MONTHLY TOURIST ARRIVALS REPORT:

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

AUGUST 2024

Sri Lanka
YOU'LL COME BACK FOR MORE

Sri Lanka Tourism Development Authority

Introduction

The following document provides a synthesis of the most recent August, 2024 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st August 2024, and subject to change. The data provides an overview of month-on-month and annual changes in visitor arrivals to Sri Lanka from international source markets. The data is meant to provide an overview of how travel and tourism is performing to Sri Lanka.

This report is developed by the Research & International Relations Division at Sri Lanka Tourism Development Authority (SLTDA). Questions, comments and feedback are welcome and will support the future amendment and enhancement of the report to ensure it meets the data and insights needs of Sri Lanka's Government and industry stakeholders.

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Summary

In August, Sri Lanka welcomed 164,609 tourists, reflecting a 12.3% decline compared to July but showing a 20.7% increase compared to August 2023. The total tourist arrivals by the end of August reached 1,362,688, highlighting a steady recovery in the tourism sector. The month-over-month decline could be attributed to seasonal fluctuations, as August often sees reduced travel due to the end of summer vacations in key source markets. However, the year-on-year growth of 20.7% indicates a positive trend, driven by ongoing efforts to attract more visitors compared to the previous year, when numbers were likely impacted by lingering effects of the pandemic or economic challenges. Despite the monthly variations, the cumulative total emphasizes the resilience and gradual recovery of Sri Lanka's tourism industry, although factors like seasonality and economic conditions in source countries may continue to influence arrival numbers.

In August, Sri Lanka's primary source markets were India, the United Kingdom, China, Germany, and Italy with notable increases in visitors from these countries driving the growth of the tourism sector.

The latest UNWTO Barometer reflects a generally positive outlook for international tourism from May to August 2024, with strong recovery anticipated. However, this recovery is limited by factors such as economic challenges like inflation and high fuel costs, geopolitical uncertainties, travel restrictions, visa requirements, low consumer confidence, and ongoing COVID-19 concerns, all of which continue to affect the pace of tourism's rebound.

Table 1. Monthly tourist arrivals, August 2024

Month	2023	2024	% Change 2024/23
January	102,545	208,253	103.08
February	107,639	218,350	102.08
March	125,495	209,181	66.7
April	105,498	148,867	41.1
May	83,309	112,128	34.6
June	100,388	113,470	13.0
July	143,039	187,810	31.30
August	136,405	164,609	20.7
September	111,938		
October	109,199		
November	151,496		
December	210,352		
TOTAL	1,487,303	1,362,688	

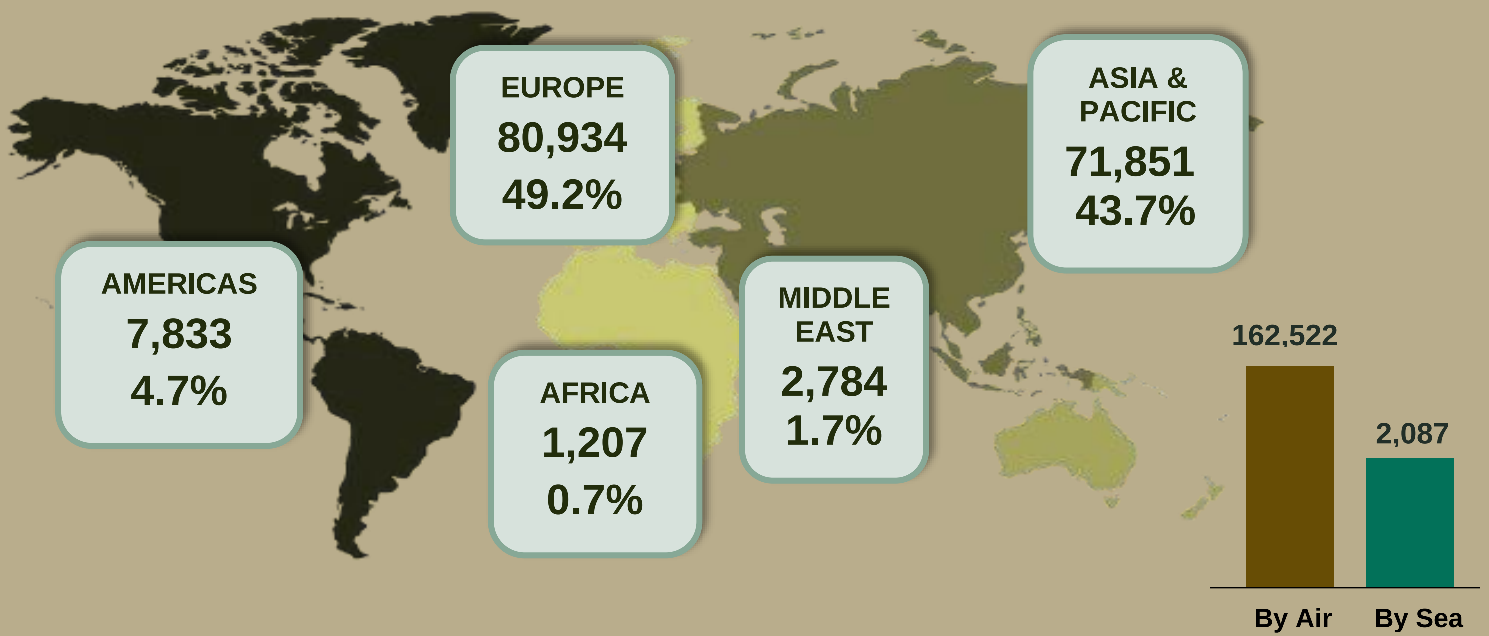
Tourist Arrivals | August 2024

164,609

Tourist arrivals by region and percentage share

August 2024

Map 1. Tourist arrivals by region and percentage share



Europe remains a dominant force in Sri Lanka's tourism, contributing 49.2% of total arrivals, while Asia and the Pacific are becoming increasingly influential, accounting for 43.7% of visitors. This shift highlights changing dynamics, with both regions playing crucial roles in shaping the industry. Growth is largely driven by rising demand from key markets such as India, the UK, Germany, and Italy, which have significantly bolstered Sri Lanka's tourism sector through strong travel connections and favorable conditions. The Americas account for 4.7% of arrivals, and the Middle East and Africa contribute 1.7% and 0.7%, respectively, adding to the diverse profile of Sri Lanka's tourist landscape. The strong European presence reflects established demand, while the growing influence of Asia and the Pacific underscores the appeal of regional travel. The relatively smaller shares from the Americas, Middle East, and Africa suggest further opportunities for targeted strategies to diversify and strengthen the market reach, enhancing the industry's overall recovery and growth.

Top primary markets and top potential markets

Top primary markets, August 2024

1. **India** — Arrivals: **33,031/ % Share: 20.1**
2. **United Kingdom** — Arrivals: **17,587 / % Share: 10.7**
3. **China** — Arrivals: **11,333 / % Share: 6.9**
4. **Germany** — Arrivals: **10,623 / % Share: 6.5**
5. **Italy** — Arrivals: **9,586 / % Share: 5.8**
6. **France** — Arrivals: **8,596 / % Share: 5.2**
7. **Spain** — Arrivals: **7,262 / % Share: 4.4**
8. **Australia** — Arrivals: **6,687/ % Share: 4.1**
9. **Netherlands** — Arrivals: **5,355 / % Share: 3.3**
10. **Russia** — Arrivals: **4,351 / % Share: 2.6**
11. **Japan** — Arrivals: **4,102/ % Share: 2.5**
12. **Bangladesh** — Arrivals: **3,877 / % Share: 2.4**
13. **Canada** — Arrivals: **3,868 / % Share: 2.3**
14. **United States** — Arrivals: **3,539 / % Share: 2.1**
15. **Israel** — Arrivals: **3,248 / % Share: 2.0**
16. **Maldives** — Arrivals: **3,198 / % Share: 1.9**
17. **Poland** — Arrivals: **2,240 / % Share: 1.4**
18. **Switzerland** — Arrivals: **1,856 / % Share: 1.1**
19. **Belgium** — Arrivals: **1,751 / % Share: 1.1**
20. **Malaysia** — Arrivals: **1,571 / % Share: 1.0**

Note: The top primary markets for Sri Lanka have been identified using visitor arrivals. The previous methodology used to identify the markets was altered due to the current arrival trends in the source markets and the socio-economic factors in Sri Lanka. The intention is to track these source markets on a go-forward basis to understand future performance of Sri Lanka's tourism economy, including during the projected international tourism recovery period, 2022-2025.

Top potential markets, August 2024

1. **Singapore**
Arrivals: **1,215 / % Share: 0.7**

2. **Austria**
Arrivals: **1,150 / % Share: 0.7**

3. **Pakistan**
Arrivals: **1,040 / % Share: 0.6**

4. **New Zealand**
Arrivals: **1,011 / % Share: 0.6**

5. **Iran**
Arrivals: **883 / % Share: 0.5**

6. **Czech Republic**
Arrivals: **822 / % Share: 0.5**

7. **Taiwan**
Arrivals: **755 / % Share: 0.5**

8. **South Korea**
Arrivals: **698 / % Share: 0.4**

9. **Portugal**
Arrivals: **667 / % Share: 0.5**

10. **Denmark**
Arrivals: **606 / % Share: 0.4**

Note: The top potential markets for Sri Lanka have been identified using visitor arrivals data. The previous methodology used to identify the markets was altered due to the current arrival trends in the source markets and the socio-economic factors in Sri Lanka. The intention is to track these source markets on a go-forward basis to understand future performance of Sri Lanka's tourism economy, including during the projected international tourism recovery period, 2022-2025.

Top ten source markets

August 2024

In August, India emerged as the top source of tourists to Sri Lanka, contributing 20.07% of total arrivals, followed by the United Kingdom at 10.68%, China at 6.8%, and Germany at 6.45%. These figures reflect shifting travel preferences among tourists. Notably, there was a significant rise in arrivals from Italy, Spain, and the Netherlands compared to the previous year, indicating a growing interest in Sri Lanka from these emerging markets. The decline in arrivals from Russia and India may be reflecting changes in travel motivations during this period. The rise of markets like Italy and the Netherlands highlights shifting dynamics in tourist source countries, offering new opportunities for Sri Lanka’s tourism sector to diversify its visitor base. This diversification helps reduce dependency on traditional markets and enhances the industry’s resilience against fluctuations in specific regions.

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

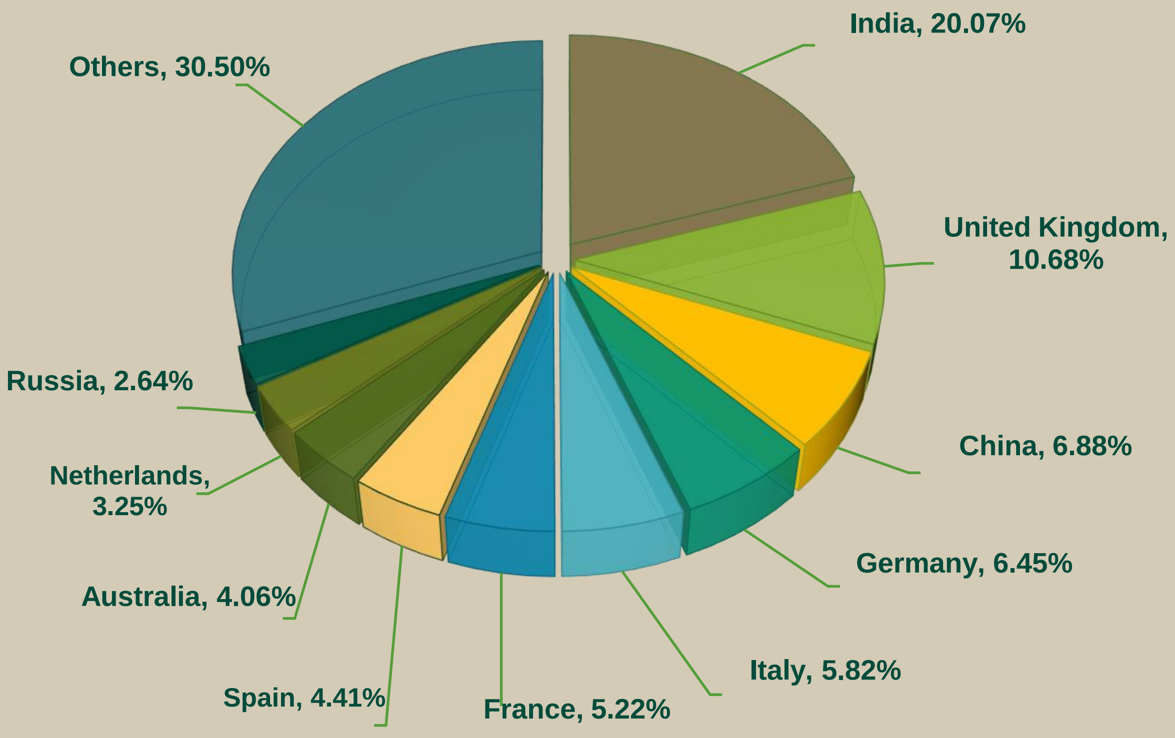
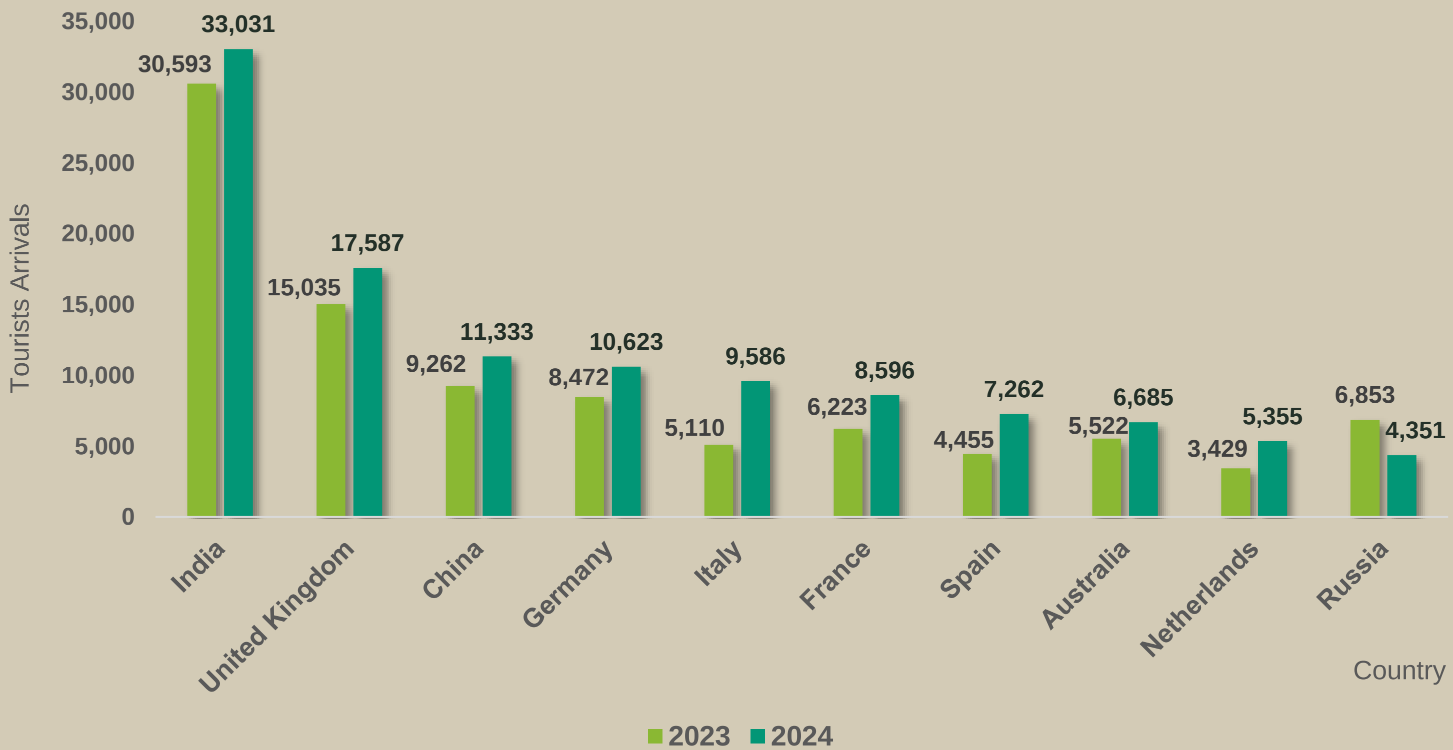


Table 2. Top ten source markets to Sri Lanka, August

Rank	Country of Residence	Tourist Arrivals (August 2024)			Tourist Arrivals
		By Air	By Sea	Total	(August 2023)
1	India	31,005	2,026	33,031	30,593
2	United Kingdom	17,574	13	17,587	15,035
3	China	11,333	0	11,333	9,262
4	Germany	10,623	0	10,623	8,472
5	Italy	9,586	0	9,586	5,110
6	France	8,592	4	8,596	6,223
7	Spain	7,262	0	7,262	4,455
8	Australia	6,685	2	6,687	5,522
9	Netherlands	5,355	0	5,355	3,429
10	Russian Federation	4,351	0	4,351	6,853

Chart 2: Comparison of arrivals from top ten markets to Sri Lanka, July/ August 2024



Top ten source markets

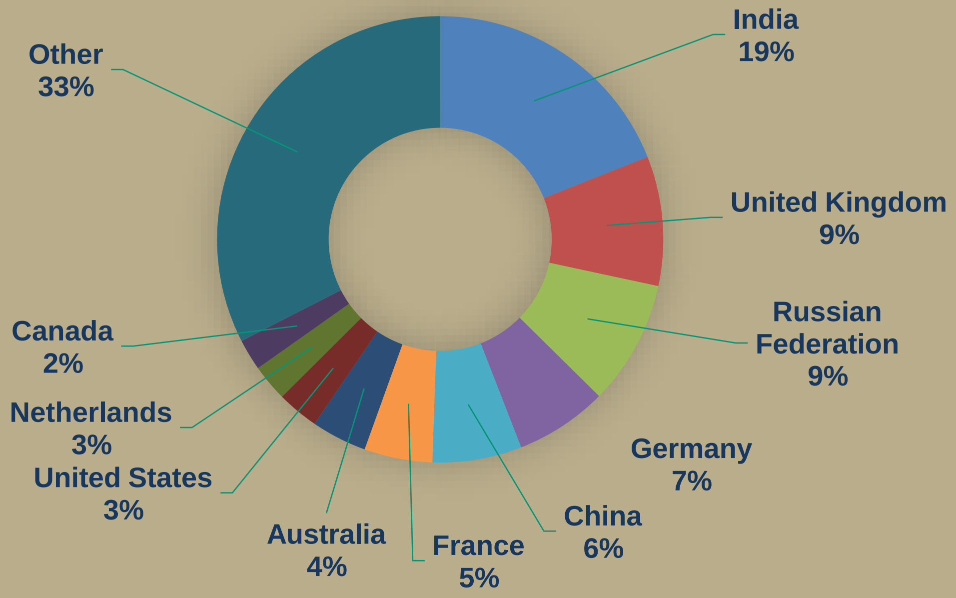
January to August 2024

From January to August this year, Sri Lanka experienced a significant increase in tourist arrivals from India, the United Kingdom, the Russian Federation, Germany, and China, positioning these countries as the top five international sources of visitors. Notably, there was a substantial rise in arrivals from China and the Netherlands during this period, reflecting the growing appeal of Sri Lanka among these markets. However, arrivals from the Russian Federation and Canada saw a decline compared to other leading countries, which could be attributed to changes in travel behavior among these tourists. This mixed trend underscores the importance of diversifying Sri Lanka's tourism markets to enhance resilience and maintain steady growth in a dynamic global environment.

Table 3. Top ten markets to Sri Lanka, January to August 2024

Rank	Country of Residence	Tourist Arrivals (Jan ~ August 2024)	Tourist Arrivals (Jan ~ August 2023)
1	India	258,672	170,247
2	United Kingdom	127,776	83,339
3	Russian Federation	123,033	125,137
4	Germany	91,311	61,682
5	China	88,189	37,743
6	France	67,341	41,243
7	Australia	54,804	39,186
8	United States	41,218	28,993
9	Netherlands	36,252	18,720
10	Canada	30,912	32,898
11	Other	443,160	265,130
Total		**1,362,668**	**904,318**

Chart 3. Top ten source markets to Sri Lanka, January to August 2024



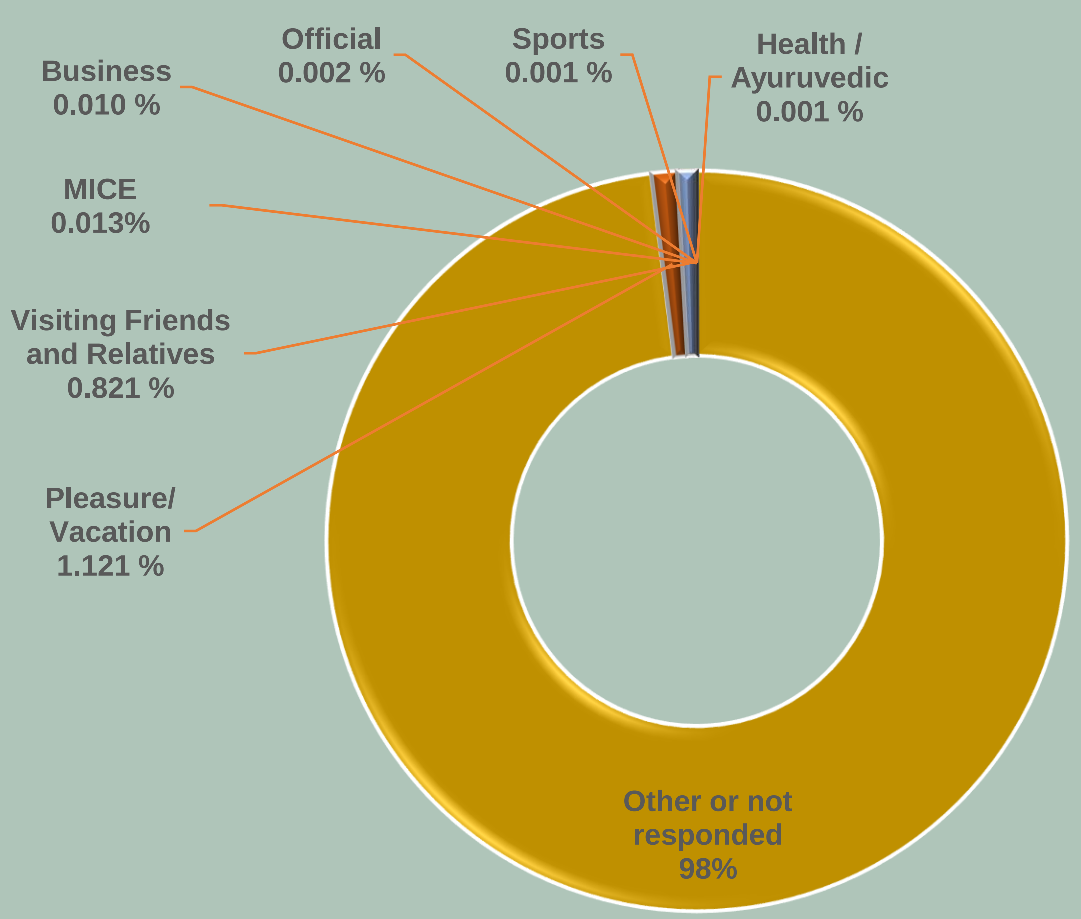
Tourist arrivals by purpose of visit

August 2024

A detailed analysis of tourist motivations for choosing Sri Lanka reveals several key reasons. The primary motivation, accounting for 1.12% of visits, is leisure and vacation, highlighting the country's strong appeal as a leisure destination. Additionally, 0.82% of tourists come to reconnect with friends and family, showing Sri Lanka's attractiveness for personal gatherings.

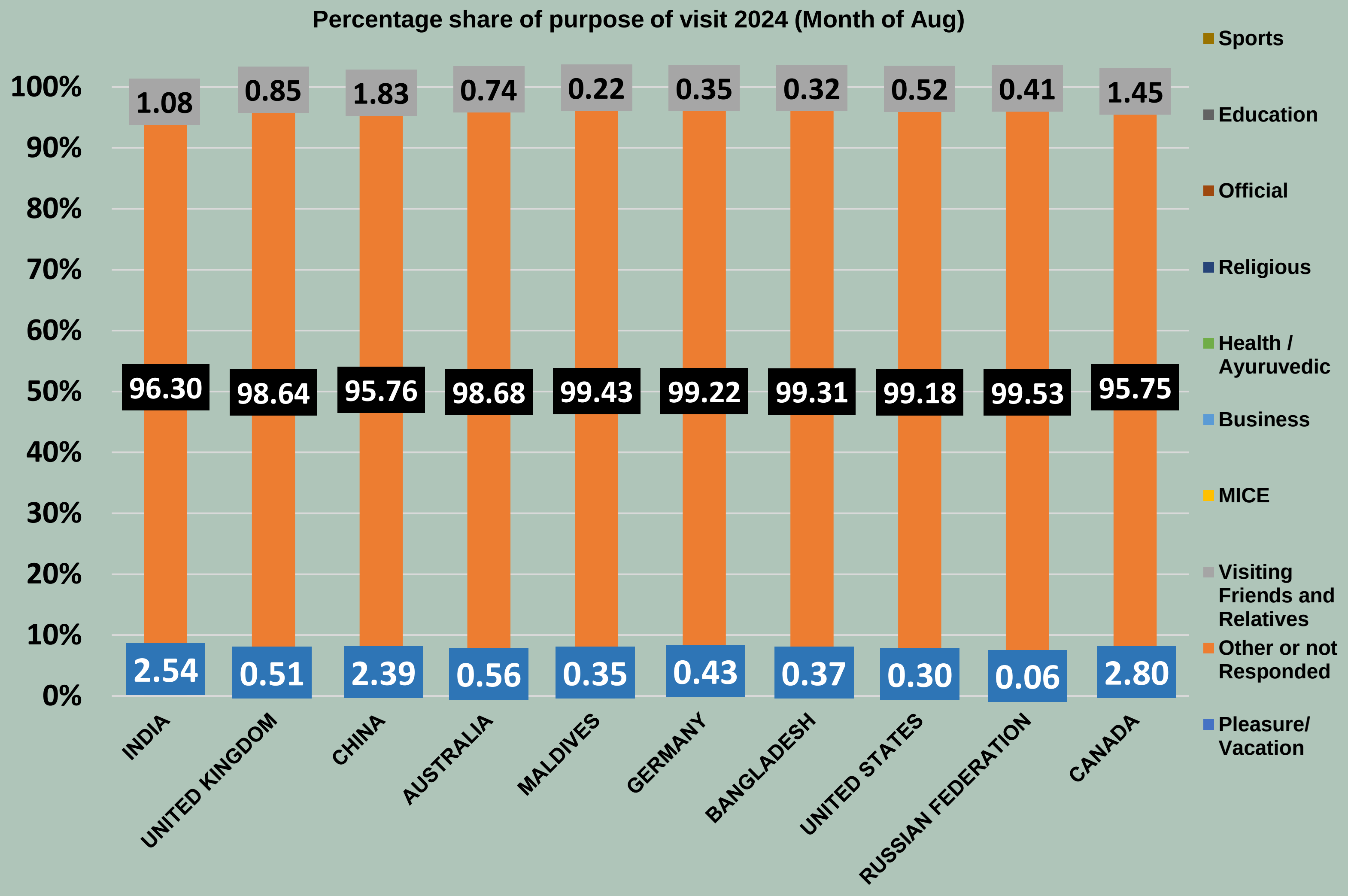
Conversely, only 0.01% of tourists visit for business, indicating a relatively minor focus on professional activities. Furthermore, 0.013% come for MICE (Meetings, Incentives, Conferences, and Exhibitions) events, reflecting Sri Lanka's growing reputation as a venue for corporate events. There is also a small but notable interest in niche areas, with 0.001% of travelers seeking health or Ayurvedic experiences and 0.001% visiting for sports and educational reasons.

Chart 4: Purpose of visit



The significant number of tourists categorized as "other" or “not responded” is a result of the lack of classification for the purpose of visit in the recently introduced visa categories. This also include tourists who had visited for other purposes also.

Chart 5: Purpose of visit vs main source markets



Generational Dynamics of Tourist Arrivals to Sri Lanka, January to June 2024

Tourism is a vital component of Sri Lanka's economy, contributing significantly to national income, employment, and foreign exchange earnings. The country's rich cultural heritage, natural beauty, and diverse wildlife attract millions of tourists annually. Thus, understanding the generational differences among tourists is crucial for tailoring tourism services, marketing strategies, and policy development to meet their distinct needs. These generational shifts influence the types of tourism experiences sought, spending behaviors, and expectations of service quality, which in turn impact the growth and sustainability of Sri Lanka's tourism industry.

Generational characteristics of different segments

Baby Boomers

Baby Boomers, born between 1946 and 1964, are mostly retired and focus on traveling to fulfill their bucket list. They are significant spenders in the travel industry, with annual expenditures of around $157 billion (Ng, 2018). This generation prefers familiar travel experiences and revisiting favorite destinations. While they primarily book holidays online, they are less likely to use smartphones for this purpose and favour personal interaction, often choosing travel advisors over AI-driven solutions. Despite the growing trend of using cards, many Baby Boomers still prefer cash while traveling, particularly in the UK. Their preference for cash is rooted in habit and comfort, necessitating travel money providers to accommodate these traditional preferences (www.mintel.com, n.d.).

Generation X

Generation X, often balancing work and family responsibilities, has limited flexibility for travel and tends to prefer shorter trips to nearby destinations. They are generally more budget-conscious than other generations, seeking experiences that offer good value for money.

Having grown up alongside rapid technological advancements, Gen X is tech-savvy and stays current with new technologies. Unlike Baby Boomers, they tend to independently research and book their travel, relying less on travel agents and tour operators. Instead, they frequently use online travel agencies (OTAs) and review platforms like TripAdvisor for planning their trips (Acorn Tourism, 2024).

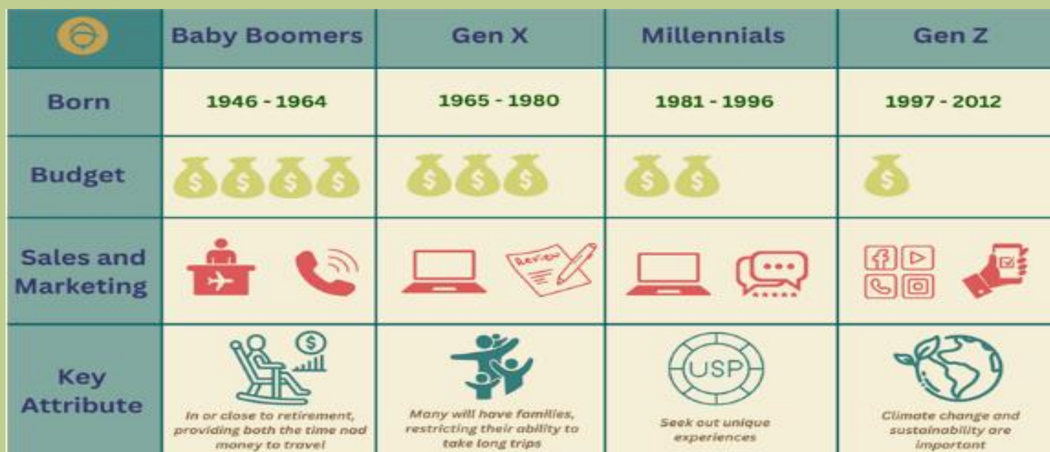
Millennials

This travel group, aged 28 to 43 as of May 2024, represents a significant portion of tourism spending, prioritizing experiences over material goods. Comprising young professionals and new parents, this diverse generation is sustainability-focused and seeks unique, off-the-beaten-path destinations for authentic experiences, avoiding overly touristy spots and staged attractions.

As the first generation to grow up with the internet, they are highly tech-savvy, with access to smartphones and computers. Four in ten UK millennials who follow or frequently view social media personalities view travel content, suggesting that travel brands should consider partnering with travel influencers to reach this demographic (www.mintel.com, n.d.). About 75% conduct online research before booking holidays, using social media for inspiration and seeking genuine, authentic content. They prefer businesses with user-friendly websites and often rely on OTAs and tour operators to make travel arrangements (Acorn Tourism, 2024).

Generation z

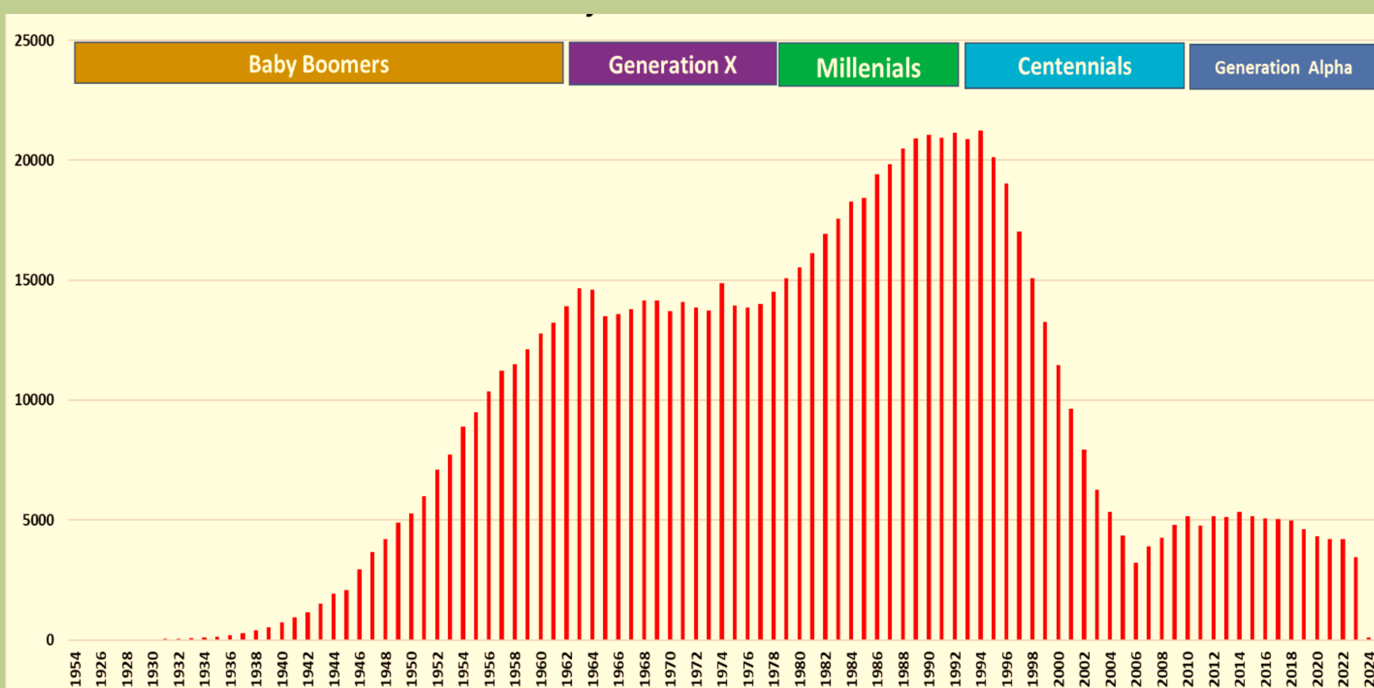
Gen Z, aged 12 to 27 as of May 2024, is the most travel-focused generation, spending about 50% of their disposable income on travel. This group, which includes gap year travelers, university students, and young professionals, has relatively lower budgets and actively seeks good deals. They prioritize sustainability and authentic, off-the-beaten-path experiences. Highly tech-savvy, they rely on social media for travel inspiration, valuing recommendations from influencers and peers. They prefer booking travel components separately through online travel agencies (OTAs) and favour businesses with straightforward booking processes and a strong online presence



	Baby Boomers	Gen X	Millennials	Gen Z
Born	1946 - 1964	1965 - 1980	1981 - 1996	1997 - 2012
Budget	$ $ $ $	$ $ $	$ $	$
Sales and Marketing		REVIEW		
Key Attribute	In or close to retirement, providing both the time nad money to travel	Many will have families, restricting their ability to take long trips	USP Seek out unique experiences	Climate change and sustainability are important

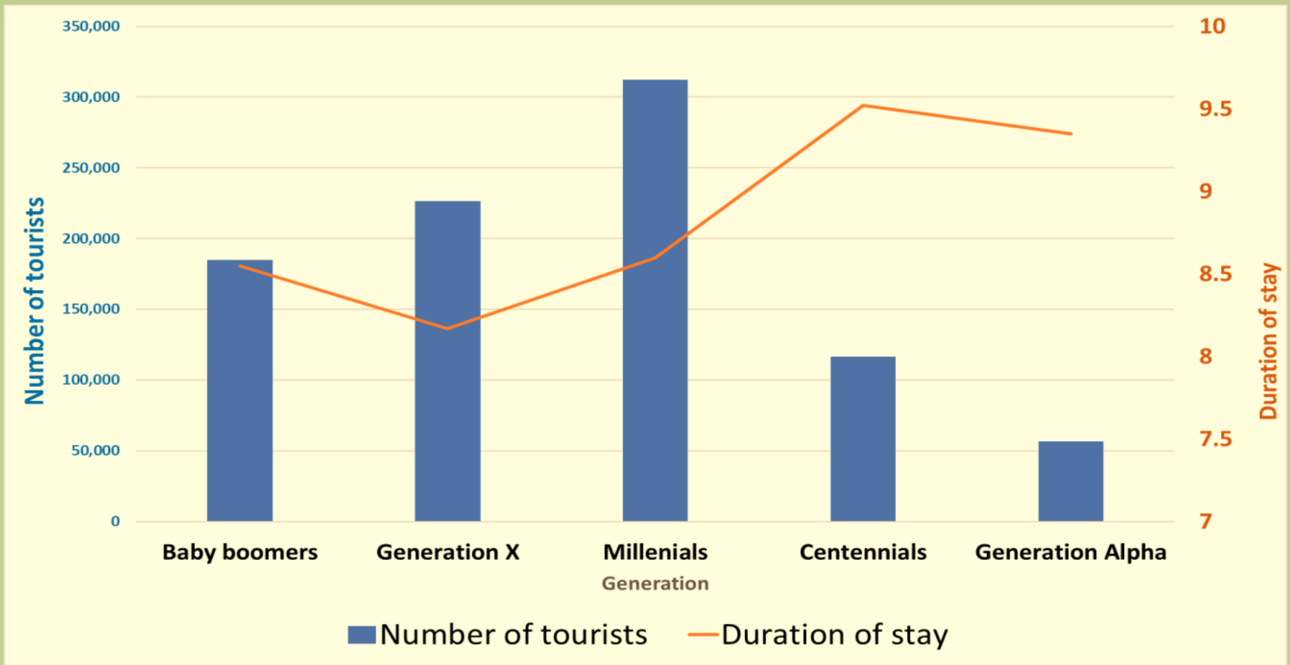
Source: Acorn

Analysis of generational dynamics of tourists visiting to Sri Lanka



Analysis of generational dynamics of tourists visiting to Sri Lanka, January to June 2024

Generation	Age Range	Number of tourists	Duration of Stay
Baby boomers	1946 ~ 1964 (78-60-)	184,736	8.55
Generation X	1965 ~ 1980 (59 -44)	226,372	8.17
Millennials	1981 ~ 1996 (43-28)	312,435	8.60
Centennials/Z	1997 ~ 2012 (27-12)	116,433	9.52
Generation Alpha	2012 on wards 12	56,803	9.35
Total		**896,779**	



An analysis of tourist arrivals to Sri Lanka by generation shows that Millennials are the most frequent visitors, followed by Generation X and Baby Boomers. According to the survey on departing tourists 2018, Millennials typically travel with friends or relatives, with a trip lead time of one month. They rely on friends and relatives for information and often engage in post-trip activities like writing blogs and posting reviews online. Millennials also prefer using online payment methods. The average duration of stay of this age cohort is 8.6 nights. This generation, comprising around 1.8 billion people or 23% of the global population, is the largest adult cohort worldwide, with a significant presence in Asia, which hosts about a quarter of the global Millennial population.

Baby Boomers visiting Sri Lanka usually travel with their spouse and plan their trips about three months in advance through travel agents, relying mainly on recommendations from friends and relatives. The average duration of stay recorded for them in Sri Lanka is 8.5 nights. In contrast, Generation X travelers either visit alone or with their spouse, make travel arrangements 1-3 months ahead, favor camping as accommodation, and typically use online payment methods. In terms of duration generation x travelers have recorded the lowest with 8.1 nights. This generational analysis highlights differing travel behaviors and preferences among tourists to Sri Lanka.

Current Implications for Sri Lanka Tourism

- ✓ **Millennials as Key Market Segment:** With Millennials being the largest group of tourists, their travel habits—such as short lead times, reliance on digital information sources, and preference for online payments—highlight the need for Sri Lanka's tourism industry to focus on digital marketing, social media engagement, and seamless online booking experiences. The average stay of 8.6 nights indicates their potential to contribute significantly to local spending.
- ✓ **Targeted Services for Baby Boomers**: Baby Boomers, who tend to plan their trips well in advance and prefer traditional travel agents, require targeted travel packages that emphasize comfort, relaxation, and curated experiences. The 8.5 nights stay suggests a steady demand for longer, slower-paced tourism experiences, benefiting the accommodation sector.
- ✓ **Adapting to Generation X Preferences**: Generation X's inclination toward camping and shorter stays (8.1 nights) suggests a need for more outdoor and adventure tourism offerings. Enhancing eco-friendly and experiential tourism can attract this segment and add value to Sri Lanka's diverse travel landscape.

Future Implications of Generational Trends for Sri Lanka Tourism

- ✓ **Growing Influence of Digital Natives:** As Generation Z and Generation Alpha become more dominant, the tourism sector in Sri Lanka will need to prioritize digital engagement strategies. Generation Alpha (born from 2010 onwards) is projected to become the largest generation by 2035. These generations are tech-savvy, prefer digital booking platforms, and are influenced by social media and peer reviews. Investments in robust digital marketing, user-friendly websites, and online payment options will be essential to attract these travelers.
- ✓ **Emphasis on Experience-Based Travel**: Both Millennials and Generation Z are drawn to unique, authentic, and experiential travel. Sri Lanka can capitalize on this by promoting immersive experiences such as cultural exchanges, eco-tourism, and adventure activities. Tailoring experiences to these generations will be key in differentiating Sri Lanka as a preferred travel destination.
- ✓ **Demand for Sustainable Tourism**: Younger generations are increasingly environmentally conscious, pushing for sustainable and ethical tourism practices. Sri Lanka will need to focus on developing eco-friendly tourism initiatives, promoting conservation efforts, and offering sustainable accommodation options to appeal to this growing demand.

- ✓ **Shift in Travel Planning and Decision-Making**: With the decline in traditional travel planning methods among younger generations, there will be a diminished role for travel agents. Sri Lanka's tourism sector should adapt by creating direct-to-consumer marketing strategies and leveraging influencers, online communities, and travel apps.
- ✓ **Shorter Booking Windows and Flexible Travel Options**: Millennials and Generation Z favour spontaneous and flexible travel plans. The tourism industry in Sri Lanka will need to accommodate these preferences by offering flexible booking policies, last-minute deals, and tailored packages that cater to short-notice travelers.
- ✓ **Increased Use of Technology and Personalization**: As Generation Alpha grows, the use of technology in travel will expand, including AI-driven personalization and virtual reality experiences for travel planning. Sri Lanka should explore integrating advanced technologies into the travel experience to meet the expectations of this tech-savvy cohort.

Looking ahead, the influence of digital natives like Generation Z and Generation Alpha will reshape the market, necessitating innovative transformations. By embracing these trends, Sri Lanka can not only cater to the evolving demands of current tourists but also position itself as a forward-thinking, sustainable destination. This approach will ensure the country's tourism sector remains vibrant and resilient, attracting a diverse range of travelers from all generations and contributing significantly to the local economy.

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International tourist arrivals by country of residence

	August 2024 Tourist Arrivals			Tourist Arrivals August 2023	% Change August (24/23) 2024	Total Tourist Arrivals Up to August 2024	Total Tourist Arrivals Up to August 2023	% Change Up to August (24/23) 2024
	By Air	By Sea	Total					
AMERICAS	**7,792**	**41**	**7,833**	**8,206**	**(4.5)**	**76,757**	**64,915**	**18.24**
North America	**7,424**	**41**	**7,465**	**7,887**	**(5.4)**	**72,784**	**62,281**	**16.86**
Canada	3,858	10	3,868	4,735	(18.3)	30,912	32,898	(6.04)
Mexico	58	0	58	45	28.9	654	390	67.69
United States	3,508	31	3,539	3,107	13.9	41,218	28,993	42.17
Caribbean & Central America	**54**	**0**	**54**	**60**	**(10.0)**	**661**	**419**	**57.76**
Costa Rica	02	0	02	2	0.0	71	33	115.15
Jamaica	05	0	05	7	(28.6)	65	32	103.13
Others	47	0	47	51	(7.8)	525	354	48.31
South America	**314**	**0**	**314**	**259**	**21.2**	**3,312**	**2,215**	**49.53**
Argentina	43	0	43	52	(17.3)	630	473	33.19
Brazil	129	0	129	77	67.5	1,326	808	64.11
Chile	42	0	42	28	50.0	399	273	46.15
Colombia	51	0	51	52	(1.9)	467	325	43.69
Others	49	0	49	50	(2.0)	490	336	45.83
AFRICA	**1,206**	**1**	**1,207**	**1,061**	**13.8**	**8,844**	**5,646**	**56.64**
North Africa	**293**	**0**	**293**	**252**	**16.3**	**2,138**	**1,676**	**27.57**
Morocco	112	0	112	82	36.6	669	497	34.61
Sudan	78	0	78	88	(11.4)	566	552	2.54
Others	103	0	103	82	25.6	903	627	44.02
Sub-Saharan Africa	**913**	**1**	**914**	**809**	**13.0**	**6,706**	**3,970**	**68.92**
Kenya	54	0	54	106	(49.1)	487	375	29.87
Mauritius	57	0	57	23	147.8	343	186	84.41
Nigeria	05	0	05	7	(28.6)	39	53	(26.42)
South Africa	324	0	324	338	(4.1)	2,905	1,852	56.86
Others	473	01	474	335	41.5	2,932	1,504	94.95

	August 2024			Tourist Arrivals August 2023	% Change August (24/23) 2024	Total Tourist Arrivals Up to August 2024	Total Tourist Arrivals Up to August 2023	% Change Up to August (24/23) 2024
	By Air	By Sea	Total					
ASIA & PACIFIC	**69,823**	**2,028**	**71,851**	**60,006**	**19.7**	**550,387**	**338,622**	**62.54**
North East Asia	**16,889**	**0**	**16,889**	**13,151**	**28.4**	**120,206**	**57,193**	**110.18**
China	11,333	0	11,333	9,262	22.4	88,189	39,186	125.05
Japan	4,102	0	4,102	2,604	57.5	18,734	11,029	69.86
South Korea	698	0	698	666	4.8	6,862	4,214	62.84
Taiwan	755	0	755	611	23.6	6,348	2,695	135.55
Others	01	0	01	8	(87.5)	73	69	5.80
South East Asia	**4,890**	**0**	**4,890**	**3,880**	**26.0**	**35,204**	**21,930**	**60.53**
Cambodia	25	0	25	09	177.8	957	353	171.10
Indonesia	291	0	291	208	39.9	2,105	1,418	48.45
Malaysia	1,571	0	1,571	1,207	30.2	12,099	6,360	90.24
Myanmar	417	0	417	355	17.5	1,253	779	60.85
Philippines	465	0	465	468	(0.6)	3,579	2,774	29.02
Singapore	1,215	0	1,215	904	34.4	7,956	5,451	45.95
Thailand	598	0	598	480	24.6	5,011	3,185	57.33
Vietnam	293	0	293	238	23.1	2,074	1,503	37.99
Others	15	0	15	11	36.4	170	107	58.88
Oceania	**7,720**	**2**	**7,722**	**6,133**	**25.9**	**62,010**	**42,514**	**45.86**
Australia	6,685	02	6,687	5,522	21.1	54,804	37,743	45.20
New Zealand	1,011	0	1,011	575	75.8	6,992	4,612	51.60
Others	24	0	24	36	(33.3)	214	159	34.59
South Asia	**40,324**	**2,026**	**42,350**	**36,842**	**15.0**	**332,967**	**216,985**	**53.45**
Afghanistan	18	0	18	41	(56.1)	120	114	5.26
Bangladesh	3,877	0	3,877	1,533	152.9	24,116	8,090	198.10
Bhutan	51	0	51	60	(15.0)	459	261	75.86
India	31,005	2,026	33,031	30,593	8.0	258,672	170,247	51.94
Iran	883	0	883	279	216.5	7,442	6,516	14.21
Maldives	3,198	0	3,198	2,596	23.2	30,098	22,791	32.06
Nepal	252	0	252	476	(47.1)	2,842	2,646	7.41
Pakistan	1,040	0	1,040	1,264	(17.7)	9,218	6,320	45.85
EUROPE	**80,917**	**17**	**80,934**	**63,848**	**26.8**	**705,935**	**475,227**	**48.55**
Northern Europe	**19,663**	**13**	**19,676**	**16,831**	**16.9**	**163,062**	**105,505**	**54.55**
Denmark	606	0	606	552	9.8	10,898	7,114	53.19
Finland	100	0	100	61	63.9	2,588	1,133	128.42
Norway	486	0	486	481	1.0	8,253	6,149	34.22
Sweden	290	0	290	317	(8.5)	7,544	4,633	62.83
United Kingdom	17,574	13	17,587	15,035	17.0	127,776	83,339	53.32
Others	607	0	607	385	57.7	6,003	3,137	91.36

	August 2024 By Air	August 2024 By Sea	August 2024 Total	Tourist Arrivals August 2023	% Change August (24/23) 2024	Total Tourist Arrivals Up to August 2024	Total Tourist Arrivals Up to August 2023	% Change Up to August (24/2) 2024
Western Europe	**29,443**	**4**	**29,447**	**21,884**	**34.5**	**239,356**	**150,958**	**58.5**
Austria	1,150	0	1,150	866	32.8	11,323	5,995	88.87
Belgium	1,751	0	1,751	1,330	31.7	11,976	7,176	66.89
France	8,592	04	8,596	6,223	38.1	67,341	41,243	63.28
Germany	10,623	0	10,623	8,472	25.4	91,311	61,682	48.04
Netherlands	5,355	0	5,355	3,429	56.2	36,252	18,720	93.65
Switzerland	1,856	0	1,856	1,483	25.2	20,499	15,686	30.68
Others	116	0	116	81	43.2	654	456	43.42
Central/ Eastern Europe	**9,310**	**0**	**9,310**	**10,499**	**(11.3)**	**217,817**	**166,505**	**30.82**
Belarus	199	0	199	497	(60.0)	7,415	6,293	17.83
Czech Republic	822	0	822	525	56.6	14,398	6,123	135.15
Estonia	15	0	15	26	(42.3)	2,814	727	287.07
Hungary	261	0	261	166	57.2	4,386	1,933	126.90
Kazakhstan	71	0	71	75	(5.3)	8,850	2,281	287.99
Lithuania	111	0	111	91	22.0	4,663	1,497	211.49
Poland	2,240	0	2,240	1,029	117.7	28,393	8,369	239.26
Romania	336	0	336	304	10.5	4,025	2,156	86.69
Russia	4,351	0	4,351	6,853	(36.5)	123,033	125,137	(1.68)
Slovakia	290	0	290	227	27.8	4,567	2,733	67.11
Ukraine	203	0	203	183	10.9	4,848	3,023	60.37
Others	411	0	411	523	(21.4)	10,425	6,233	67.25
Southern/ Mediterranean Europe	**22,501**	**0**	**22,501**	**14,634**	**53.8**	**85,700**	**52,259**	**63.99**
Greece	339	0	339	307	10.4	1,812	1,099	64.88
Italy	9,586	0	9,586	5,110	87.6	27,444	14,967	83.36
Portugal	667	0	667	368	81.3	3,954	2,269	74.26
Spain	7,262	0	7,262	4,455	63.0	23,848	13,663	74.54
Turkey	448	0	448	262	71.0	4,480	2,053	118.22
Israel	3,248	0	3,248	3,396	(4.4).	17,373	14,287	21.60
Others	951	0	951	736	29.2	6,789	3,921	73.14
MIDDLE EAST	**2,784**	**0**	**2,784**	**3,284**	**(15.2)**	**20,745**	**19,908**	**4.20**
Bahrain	140	0	140	176	(20.5)	884	940	(5.96)
Egypt	265	0	265	239	10.9	2,608	1,817	43.53
Iraq	172	0	172	103	67.0	692	649	6.63
Jordan	173	0	173	389	(55.5)	1,775	2,688	(33.97)
Kuwait	207	0	207	293	(29.4)	1,450	1,507	(3.78)
Lebanon	244	0	244	250	(2.4)	2,412	2,132	13.13
Oman	473	0	473	386	22.5	2,124	1,657	28.18
Qatar	102	0	102	134	(23.9)	578	692	(16.47)
Saudi Arabia	330	0	330	708	(53.4)	4,320	5,011	(13.79)
United Arab Emirates	562	0	562	379	48.3	3,114	2,037	52.87
Others	116	0	116	227	(48.9)	788	778	1.29
TOTAL	**162,522**	**2,087**	**164,609**	**136,405**	**20.7**	**1,362,668**	**904,318**	**50.68**

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

An analysis of tourists' departure airports and preferred airlines traveling to Sri Lanka underscores the critical importance of air travel in the country's tourism industry. About 37% of tourists transited through Dubai, Doha, and Chennai airports as their final stopovers before arriving in Sri Lanka. Additionally, Sri Lankan Airlines, Qatar Airways, and Emirates accounted for 48% of all tourist arrivals, highlighting the dominant role these carriers play in facilitating international travel to the island. This concentration of traffic through specific airports and airlines emphasizes the strategic influence of well-connected hubs and major carriers in driving tourist flows to Sri Lanka.

Chart 6. Main last departure airports to Sri Lanka, August 2024

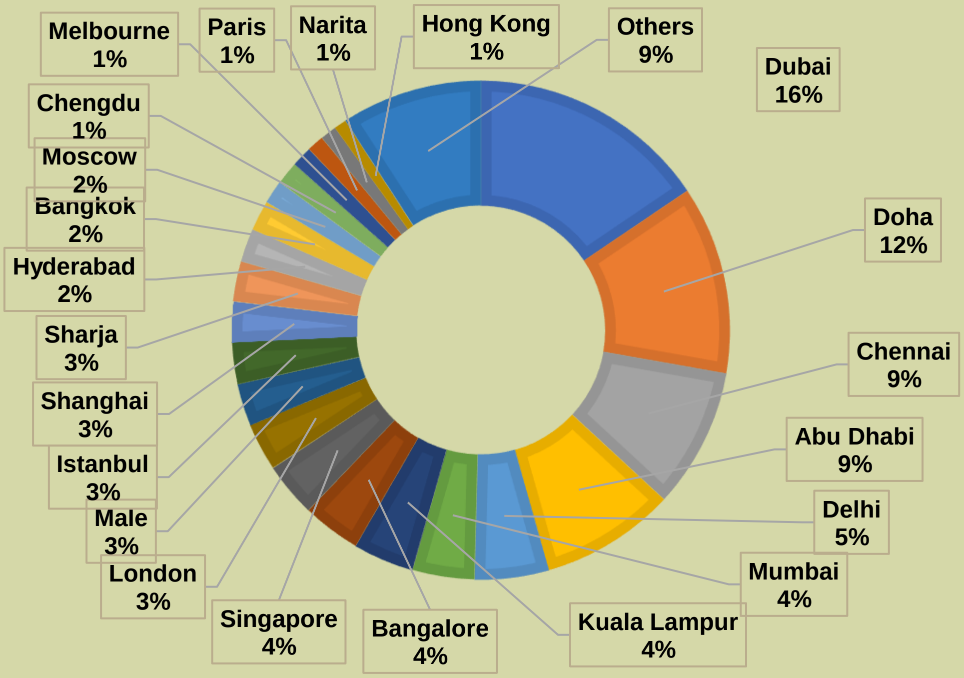
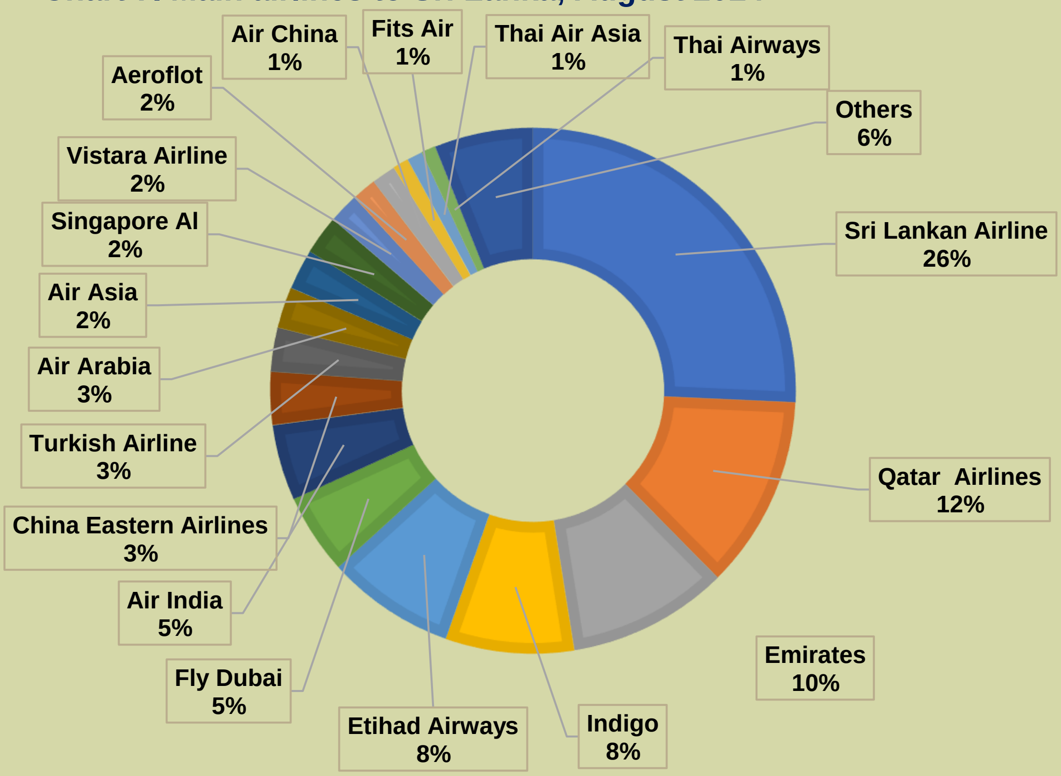


Chart 7. Main airlines to Sri Lanka, August 2024



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

August 2023

Travelers' experiences in Sri Lanka are greatly influenced by the airlines they choose, which frequently reflect their favourite carriers and nationalities. Indian tourists frequently opt for Sri Lankan Airlines and IndiGo, aligning with the strong air connectivity between the two countries. Chinese visitors typically choose China Eastern Airlines and Air China, indicating a preference for familiar national carriers. Visitors from the UK and Australia commonly fly with Sri Lankan Airlines, showcasing the airline's strong presence and appeal in these markets. Dutch tourists tend to prefer Emirates, likely due to its extensive network and high service standards. Meanwhile, Qatar Airways is popular among travelers from Germany, France, and Spain, highlighting its strategic hub in Doha and convenient connections to Sri Lanka. These preferences underline the importance of maintaining strong partnerships with key airlines to cater to diverse markets and enhance the overall travel experience for international tourists visiting Sri Lanka.

Chennai serves as the main departure airport for travelers from India, while Doha is the primary gateway for tourists from the United Kingdom, France, and Spain. Australian and Chinese travelers typically depart from Singapore and Shanghai airports, respectively, while Dubai is a crucial departure point for visitors from Germany, Italy, and the Netherlands. This highlights the importance of accessibility in bolstering Sri Lanka's tourism sector, showing how travelers' preferences for airlines and airports are influenced by their home countries. Effective travel connections and strategically positioned departure points play a key role in attracting international visitors, emphasizing the need for Sri Lanka to maintain strong links with these major transit hubs to support and enhance its tourism industry.

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

Country	Sri Lankan Airline	Qatar Airlines	Emirates	Indigo	Etihad Airways	Fly Dubai	Air India	China Eastern Airlines	Turkish Airline	Air_Arabia	Air Asia	Singapore Al	Vistara Airline	Aeroflot	Air China	Fits Air	Thai Air Asia	Thai Airways	Others	Total
India	40.86	0.35	0.94	29.27	0.40	0.47	12.58	0.01	0.02	0.69	0.20	0.17	4.28	0.00	0.01	1.40	0.07	0.07	8.21	100.00
United Kingdom	29.68	24.62	18.19	1.12	10.55	4.16	1.94	0.27	1.39	0.64	1.63	0.65	0.68	0.00	0.01	0.30	0.64	0.39	3.14	100.00
China	14.90	0.24	1.31	0.11	0.41	0.45	0.24	37.97	0.05	0.10	6.88	1.71	0.06	0.00	21.34	0.56	3.33	2.40	7.95	100.00
Germany	13.94	24.41	17.98	0.89	20.01	7.24	3.44	0.15	3.49	0.35	1.60	0.38	2.30	0.07	0.00	0.18	0.61	0.19	2.78	100.00
Italy	8.10	13.40	12.15	0.46	21.19	12.01	5.81	0.26	5.48	12.83	0.71	0.04	0.48	0.00	0.01	0.23	0.18	0.18	6.49	100.00
France	20.29	20.32	14.17	0.87	12.53	3.30	7.31	0.06	5.11	0.52	2.02	0.30	9.70	0.01	0.01	0.55	0.97	0.15	1.80	100.00
Spain	13.95	22.71	16.91	0.70	19.87	3.42	1.40	0.28	12.83	1.90	1.24	0.12	0.77	0.00	0.00	0.76	0.43	0.03	2.69	100.00
Australia	54.34	1.21	1.30	0.72	1.03	0.54	2.20	0.15	0.40	0.18	3.35	25.36	0.10	0.00	0.01	0.06	0.43	0.90	7.70	100.00
Netherlands	13.18	24.84	28.42	0.80	8.87	7.45	4.31	0.07	5.99	0.39	2.09	0.24	1.27	0.00	0.00	0.22	0.78	0.17	0.88	100.00
Russian Federation	2.96	1.06	3.72	0.67	2.48	5.24	0.18	5.61	0.25	16.34	1.20	0.07	0.18	55.85	0.09	0.74	0.60	0.16	2.60	100.00

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

Country	Dubai	Doha	Chennai	Abu Dhabi	Delhi	Mumbai	Kuala Lampur	Bangalore	Singapore	London	Male	Istanbul	Shanghai	Sharja	Hyderabad	Bangkok	Moscow.	Chengdu	Melbourne	Others	Total
India	671	125	10,692	237	3,950	3,574	174	4,884	157	28	172	8	5	228	3,307	114	0	2	30	4,673	33,031
United Kingdom	4,032	4,336	773	1,892	265	260	393	193	241	3,723	241	245	67	117	37	169	0	1	25	577	17,587
China	417	27	35	58	8	12	952	3	258	10	403	6	3,239	87	5	506	0	2,418	7	2,882	11,333
Germany	2,719	2,593	202	2,166	395	419	217	240	79	84	73	371	26	37	15	54	7	0	7	919	10,623
Italy	2,342	1,533	53	2,154	657	90	80	33	12	66	126	525	37	1,230	8	37	0	1	5	597	9,586
France	1,543	1,839	252	1,202	620	945	216	129	64	121	61	439	20	45	16	42	1	1	4	1,036	8,596
Spain	1,518	1,795	51	1,697	179	90	104	34	24	226	185	932	22	138	4	18	0	0	2	243	7,262
Australia	131	82	103	76	246	28	689	48	1,967	74	54	27	11	12	18	108	0	1	1,929	1,083	6,687
Netherlands	1,939	1,331	43	480	260	128	141	94	23	170	108	321	6	21	10	27	0	0	5	248	5,355
Russian Federation	431	47	25	195	23	15	61	18	7	2	45	11	225	713	8	23	2,430	4	3	65	4,351

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