owner) – 1; Self-employed Professional (Chartered Accountant/Doctor/Consultant/ Lawyer/Engineer) -2; Employed in government sector – 3; Employed in private sector – 4; Unemployed and seeking work – 5; Student/Researcher – 6; Agriculturist – 7; Homemaker/Housewife – 8; Retired – 9.

3. Visit Profile

301.	Total expected Duration of trip abroad (number of days)			
302.	Airline for exit			
303.	Airline for return			
304.	Travel Pattern	Individual=1	Family=2	Group=3
305.	If Group/Family, number of members including the respondent			
306.	Principal purpose of visit (Codes)			
307.	How did you book your travel arrangements? Please rank the top three methods you used.	a. Local travel agent/tour operator in Sri Lanka……………….. b. International online travel agent (OTA)/tourism operator .,... c. Expedia, Booking.com, Agoda, Airbnb, Trip advisor, etc……… d. Charter/Tour operator in my home country………………… e. Direct with hotel/resort in Sri Lanka…………………..		
308.	Is this your first visit abroad	Yes=1	No=2	
309.	For your upcoming outbound trip, what amount (in US dollars) do you expect to spend, excluding the cost of flights?			

Codes for 306: Holiday or Leisure Trip/Vacation – 1; Visiting Friends/Relatives - 2; Business/Conference: specify

i) Trade Fairs/Shows/Exhibitions;

ii) Meetings;

iii) Conference

iv) Incentive reward

Education-4; Training and research – 5; Health/Medical Care – 6; Religious/Pilgrimage – 7; Shopping - 8; Sport- participation – 9; Sport- spectating – 10; Other - 11

4. Expenditure incurred within SL

401. Whether Package Trip	Yes=1	No=2	
402. If Package trip, whether bought from within SL	Yes=1	No=2	
403. If Package trip, Total cost of package:			
404. Specify Currency Name:			
If package trip, Components of Package (Put Tick):	405. International travel	Yes=1	No=2
	406. Food	Yes=1	No=2
	407. Accommodation	Yes=1	No=2
	408. Local sightseeing	Yes=1	No=2
	409. Domestic Transport	Yes=1	No=2
	4010. Others	Yes=1	No=2
If non-package, provide cost of the following components (**please note that the details are to be provided for expenditure incurred within SL, during the period of travel from residence to final point of exit to another country**) :			
410. Specify Currency Name:			
Accommodation			
411. Hotel			
412. Villas			
413. Guest House/Rest house/Inns/Lodges			
414. Hostels			
415. Homestays			
416. Camping			
417. Apartments			
418. Friends' or relatives' place			
419. Others (specify)			
420. **Accommodation Sub-total** (if more than one) (411 to 419)			
421. **Food and Drink**			
Transport within SL			

422. Buses (Public Transport)	
423. Trains (Public Transport)	
424. Hired Vehicles (Car/Van/SUV/Jeep/Coach)	
425. Three-wheeler	
426. Two-wheeler (Scooters/Bikes/Bicycles)	
427. Boat/Catamaran	
428. Air (Domestic flight)	
429. Others (specify)	
430. **Transport Sub-total** (if more than one) (422 to 429)	
431. Travel agencies/tour operators/travel guide services	
Shopping	
432. Clothing & accessories	
431. Homeware	
432. Souvenirs	
433. Batik & Handicraft	
434. Gems & Jewellery	
435. Ceylon Tea	
436. Spices & Local Food	
437. Ayurvedic /Spa products	
438. Others (specify)	
440. Shopping Sub-total (if more than one) (431 to 439)	
Health	
441. Health & Wellness related	
442. Ayurveda/spa	
443. Other health and medical needs	
444. Health Sub- total (if more than one) (441 to 443)	
Other activities	
445. Casinos	
446. Nightclubs	
447. Others (specify)...	
448. Other Sub-total (if more than one) (445 to 447)	

5. Amount of Reimbursement

501.	Whether any of the cost of the current tour paid or reimbursed by an institution	Yes and amount known=1	Yes but amount not known=2	No=3
502.	If "1" in 501, type of institution	Government =1	Others=2	
503.	If "1" in 501, amount paid or reimbursed (in local currency)			

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