YEAR IN REVIEW

2023

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- Visitors to Museums
- Visitors to Zoological Gardens

TOURISM ACCOMODATION INVESTMENT

- Tourism investment projects received
- Investment projects received & approved

5

HIGHLIGHTS

Tourist arrivals

1,487,303

Tourism revenue
2,067.96* USD Mn
2.07* billion USD
677,360.3* RS Mn

Average duration of stay
8.44 * nights

Receipt per tourist per day / average expenditure per day
164.4 * USD

TOURIST ARRIVALS TO SRI LANKA

1

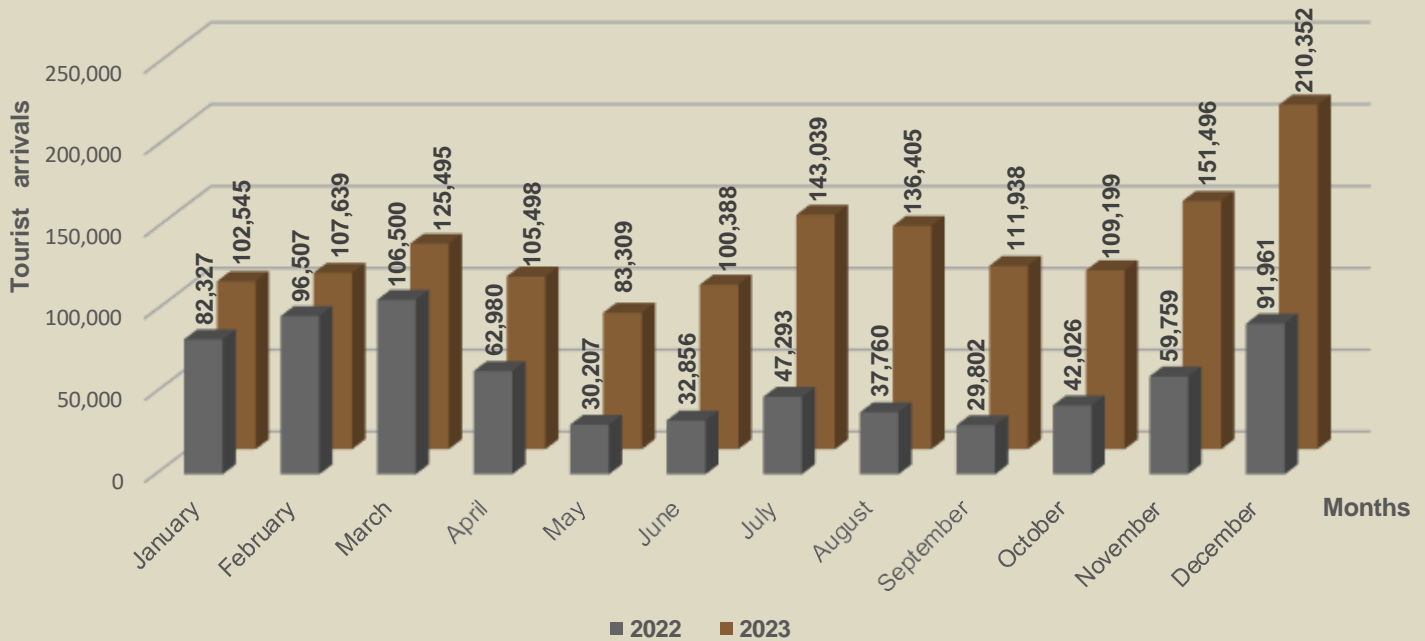## Chart 01: Tourist arrivals by month, 2022 & 2023

2022 **2023**

Table 01: Tourist arrivals by month & percentage change, 2022 & 2023

Month	2022	2023	% Change 2023/22
January	82,327	102,545	24.5
February	96,507	107,639	11.5
March	106,500	125,495	17.8
April	62,980	105,498	67.5
May	30,207	83,309	175.8
June	32,856	100,388	205.5
July	47,293	143,039	202.5
August	37,760	136,405	261.2
September	29,802	111,938	275.6
October	42,026	109,199	159.8
November	59,759	151,496	153.51
December	91,961	210,352	128.7
Total	**719,978**	**1,487,303**	**106.6**

Throughout the year, there was a significant increase in tourist arrivals by 106.6% compared to the corresponding months of the previous year, indicating a positive trajectory for Sri Lanka's tourism industry. This surge reflects a heightened interest in Sri Lanka as a preferred tourist destination.

Of particular note, September witnessed the most substantial growth rate, soaring by 275.6% from the previous year. This surge could be attributed to various factors, including favorable weather conditions and holiday seasons in key source markets.

December marked the peak tourist season with the highest number of arrivals, totaling 210,352 visitors. This underscores December's popularity, likely influenced by winter vacations and other advantageous conditions.
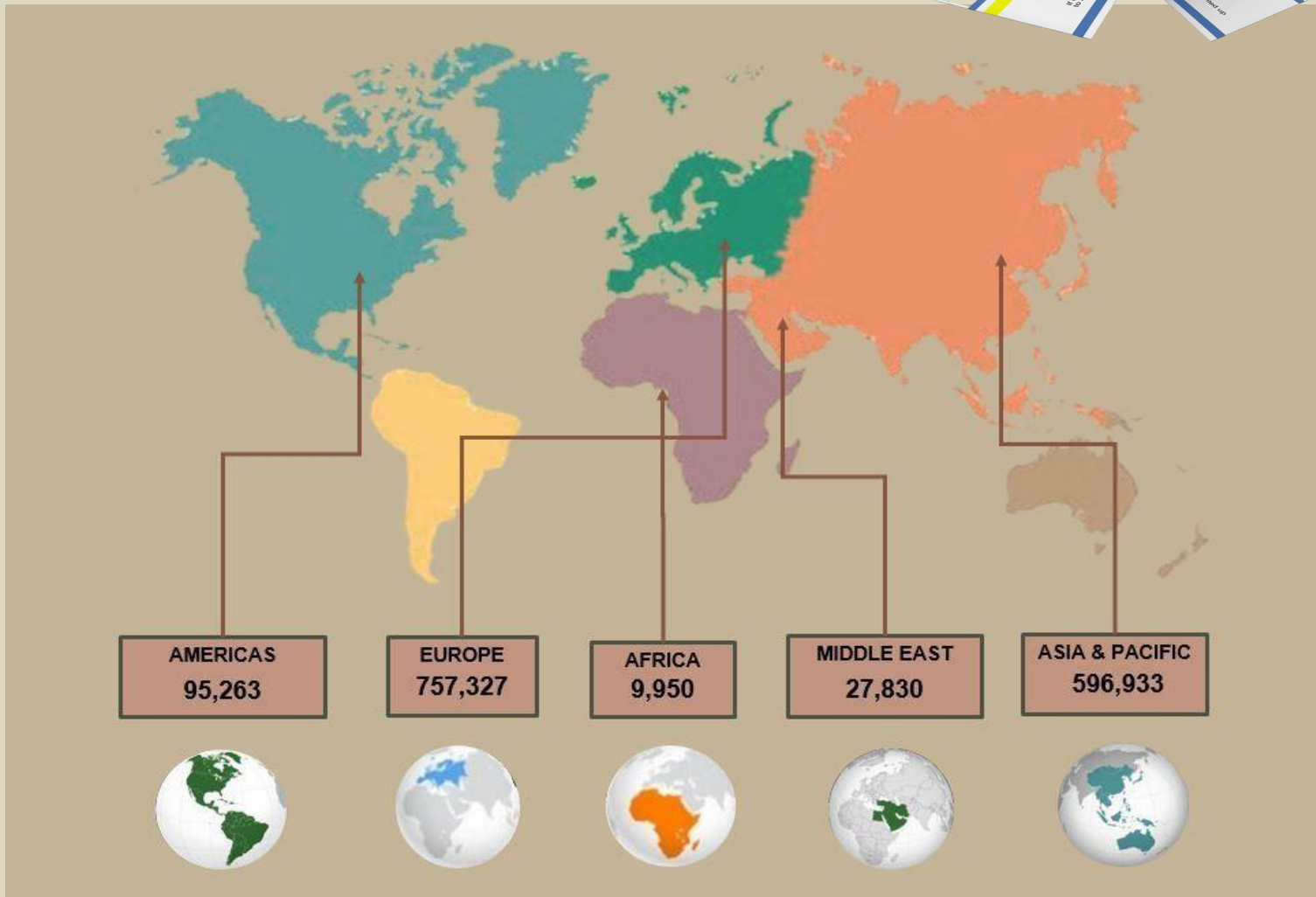
Conversely, May recorded the lowest tourist arrivals, with 83,309 visitors. This decline may be due to less favorable weather conditions or fewer incentives for travel during this period.

Tourist arrivals by region

Figure 01: Tourist arrivals by region

AMERICAS	EUROPE	AFRICA	MIDDLE EAST	ASIA & PACIFIC
95,263	757,327	9,950	27,830	596,933

A breakdown of tourist arrivals by regions indicates that Europe constituted 50.9% of the total arrivals, with notable contributions from countries such as Russia, the United Kingdom, Germany, and France driving this growth. Conversely, a substantial increase in arrivals from India, China, and the Maldives significantly boosted tourist numbers in the Asia and Pacific region, accounting for 40.1% of the total arrivals. The Americas contributed 6.4% to the overall arrivals, while the Middle East comprised 1.9%. Africa held a modest share of 0.7% in total tourist arrivals. These statistics underscore the varied tourism patterns across regions, emphasizing the influence of specific countries and regions on the global tourism landscape.

Tourist arrivals by age and gender

Table: 02: Tourist arrivals by age category, 2023

Chart: 02: Tourist arrivals by gender, 2023

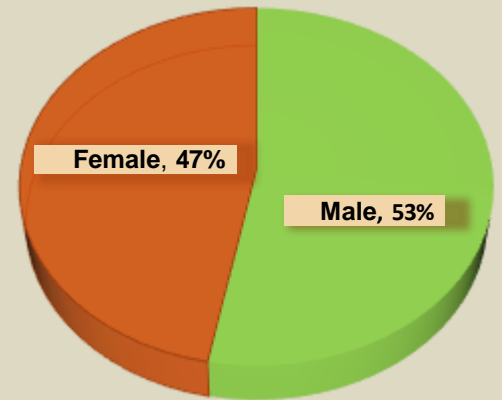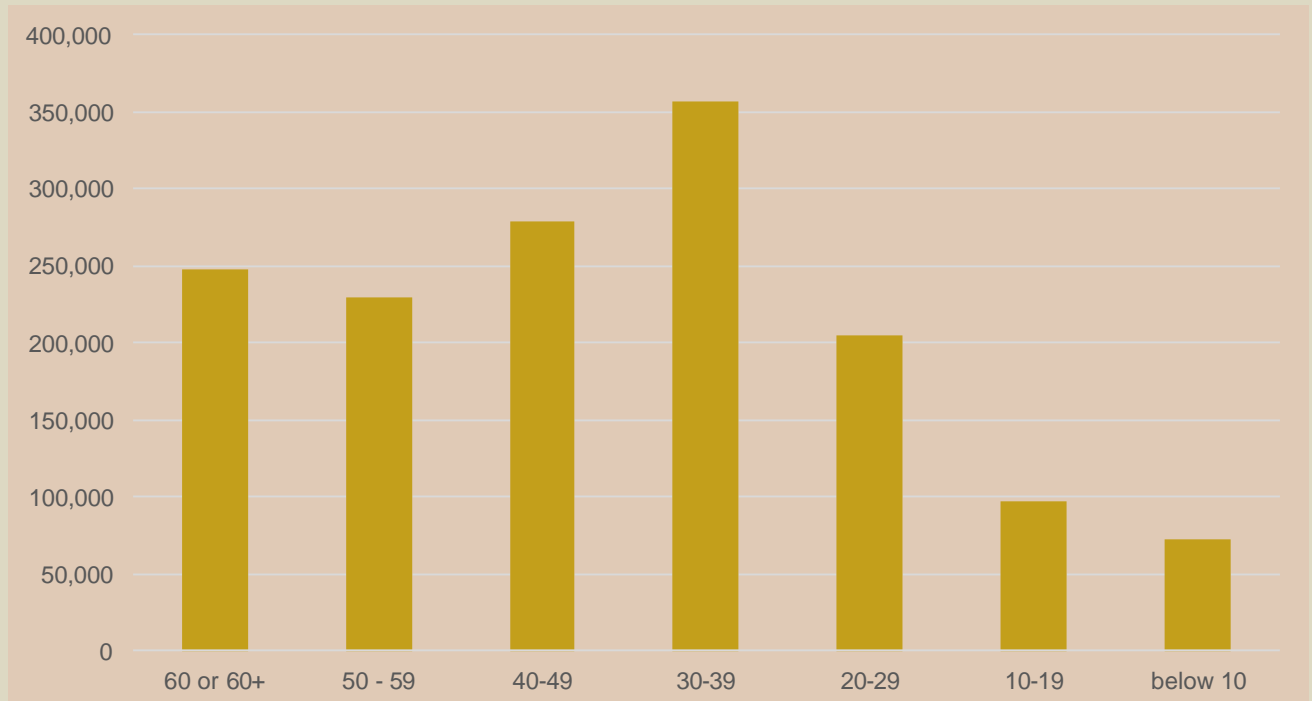| Age	Number of Passengers	% Share
60 or 60+	247,598	16.6
50 - 59	229,756	15.4
40-49	279,414	18.8
30-39	356,105	23.9
20-29	204,672	13.8
10-19	97,164	6.5
below 10	72,594	4.9
Total	1,487,303	100.0

Female, 47%

Male, 53%

Chart: 03: Tourist arrivals by age category, 2023

The distribution of tourist arrivals by age shows that the largest proportion (23.9%) falls within the 30-39 age category. Following closely, 18.8% of tourists belong to the 40-49 age bracket. Those aged 60 or above account for 16.6% of tourist arrivals, while the 50-59 age group comprises 15.4%. Additionally, 13.8% of tourists are in the 20-29 age range.

Gender wise, 53% of tourists were male while 47% of tourists were female.

Top ten source markets -2023

1

INDIA
Arrivals: 302,844
Share   : 20.3 %

2

Russian Federation
Arrivals: 197,498
Share   : 13.2%

3

United Kingdom
Arrivals: 130,088
Share   : 8.7%

4

Germany
Arrivals: 102,539
Share   : 6.8%

5

China
Arrivals: 68,789
Share   : 4.6%

6

Australia
Arrivals: 67,436
Share   : 4.5%

7

France
Arrivals: 56,251
Share   : 3.8%

8

United States
Arrivals: 46,344
Share   : 3.1%

9

Canada
Arrivals: 43,944
Share   : 2.9%

10

**Maldives**
Arrivals: 37,328
Share   : 2.5%

In 2023, Sri Lanka's top source markets for tourism included India, the Russian Federation, the United Kingdom, Germany, and China. India led with 302,844 arrivals, representing 20.3% of the total, followed by the Russian Federation with 197,498 arrivals (13.2%), and the United Kingdom with 130,088 arrivals (8.7%). Germany and China contributed 6.8% and 4.6% respectively, with 102,539 and 68,789 arrivals. Australia, France, the United States, Canada, and the Maldives also featured prominently, each contributing between 2.5% and 4.5% of the total tourist arrivals. This diverse influx of tourists underscores the global appeal of Sri Lanka as a travel destination, despite economic challenges and efforts to revive the tourism sector following the COVID-19 pandemic.

Tourist arrivals from main source markets, 2017 to 2023

Chart: 04 Tourist arrivals from main source markets, 2017 - 2023
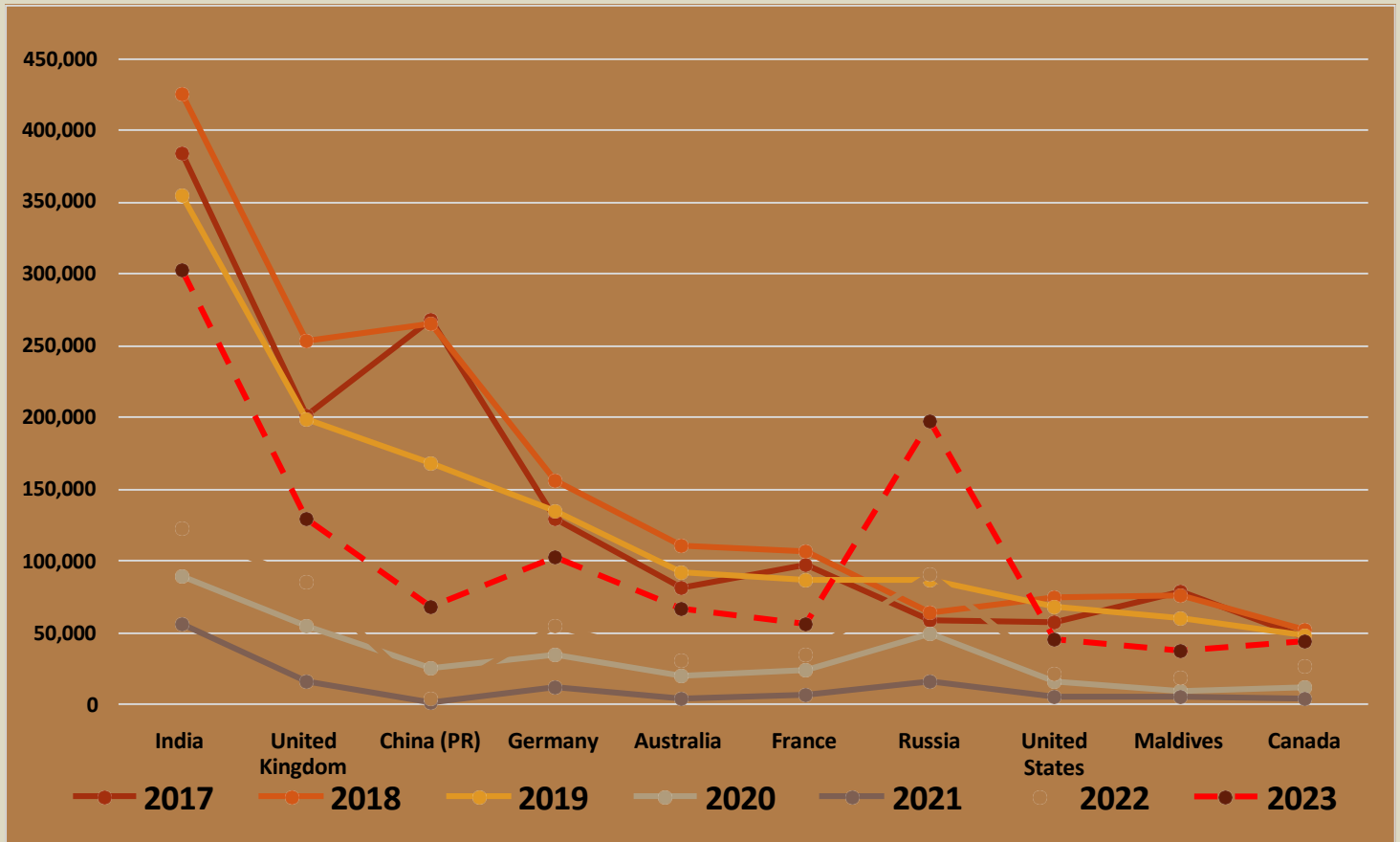
The depicted graph shows the arrival trends from 2017 to 2023 for the primary source markets. It's evident that overall arrivals remain below pre-pandemic levels, except for Russia, which surpasses them. This could be attributed to the conditions arising from the Russia -Ukraine conflict and the growing popularity of Sri Lanka among Russian tourists. Although there's noticeable progress in the Indian market, it still lags behind pre-pandemic figures. Similarly, the decline in arrivals from China is significant. Factors such as border closures, sluggish recovery in outbound travel, and diverse travel preferences among Chinese tourists may contribute to this slow recovery.

Analysis of Purpose of visit

Table 03: Purpose of visit from main source markets

Country	Pleasure/ Vacation	Visiting friends & relatives	MICE	Business	Other	Total
India	191,827	21,225	16,939	44,000	28,853	302,844
Russian Federation	91,335	4,011	13,586	155	88,411	197,498
United Kingdom	66,298	47,397	2,390	2,421	11,582	130,088
Germany	70,959	13,061	3,850	754	13,915	102,539
China	57,230	1,470	3,711	3,794	2,584	68,789
Australia	27,720	31,312	927	1,113	6,364	67,436
France	36,997	10,762	4,207	623	3,662	56,251
United States	23,944	13,426	1,322	1,461	6,191	46,344
Canada	10,355	29,821	583	354	2,831	43,944
Maldives	677	510	47	41	36,053	37,328

Upon analyzing visitor motivations, it's evident that nations like India, Russia, Germany, France, China, and the United States primarily travel for leisure. Conversely, travelers from Canada (67.9%), Australia (46.4%), and the United Kingdom (36.4%) often visit to reunite with family and friends, possibly due to diaspora ties. Notably, Canada's visitors for visiting friends and families surpass those for leisure. Similarly, a considerable portion of UK tourists (36.4%) visit for visiting friends and families. This underscores the importance of promoting Sri Lanka as a leisure destination for Canadian and British tourists. Moreover, a notable 14.5% of Indian tourists visit for business purposes. With India's projected 6.2% economic growth in 2024 and its geographical proximity, Sri Lanka has significant opportunities for development if these factors are effectively leveraged. Furthermore, arrivals from France, India, Russia, and China indicate potential for Meetings, Incentives, Conferences, and Exhibitions (MICE) tourism, which can be further capitalized on.

Chart 05: Tourist arrivals by purpose of visit
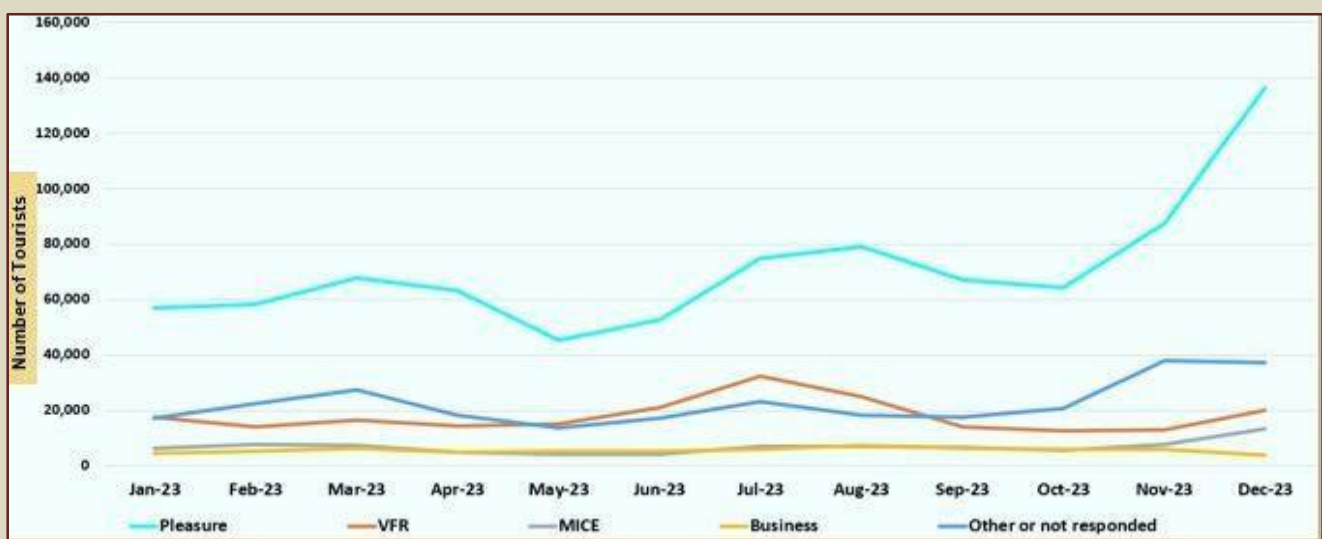
Purpose of visit by month – 2023

Table 04: Purpose of visit by month

Month	Pleasure	VFR	MICE	Business	Other or not responded	Total
January	56,769	17,439	6,417	4,592	17,328	102,545
February	58,124	14,121	7,580	5,367	22,447	107,639
March	67,863	16,495	7,466	6,250	27,421	125,495
April	63,126	14,498	4,754	4,895	18,225	105,498
May	45,329	14,927	4,159	5,190	13,704	83,309
June	52,508	20,942	4,338	5,344	17,256	100,388
July	74,618	32,228	6,893	6,034	23,266	143,039
August	79,026	24,926	7,083	7,288	18,082	136,405
September	67,102	14,121	6,637	6,462	17,616	111,938
October	64,096	12,797	5,560	6,129	20,617	109,199
November	87,325	12,857	7,723	5,835	37,756	151,496
December	136,090	20,044	13,186	3,942	37,090	210,352
	851,976	**215,395**	**81,796**	**67,328**	**270,808**	**1,487,303**

An examination of the purpose of visits to Sri Lanka by month indicates that a majority (851,976) of tourists traveled for leisure, with a notable surge observed from July to December, likely due to holiday festivities and favorable weather conditions. Conversely, business travel registered the lowest number of visitors at 67,328, with August recording the highest business visits at 7,288. Additionally, 81,796 tourists visited for MICE purposes, with peak arrivals noted in February, March, August, November, and December. Visits for social reasons, such as visiting friends and relatives, accounted for the second-highest purpose, constituting 14.4% of total arrivals. Notably, the presence of the Sri Lankan diaspora in countries like the UK, Canada, and Australia influences visitation patterns, with preferred months being June, July, August, and December. These variations throughout the year emphasize the importance of promoting Sri Lanka as a destination that appeals to tourists year-round.

Average duration of Stay
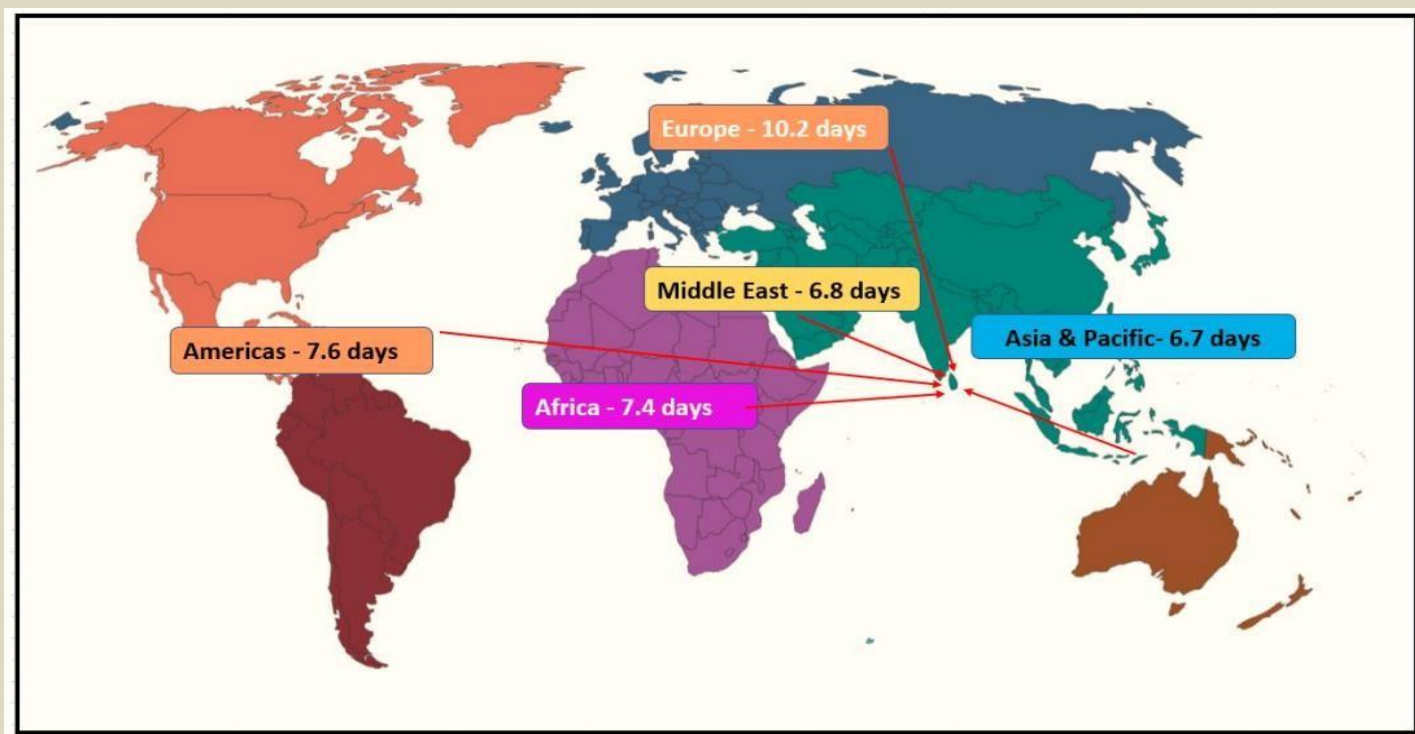
Figure 02: Average duration of stay by regions

Europe - 10.2 days

Middle East - 6.8 days

Asia & Pacific- 6.7 days

Americas - 7.6 days

Africa - 7.4 days

Table: 05   Average duration of stay by source markets

Rank	Country	Number of tourists	Average duration of Stay (Nights)
1	India	302,844	4.60
2	Russian Federation	197,498	10.00
3	United Kingdom	130,088	13.38
4	Germany	102,539	11.93
5	China	68,789	6.42
6	Australia	67,436	10.32
7	France	56,251	11.39
8	United States	46,344	7.32
9	Canada	43,944	11.25
10	Maldives	37,328	5.09
11	Netherlands	29,056	14.10
12	Spain	23,905	9.95
13	Switzerland	23,556	12.93
14	Italy	22,242	10.44
15	Israel	19,517	12.28
16	Japan	19,583	5.58
17	Poland	17,946	10.40
18	Bangladesh	17,846	3.85
19	Czech Republic	12,056	11.28
20	Belgium	10,667	12.89

Tourist arrivals vs duration of stay -2023 (Top ten markets)

Chart: 04 Tourist arrivals vs duration of stay

Tourist arrivals vs Duration of Stay - 2023 (Top 20 Markets)
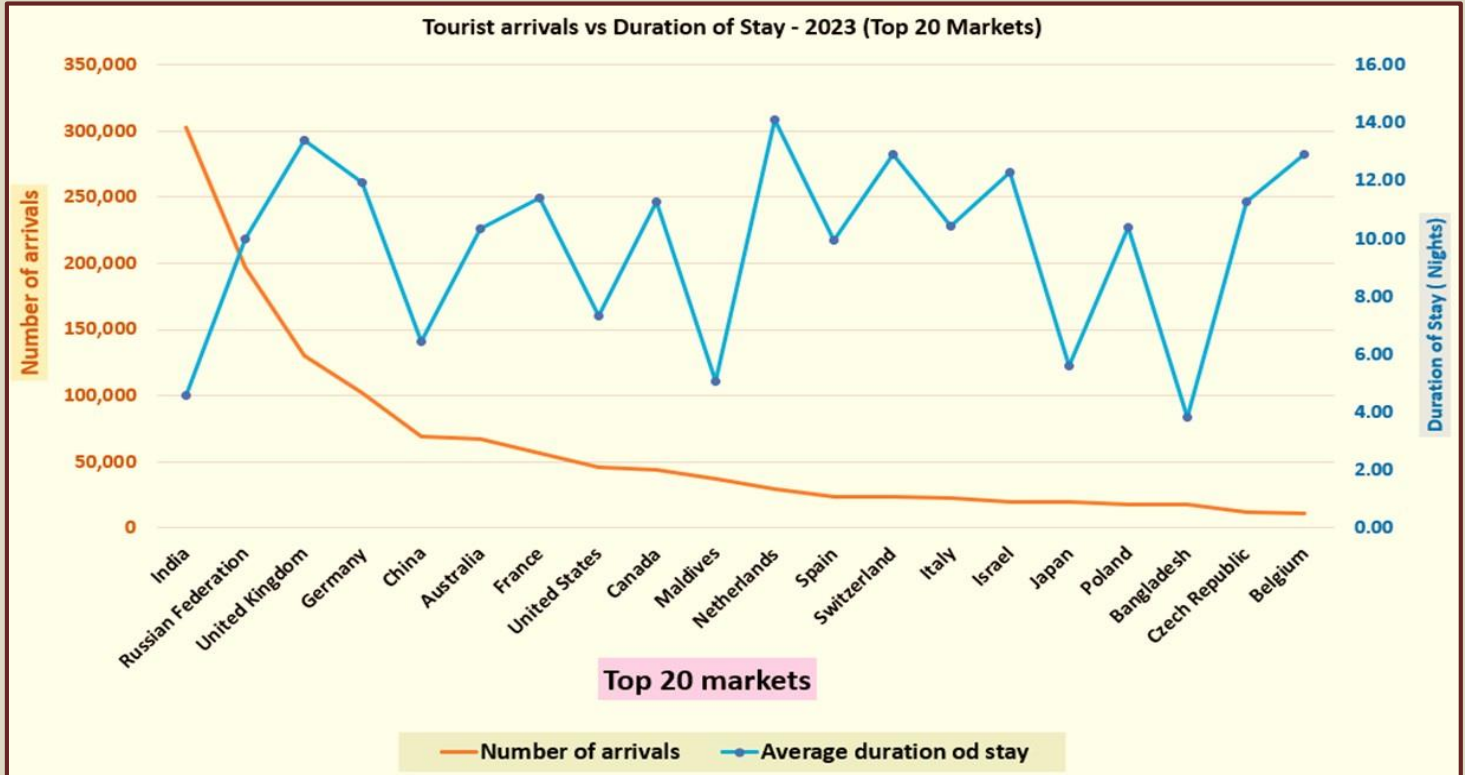
The above data illustrates the average length of stay for key source markets in Sri Lanka. Notably, countries like the Netherlands, the United Kingdom, Switzerland, Belgium, Israel, Germany, France, Canada, and the Czech Republic exhibit extended stays exceeding 11 days. Possible reasons include engagement in emerging niche tourism segments, particularly evident with UK and Canadian visitors staying longer, often for familial visits. Moreover, German tourists predominantly pursue wellness tourism, necessitating prolonged stays. These findings underscore the imperative to promote sustainable niche tourism to optimize Sri Lanka's tourism potential. Conversely, countries such as Bangladesh, India, and the Maldives demonstrate shorter stays, likely due to varied purposes like business or health-related visits. This highlights the urgency to extend the duration of stay for these markets by introducing novel niche tourism experiences that ensure sustainability as well.

Chart 05: Levels of growth Sri Lanka's source markets during 2023
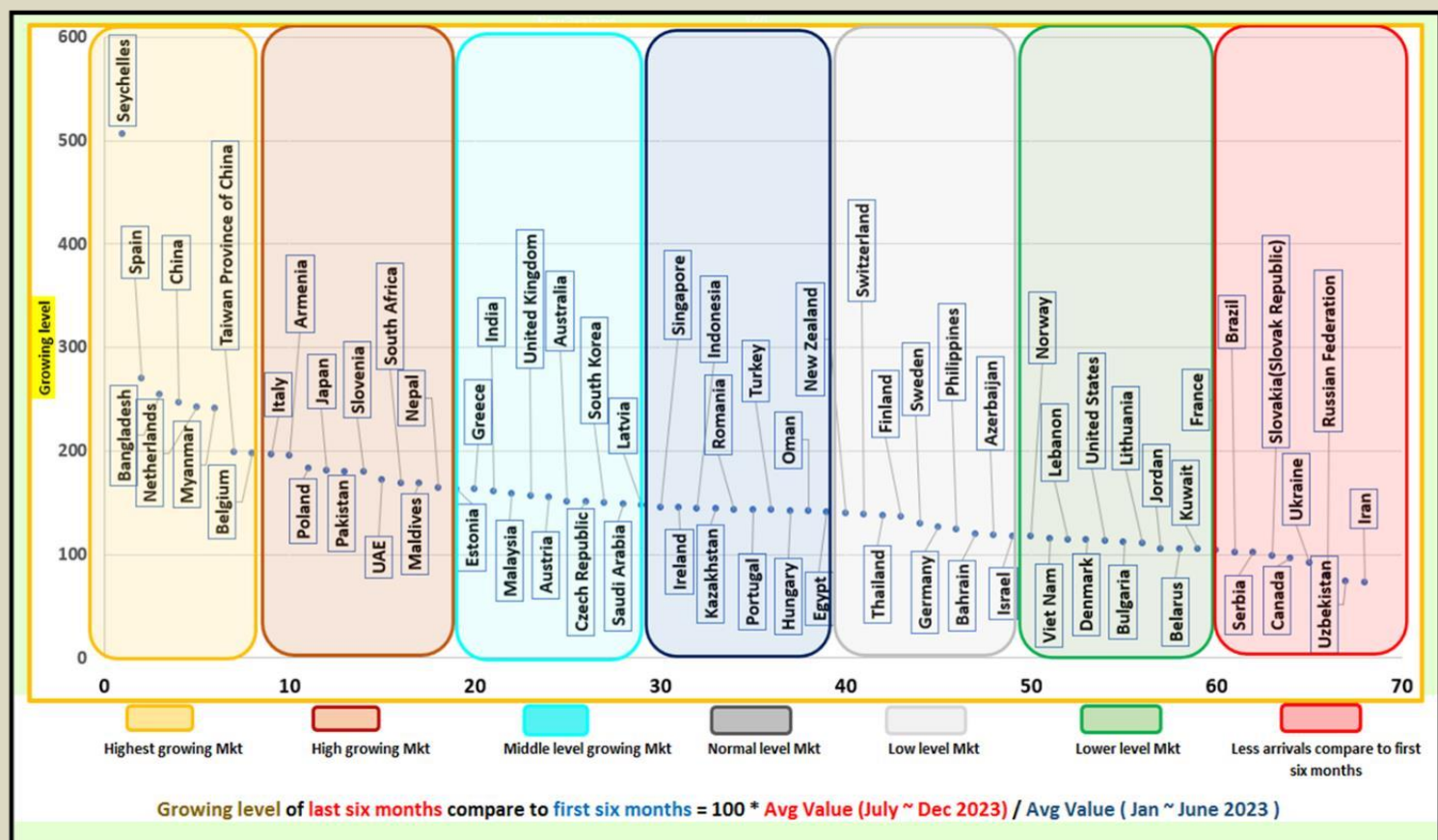
The analysis of tourist arrivals compared from July to December 2023 to January to June 2023 revealed varying growth rates among different source markets. Spain, the Netherlands, China, Belgium, Myanmar, Bangladesh, Taiwan, and the Seychelles demonstrated the most rapid growing rates. Additionally, Poland, UAE, Pakistan, Maldives, Italy, Japan, Armenia, Slovenia, South Africa, and Nepal also showed substantial growth rates. In contrast, India, the United Kingdom, Australia, South Korea, Latvia, Saudi Arabia, the Czech Republic, Austria, Malaysia, Estonia, and Greece exhibited moderate growth levels. Meanwhile, Thailand, Germany, Switzerland, Denmark, and France experienced lower growth rates. Notably, despite being top markets, Russia, Canada, and France had slower recovery levels, potentially influenced by factors such as the Russia-Ukraine war and decreased visitation from Canada, particularly for VFR (Visiting Friends and Relatives) purposes

TOURISM INCOME

Table 06: Income from tourism

Month	Number of tourist arrivals	Average value of the Month **	Average duration of the Month**	Total value (USD Mn) **
January	102,545	164.4	9.11	153.5
February	107,639	164.4	9.13	161.61
March	125,495	164.4	9.15	188.84
April	105,498	164.4	8.55	148.22
May	83,309	164.4	7.30	99.98
June	100,388	164.4	7.44	122.85
July	143,039	164.4	9.31	218.98
August	136,405	164.4	9.39	210.51
September	111,938	164.4	8.27	152.19
October	109,199	164.4	7.61	136.7
November	151,496	164.4	8.24	205.31
December	210,352	164.4	7.79	269.27
Total	**1,487,303**		**8.44**	**2,067.96**

TOURISM ACCOMMODATION AND OTHER SERVICES

2

Table 07: SLTDA registered accommodation establishments, 2022 & 2023

Category	2022		2023	
	Number of establishments	Number of rooms	Number of establishments	Number of rooms
Boutique Hotel	40	845	41	865
Boutique Villa	49	346	51	356
Bungalow	857	3,513	984	4,078
Classified Tourist Hotel	**156**	**15,080**	**168**	**16,686**
1 Star	28	5,931	41	1,852
2 Star	28	3,110	41	2,499
3 Star	26	2,449	26	2,462
4 Star	37	1,903	30	3,590
5 Star	37	1,687	30	6,283
Guest House	1,380	15,438	1,679	18,622
Eco lodge	*	*	1	20
Heritage Bungalow	4	19	4	19
Heritage Home	3	9	2	2
Heritage Hotel	*	*	2	312
Home Stay Unit	1,009	3,049	1,080	3,231
Hostels	11	133	12	143
Rented Apartment	85	323	86	328
Rented Home	10	28	14	41
Themed Accommodation & Value-added Activities	1	11	1	11
Tourist Hotel	224	9,326	221	8,515
Total	**3,829**	**48,120**	**4,346**	**53,229**

* **The registrations of Eco lodge and Heritage Hotels were started from 2023 onwards.**

In 2023, the SLTDA registered a total of 4,346 accommodation establishments. Among them, 168 were classified as tourist hotels, with 30 being five-star. Small and medium enterprises, such as guest houses, homestays, and bungalows, dominated the sector, with 1,679, 1,080, and 984 registered establishments, respectively. Guest houses comprised 38.6% of the sector, followed by homestays at 24.8% and bungalows at 22.6%. Classified tourist hotels accounted for only 3.9%. The total room inventory in 2023 reached 53,229, with guest houses having the highest count of 18,622 rooms, underscoring the significance of small and medium enterprises. Comparing 2023 to 2022,

the number of establishments increased by 13.5%, while the number of rooms increased by 10.6%.

Fluctuations in establishment numbers may stem from several factors: new openings, upgrades/downgrades during renewals, SLTDA registration of service providers, and closures due to COVID-19 and economic challenges. Noteworthy is the growth of small and medium enterprises. In 2023, homestay units rose by 7.03% compared to 2022, while bungalows saw a 14.8% increase. Establishments in categories like Heritage Bungalow and themed accommodation remained stable since 2022. The count of establishments in the Heritage Bungalow and themed accommodation categories has stayed constant since 2022. This sector merits further promotion, especially considering the global trend toward emerging tourism segments.

Room Distribution by Province

Figure 03: Distribution of rooms by province

Table: 08 Distribution of rooms by provinces

Province	Number of Rooms
Western Province	18,095
Southern Province	14,144
Central Province	8,816
Uva Province	2,793
Eastern Province	2,552
North Central Province	2,353
North Western Province	2,149
Sabaragamuwa Province	1,372
Northern province	955
Total	**53,229**
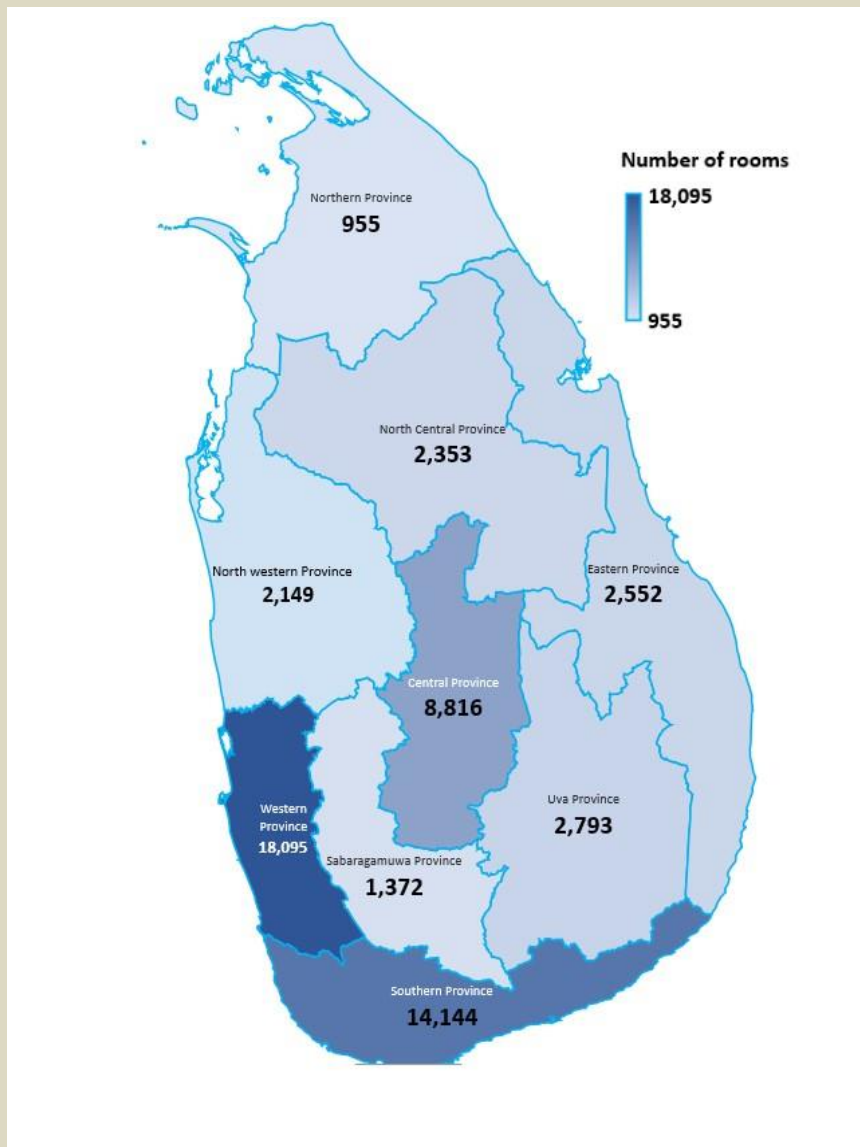
In terms of provincial distribution, the majority of accommodations are concentrated in the Western, Southern, and Central Provinces, collectively representing a significant share of the country's room inventory. Specifically, the Western Province stands out with the highest allocation of rooms, comprising 34% of the total, followed by the Southern and Central Provinces at 26.6% and 16.6%, respectively. Conversely, the Northern Province has a notably lower proportion of rooms, accounting for only 1.8% of the total, indicating a disparity in accommodation distribution across regions. Additionally, the Uva Province contributes 5.2% of the total rooms available.

This distribution underscores a concentration of the accommodation sector in specific regions, potentially limiting the equitable development of tourism across the country. To foster more balanced growth and capitalize on the tourism potential of all provinces, there is a pressing need to diversify tourism development initiatives beyond the Western, Southern, and Central Provinces, ensuring that other regions, including the Northern and Uva Provinces, receive adequate attention and investment. This approach can contribute to a more inclusive and sustainable tourism landscape nationwide.

Room Distribution by Districts

Table 09: Distribution of rooms by districts

District	Number of rooms	Percentage share
Colombo	9545	17.9
Galle	8973	16.9
Gampaha	4603	8.6
Kandy	3956	7.4
Kalutara	3947	7.4
Matara	2694	5.1
Hambantota	2477	4.7
Matale	2451	4.6
Nuwara Eliya	2409	4.5
Badulla	2082	3.9
Anuradhapura	1677	3.2
Puttlam	1509	2.8
Batticaloa	970	1.8
Ampara	800	1.5
Trincomalee	782	1.5
Monaragala	711	1.3
Ratnapura	703	1.3
Polonnaruwa	676	1.3
Kegalle	669	1.3
Jaffna	647	1.2
Kurunegala	640	1.2
Vavuniya	102	0.2
Kilinochchi	97	0.2
Mullaitivu	64	0.1
Mannar	45	0.1
Total	53,229	

Figure: 04   Distribution of rooms by districts
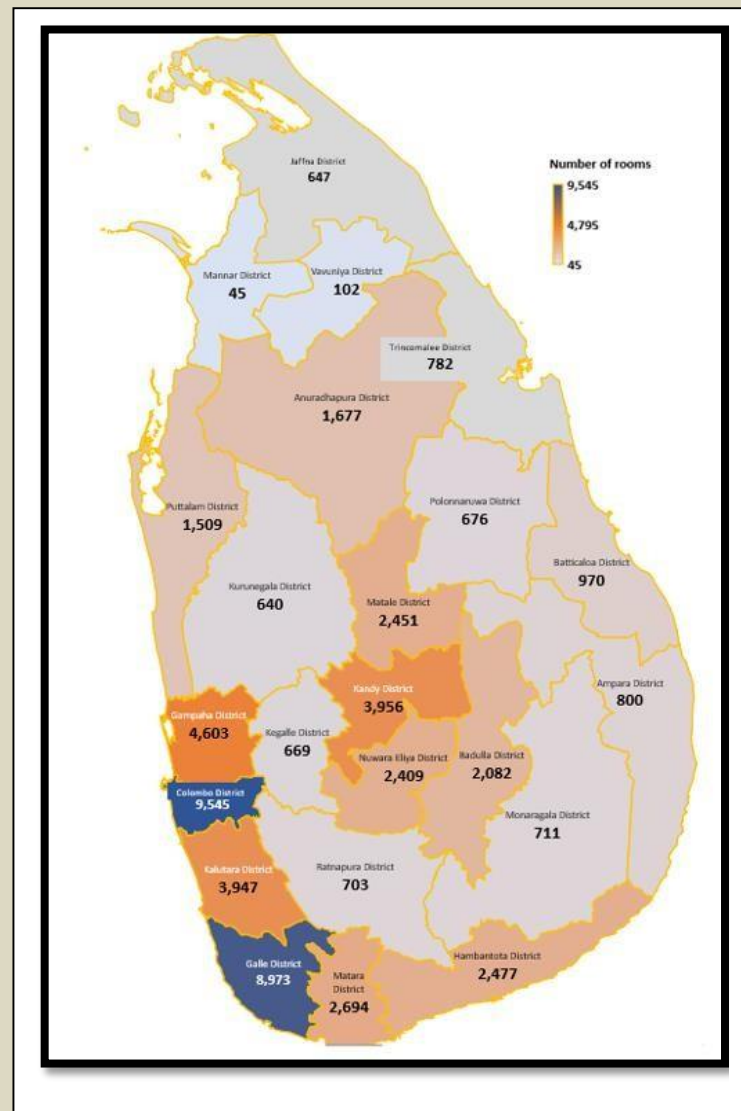
Colombo, Galle, Gampaha, Kalutara, and Kandy districts exhibit a notable concentration of accommodations. Their popularity as tourist destinations or commercial centers likely contributes to this. Colombo, being the capital, serves as a significant hub for business and tourism, whereas Galle is renowned for its historical sites. Gampaha, Kalutara, and Kandy also draw tourists due to their cultural and natural attractions. Conversely, Mullaitivu and Mannar districts have fewer accommodations, highlighting the need to foster tourism in these regions with untapped potential.

Table: 10 Distribution of rooms by star category

Star	Number of Rooms
One	1,852
Two	2,499
Three	2,462
Four	3,590
Five	6,283
Total	**16,686**

Chart: 08 Distribution of rooms by star category
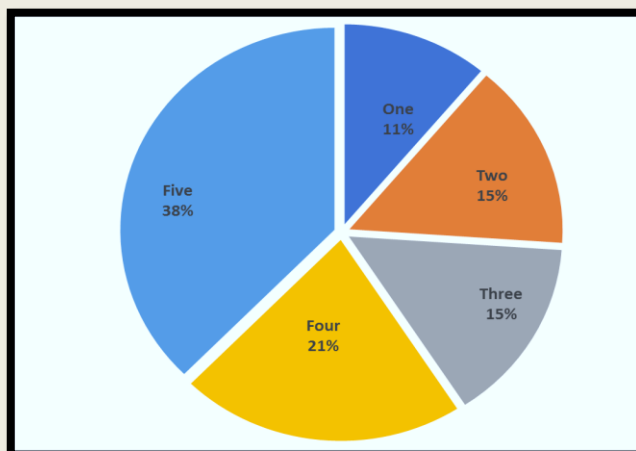
The breakdown of rooms in classified hotels shows that five-star establishments have the largest share, comprising 38% of total rooms. Four-star hotels follow with 21%, while three, two, and one-star accommodations account for 15%, 15%, and 11% respectively.

Table: 11 Distribution of classified hotels by districts

District	Number of Hotels
Colombo	42
Galle	21
Kandy	16
Kalutara	15
Gampaha	12
Matale	10
Nuwara Eliya	10
Hambantota	7
Anuradhapura	7
Trincomalee	4
Puttalam	4
Rathnapura	4
Matara	3
Polonnaruwa	3
Jaffna	3
Batticaloa	2
Kurunegala	2
Monaragala	2
Vavuniya	1
Total	**168**

Table: 12 Distribution of classified hotels by provinces

		Province									
		Western	Central	Southern	North Central	Eastern	North Western	Northern	Sabaraga	Uva	Total
Star Category	**Five**	13	6	9	1	1	0	0	0	0	**30**
	Four	9	9	5	2	2	1	0	1	1	**30**
	Three	10	7	3	2	1	1	2	0	0	**26**
	Two	15	8	9	2	2	3	1	1	0	**41**
	One	22	6	5	3	0	1	1	2	1	**41**
	Total	**69**	**36**	**31**	**10**	**6**	**6**	**4**	**4**	**2**	168

The distribution of tourist accommodations in Sri Lanka showcases a significant concentration in key districts such as Colombo, Galle, Kandy, and Kalutara. Notably, the Western province stands out with 69 classified hotels, with a majority falling into the one-star category, while 13 are categorized as luxurious five-star establishments. This distribution pattern suggests varying levels of accommodation options catering to diverse traveler preferences and budget considerations. Five and four-star hotels are present across all provinces except the Northern province. This highlights the need to targeted investments and development initiatives to promote tourism and economic growth in the province.

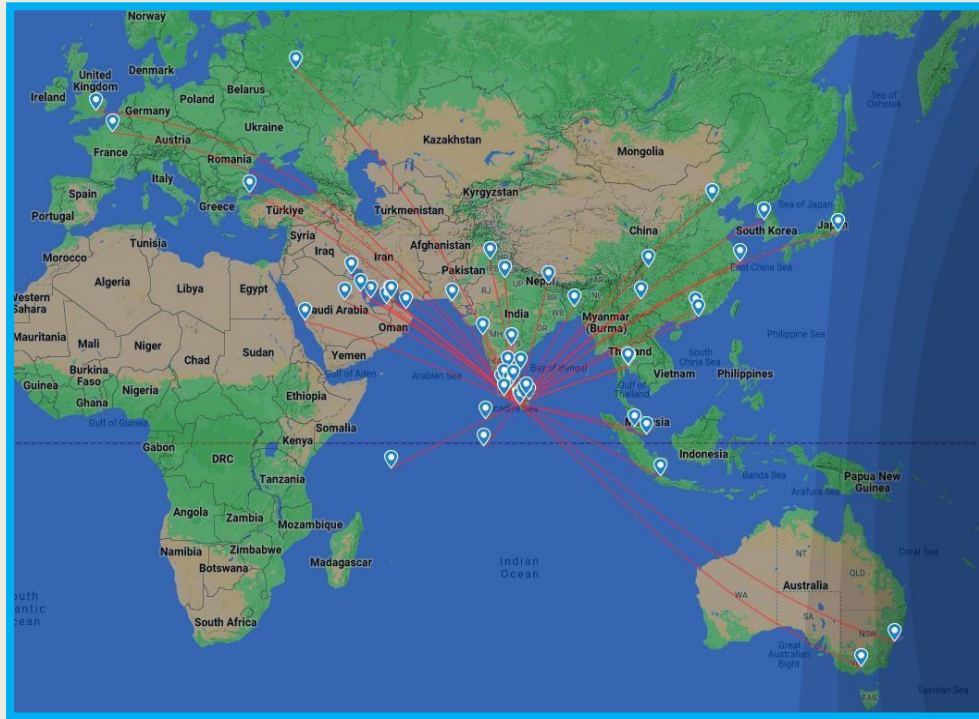## Table: 13 Distribution of other tourism services by districts

District	Camping Sites	Eco lodge	Restaurants	Tourist friendly eating places	Tourist Shops	Water Sports	Spice Garden	Travel agencies	Spa
Ampara			1	4		1		16	
Anuradhapura			13	13				3	
Badulla			9	10					
Batticaloa			3			1		10	2
Colombo			380	80	28	2		771	52
Galle			68	34	8	4	3	29	16
Gampaha			100	23	6	1		197	14
Hambantota	2		14	7				1	6
Jaffna			11	4				1	
Kalutara			18	9	5	5		45	11
Kandy	1		33	27	30			34	7
Kegalle			20	6		3	13	13	1
Kilinochchi			2	3					
Kurunegala			24	5		1		28	1
Mannar									
Matale			19	2	13		24		2
Matara		1	31	22	1	10		6	6
Monaragala	5		11	2					
Mullaitivu			4	3					
Nuwara Eliya			13	4	2			2	4
Polonnaruwa			7	7	1		1		1
Puttalam			16	9		15		19	1
Rathnapura	1		9	4	1			3	1
Trincomalee			5			1		4	2
Vavuniya			1						
Total	9	1	812	278	95	44	41	1,182	127

The concentration of various services, including restaurants, tourist-friendly eateries, shops, travel agencies, and spas, is notable in Colombo. SLTDA-registered water sports centers are predominantly found in Puttlam and Matara districts, while spice gardens are officially recognized in Matale, and Kegalle districts. Camping sites are exclusively situated in Hambantota, Monaragala, Kandy, and Ratnapura districts. Additionally, most travel agencies and spas are primarily located within the Colombo District. Similar to accommodation, the clustering of these tourism-related services is centered on key districts like Colombo and Galle.

AIR CONNECTIVITY

3

Direct air connectivity to and from Sri Lanka to main destinations

Dubai, Doha and Chennai serve as the primary departure airports for tourists traveling to Sri Lanka, collectively contributing to 37.6% of tourist arrivals. This suggests that these airports play a significant role in facilitating tourist travel to Sri Lanka. The strategic location, connectivity, and flight frequency from these hubs likely contribute to their prominence in funneling tourists to the island nation.

Table 14: Main final departure airports to Sri Lanka

Rank	Port	Number of passengers	% share
1	Dubai	230,603	15.5
2	Doha	178,712	12.0
3	Chennai	150,857	10.1
4	Moscow	61,981	4.2
5	London	59,880	4.0
6	Kuala Lampur	53,495	3.6
7	Bangalore	52,020	3.5
8	Delhi	51,324	3.5
9	Mumbai	49,056	3.3
10	Singapore	46,910	3.2
11	Abu Dhabi	41,147	2.8
12	Sharja	37,078	2.5
13	Male	33,060	2.2
14	Shanghai	25,092	1.7
15	Domodedovo	23,426	1.6
16	Melbourne	21,748	1.5
17	Muscat	21,684	1.5
18	Istanbul	21,366	1.4
19	Bangkok	21,163	1.4
20	Paris	20,912	1.4

Rank	Port	Number of passengers	% share
21	Hyderabad	20,747	1.4
22	Zhukovsky	17,634	1.2
23	Bahrain	14,160	1.0
24	Hambanthota	14,093	0.9
25	Vnukovo	12,898	0.9
26	Frankfurt	11,037	0.7
27	Kuwait	10,650	0.7
28	Dhaka	10,347	0.7
29	Kunming	10,108	0.7
30	Sydney	9,416	0.6
31	Narita	9,338	0.6
32	Chengdu	7,900	0.5
33	Guangzhou	6,464	0.4
34	Tiruchchirapalli	6,340	0.4
35	Madurai	6,116	0.4
36	Kochi	6,018	0.4
37	Tolmachevo Novosibirsk	5,694	0.4
38	Kathmandu	4,555	0.3
39	St. Petersburg	4,046	0.3
40	Riyadh	3,808	0.3

Contribution of Airlines on tourist arrivals to Sri Lanka

A breakdown of tourist arrivals by carriers reveals that, Sri Lankan Airlines accounted for 31.3% of the total. The remaining significant contributors were Qatar Airways, Emirates, IndiGo, and Red Wings, contributing 11.7%, 10.9%, 6.6%, and 4.1% of tourists to Sri Lanka, respectively.

#	Airline	Details	#	Airline	Details
1	SriLankan Airlines	Number of passengers: **464,958** Percentage Share: **31.3%**	11	CHINA EASTERN	Number of passengers: **32,243** Percentage Share: **2.2%**
2	QATAR AIRWAYS	Number of passengers: **174,601** Percentage Share: **11.7 %**	10	ETIHAD AIRWAYS	Number of passengers: **30,496** Percentage Share: **2.1%**
3	Emirates	Number of passengers: **161,458** Percentage Share: **10.9%**	11	SINGAPORE AIRLINES	Number of passengers: **29,444** Percentage Share: **2.0%**
4	IndiGo	Number of passengers: **98,778** Percentage Share: **6.6%**	12	airasia	Number of passengers: **26,868** Percentage Share: **1.8%**
5	RED WINGS AIRLINES	Number of passengers: **60,664** Percentage Share: **4.1%**	13	vistara	Number of passengers: **21,609** Percentage Share: **1.5%**
6	flydubai	Number of passengers: **55,698** Percentage Share: **3.7%**	14	TURKISH AIRLINES	Number of passengers: **21,325** Percentage Share: **1.4%**
7	AEROFLOT Russian Airlines	Number of passengers: **42,789** Percentage Share: **2.9%**	15	OMAN AIR	Number of passengers: **16,217** Percentage Share: **1.1%**
8	azurair	Number of passengers: **39,006** Percentage Share: **2.6%**	16	GULF AIR	Number of passengers: **14,239** Percentage Share: **1.0%**
9	AirArabia	Number of passengers: **36,924** Percentage Share: **2.5%**	17	malaysia AIRLINES	Number of passengers:**11,821** Percentage Share: **0.8%**
10	AIR INDIA	Number of passengers: **33,707** Percentage Share: **2.3%**	18	FirstAir Fly the Arctic	Number of passengers:**8,832** Percentage Share: **0.6%**
			19	OTHERS	Number of passengers:**105,626** Percentage Share: **7.1%**

Source: Department of Immigration and Emigration

VISITORS TO MAJOR TOURIST ATTRACTION

4

Visitors to wildlife parks, 2023

Table: 15 Visitors to wildlife parks, 2023

Parks	Local Visitors		Foreign Visitors		Total Visitors	Total Income
	Number of local Visitors	Local Income (Rs)	Number of foreign Visitors	Foreign Income (Rs)		
Yala	251,865	38,050,064	214,572	1,708,426,610	466,437	1,746,476,673
Horton Plains	214,756	30,947,100	30,950	247,267,547	245,706	278,214,647
Udawalawa	98,561	14,575,800	89,827	725,187,069	188,388	739,762,869
Wasgomuwa	9,014	519,980	1,347	5,278,824	10,361	5,798,804
Minneriya *	40,894	4,454,910	21,170	117,657,669	62,064	167,773,687
Bundala	5,587	330,360	4,131	16,075,246	9,718	16,405,606
Horagolla	11,011	431,320	19	29,558	11,030	460,878
Kaudulla	45,564	6,739,800	49,059	385,314,243	94,623	392,054,043
Galoya	9,538	325,530	4,281	6,738,938	13,819	7,064,468
Kumana	21,263	5,390,380	7,267	27,557,142	28,530	32,947,522
Angammedilla	1,031	59,460	02	7,956	1,033	67,416
Galways Land	14,850	795,790	341	1,299,200	15,191	2,094,990
Wilpattu	49,113	7,325,300	24,970	199,439,528	74,083	206,764,828
Maduruoya	1,624	93,130	315	1,177,402	1,939	1,270,532
Lahugala	437	25,170	40	154,234	477	179,404
Pigeon Island	53,992	7,876,310	9,384	65,500,573	63,376	73,376,883
Hikkaduwa	31,062	1,198,250	1,385	2,007,665	32,447	3,205,915
Eth Athuru Sevana	112,080	9,799,070	61,596	99,174,995	173,676	108,974,065
Kalawewa**	766	18,000	121	109,805	887	220,040
Bareef - Kalpitiya	8,135	188,030	1,922	4,994,218	10,057	5,182,248
Mirissa	16,059	1,582,500	60,900	166,058,035	76,959	167,640,535
Girithale	8,610	295,720	104	64,523	8,714	360,243
TOTAL	**1,005,812**	**131,021,974**	**583,703**	**3,779,520,981**	**1,589,515**	**3,956,296,298**

Ticket prices: http://www.documents.gov.lk/files/egz/2022/8/2292-

* Segregated revenue data for local and foreign tourists are not available. (Months of July & August)

** Segregated revenue data for local and foreign tourists are not available. (Month of September)

Source: Department of Wildlife Conservation

An examination of wildlife park visitor numbers reveals that Yala, Horton Plains, Udawalawa, Eth Athuru Sewana, and Kaudulla are the most frequented parks in Sri Lanka. Revenue-wise, Yala, Udawalawa, Kaudulla, Horton Plains, and Wilpattu rank highest. Dome stic visitors account for 63.2% of park visitors, while foreign travelers make up 36.7%. Foreign ticket sales contribute significantly to revenue, comprising 96.6%, compared to domestic sales at 3.3%. Given foreign visitors' substantial revenue contribution, maintaining park standards is crucial.

Top destinations for domestic visitors include Yala, Horton Plains, Eth Athuru Sevana, Udawalawa, and Pigeon Island. For foreign visitors, the preferred parks are Yala, Udawalawa, Eth Athuru Sewana, Mirissa (for dolphin and whale watching), and Kaudulla. Given the high visitation rates at Yala, Udawalawa, and Eth Athuru Sevana by both local and international tourists, it's evident that efforts should be made to redistribute visitors to other parks to alleviate overcrowding. Promoting lesser-known parks like Wasgomuwa and offering innovative activities in these untapped areas can help redirect tourist traffic effectively. Yala, Horton Plains, Udawalawa, Eth Athuru Sewana, and Pigeon Island lead in revenue generation from domestic tourists while Yala, Udawalawa, Kaudulla, Horton Plains and Wilpattu lead in revenue generation from foreign visitors. In 2023, wildlife parks in Sri Lanka attracted 39.2% of total tourist arrivals.

## Chart 09: Visitation of domestic tourists to top Wildlife Parks
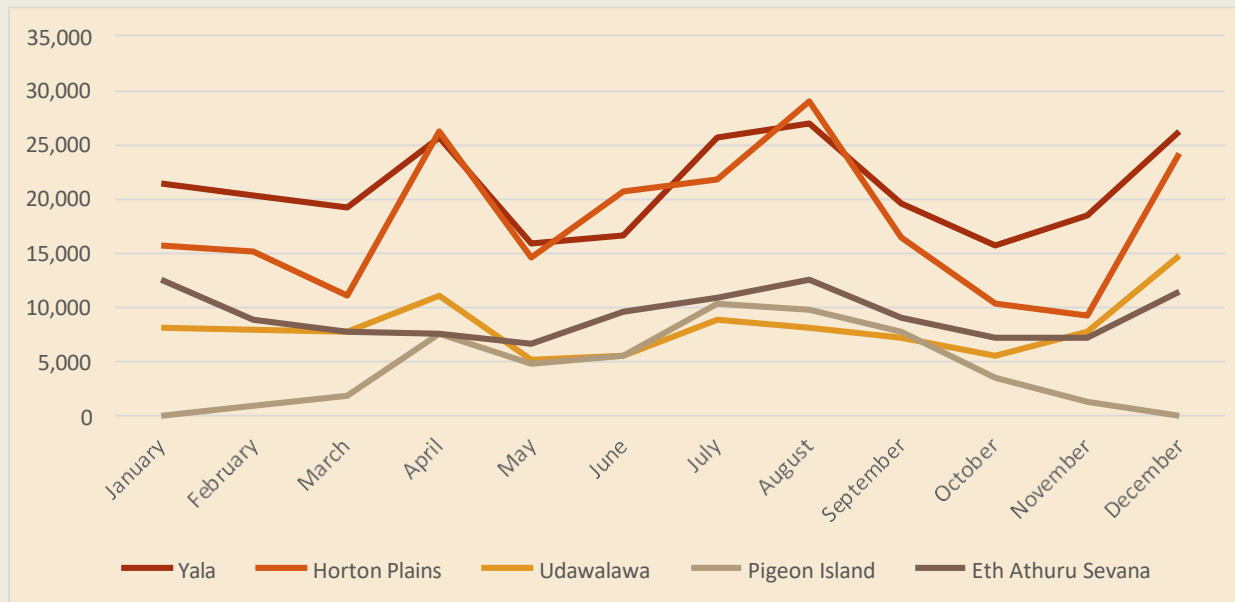
The peak months for domestic tourists visiting wildlife parks are typically April, August, and December, coinciding with school holidays during these periods. This trend reflects the busiest times for these destinations.

Source: Department of Wildlife Conservation

Chart 10: Visitation of Foreign tourists to top Wildlife Park
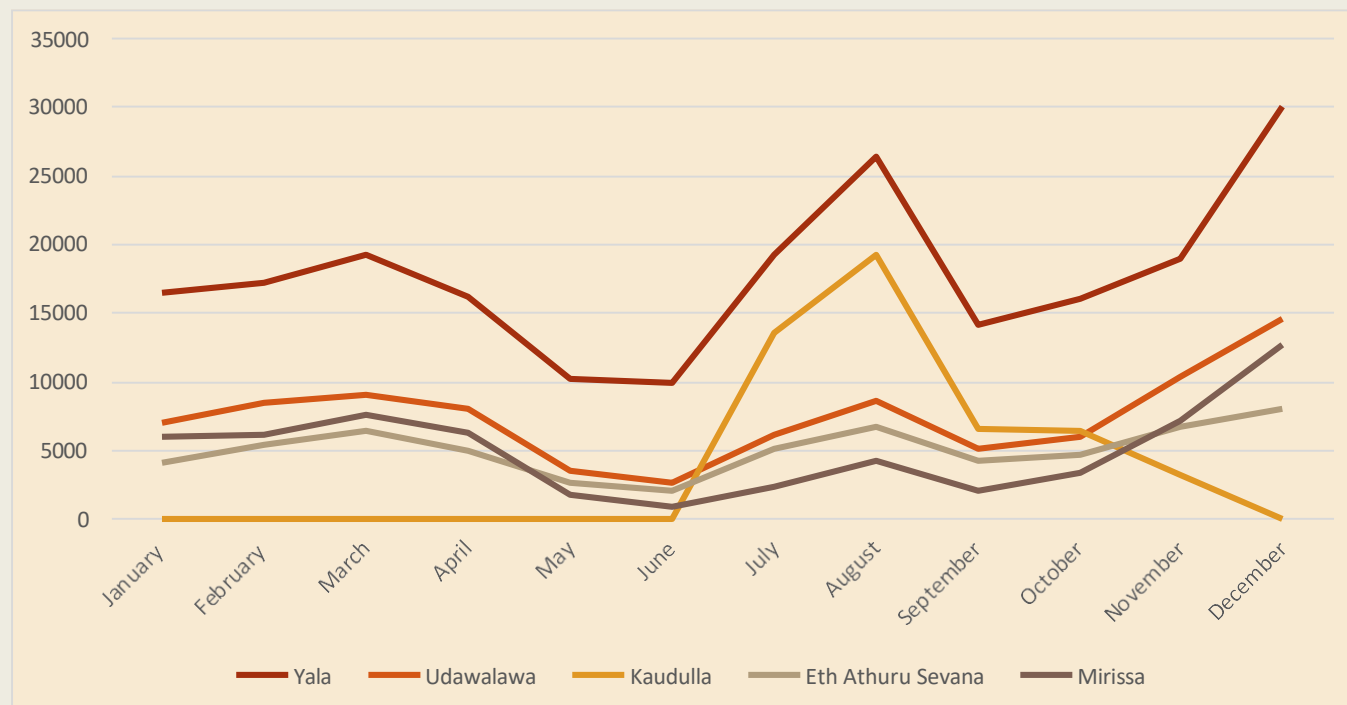
Foreign tourists predominantly visit main wildlife parks during March, August, and December, experiencing a steady influx throughout the remaining months. Conversely, May, June, September, and October witness lower visitation rates. However, Kaudulla National Park experiences its peak season from June, with a gradual decline in visitors until October.

Visitors to conservation forests, 2023

Table: 16 Visitors to conservation forests

| Name of the Forest	Number of visitors		Total	Income without VAT		Total
	Domestic tourists	Foreign tourists		Domestic tourists	Foreign tourists	
Makandawa Conservation Forest	1,491	557	2,048	80,177.88	411,652.54	491,830.42
Kottawa Conservation Forest	1,185	186	1,371	70,481.69	101,582.74	172,064.43
Kanneliya Conservation Forest	33,739	1,726	35,465	2,578,005.35	1,722,260.88	4,300,266.23
Hurulu Eco Park	43,585	67,618	111,203	7,337,913.05	115,617,391.31	122,955,304.36
Sinharaja Conservation Forest	45,153	12,232	57,385	4,799,505.53	12,021,188.57	16,820,694.10
Udawattakele Conservation Forest / Kandy	21,781	3,947	25,728	1,177,126.45	3,044,352.33	4,221,478.78
Knuckles Conservation Forest	123,223	17,982	141,205	7,147,193.88	3,047,214.32	10,194,408.20
Kurulukele	1,765	0	1,765	94,990.18	0.00	94,990.18
Nuwaragala (Ampara)	1,166	0	1,166	143,374.72	7,826.00	151,200.72
Rathna Ella (Kandy)	5,076	638	5,714	303,565.37	471,842.98	775,408.35
Mandaramnuwara (Nuwara Eliya)	14,227	03	14,230	847,824.80	2,347.80	850,172.60
Piduruthalagala (Nuwara Eliya)	15,362	54	15,416	857,685.31	40,695.20	898,380.51
Badagamuwa Ecological Zone (Kurunegala)	5,752	01	5,753	234,956.49	521.73	235,478.22
Galwila Eco Park (Puttlam)	153	09	162	15,285.00	6,885.00	22,170.00
Dolukanda (Kurunegala)	2,119	07	2,126	133,649.75	4,590.00	138,239.75
Badulla Haputhale	8,336	10,972	19,308	492,140.70	7,779,054.42	8,271,195.12
Geradigala	278	01	279	29,009.30	782.61	29,791.91
Yahangala	82	02	84	8,556.70	1,565.22	10,121.92
Kande Ela Nuwara Eliya	371	0	371	13,343.52	0.00	13,343.52
Gal Oya	654	2,401	3,055	67,095.64	1,866,130.44	1,933,226.08
Ek Gal Oya	205	0	205	0.00	0.00	133,200.00
Total	**325,703**	**118,336**	**444,039**	**26,431,881.3**	**146,147,884.09**	**172,712,965.40**

Source: Forest Department, Sri Lanka

Of all visitors to conservation forests, 73.3% are domestic tourists, while 26.6% are foreign tourists. Regarding revenue, domestic tourists contribute 15.3%, whereas foreign tourists contribute 84.6%. Additionally, 7.9% of tourists, out of total tourists that visited Sri Lanka have visited the conservation parks.

In the year 2023, Sri Lanka's forests witnessed a diverse influx of visitors, both domestic and foreign, each contributing to the country's tourism sector in unique ways. Among these natural sanctuaries, Knuckles Conservation Forest emerged as a beacon of attraction, drawing in a substantial number of 123,223 domestic visitors and 17,982 foreign visitors. Its appeal likely lies in its pristine beauty and rich biodiversity, making it a must-visit destination for nature enthusiasts. According to the statistics, Hurulu Eco Park stands out as the top destination among foreign tourists, with Knuckles and Sinharaja forests following closely behind.

Despite ranking second in terms of total visitors, Hurulu Eco Park stood out with its exceptional income generation. By leveraging its unique selling points and addressing any shortcomings, Hurulu Eco Park can further solidify its position as a premier eco-tourism destination, contributing significantly to Sri Lanka's sustainable tourism landscape. Additionally, there is potential in it for further development to redirect tourists from overcrowded parks facing carrying capacity issues. Tourism predominates across most forests, showcasing the allure of Sri Lanka's natural heritage on an international scale. However, notable exceptions like Kurulukele and Nuwaragala (Ampara), Kande Ela, Ekgal Oya indicate untapped potential in attracting more foreign tourists to these forests. Hurulu Eco Park, Sinharaja, and Knuckles emerge as the top revenue-generating forest reserves. This likely stems from their pristine biodiversity, attracting visitors. Hurulu Eco Park, particularly, benefits from its proximity to tourist hotspots like Sigiriya, enhancing its appeal
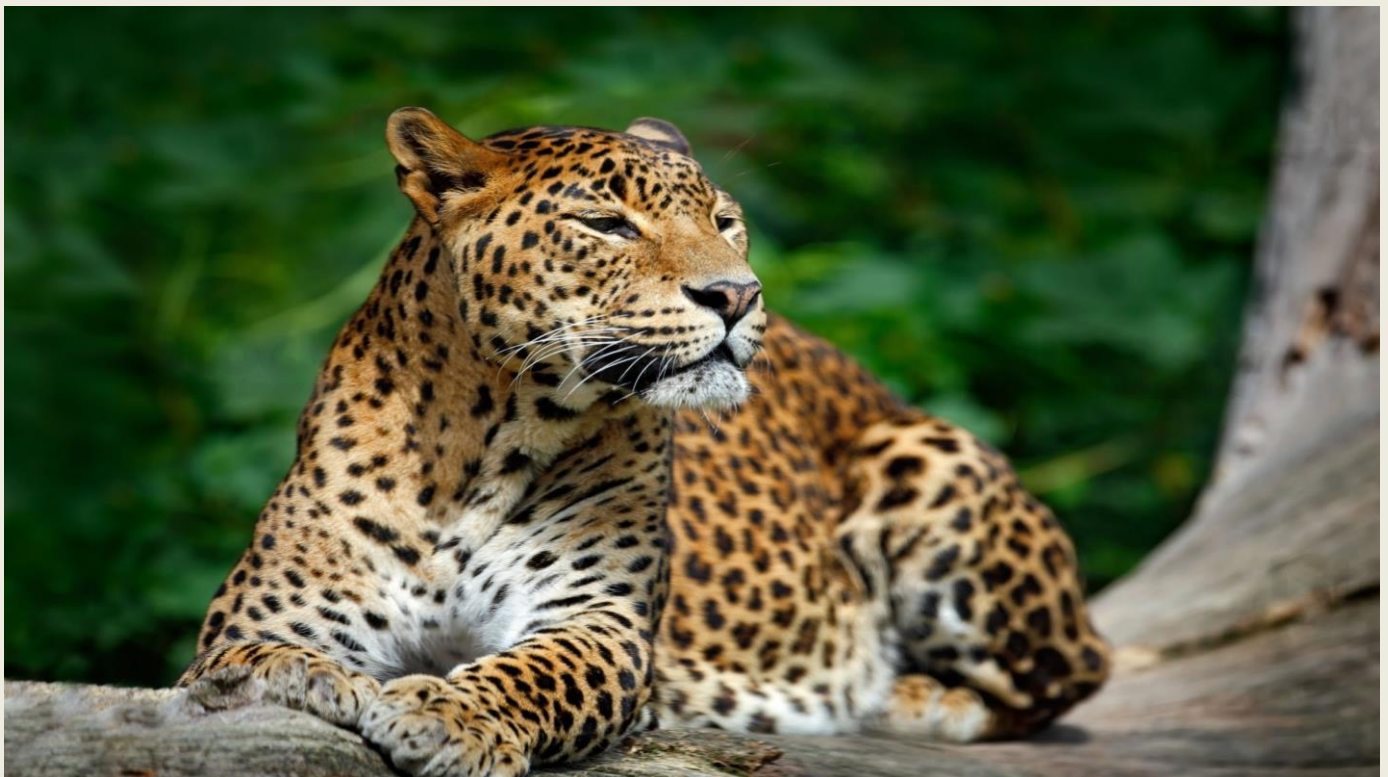
# Visitors to tourist attractions administered by Central Cultural Fund

Table: 17 Visitors to tourist attractions administered by Central Cultural

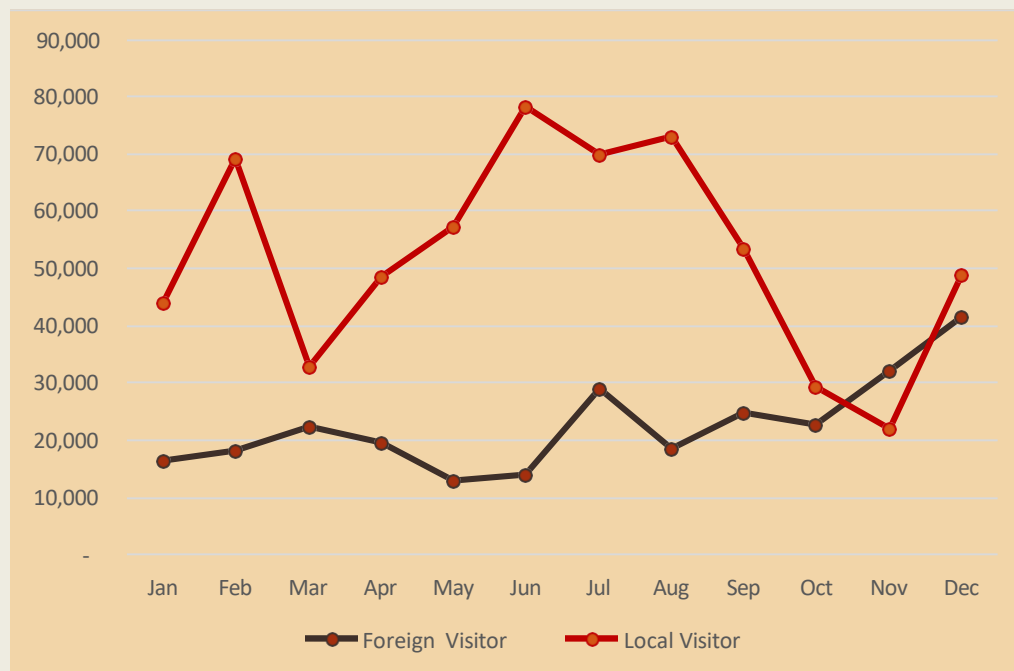| Locations	Number of foreign visitors	Number of local visitors	Total number of visitors	Local Visitor income	Foreign visitor income	Total visitor income
Abhayagiriya	984	18,681	19,665	1,738,300	8,240,425	9,978,725
Jethawanaya	40,390	14,902	55,292	1,317,713	278,882,489	280,200,202
Sigiriya Museum and Sigiriya Rock	272,475	627,712	900,187	57,793,950	2,373,358,021	2,431,151,971
Polonnaruwa Gal viharaya,Museum & Kingdom	109,915	27,794	137,709	2,602,375	772,915,599	775,517,974
Kandy Museum	211	9,269	9,480	407,000	66,129	473,129
Galle Museum	10,555	54,050	64,605	4,499,950	17,078,440	21,578,390
Ramba Viharaya	76	0	76	0	48,576	48,576
Jaffna Fort	10,292	244,827	255,119	6,972,210	12,013,301	18,985,511
Katharagama Museum	52	4,606	4,658	417,700	99,328	517,028
Ampara lahugala	360	0	360	0	112,528	112,528
Rathugala	201	0	201	24,583	100,457	125,040
Buduruwagala	22,996	0	22,996	0	14,776,892	14,776,892
Dambulla Museum	270	687	957	64,200	163,035	227,235
Ritigala forest Monastery	7,121	30,559	37,680	1,398,698	9,591,066	10,989,764
Ibbankatuwa Ancient Bural Ground	689	18,949	19,638	1,732,250	414,084	2,146,334
Trincomelee	350	5,047	5,397	491,900	947,856	1,439,756
Namal Uyana	1,041	41,541	42,582	1,828,532	1,251,786	3,080,318
Total	**477,978**	**1,098,624**	**1,576,602**	**81,289,361**	**3,490,060,010**	**3,571,349,371**

Source: Central Cultural Fund, Sri Lanka

Visitor and revenue data from sites overseen by the Central Cultural Fund indicate that 477,628 foreign visitors, comprising 32.1% of Sri Lanka's total tourist arrivals, have visited these locations. Among foreign tourists, Sigiriya Museum and Sigiriya Rock, Polonnaruwa Gal Viharaya, Museum & Kingdom, and Jethawanaya are favored historical sites. For domestic tourists, top attractions include Sigiriya Museum and Sigiriya Rock, Jaffna Fort, and Galle Museum. Sigiriya Museum and Sigiriya Rock, Jaffna Fort, and Polonnaruwa Gal Viharaya, Museum & Kingdom record the highest visitor numbers overall. Regarding revenue, Sigiriya Museum and Sigiriya Rock, Polonnaruwa Gal Viharaya, Museum & Kingdom, and Jethawanaya are the leading revenue-generating destinations. Extending the opening hours of Sigiriya to facilitate sunrise viewing from its summit could have enhanced its growing appeal to both domestic and international tourists. This underscores the significance of value addition of such destinations to enhance their allure. Sigiriya stands out for its popularity and revenue among both foreign and domestic visitors, emphasizing the need for effective visitor management to ensure its long-term sustainability.
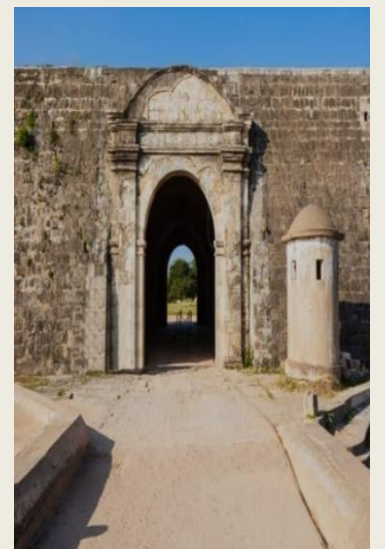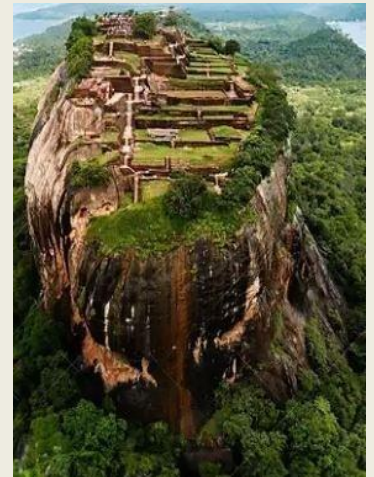
Chart 11 : Tourist visitation at Sigiriya

Visitors to Botanical Gardens, 2023

Location	Foreign Tickets		Local Tickets		Total
	Number of Foreign Tourists	Revenue RS .(000)	Number of Domestic Tourists	Revenue RS .(000)	Revenue RS .(000)
Peradeniya	211,677	528,319,700.00	977,869	112,456,710.00	640,776,410.00
Hakgala	14,844	36,657,500.00	548,742	63,270,140.00	99,927,640.00
Gampaha	165	1,244,500.00	129,506	17,073,700.00	18,318,200.00
Mirijjawila	753	1,818,000.00	65,416	6,612,940.00	8,430,940.00
Avissawella	285	600,523.00	202,965	23,569,450.00	24,169,973.00
Ganewattha	5	11000.00	631	78,220.00	89,220.00
Total	**227,729**	**568,651,223.00**	**1,925,129**	**223,061,160.00**	**791,712,383.00**

Source: Department of National Botanical Gardens

In 2023, the botanical gardens of Sri Lanka saw significant variance in both visitor numbers and revenue generation across different locations. Peradeniya emerged as the most visited and highest-earning garden. It attracted 211,677 foreign tourists, generating RS 528,319,700.00 in revenue from this group. Comparatively, 977,869 local tourists visited, contributing RS 112,456,710.00. The total revenue for Peradeniya was RS 640,776,410.00. Foreign tourists constituted approximately 17.8% of the total visitors but were responsible for a substantial 82.4% of the garden's total revenue. Hakgala Botanical Garden follows with significantly fewer visitors but still notable numbers, particularly 14,844 foreign tourists and 548,742 local tourists, contributing to a total revenue of RS 99,927,640.00. Gampaha, Mirijjawila, Avissawella, and Ganewattha have considerably fewer visitors and revenue.

Ganewattha saw the least number of visitors overall. Only 5 foreign tourists visited, resulting in RS 11,000.00 in revenue, while 631 local tourists generated RS 78,220.00. The total revenue was RS 89,220.00. Foreign visitors were 0.8% of the total, contributing 12.3% to the revenue.

Across all gardens, the cumulative total of 227,729 foreign tourists generated RS 568,651,223.00, while 1,925,129 local tourists contributed RS 223,061,160.00. This totals to RS 791,712,383.00 in revenue for 2023. Foreign visitors accounted for 10.6% of the total visitors but generated a remarkable 71.8% of the overall revenue. This disparity underscores the significant financial impact foreign tourists have on these botanical gardens despite their smaller numbers.

Visitors to Museums, 2023

Museums	Foreign Tickets		Local Tickets	
	Number of Foreign Tourists	Revenue (In Rs.)	Number of Local Tourists	Revenue (In Rs.)
Colombo National Museum	32,645	40,041,143	181,923	11,309,190
Natural History Museum	4271	5,399,100	90,462	5,154,180
Dutch Museum *	0	0	0	0
Independence Memorial Museum	1086	535,400	14,093	483,390
Hambantota National Museum	228	124,200	1444	62,630
Rathnapura National Museum	120	68,300	25,747	1,735,635
Galle National Museum	3464	1,874,200	31,772	1,034,025
Galle Maritime Museum	3452	1,858,800	41,538	1,441,485
Anuradapura Folk Museum	0	0	0	0
Kandy National Museum	1966	1,169,000	19,657	1,262,820
Polonnaruwa Museum	107	124,800	46,654	2,885,850
Total	47,339	51,194,943	453,290	25,369,205

In 2023, the visitor and revenue data for museums in Sri Lanka showcase significant trends and insights Into the patterns of tourism. The total number of foreign tourists across all museums was 47,339, generating Rs. 51,194,943, while the total number of local tourists was significantly higher at 453,290, with a revenue of Rs. 25,369,205. Foreign tourists contributed 66.8% to the total revenue, highlighting the significant impact of international tourism on the museum sector in Sri Lanka. Local tourists, though more in number, contributed 33.13% to the total revenue. This disparity is reflected in the different pricing structures for the two categories. The Colombo

Smaller museums like the Polonnaruwa Museum and the Rathnapura National Museum had minimal foreign visitors but still contributed to the local tourist numbers. Overall, the museums significantly benefitted from local tourists both in terms of numbers and revenue, although foreign tourists generated higher revenue, particularly at prominent museums such as the Colombo National Museum.

Source: Department of Museums

Visitors to Zoological Gardens, 2023

Location	Year	Domestic Tourists		Foreign Tourists		Total	Revenue
		Number	Revenue	Number	Revenue	Number	
Dehiwala	2022	1,278,222	177,929,600	7,112	14,329,800	1,285,334	192,259,400
	2023	**1,272,912**	**242,911,660**	**15,837**	**55,062,934**	**1,288,749**	**297,974,594**
Pinnawala	2022	345,986	44,804,110	45,872	110,245,750	391,858	155,049,860
	2023	**452,559**	**82,131,470**	**114,867**	**434,253,786**	**567,426**	**516,385,256**
Pinnawala Zoo	2022	248,991	33,631,410	1,871	1,249,800	250,862	34,881,210
	2023	**263,407**	**48,253,570**	**14,458**	**19,723,848**	**277,865**	**67,977,418**
Safari Park	2022	254,836	81,659,230	2,741	7,321,600	257,577	88,980,830
	2023	**221,938**	**84,595,200**	**5,138**	**19,710,277**	**227,076**	**104,305,477**
Total	2022	2,128,035	338,024,350	57,596	133,146,950	2,185,631	471,171,300
	2023	**2,210,816**	**457,891,900**	**150,300**	**528,750,845**	**2,361,116**	**986,642,745**

Source: National Zoological Gardens

In 2023, generally there were notable increases in both the number of visitors and revenue across all zoological gardens compared to 2022. Specifically, Dehiwala Zoological Garden saw a slight decline in domestic tourists by 0.4%, from 1,278,222 to 1,272,912, but an increase in foreign tourists by 122.6%, from 7,112 to 15,837. Pinnawala Elephant Orphanage experienced a substantial increase in domestic tourists by 30.8%, from 345,986 to 452,559, and foreign tourists by 150.4%, from 45,872 to 114,867. Consequently, its total revenue surged by 233%, from 155.05 million to 516.39 million. Pinnawala Zoo also saw growth, with domestic tourists increasing by 5.8%, from 248,991 to 263,407, and foreign tourists by 672.8%, from 1,871 to 14,458. This resulted in an overall revenue increase of 94.9%, from 34.88 million to 67.98 million.

Safari Park reported a decrease in domestic tourists by 12.9%, from 254,836 to 221,938, while foreign tourists increased by 87.5%, from 2,741 to 5,138. This led to a revenue increase of 17.3%, from 88.98 million to 104.31 million. Overall, the total number of visitors to all zoological gardens rose by 7.4%, from 2,185,631 to 2,361,116, with domestic tourists increasing by 3.9% and foreign tourists by 161%. The total revenue for all locations combined grew dramatically by 109%, from 471.17 million to 986.64 million.

TOURISM INVESTMENT

5

Table 18: Investment Projects received since 2010 to 31ˢᵗ December 2023

No	District	Total Projects	Rooms	Investment value (USD Mn)
1	Ampara	31	439	15.427
2	Anuradhapura	15	286	9.822
3	Badulla	29	711	67.28
4	Batticaloa	28	702	64.71
5	Colombo	86	9,530	2,874.647
6	Galle	161	5,307	544.313
7	Gampaha	50	3,182	305.423
8	Hambantota	72	2,761	714.379
9	Jaffna	47	983	101.1454
10	Kalutara	43	1,885	207.082
11	Kegalle	5	215	15.588
12	Kurunegala	3	87	5.64
13	Kandy	52	2,269	274.437
14	Kilinochchi	3	64	1.32
15	Manar	9	137	3.19
16	Monaragala	4	57	1.84
17	Matara	87	2,055	238.964
18	Matale	53	1,827	152.414
19	Mullaitivu	1	99	7.4
20	Nuwara Eliya	29	1,592	234.799
21	Polonnaruwa	4	129	4.212
22	Puttlam	29	1,317	112.515
23	Ratnapura	7	117	10.06
24	Trincomalee	46	1,435	142.511
25	Vavuniya	4	86	1.88
	Total	**898**	**37,272**	**6,111.00**

By the end of 2023, Galle, Colombo, and Matara had attracted the most investment projects, totaling 161, 86, and 87 projects respectively. The Southern Province is evidently becoming a prominent destination for tourism accommodation investments. Likewise, investments in Colombo, Galle, and Gampaha will result in the highest number of rooms available. In terms of investment value, Colombo, Hambantota, and Galle emerged as the top contenders. As of December 31, 2023, a total of 898 projects were received, collectively representing a substantial investment value of USD 6,111 million.

Number of investment projects received and approved

Table: 19 Investment projects received and approved

Year	Received Projects			Approved Projects		
	Number of projects received	Number of rooms	Investment /USD Mn.	Number of projects approved	Number of rooms	Investment /USD Mn.
2010	54	4437	938.87	3	262	17.17
2011	155	8951	1,187.63	44	2159	251.57
2012	72	3942	576.24	57	3695	313.22
2013	60	4098	1123.195	36	2327	370.64
2014	68	3764	957.79	42	2747	426.398
2015	59	3469	430.98	36	2256	889.945
2016	76	3916	588.96	41	1579	145.633
2017	95	2974	314.82	45	2391	379.77
2018	141	4051	935.06	44	1377	159.724
2019	132	2567	189.90	57	2027	755.73
2020	54	1699	837.85	24	690	95.47
2021	45	1328	133.73	30	922	103.985
2022	42	1054	68.437	22	393	36.833
2023	68	1950	237.702	34	1273	170.126
Total	**1,121**	**48,200**	**8,521.153**	**515**	**24,098**	**4,116.214**

In 2023, 68 investment projects were received, but only 34 projects received approval. These approved projects amounted to a total value of USD 170.126 million. Additionally, these projects will contribute 1273 new rooms to the inventory.

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