Exploring Visitor Arrival Trends and Travel Dynamics in Sri Lanka: Insights from Telecommunication Data

CONTENTS

01   Background

In the realm of modern tourism management and strategic planning, the utilization of unconventional data sources has become imperative to garner comprehensive insights. Recognizing the significance of this paradigm shift, the Sri Lanka Tourism Development Authority (SLTDA) embarks on a pioneering initiative, venturing into uncharted territories by harnessing telecommunication data to unravel the intricacies of tourist arrival trends and travel dynamics within the landscapes of Sri Lanka.

For the first time, this report delves into the rich tapestry of telecommunication data, offering a unique lens through which to analyze and understand the ebb and flow of tourists visiting the island nation. Traditionally reliant on surveys and ticket sales data, SLTDA now incorporates telecommunication data to complement its existing information streams, providing a more nuanced and real-time perspective on tourist behavior and movement.

Telecommunication data, encompassing mobile roaming patterns, call records, and data usage, offers a dynamic and granular view of tourist activities. This innovative approach not only enhances the accuracy and timeliness of the information available to SLTDA but also enables a deeper understanding of the preferences, itineraries, and engagement patterns of tourists during their sojourn in Sri Lanka.

As the global tourism landscape undergoes rapid transformations, driven by technological advancements and changing consumer behaviors, the integration of telecommunication data marks a strategic leap forward for SLTDA. By tapping into this wellspring of digital information, it is anticipated to not only stay abreast of evolving travel dynamics but also to proactively shape policies and initiatives that will elevate Sri Lanka's position as a premier tourist destination.

In the following sections of this report, the methodologies employed in collecting and analyzing telecommunication data, will be explored to unveil key findings regarding tourist arrival trends, and draw insightful correlations between telecommunication patterns and various facets of the tourist experience in Sri Lanka. This pioneering endeavour promises to provide a comprehensive and forward-looking perspective, empowering stakeholders to make informed decisions in fostering sustainable tourism development in Sri Lanka.

2.1 Definitions

Visitor

A visitor is a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure of other personal purpose) other than to be employed by a resident entity in the country or place visited. These trips taken by visitors qualify as tourism trips.

A domestic, inbound or outbound traveller on a tourism trip is called a domestic, inbound or outbound visitor (IRTS, 2008 by UNWTO).

Domestic tourism

comprises the activities of a resident visitor within the country of reference either as part of a domestic tourism trip or part of an outbound tourism trip (IRTS, 2008 by UNWTO).

The usual environment of an individual

The usual environment of an individual, a key concept in tourism, is defined as the geographical area (though not necessarily a contiguous one) within which an individual conducts his/her regular life routines.

The determination of the usual environment should be based on the following criteria:

(a) Frequency of the trip (except for visits to vacation homes);
(b) Duration of the trip;

       Domestic same - day trips

A person who travels without spending a night within the borders of his country, within a day and arrives at a place of usual place of residence or a specific place in usual environment. (Visits made on the same day from 00.00 to 23.59 according to the 24-hour clock)

       Domestic Overnight Trips

A person spends one night or more within the borders of his or her country, arriving at a usual place of residence or a specific place in the usual environment, with or without accommodation elsewhere during his visit. (24 hours after 00.00 hrs.)

(c) The crossing of administrative or national borders;

(d) Distance from the place of usual residence. {Whole distance of 10 Km (as adopted by DCS)}

2.2 Methodology

The methodology for obtaining telecommunication data on inbound and domestic tourists from a dashboard provided by the service provider involves leveraging advanced data analytics and visualization tools to extract, process, and interpret mobility insights. Below is an elaboration on the process:

Data Source and Collection

Dashboard Integration: The telecommunication service provider offers a dedicated dashboard that aggregates anonymized mobile network data. These records capture active events in the network, such as calls, SMS, and data usage, along with timestamps and approximate location data.

Zoning and Geographic Segmentation: To analyze tourist movement patterns effectively, the dashboard defines geographic zones. These zones are aligned with the cellular network's structure to optimize location accuracy.

Data Processing

Anonymization and Privacy Compliance: All data is anonymized to ensure compliance with privacy regulations. Personally, identifiable information is excluded, focusing only on aggregated mobility trends.

Key Metrics Derived

Inbound Tourist Data: Using mobile network connections from foreign SIM cards or roaming data, which is connected to telecommunication service provider and SIM cards purchased by inbound tourists using passports, the dashboard identifies inbound tourist activity in line with the definitions

Domestic Tourist Data: Patterns of movement within the country are tracked based on local SIM card activity across different zones in line with the definitions.

2.3 Limitations

- Data obtained from a single service provider in Sri Lanka may not represent the full spectrum of tourists in Sri Lanka, as not all tourists use this particular service provider. The market share of the particular service provider is around 50%.
- Rural and remote areas in Sri Lanka may have limited network coverage, which can result in under-reporting of tourist activity in those regions.
- Telecommunication data may be affected by network instability, poor service quality, and interruptions, which can lead to gaps or inaccuracies in the collected data.
- Strict privacy regulations may limit the granularity or type of data that can be shared with third parties like the SLTDA. This can restrict the depth of behavioural analysis possible from the data.

Understanding inbound travel patterns is critical for informed tourism planning and destination management. With advancements in technology, telecommunication data, particularly anonymized mobile network records—has emerged as a powerful tool for analyzing tourist movements, length of stay, and visitation trends with greater accuracy and timeliness than traditional survey methods alone. This section explores recent patterns in inbound travel to Sri Lanka as revealed by telecommunication data, offering valuable insights into visitor behavior, seasonality, source markets, and spatial distribution. The implications of these findings are discussed in the context of tourism development, infrastructure planning, and policy formulation aimed at enhancing visitor experiences and promoting sustainable growth.

3.1   Distribution of inbound visitors in different districts in Sri Lanka, (January – October 2024)

| District	Number of Tourists
Colombo	4,193,342
Galle	2,671,580
Gampaha	2,100,780
Kandy	1,722,666
Matale	1,249,150
Kalutara	1,181,326
Matara	1,170,772
Badulla	818,133
Nuwara Eliya	752,301
Anuradhapura	735,481
Kurunegala	693,239
Puttalam	642,261
Hambantota	617,534
Kegalle	506,575
Jaffna	504,726
Batticaloa	461,090
Ampara	458,925
Polonnaruwa	411,028
Trincomalee	347,984
Monaragala	326,805
Ratnapura	292,939
Vavuniya	124,645
Kilinochchi	79,778
Mannar	78,172
Mullaitivu	76,132
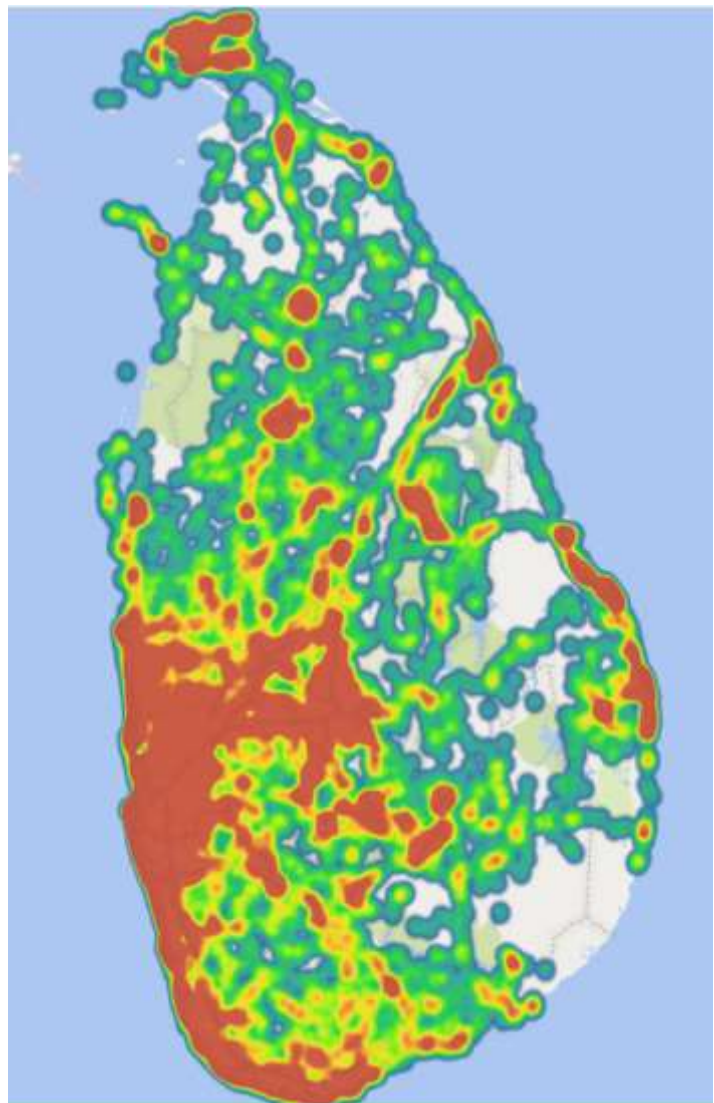
According to the telecommunication data on tourist arrivals in Sri Lanka, the districts that receive the highest number of visitors include Colombo, Galle, Gampaha, Kandy, Matale, Kalutara, Matara, Badulla, Nuwara Eliya, and Anuradhapura. These districts are among the most popular tourist destinations due to their diverse attractions, ranging from cultural heritage sites and scenic landscapes to vibrant urban experiences and coastal resorts.

Colombo, as the commercial capital, attracts visitors with its blend of modernity and historical significance. Galle and Matara, known for their coastal beauty and colonial heritage, draw beach lovers and history enthusiasts alike. Gampaha with Negombo as a key attraction and being close to the international airport, serves as a convenient entry point and location for leisure for travelers. Kandy and Nuwara Eliya, located in the central highlands, are famous for their cultural sites and picturesque tea plantations. Matale offers a mix of historical and natural attractions with the location of Sigiriya, while Kalutara is known for its beaches and religious sites. Badulla, with its stunning waterfalls and hiking trails, appeals to nature lovers, whereas Anuradhapura, a UNESCO World Heritage Site, is a major pilgrimage destination for those interested in Sri Lanka's ancient history.

In contrast, Mullaitivu district records the lowest number of tourist arrivals. This could be attributed to its remote location, limited tourism infrastructure. However, the district possesses untapped potential for eco-tourism and historical exploration, which could be developed with strategic planning and investment in tourism facilities.

3.2 Duration of stay of inbound visitors in key tourist destinations

Attraction	Average Duration of Stay
Bentota	4
Kandy	7
Galle Fort	7
Dambulla	7
Sigiriya	7
Unawatuna	7
Nuwara Eliya	7
Mirissa	7
Pinnawala	4
Ella	7
Trincomalee	10
Anuradhapura	10
Kataragama	7
Yala	7
Polonnaruwa	10
Jaffna	10
Arugam Bay	10
Horton Place	7
Adams Peak	7
Singharajaya	7
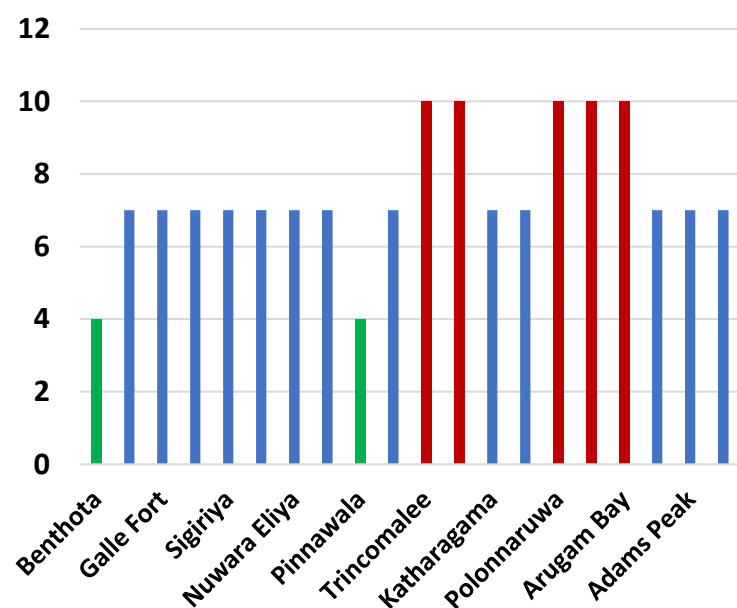
The table provides insights into the average duration of stay for inbound tourists at key attractions across Sri Lanka. The majority of destinations, such as Kandy, Galle Fort, Dambulla, Sigiriya, Unawatuna, and others, record an average stay of 7 days. In contrast, locations like Bentota and Pinnawala show a shorter average stay of 4 days, while destinations such as Trincomalee, Anuradhapura, Polonnaruwa, Jaffna, and Arugam Bay reflect a longer average stay of 10 days.

The variation in the duration of stay can be attributed to several factors. Destinations with shorter stays, like Bentota and Pinnawala, are often popular as day-trip or short-visit locations, possibly due to their proximity to other major cities or the limited range of activities available. On the other hand, locations with longer stays, such as Arugam Bay, are renowned for specific activities like surfing and other water-based recreation, encouraging tourists to spend more time there. Similarly, destinations like Anuradhapura, Polonnaruwa, and Trincomalee are rich in historical and cultural attractions, often requiring several days for visitors to fully explore their diverse offerings.

It is important to note that these average durations are estimated using telecommunication data, specifically by tracking the length of time a tourist's mobile device is connected to local cell towers in each area. While this method provides valuable real-time information for understanding tourist behavior, planning marketing strategies, and managing resources, it could also has certain limitations.

Despite these limitations, telecommunication data remains a useful tool for gaining an overall perspective on tourist movement and stay patterns, to make informed decisions to enhance visitor experiences and destination management.

4.1 Understanding the Indian market: Visitor trends and travel dynamics

India remains a key source market for Sri Lanka, with immigration statistics indicating that up to October 2024, a total of 322,973 Indian tourists have visited the country. Travel patterns of Indian tourists with in Sri Lanka as indicated by telecommunication data up to October reveals that they tend to travel more in Western, southern, central, Eastern and Northern provinces. It is worth noting that a significant number of expatriates residing in India travel to Sri Lanka primarily to visit friends and relatives. This may partly explain the notable presence of tourists in the Northern Province. The movement patterns of Indian tourists within Sri Lanka indicate a strong preference for visiting the Western, Southern, Central, Eastern, and Northern provinces. This widespread travel footprint suggests that Indian visitors engage in a diverse range of tourism activities, including cultural exploration, religious pilgrimages, beach vacations, and nature-based experiences.
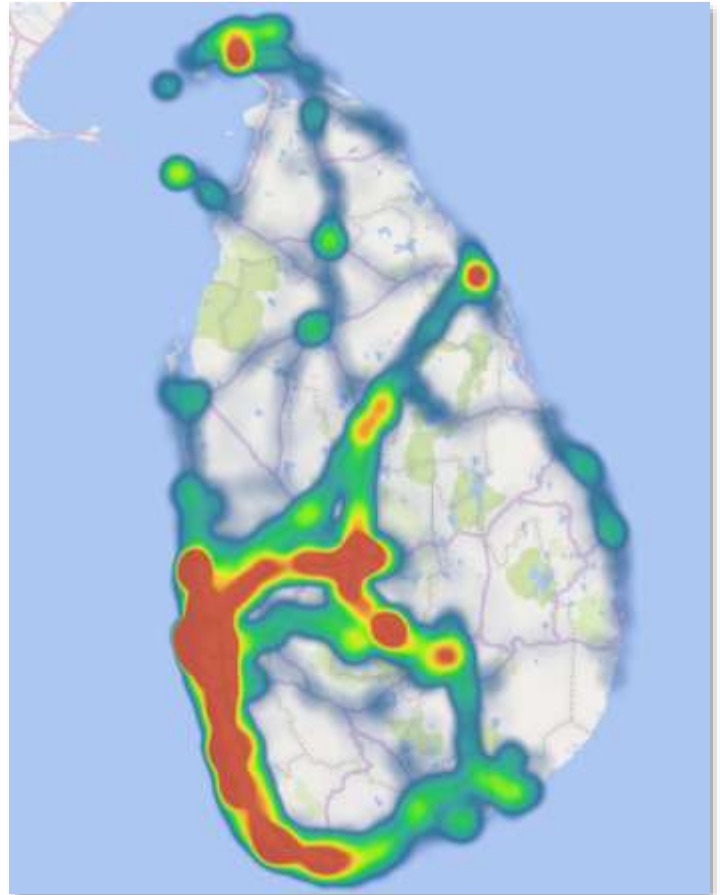

Destination choices of Indian visitors in Sri Lanka
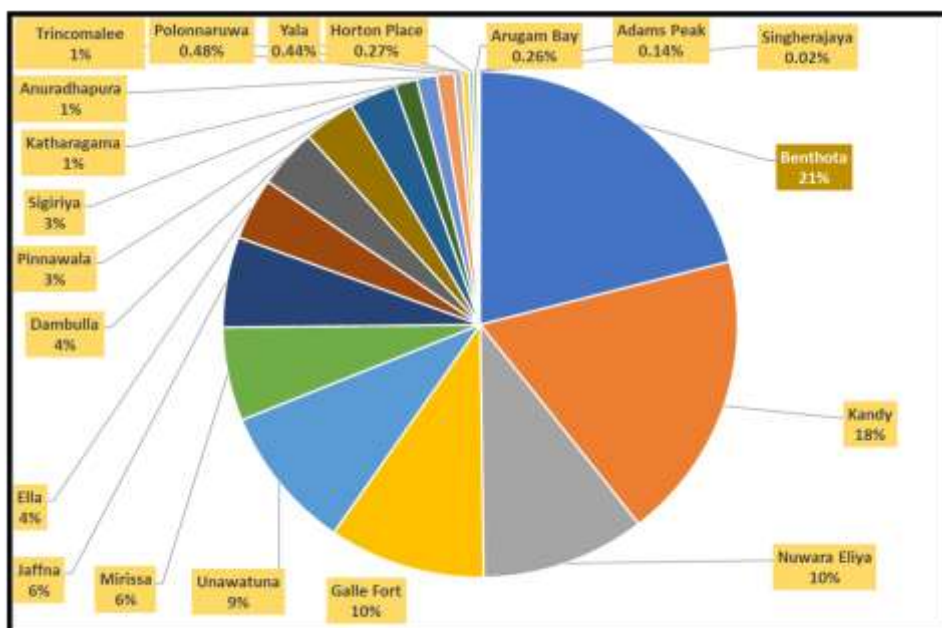
The chart displays the distribution of visits by Indian visitors to various key attraction sites in Sri Lanka. Bentota is the most popular destination, accounting for 21% of visits, followed by Kandy at 18%. Nuwara Eliya and Galle Fort each attract 10% of tourists, while Unawatuna draws 9%. Mirissa and Jaffna each receive 6% of visits, with Ella and Dambulla at 4% each. Pinnawala and Sigiriya account for 3% each, while Katharagama, Anuradhapura, and Trincomalee each hold 1%. The least visited sites include Polonnaruwa (0.48%), Yala (0.44%), Horton Place (0.27%), Arugam Bay (0.26%), Adams Peak (0.14%), and Singherajaya with only 0.02%. This distribution indicates a strong preference among Indian tourists for coastal resorts, cultural and historical sites, and hill country destinations, while wildlife parks and some ancient cities receive significantly fewer visitors.

District-Level insights into Indian visitor movements
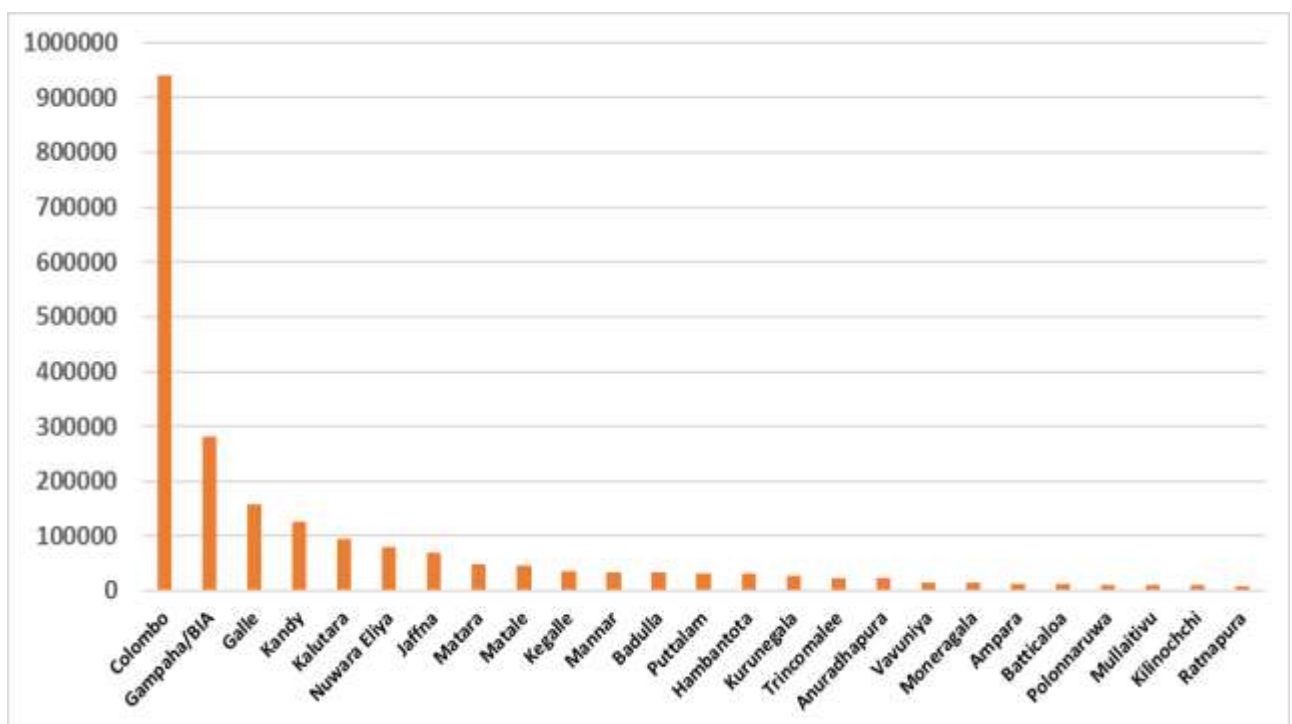
The chart illustrates the number of Indian tourists visiting various districts in Sri Lanka, with a clear concentration in a few key areas. Colombo stands out as the most visited district by a significant margin, attracting nearly 950,000 Indian tourists, which is more than three times the number visiting the second most popular district, Gampaha, with around 280,000 visitors. Other notable districts include Galle, Kandy, Kalutara, Nuwara Eliya, and Jaffna. The numbers gradually decline for districts such as Matara, Matale, Kegalle, Mannar, Badulla, and Puttalam. The least visited districts, such as Mullaitivu, Kilinochchi, and Ratanapura, attract fewer tourists. Overall, the data indicates that Indian tourists predominantly visit urban centers, coastal regions, and culturally significant districts, with Colombo serving as the primary gateway and hub for their travels in Sri Lanka.

Insights into the length of stay of Indian visitors
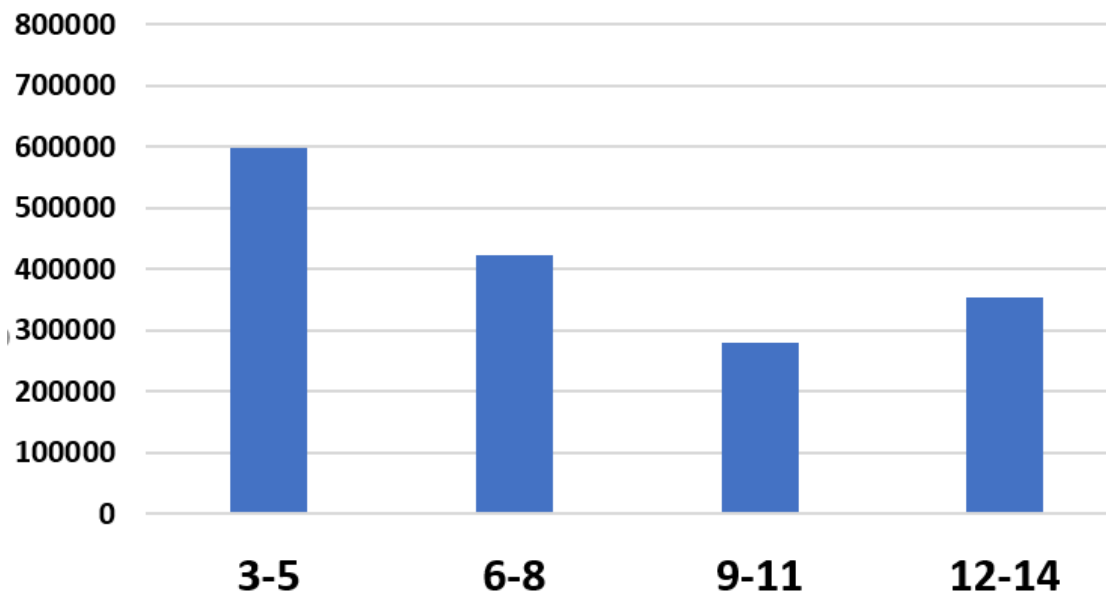
An analysis of the duration of stay among Indian visitors reveals that most choose to spend 3 to 5 days in Sri Lanka. This pattern is reflected in both the districts they visit and the types of activities they participate in. Survey findings on inbound tourists show that the main activities enjoyed by Indian visitors include beach and sea experiences, sightseeing excursions, visits to museums and galleries, shopping, dining at restaurants, wellness and spa treatments, and spending time at casinos. These preferred activities align closely with the regions they frequent and the duration of stay, indicating that the travel choices of Indian visitors are strongly influenced by the availability of these attractions and experiences in the districts they visit.

4.2 Understanding the Russian market: Visitor trends and travel dynamics
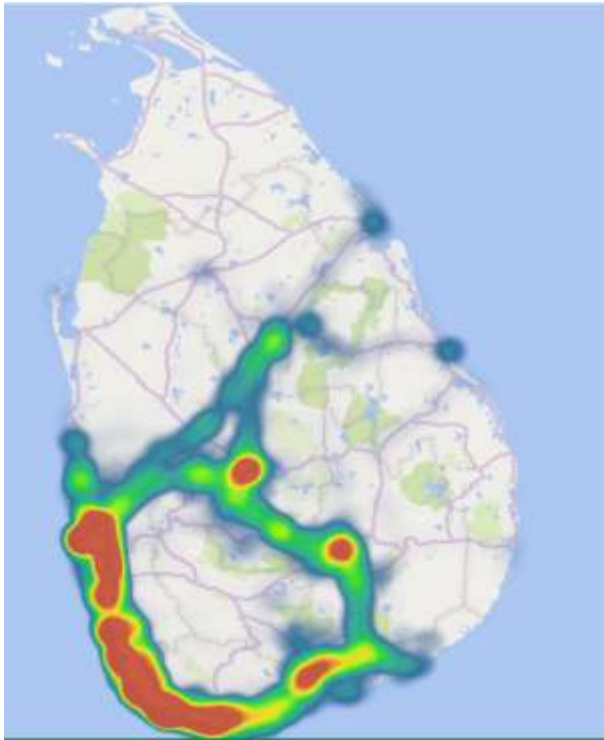
Russia has emerged as a significant source market for Sri Lanka, with a notable influx of Russian tourists in recent years recording 137,599 arrivals up to October 2024. Analysis of travel patterns, as depicted by the heat map, reveals that Russian tourists predominantly visit the western, southern, and southwestern coastal regions of the country, with particularly high concentrations in areas such as Galle, Matara, Kalutara, and Hambantota. The map also indicates moderate travel activity extending into the central and southeastern parts of Sri Lanka, including popular destinations like Kandy and Hambantota. In contrast, there is limited movement observed in the northern and deep eastern provinces. This travel footprint suggests that Russian visitors primarily seek out beach destinations, coastal leisure, and scenic experiences, while also showing interest in cultural and urban attractions in the central and southern districts. The concentrated travel activity along the coastline aligns with survey findings that highlight beach and sea recreation, surfing, snorkeling, sightseeing, and visits to restaurants and shopping areas as key activities for Russian tourists. Overall, the movement patterns of Russian tourists reflect a strong preference for the island's renowned coastal resorts and vibrant tourist hubs, with some interest in inland cultural and natural attractions.

Destination choices of Russian visitors in Sri Lanka
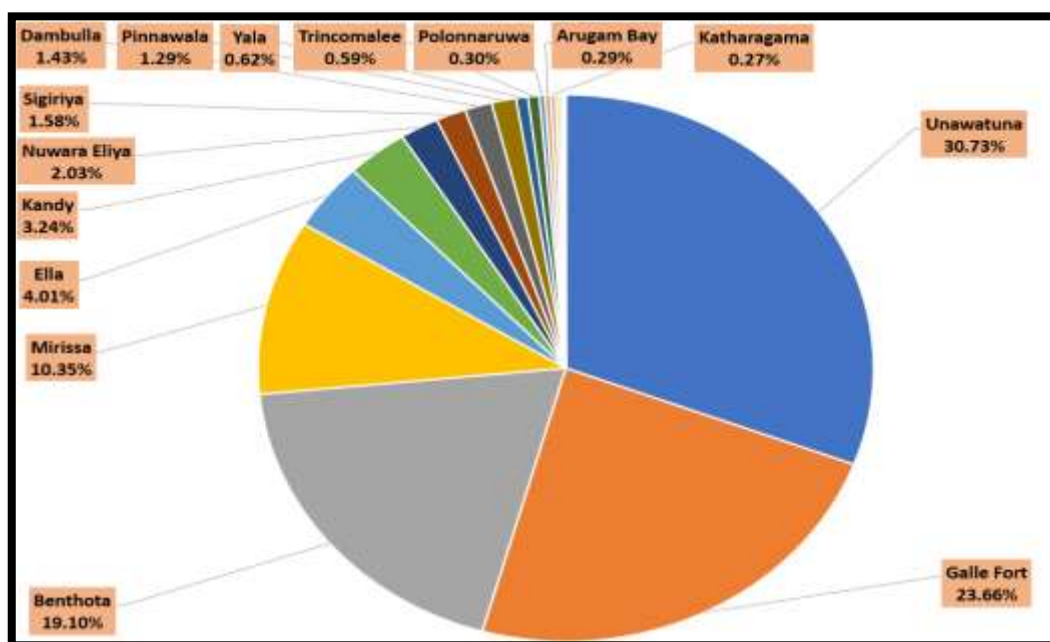
The chart displays the destination preferences of Russian tourists visiting Sri Lanka, revealing a strong inclination toward southern coastal areas. Unawatuna stands out as the most popular destination, attracting 30.73% of Russian visitors, followed by Galle Fort at 23.66% and Bentota at 19.10%. Mirissa also draws a notable 10.35% of tourists. Hill country and cultural destinations, such as Ella (4.01%), Kandy (3.24%), and Nuwara Eliya (2.03%), receive comparatively fewer visitors. Other sites like Sigiriya (1.58%), Dambulla (1.43%), Pinnawala (1.29%), Yala (0.62%), Trincomalee (0.59%), Polonnaruwa (0.30%), Arugam Bay (0.29%), and Katharagama (0.27%) each account for only a small fraction of Russian tourist visits. This distribution highlights a clear preference for beach resorts and established tourist hubs in the south, with limited exploration of inland and less frequented destinations.

District-Level insights into Russian visitor movements
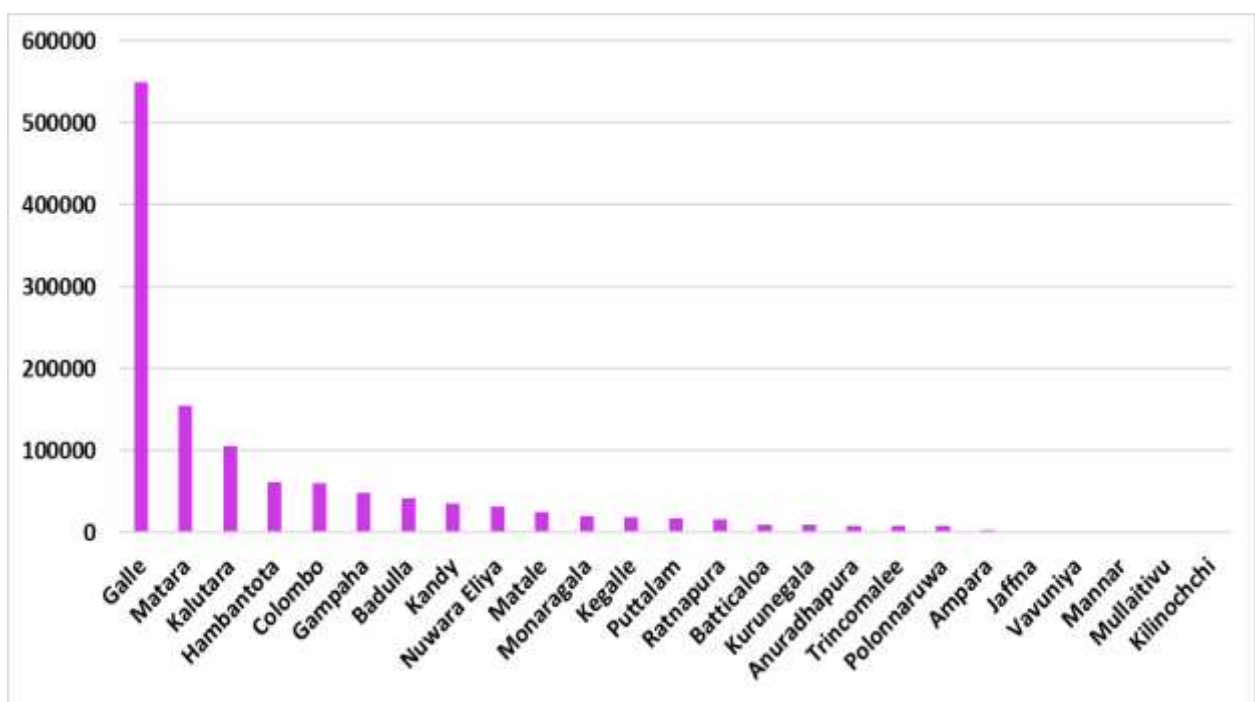
The chart presents the distribution of Russian tourists across various districts in Sri Lanka, revealing clear preferences and travel patterns. Galle stands out as the overwhelmingly most popular destination, attracting well over 500,000 Russian visitors-far surpassing all other districts. This suggests that Galle, with its coastal attractions, historic sites, and beach resorts, is a major draw for Russian tourists.

Following Galle, Matara and Kalutara are the next most visited districts, with visitor numbers significantly lower but still notable. Hambantota and Colombo also see considerable numbers of Russian tourists. Other districts such as Gampaha, Badulla, Kandy, Nuwara Eliya, and Matale receive moderate numbers of Russian visitors, indicating some interest in inland and hill country destinations, possibly for nature, cultural, or heritage experiences.

The number of Russian tourists visiting districts such as Monaragala, Kegalle, Puttalam, Ratnapura, Batticaloa, and Kurunegala declines sharply, each drawing only a small fraction of the total. The least visited districts include Anuradhapura, Trincomalee, Polonnaruwa, Ampara, Jaffna, Vavuniya, Mannar, Mullaitivu, and Kilinochchi, all of which attract minimal numbers of Russian tourists.

Overall, the data highlights a strong coastal preference among Russian tourists, with the southern and western coastal districts being the primary destinations. Urban centers like Colombo and hill country areas also attract some visitors, but the northern and eastern districts see very limited Russian tourist activity. This pattern suggests that Russian tourists are primarily motivated by beach tourism and coastal leisure, with less interest in the cultural, historical, or less developed regions of the country. The concentration in a few key districts could have implications for tourism planning, infrastructure development, and targeted marketing strategies to diversify tourist flows and promote lesser-known destinations.

## Insights into the length of stay of Russian visitors
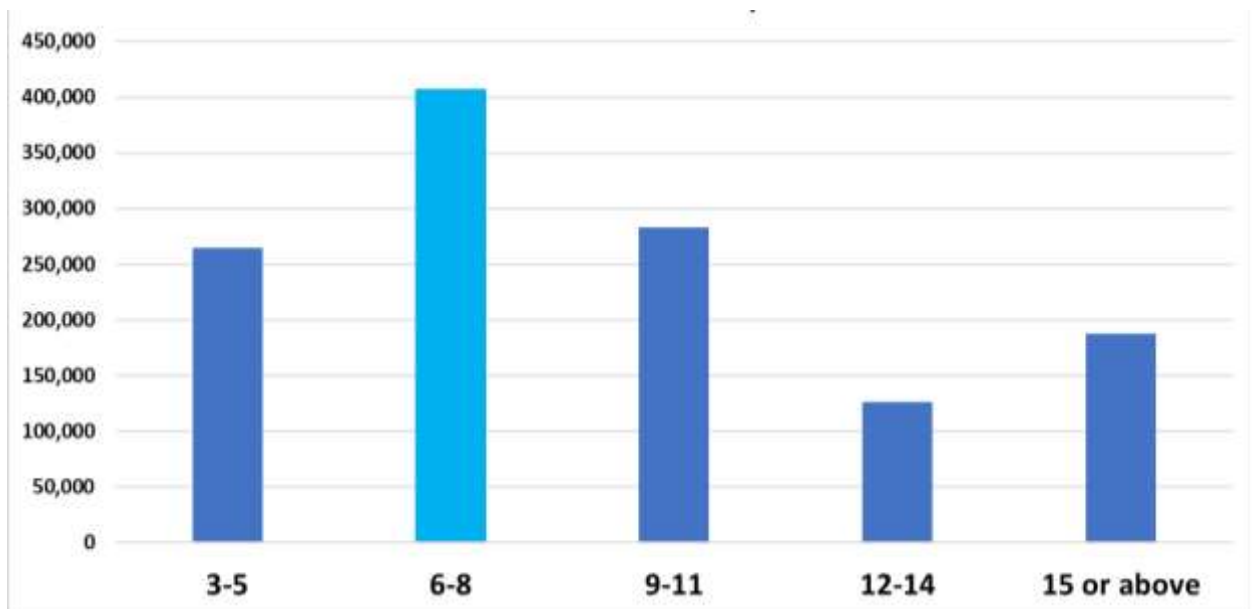
The chart depicting the duration of stay of Russian visitors in Sri Lanka reveals that the majority prefer to stay between 6 to 8 days. This is followed by stays of 9 to 11 days and 3 to 5 days. the least common duration is 12 to 14 days. These patterns suggest that Russian tourists generally favour medium-length visits, typically ranging from one week to just over a week, although both shorter and extended stays are also significant. The key districts visited by Russian tourists include Galle, Matara, Kalutara, Hambantota, Colombo, Gampaha, Badulla, and Kandy, highlighting a preference for coastal, urban, and cultural destinations. According to surveys on inbound tourists, Russian visitors engage in activities such as beach and sea recreation, surfing, snorkeling, sightseeing, museum and gallery visits, dining at restaurants, and shopping. The combination of these popular activities and the duration of stay indicates that Russian tourists seek a balanced experience of relaxation, adventure, cultural exploration, and leisure during their time in Sri Lanka.

The heat map depicting the travel patterns of visitors from the United Kingdom in Sri Lanka reveals a widespread and diverse movement across the island. The highest concentrations of British tourists are observed in the western and southern coastal regions, particularly in Colombo, Galle, Kalutara, and Matara, as indicated by the prominent red zones. There is also significant activity extending into the central districts, with Kandy and Matale standing out as key inland destinations. The northern region, especially Jaffna, shows notable travel intensity as well, suggesting that tourists from UK are exploring both the cultural heartland and the more remote areas of the country.
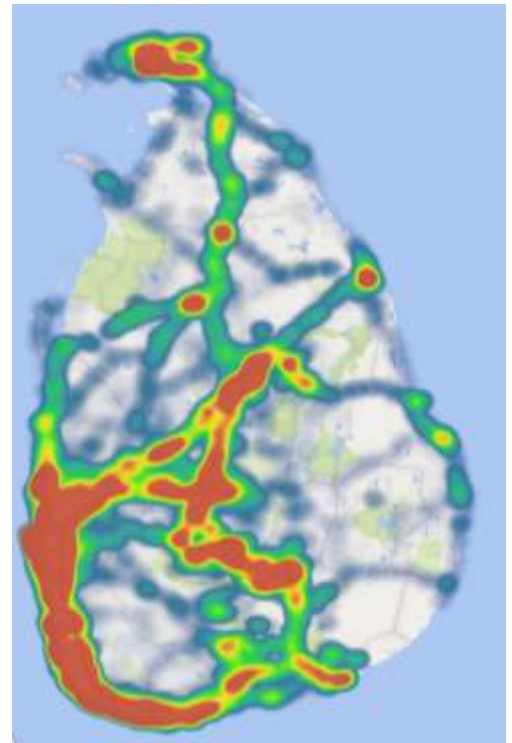

Gampaha, adjacent to Colombo and Negombo being a key coastal attraction, also registers high tourist activity, reflecting its role as a key destination. The travel footprint of UK tourists is not limited to traditional holiday destinations; it also extends along major transport corridors and into interior districts, highlighting a pattern of extensive exploration.

This broad distribution can be partially attributed to the presence of Sri Lankan expatriates residing in the UK, many of whom return to visit friends and relatives in various parts of the country, especially the Northern province. Such visits contribute to the dispersion of tourist activity beyond the main tourist hubs, as expatriates often travel to their hometowns and other less frequented areas.

Overall, the map indicates that tourists from UK, including both leisure travelers and expatriates visiting friends and relatives, engage in a wide range of tourism activities. These range from beach vacations along the southern and western coasts, to cultural and historical exploration in central districts like Kandy and Matale, and reconnecting with family in regions such as Jaffna. This diverse travel pattern underscores the multifaceted appeal of Sri Lanka to UK visitors and highlights the importance of both tourism infrastructure and family networks in shaping travel behavior.

## Destination choices of British visitors in Sri Lanka
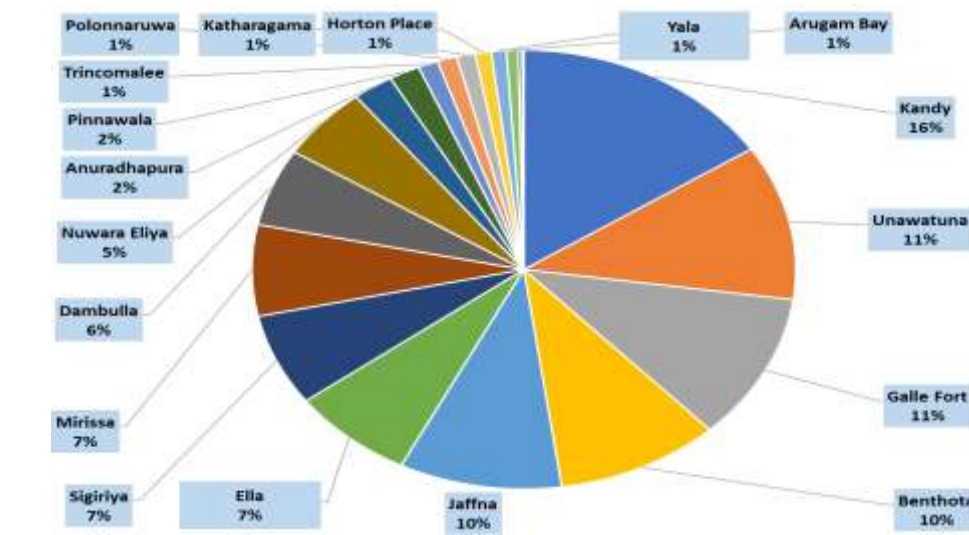
The chart illustrates the destination preferences of visitors from United Kingdom to Sri Lanka, revealing a clear pattern in their travel interests. Kandy stands out as the most popular destination, attracting 16% of UK visitors, followed closely by the southern coastal resorts of Unawatuna and Galle Fort, each drawing 11% of visitors. The beaches of Bentota and the cultural city of Jaffna are also significant attractions, accounting for 10% each of UK tourist choices.

The scenic hill country town of Ella, as well as the historical and natural sites of Sigiriya and Mirissa, each receive 7% of UK visitors, indicating a strong interest in both natural beauty and cultural heritage. Dambulla (6%) and Nuwara Eliya (5%) also feature prominently, reflecting the appeal of Sri Lanka's central highlands and ancient sites.

Other destinations such as Anuradhapura and Pinnawala secure 2% of tourists from UK each, while Trincomalee, Polonnaruwa, Katharagama, Horton Place, Yala, and Arugam Bay each attract 1% of visitors, indicating a more limited but still notable interest in these locations.

This distribution highlights strong preference for a blend of cultural exploration and coastal relaxation, with a particular focus on the central and southern regions of Sri Lanka. While the majority of visitors concentrate on well-established tourist circuits, there is also a notable interest in the country's northern and eastern destinations, suggesting a desire for diverse experiences that combine heritage, nature, and leisure. Additionally, the popularity of northern and eastern locations may be partly attributed to visitors from UK traveling to visit friends and relatives residing in these regions, further enhancing their appeal as travel destinations.

Insights into the length of stay of visitors from United Kingdom
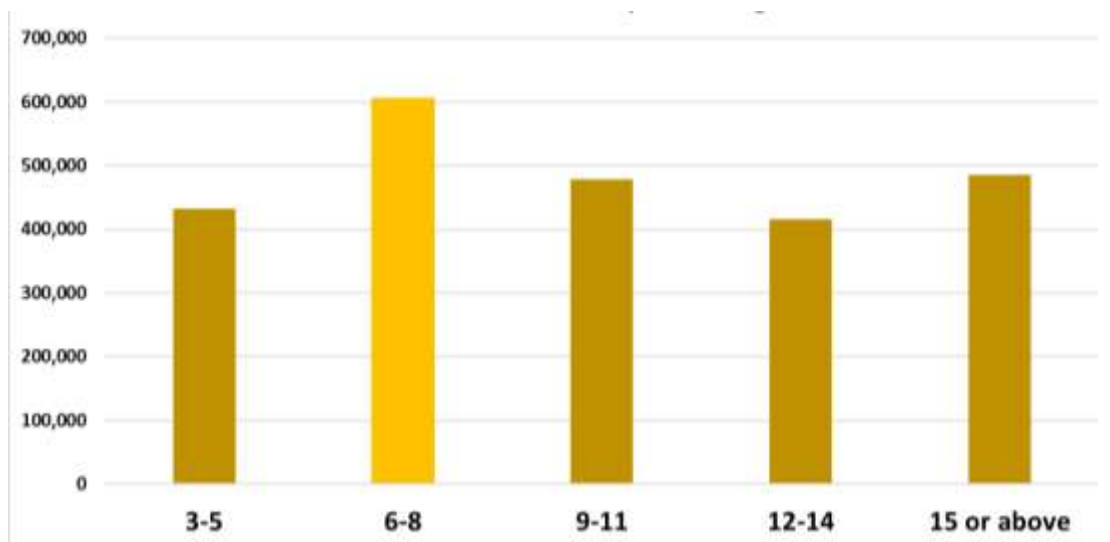
The chart showing the duration of stay of British tourists in Sri Lanka indicates that the majority prefer medium-length visits, with the highest number of tourists staying between 6 to 8 days. Visits lasting 15 days or more and those between 9 to 11 days also represent significant proportions. Shorter stays of 3 to 5 days account for roughly 430,000 visitors, while stays of 12 to 14 days are slightly lower, at around 410,000 tourists.

One possible reason for these varied durations is that a considerable segment of British visitors are expatriates of Sri Lankan origin who come to visit friends and relatives, which often leads to longer stays. Additionally, British tourists engage in a diverse range of activities, including beach and sea recreation, wildlife safaris, hiking and trekking, dining at restaurants, and wellness experiences, as highlighted by surveys on inbound tourists. These activities often require more time to fully enjoy, which explains the preference for medium to longer stays. The combination of leisure, cultural connections, and adventure tourism contributes to the broad distribution of visit durations among British tourists in Sri Lanka.

District-Level insights into British visitor movements
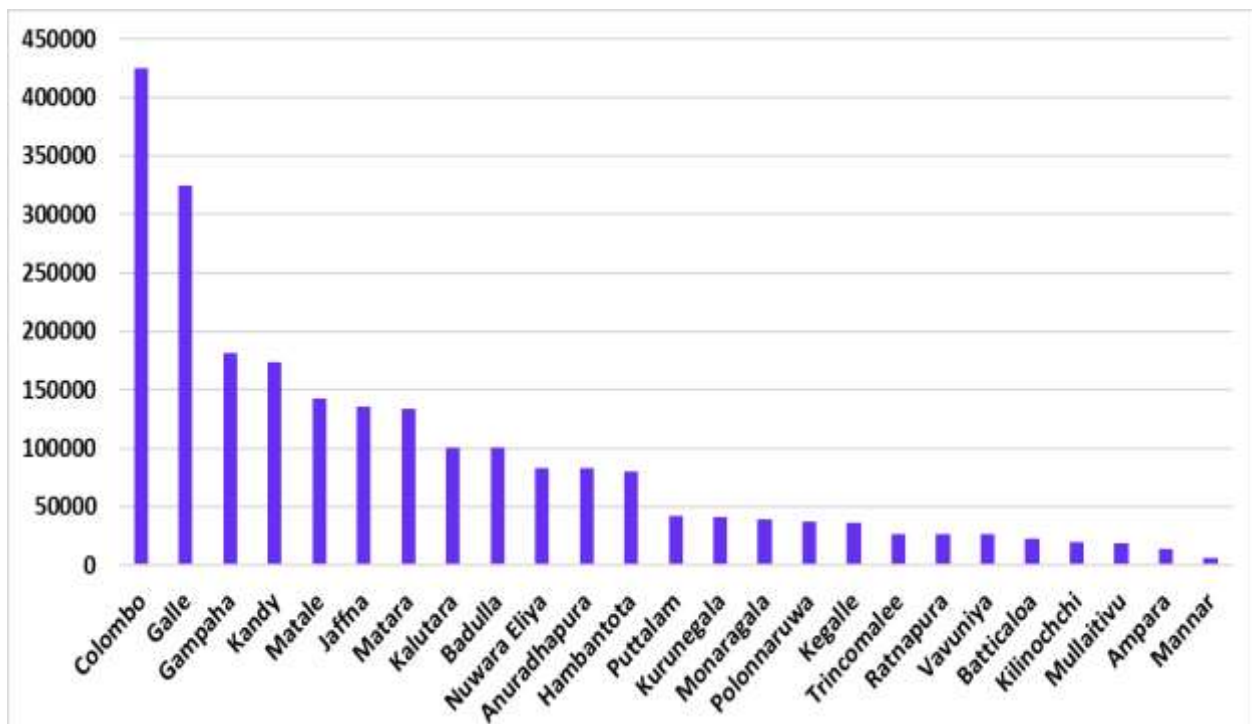
The chart illustrating the key districts visited by British tourists in Sri Lanka shows a clear concentration of visits in several prominent areas. Colombo is the most visited district by a significant margin, reflecting its status as the commercial capital and primary entry point. Galle and Gampaha follow, highlighting the popularity of coastal and suburban areas. Other key districts such as Kandy, Matale, Jaffna, Matara, and Kalutara each receive between approximately 130,000 to 150,000 tourists, indicating strong interest in cultural, historical, and beach destinations. Districts like Badulla, Nuwara Eliya, Anuradhapura, Hambantota, and Puttalam attract moderate numbers, suggesting that British tourists also explore inland and wildlife areas. The remaining districts, including Kurunegala, Monaragala, Polonnaruwa, Kegalle, Trincomalee, and others, receive fewer tourists, with Mannar having the lowest number. Overall, the data highlights that British tourists favour a mix of urban, coastal, cultural, and natural attractions, with a strong emphasis on Colombo and southern coastal districts such as Galle and Matara.

4.4 Understanding the German market: Visitor trends and travel dynamics
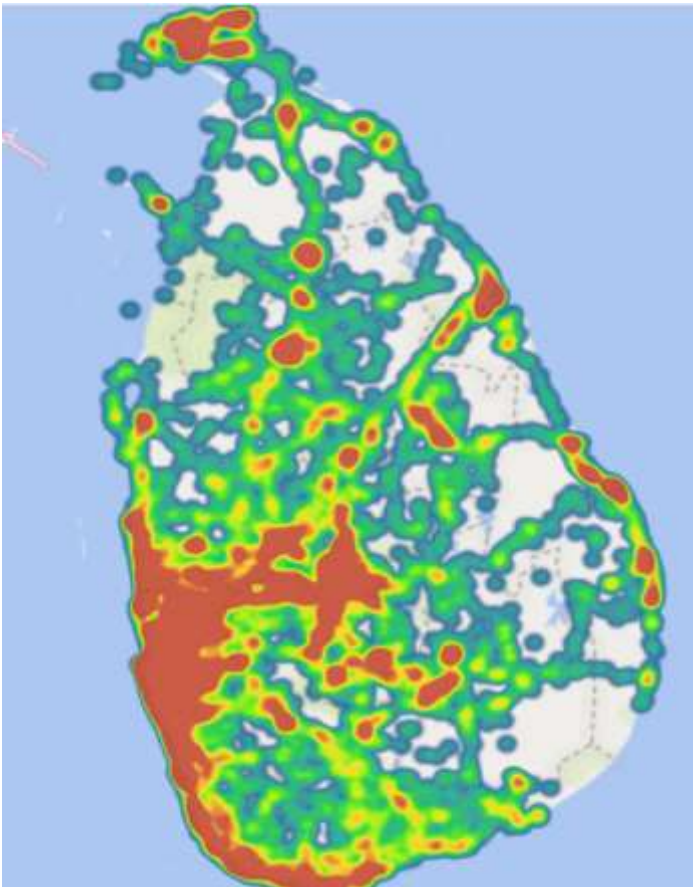
The heat map illustrating the travel patterns of German visitors in Sri Lanka reveals a concentrated yet diverse movement across the island. The most intense activity is observed in the central and southern regions, with a particularly strong presence in the central highlands and cultural heartland. Areas such as Kandy, Nuwara Eliya, and the Cultural Triangle, including Sigiriya and Dambulla, stand out as key inland destinations, reflecting German tourists' interest in heritage sites, scenic landscapes, and the cooler climate of the hills. Along the southern coast, significant tourist activity is noted in Bentota, Galle, Matara, and Mirissa, popular for their beaches, colonial history, and opportunities for whale watching. The western coastal belt, including Colombo and Negombo, also registers notable tourist presence, serving as major urban hubs and entry points.

The presence of Sri Lankan expatriates residing in Germany influences travel patterns in the northern regions, with expatriates returning to visit family and relatives. This results in a noticeable, though less intense, travel footprint in the northern parts of the island, including areas such as Jaffna. These visits by expatriates contribute to the extension of German tourist activity beyond the main tourist hubs, highlighting the role of family networks in shaping travel behavior.

Overall, the travel footprint of German tourists is characterized by a strong focus on cultural exploration, nature-based tourism, and leisure activities like beach holidays and adventure sports. This pattern suggests that German visitors are primarily motivated by heritage and eco-tourism experiences.

Destination choices of German visitors in Sri Lanka
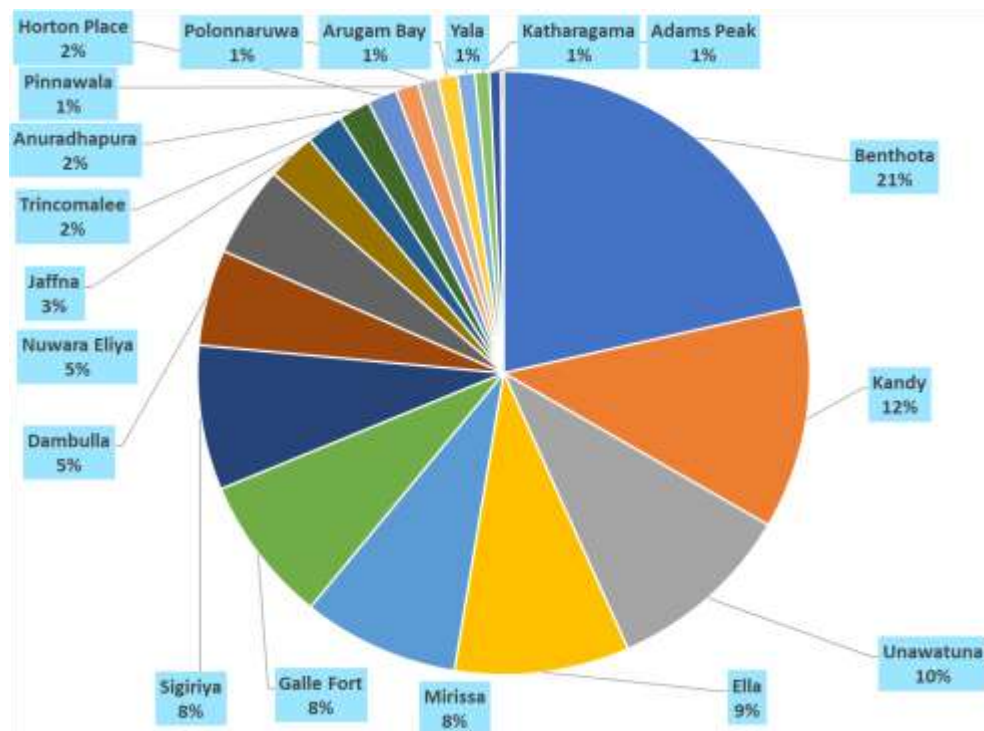
The chart illustrates the destination preferences of German visitors to Sri Lanka, revealing a distinct pattern of travel interests. Bentota emerges as the clear favourite, capturing 21% of German tourist visits, followed by Kandy at 12% and Unawatuna at 10%. The hill country destination of Ella attracts 9% of visitors, while Mirissa, Galle Fort, and Sigiriya each account for 8% of German tourist choices. The cultural and religious sites of Dambulla and the hill station of Nuwara Eliya both receive 5% of visits. Northern Jaffna attracts a smaller but notable 3% of German travelers, while Trincomalee, Anuradhapura, and Horton Place each receive 2%. The remaining destinations-Polonnaruwa, Arugam Bay, Yala, Katharagama, Adams Peak, and Pinnawala-each account for just 1% of German visitors. This distribution highlights German tourists' strong preference for coastal resorts and beaches (particularly in the south), combined with significant interest in cultural heritage sites and scenic hill country locations. The data suggests that while most German visitors concentrate on established tourist circuits in the southern and central regions, a smaller portion ventures to the northern and eastern parts of the island, creating a tourism footprint that balances beach relaxation with cultural exploration.

## Insights into the length of stay of visitors from Germany
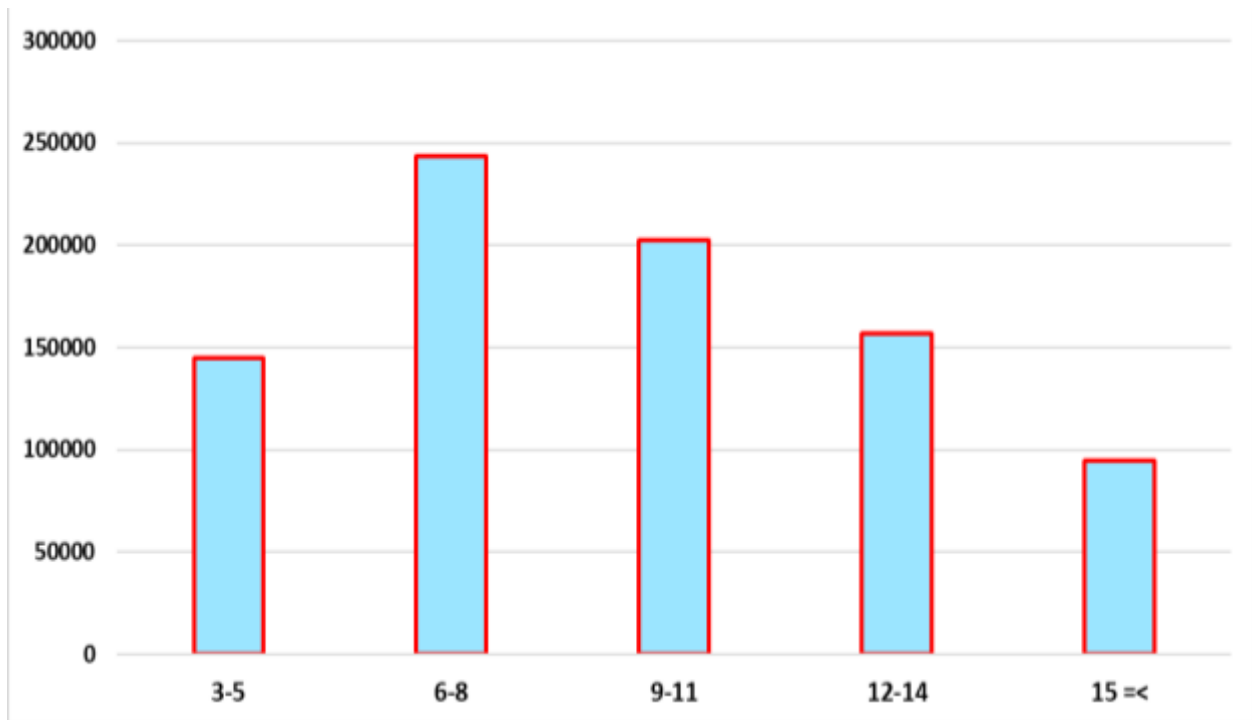
The chart depicting the duration of stay of German tourists in Sri Lanka reveals that the majority of visitors opt for medium-length holidays, with the highest concentration staying between 6 to 8 days, followed by significant numbers in the 9 to 11 day and 12 to 14 day ranges. Shorter stays of 3 to 5 days and extended visits of 15 days or more are less common but still notable. This pattern aligns with the diverse motivations and activities that attract German travelers to Sri Lanka. Many Germans visit the island for wellness purposes, taking advantage of Sri Lanka's renowned Ayurveda retreats and spa experiences, which often require stays of a week or longer to fully benefit from therapeutic programs. Visiting friends and relatives also contributes to the spread in duration, as these travelers may tailor their visits to family schedules and local events.

Survey data further highlights that German tourists are highly engaged in a variety of activities during their stay, including enjoying the beach and sea, surfing, snorkeling, wildlife safaris, sightseeing, hiking, dining at restaurants, indulging in Ayurveda treatments, and shopping. The popularity of medium-length stays suggests that German visitors seek a balanced itinerary that allows for both relaxation and active exploration. They are likely to split their time between the southern and western coasts for beach and water sports, the central highlands for hiking and sightseeing, and wellness centers for Ayurveda. The presence of longer stays also indicates that some German tourists, particularly those visiting family or seeking extended wellness retreats, immerse themselves more deeply in local culture and experiences. Overall, the data reflects the multifaceted appeal of Sri Lanka for German tourists, who combine leisure, adventure, wellness, and social connections into their travel plans.

**District-Level insights into German visitor movements**
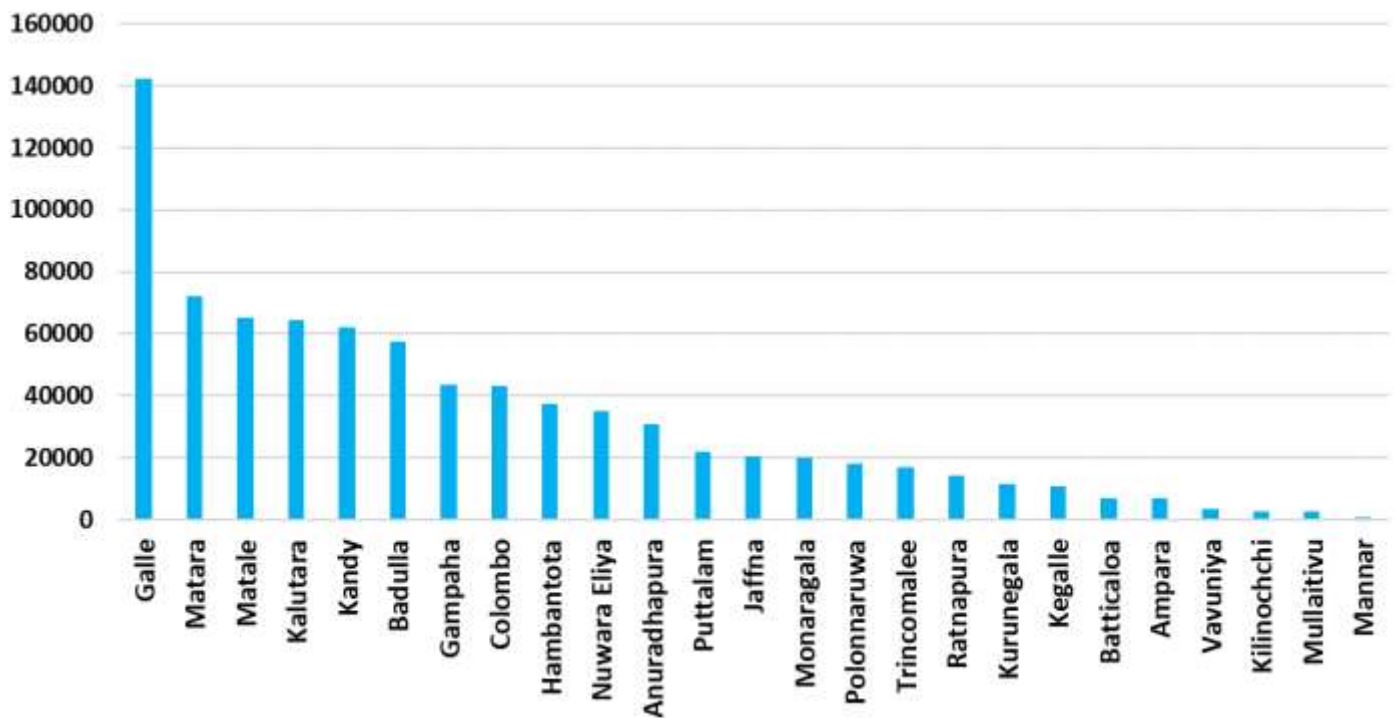
The chart reveals that Galle is the most visited district by German tourists in Sri Lanka, underscoring the region's appeal for its coastal attractions and historical significance. Matara, Matale, Kalutara, and Kandy each receive between 60,000 to 80,000 visitors, marking their popularity for beach stays, cultural explorations, and scenic landscapes. Districts such as Badulla, Gampaha, Colombo, Hambantota, Nuwara Eliya, and Anuradhapura attract moderate numbers indicating a mix of interest in hill country destinations, urban experiences, and ancient sites. Jaffna, Monaragala, Polonnaruwa, Trincomalee, and Ratnapura have lower but notable visit counts, reflecting niche interests in more remote or culturally distinct areas. The remaining districts, including Kurunegala, Kegalle, Batticaloa, Ampara, Vavuniya, Kilinochchi, Mullaitivu, and Mannar, attract the fewest German tourists, suggesting that these areas are either less accessible or less aligned with the typical German tourist's itinerary. Overall, the distribution highlights that German visitors show a strong preference for the coastal south and culturally rich central regions, with Colombo serving as a gateway for onward travel.

4.5   Understanding the Chinese market: Visitor trends and travel dynamics

The heat map illustrating the travel patterns of Chinese tourists in Sri Lanka up to October 2024, when 105,574 Chinese visitors were recorded, reveals a highly concentrated movement in the southern and western regions of the island. The most intense activity is observed in the southwest, where large red zones indicate heavy tourist presence, particularly along the southern coastal belt and the southwestern interior. This pattern suggests that Chinese tourists show a strong preference for established tourist hubs and beach destinations, with significant activity in areas such as Colombo, Bentota, Galle, Matara, and Hambantota, which are known for their beaches, resorts, and urban attractions. The central highlands, including Kandy and Nuwara Eliya, also register notable tourist activity, reflecting Chinese visitors' interest in scenic landscapes, tea plantations, and cultural heritage. While the northern and eastern regions of Sri Lanka show less intense tourist movement, as indicated by green and yellow zones, there is still a visible presence, suggesting growing interest in less crowded destinations such as Trincomalee and Jaffna. The map also highlights well-defined travel corridors connecting major cities and attractions, indicating the use of main highways and established tourist routes. Overall, the travel footprint of Chinese tourists is characterized by a strong focus on leisure and beach holidays, cultural and nature-based tourism, and urban experiences, with limited but increasing exploration into the northern and eastern parts of the country. This pattern underscores the importance of established tourist infrastructure and highlights opportunities to promote lesser-known destinations to diversify the Chinese tourist footprint in Sri Lanka.
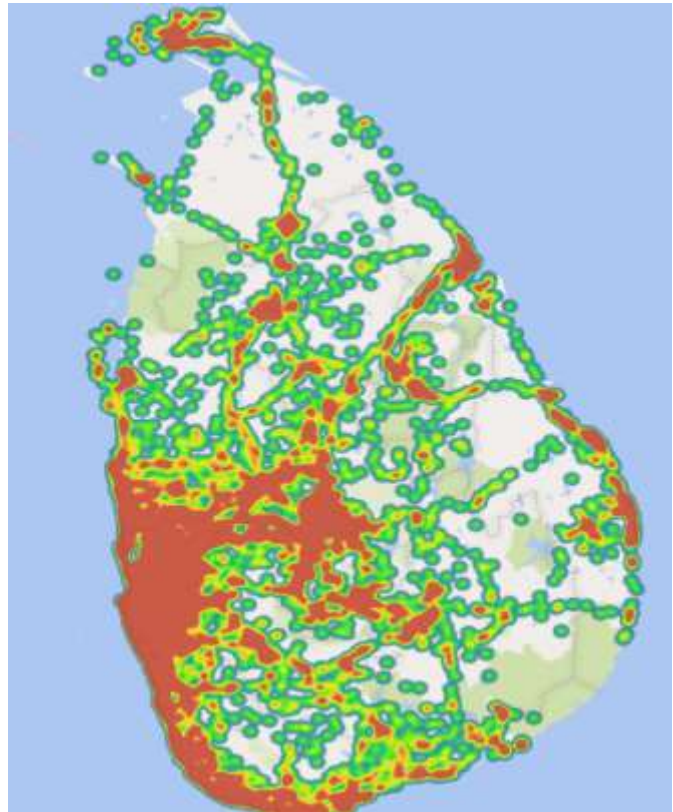
Destination choices of Chinese visitors in Sri Lanka
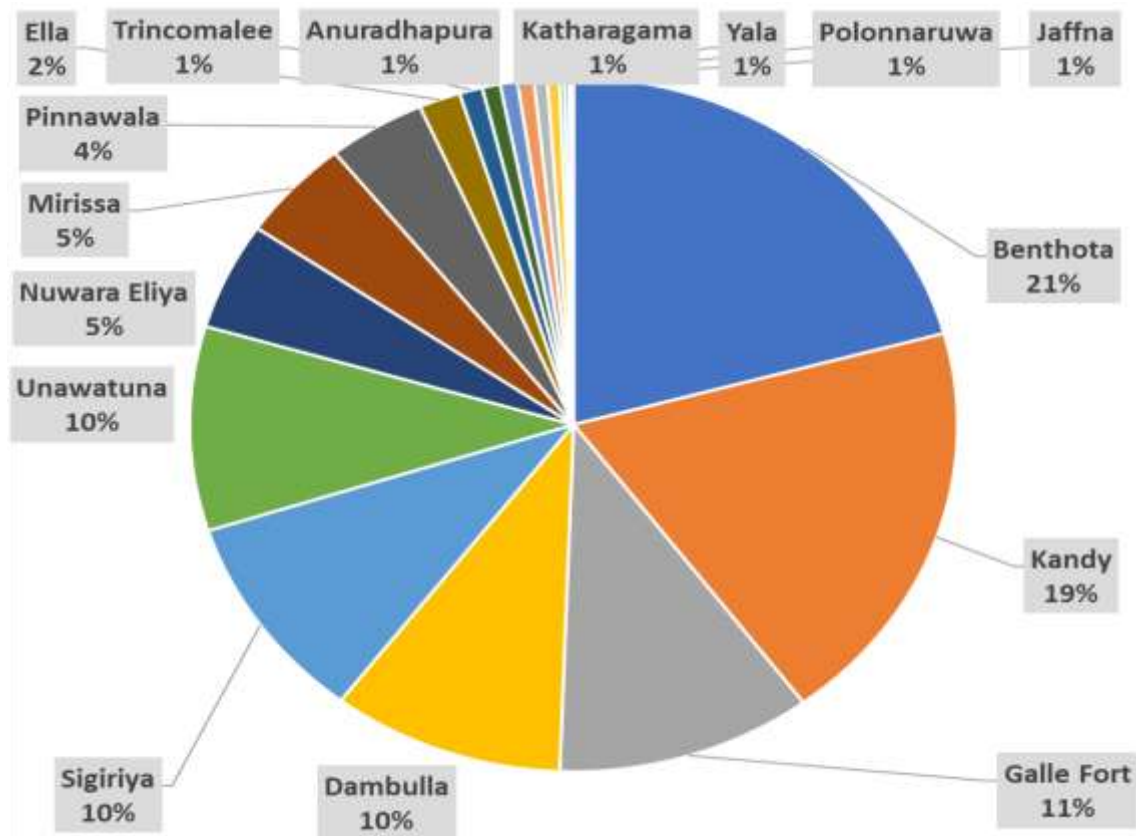
The chart depicting the destination preferences of Chinese visitors to Sri Lanka reveals a highly concentrated pattern of travel, with a clear emphasis on the island's southern and central regions. Bentota stands out as the most popular destination, attracting 21% of Chinese tourists, followed closely by Kandy at 19%. Galle Fort is the third most visited, with 11% of tourists, while Unawatuna, Sigiriya, and Dambulla each account for 10% of visits, indicating a strong interest in both coastal resorts and cultural heritage sites. Hill country destinations such as Nuwara Eliya and Mirissa each draw 5% of visitors, while Pinnawala receives 4%. Ella attracts 2% of Chinese tourists, and the remaining destinations-including Trincomalee, Anuradhapura, Katharagama, Yala, Polonnaruwa, and Jaffna-each account for just 1% of visits. This distribution highlights a pronounced preference among Chinese tourists for well-established tourist circuits, particularly along the southwest coast and in the central cultural heartland. The relatively low percentages for northern and eastern destinations suggest that Chinese visitors are less likely to venture off the main tourist routes, focusing instead on beach holidays, scenic hill stations, and iconic heritage sites. Overall, the data underscores the importance of Sri Lanka's southern and central attractions for the Chinese market, while also indicating potential for growth in less-visited regions as travel interests diversify.

**Insights into the length of stay of visitors from China**
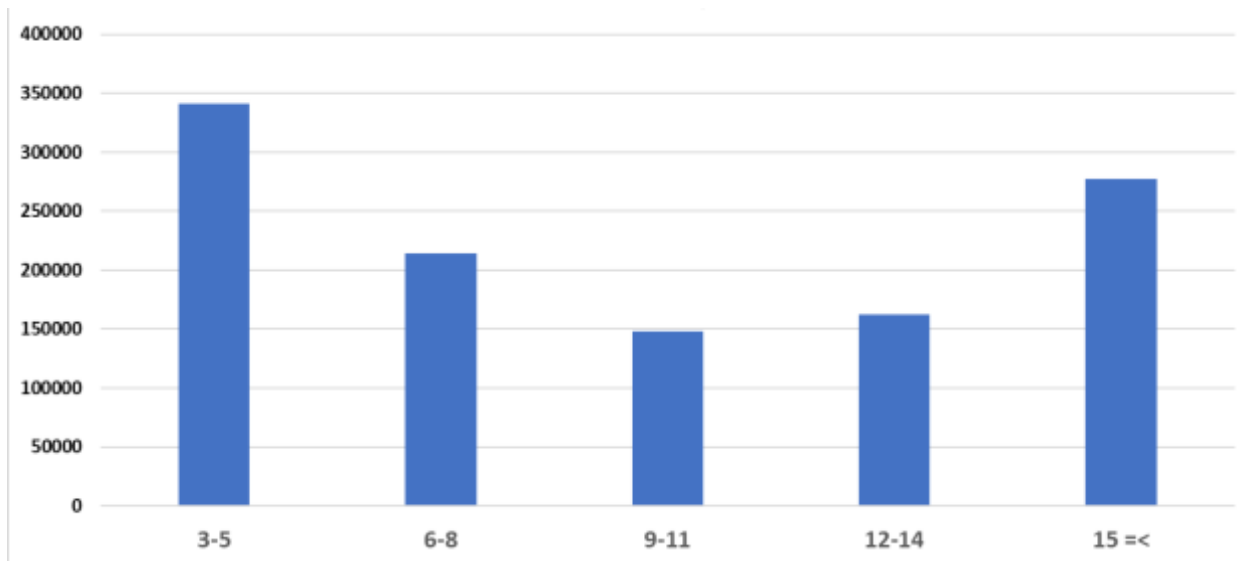
The bar chart provides valuable insights into the length of stay of Chinese visitors to Sri Lanka and, when combined with survey findings on their key activities, reveals important trends in travel behavior. The most popular duration of stay is 3–5 days, with the highest number of visitors falling into this category. This suggests that a significant portion of Chinese tourists prefer short, focused trips, likely prioritizing quick access to popular attractions such as beaches, sightseeing excursions, and shopping experiences. The next largest group is those staying 15 days or more, indicating a substantial segment of travelers who opt for extended visits. These longer stays may be associated with in-depth exploration, including wildlife safaris, multiple sightseeing excursions, and more immersive cultural experiences such as museum and gallery visits.

The 6–8 day category also attracts a considerable number of visitors, reflecting a preference for week-long vacations that allow for a balanced itinerary of beach relaxation, sightseeing, and other leisure activities. The 9–11 and 12–14 day categories show lower but still notable numbers, suggesting that while fewer Chinese tourists choose medium-length stays, there remains a steady interest in more comprehensive travel experiences that combine multiple activities.

Overall, the chart indicates a dual pattern: a large proportion of Chinese tourists favor short, activity-packed holidays, while a significant minority enjoy extended stays that enable deeper engagement with Sri Lanka's diverse offerings. The popularity of activities such as beach and sea recreation, sightseeing, wildlife safaris, and shopping aligns well with both short and long stay preferences, highlighting the need for tailored tourism products that cater to these distinct visitor segments**.**

District-Level insights into Chinese visitor movements
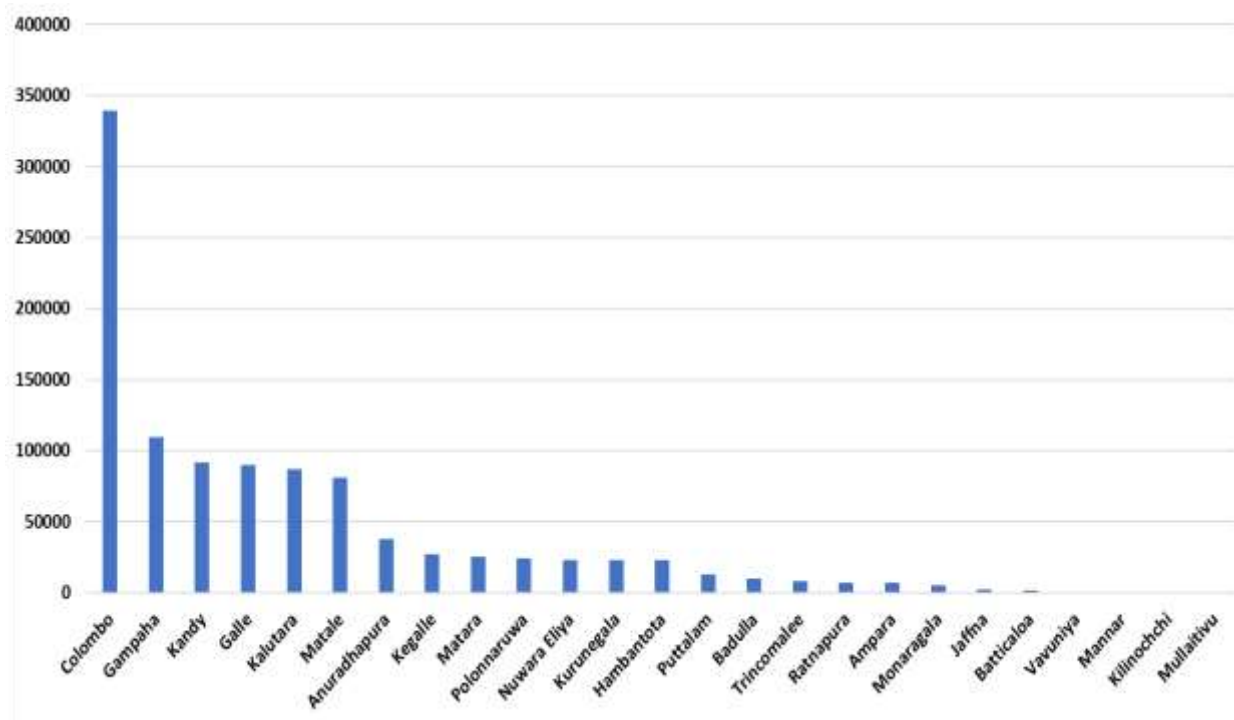
The bar chart depicting district-level movements of Chinese visitors in Sri Lanka reveals a highly uneven distribution of tourist activity across the island. Colombo stands out as the primary hub, attracting over 330,000 visitors-by far the highest among all districts-highlighting its role as the main entry point and commercial center for Chinese tourists. Gampaha follows as the second most visited district, with just over 100,000 visitors, likely due to its proximity to the international airport and Negombo beach. Kandy, Galle, Kalutara, Matale, and Anuradhapura each attract between 80,000 and 100,000 visitors, reflecting the popularity of these areas for their cultural, historical, and coastal attractions. Districts such as Kegalle, Matara, Polonnaruwa, Nuwara Eliya, Kurunegala, and Hambantota register moderate visitor numbers, indicating Chinese tourists' interest in nature, heritage, and hill country experiences. In contrast, districts like Puttalam, Badulla, Trincomalee, Ratnapura, Ampara, Monaragala, Jaffna, Batticaloa, Vavuniya, Mannar, Kilinochchi, and Mullaitivu receive very low numbers of Chinese tourists, suggesting limited penetration into the northern and eastern parts of the country. This pattern underscores a strong concentration of Chinese tourist activity in the western, central, and southern districts, particularly in established urban, cultural, and coastal hubs, while highlighting significant opportunities for tourism development and diversification in less-visited regions.

5.1   Introduction

Domestic tourism plays a vital role in sustaining Sri Lanka's tourism sector, contributing to regional economies, cultural exchange, and the year-round utilization of attractions. This section explores the dynamics of domestic travel across the island, drawing attention to key patterns such as popular destinations, travel frequency and regional preferences. By understanding how Sri Lankan residents engage with their own country as tourists, policymakers and industry stakeholders can better tailor services, infrastructure, and promotional strategies to support and enhance local tourism experiences.

5.2   Distribution of domestic visitors in key tourist attractions in Sri Lanka

Rank	Location	No. of Domestic Tourist
1	Kandy	13.99
2	Anuradhapura	10.67
3	Nuwara Eliya	9.75
4	Galle Fort	9.02
5	Dambulla	7.76
6	Unawatuna	7.10
7	Katharagama	6.77
8	Polonnaruwa	6.35
9	Ella	5.87
10	Mirissa	4.98
11	Adams Peak	4.22
12	Jaffna	3.73
13	Sigiriya	2.98
14	Yala	1.81
15	Trincomalee	1.70
16	Horton Place	1.16
17	Pinnawala	1.09
18	Arugam Bay	0.76
19	Bentota	0.19
20	Sinharajaya	0.10
Total		**100.00**
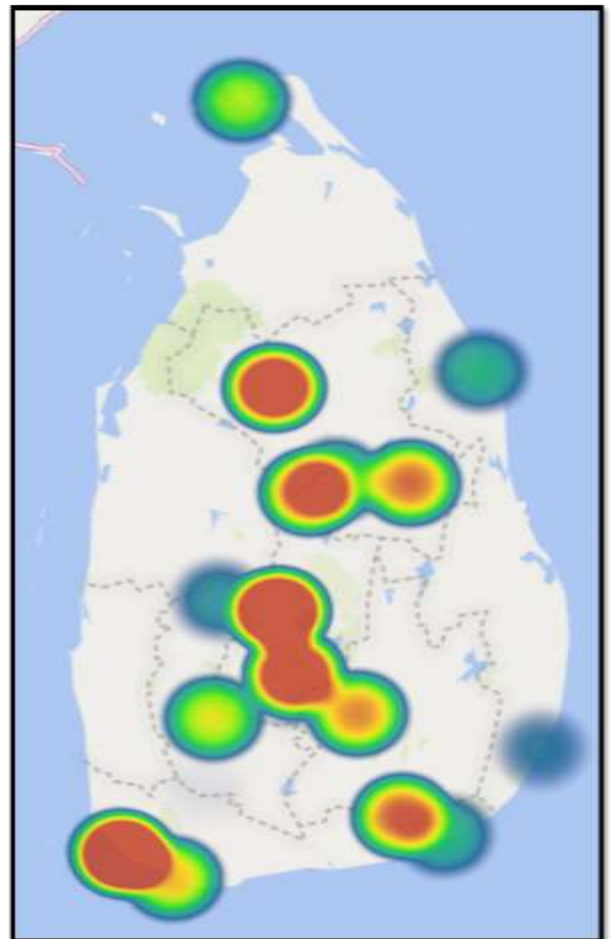
The data on domestic tourist visitation patterns in Sri Lanka reveals a clear hierarchy of destination popularity, which aligns with and extends the insights from the 2018 Domestic Expenditure Survey conducted by the Department of Census and Statistics. Kandy emerges as the most visited destination, attracting 13.99% of domestic tourists, underscoring its enduring appeal as a cultural and religious hub with excellent accessibility from major cities. Anuradhapura (10.67%) and Nuwara Eliya (9.75%) also rank highly, reflecting strong domestic interest in historical sites and cool-climate hill country retreats-trends that were similarly highlighted in the 2018 survey, which found that Sri Lankans value cultural, religious, and natural attractions for short leisure trips.

Galle Fort (9.02%) and Dambulla (7.76%) round out the top five, both benefiting from their rich historical and cultural significance. The mid-tier destinations, including Unawatuna (7.10%), Katharagama (6.77%), and Polonnaruwa (6.35%), maintain steady interest due to their religious importance and coastal appeal, while scenic and leisure-oriented spots like Ella (5.87%) and Mirissa (4.98%) continue to attract nature lovers and young travelers. Notably, internationally renowned sites such as Adams Peak (4.22%), Jaffna (3.73%), and Sigiriya (2.98%) receive fewer domestic visitors, possibly due to accessibility challenges, seasonal preferences, or the perception that these are more suited for international tourists.

Wildlife and coastal destinations such as Yala (1.81%) and Trincomalee (1.70%) show relatively low domestic visitation, which may be attributed to their remote locations or the dominance of other, more accessible attractions. The least visited destinations-Horton Plains (1.16%), Pinnawala (1.09%), Arugam Bay (0.76%), Bentota (0.19%), and Sinharaja (0.10%)-likely suffer from limited domestic awareness, niche appeal, or distance from major population centers.

These patterns are further contextualized by the data on duration of stay, which shows that 65.49% of domestic tourists opt for one-day visits, with a sharp decline in longer stays. This supports the 2018 domestic tourism expenditure survey's findings that domestic tourism in Sri Lanka is characterized by short, high-frequency trips, often to nearby or easily accessible locations. The combination of strong day-trip culture, limited vacation time, and budget considerations shapes these visitation trends. To broaden the appeal of lower-tier destinations and encourage longer stays, targeted marketing, improved infrastructure, and the development of multi-day tourism products could be effective strategies, as suggested by both recent data and the 2018 survey analysis.

5.3 Percentage share of the contribution to domestic tourism by province of origin

Districts	% Share
Colombo	14.3
Gampaha	14.3
Kurunegala	14.3
Kandy	10.0
Anuradhapura	7.9
Galle	5.0
Kalutara	3.6
Badulla	3.6
Nuwara Eliya	3.6
Hambantota	3.6
Monaragala	2.9
Others	17.1
Total	100.0
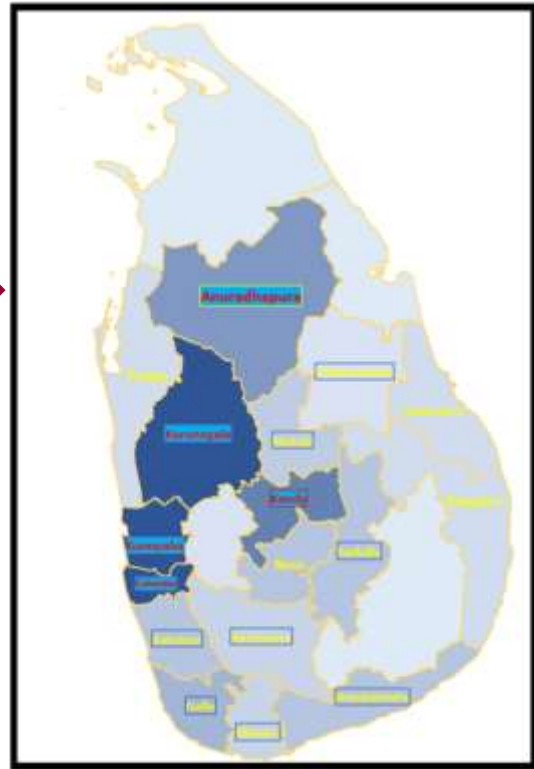
The domestic tourism landscape in Sri Lanka is notably dominated by three key districts-Colombo, Gampaha, and Kurunegala-each contributing equally to 14.3% of the total domestic tourist population, collectively accounting for 42.9%. Colombo's leading role is unsurprising given its status as the country's economic hub, characterized by higher disposable incomes, advanced travel infrastructure, and greater access to tourism services. Gampaha and Kurunegala, while less urbanized comparatively, also play a significant role, likely due to their substantial middle-class populations and strategic geographic locations that serve as important transit hubs facilitating travel. Beyond these, districts such as Kandy (10.0%) and Anuradhapura (7.9%) follow, reflecting their cultural prominence and proximity to major historical and religious attractions. However, there exist notable regional disparities, with districts like Monaragala (2.9%) and Hambantota (3.6%) contributing minimally to domestic tourism. This underrepresentation may stem from economic constraints, limited awareness of tourism opportunities, and infrastructural deficiencies that hinder access and travel. The higher contributions from Colombo and Kurunegala are closely linked to superior transportation networks and greater economic capacity, whereas lower shares from districts such as Badulla and Kalutara (each 3.6%) point to challenges including lower income levels and accessibility issues. These patterns highlight the need for targeted tourism strategies that focus on promoting packages and discounts in underrepresented districts to stimulate demand, investing in road connectivity and public transport to improve accessibility in peripheral regions, and leveraging seasonal festivals or events. Overall, while domestic tourism remains concentrated in economically robust and well-connected districts, addressing infrastructural and economic barriers through data-driven marketing and development efforts could unlock significant untapped potential, fostering more equitable and sustainable tourism growth across Sri Lanka.

5.4 Top ranking source districts of domestic visitors

Attractions	Top ranking Districts						
	1	2	3	4	5	6	7
Adams Peak	Colombo	Gampaha	Kurunegala	Kandy	Nuwara Eliya	Anuradhapura	Rathnapura
Anuradhapura	Colombo	Anuradhapura	Gampaha	Kurunegala	Kandy	Jaffna	Puttalam
Arugam Bay	Ampara	Colombo	Monaragala	Gampaha	Kandy	Kurunegala	Batticaloa
Benthota	Colombo	Kalutara	Kurunegala	Gampaha	Galle	Kandy	Anuradhapura
Dambulla	Colombo	Anuradhapura	Kandy	Gampaha	Matale	Kurunegala	Trincomalee
Ella	Colombo	Badulla	Gampaha	Monaragala	Kandy	Kurunegala	Nuwara Eliya
Galle Fort	Colombo	Galle	Matara	Gampaha	Kalutara	Kurunegala	Hambantota
Horton Place	Colombo	Gampaha	Badulla	Nuwara Eliya	Kandy	Kurunegala	Rathnapura
Jaffna	Jaffna	Colombo	Gampaha	Kandy	Anuradhapura	Kilinochchi	Kurunegala
Kandy	Kandy	Colombo	Gampaha	Kurunegala	Matale	Nuwara Eliya	Anuradhapura
Kataragama	Colombo	Monaragala	Gampaha	Hambantota	Galle	Badulla	Kurunegala
Mirissa	Colombo	Matara	Galle	Gampaha	Hambantota	Kalutara	Kurunegala
Nuwara Eliya	Colombo	Gampaha	Nuwara Eliya	Badulla	Kandy	Kurunegala	Anuradhapura
Pinnawala	Colombo	Gampaha	Kurunegala	Kegalle	Kandy	Puttalam	Anuradhapura
Polonnaruwa	Polonnaruwa	Colombo	Ampara	Gampaha	Batticaloa	Anuradhapura	Kurunegala
Sigiriya	Colombo	Gampaha	Matale	Anuradhapura	Kurunegala	Trincomalee	Kandy
Singherajaya	Rathnapura	Colombo	Kurunegala	Kalutara	Gampaha	Galle	Kandy
Trincomalee	Trincomalee	Colombo	Anuradhapura	Gampaha	Kurunegala	Kandy	Matale
Unawatuna	Colombo	Matara	Galle	Gampaha	Hambantota	Kalutara	Kurunegala
Yala	Colombo	Monaragala	Gampaha	Hambantota	Badulla	Galle	Kurunegala

5.5 Insights into the Length of Stay of Domestic Visitors

Duration (Days)	Number of Domestic Tourists
1	65.49
2	25.59
3	5.99
4	1.76
5 days or more	1.17
Total	100.00
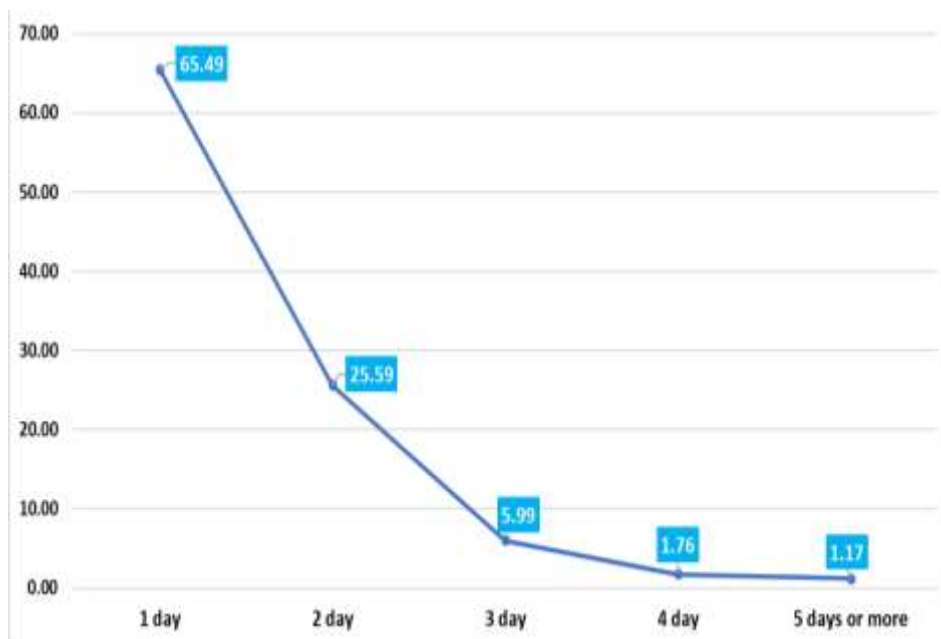
The chart on the distribution of duration of stay among domestic tourists at Sri Lankan attractions reveals a strong dominance of day trips, with 65.49% of tourists staying just one day. This pattern suggests that most visits are short-term, likely due to several factors such as the proximity of attractions to major population centers, limited accommodation options or budget constraints, and the perception of many sites as suitable for day visits (for example, cultural landmarks or beaches). Only 25.59% of tourists stay for two days, and the percentage drops sharply for longer durations-only 5.99% stay for three days, 1.76% for four days, and a mere 1.17% for five days or more. This steep decline points to significant barriers to extended stays, including a lack of multi-day activities, high accommodation costs or limited availability, and time constraints related to work or school schedules.

Economically, this trend limits the potential revenue for tourism-dependent businesses such as hotels, restaurants, and local guides, as day-trippers typically spend less per visit than overnight guests. Regionally, easily accessible sites like Kandy or Galle Fort are likely to attract more day visitors, while remote or niche destinations such as Yala or Horton Plains may struggle to retain tourists overnight due to logistical challenges.

To address these issues and encourage longer stays, several strategies can be recommended. First, enhancing the multi-day appeal of destinations by developing bundled experiences and linking nearby attractions-or promoting adventure tourism that necessitates overnight visits can increase the attractiveness of longer stays. Improving accommodation infrastructure, particularly by expanding budget-friendly lodging in rural or underserved areas and offering discounts for extended stays through partnerships with private operators, can also help. Targeted marketing campaigns-such as weekend getaway packages for working professionals or families, and social media promotions for lesser-known destinations-could stimulate demand for longer trips. Additionally, improving transport connectivity between attractions and aligning special promotions with school holidays or festivals may further encourage domestic tourists to extend their visits.

Overall, while the current pattern is heavily skewed toward short visits, a combination of product development, infrastructure investment, and strategic marketing could shift the trend toward longer, more economically beneficial stays.

## 5.6 Seasonal distribution of domestic tourist activity
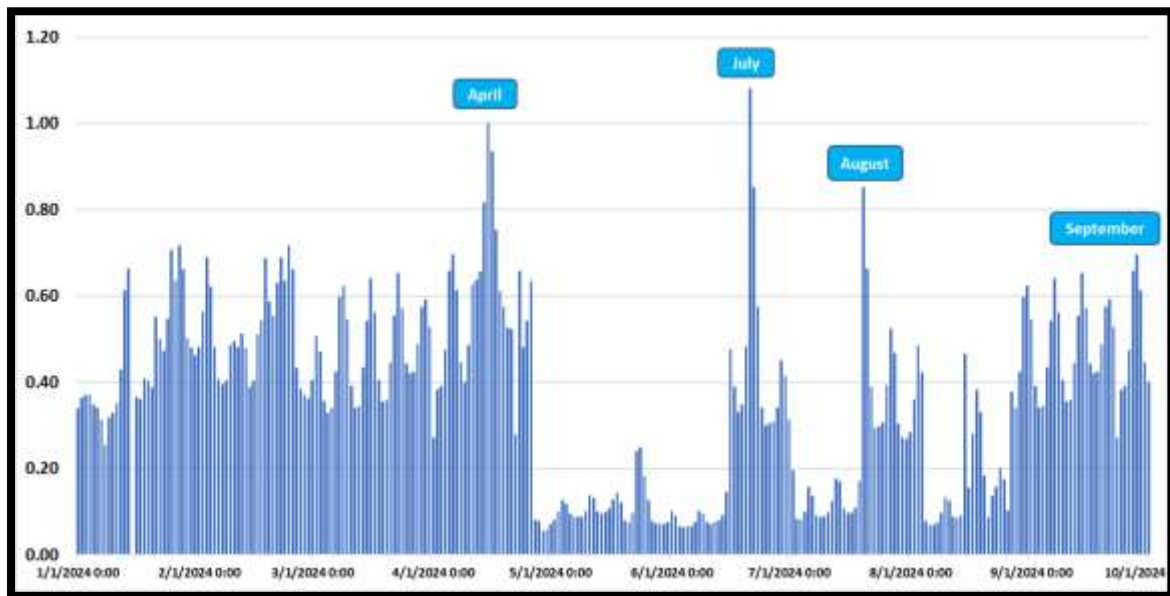
The chart depicting the number of domestic tourists in Sri Lanka from January to October 2024 reveals distinct seasonal patterns. The most prominent peak occurs in April, which likely coincides with the Sinhala and Tamil New Year, a major national holiday that traditionally sees increased domestic travel for celebrations and family gatherings. Another significant surge is observed in July, followed by elevated numbers in August, both of which align with school holidays and favorable weather, making these months popular for family vacations and leisure travel. September also shows a noticeable rise, potentially linked to the end of the monsoon season and local events. In contrast, the months of May and June experience a sharp decline in tourist numbers, reflecting off-peak periods likely due to the school term and less favorable weather conditions.

Findings from the Domestic Tourism Expenditure Survey 2018 also reinforce these patterns, showing that domestic tourism in Sri Lanka is highly seasonal, with travel activity closely associated with major holidays, school vacations, and climate-related factors. The 2018 survey highlighted that periods such as April, August, and December generally record higher levels of domestic travel and related spending. Although the current 2024 data is available only up to October, it is important to note that December is traditionally another peak month for domestic tourism, driven by the festive season, year-end holidays, and favorable travel conditions.

Overall, the data highlights a strong seasonality in domestic tourism demand, shaped primarily by holidays, school schedules, and weather patterns.

5.7 Length of stay of domestic tourists at key destinations
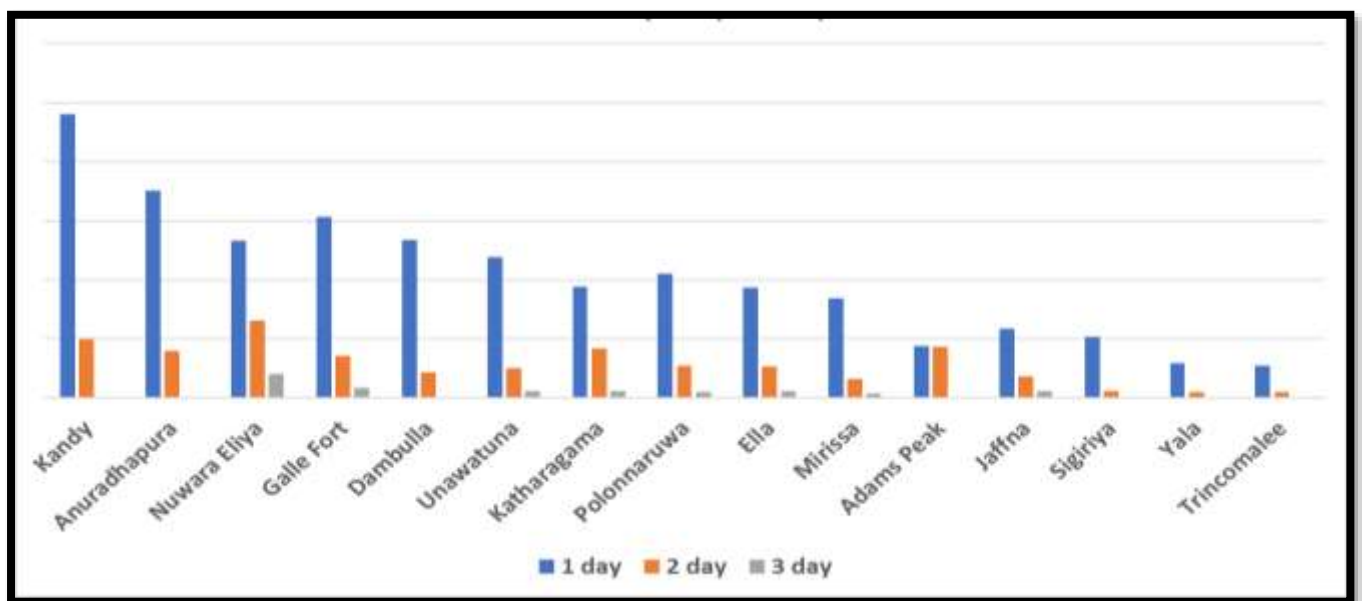
The chart on the duration of stay at the top fifteen tourist destinations in Sri Lanka reveals that the majority of domestic tourists prefer one-day visits, as shown by the dominant blue bars across all locations. This trend is particularly strong in destinations like Kandy, Anuradhapura, Galle Fort, Dambulla, and Ella, indicating that these places are popular for day trips, likely due to their accessibility or the nature of attractions that can be experienced within a single day. Two-day stays, are less common but still notable in places such as Nuwara Eliya, Katharagama, Anuradhapura, Adams Peak and Polonnaruwa, which offer more extensive experiences or require additional travel time. Three-day stays, are rare across all destinations, expect for Nuwara Eliya suggesting that domestic tourists generally do not extend their trips for longer periods, possibly due to time or budget constraints. Overall, the data highlights a clear preference for short visits among domestic travelers, with only a few destinations encouraging slightly longer stays, which provides valuable insights for tourism planners aiming to develop strategies that could increase overnight stays and enhance local economic benefits.

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