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## Introduction

The following document provides a synthesis of the most recent February, 2024 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 29<sup>th</sup> February 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 February 2024, Sri Lanka witnessed a substantial upsurge in international tourist arrivals, marking an impressive 102.09% increase from the previous year, totaling 218,350 visitors. This surge was attributed to sustained peak tourism season momentum and favorable local and international conditions, contributing significantly to the overall rejuvenation of the tourism sector.

Throughout February, Sri Lanka experienced a notable surge in visitors from pivotal source markets, including Russia, India, the United Kingdom, Germany, and China. These nations played a pivotal role in propelling the surge in tourist arrivals, thereby providing additional support to Sri Lanka's tourism industry.

According to the most recent projections by PATA, international visitor arrivals (IVA) are expected to

see substantial growth in 2024, surpassing the volume recorded in 2019. Furthermore, the forecasts suggest that this trend of annual increases will persist into both 2025 and 2026.

As per the UNWTO, despite the pandemic challenges, international tourism has rebounded to 88% of pre-pandemic levels, driven by strong pent-up demand. Forecasts indicate a complete recovery by 2024, with a projected 2% growth surpassing 2019 levels. Industry optimism is high, with 67% of professionals expressing positivity for 2024 compared to the preceding year, according to the latest UNWTO Tourism Confidence Index survey. The anticipated recovery by the end of 2024 is credited to the release of pent-up demand, improved air connectivity, and the robust resurgence of Asian markets and destinations

**Table 1. Monthly tourist arrivals, February 2024**

Month	2023	2024	% Change 2024/23
January	102,545	208,253	103.08
February	107,639	218,350	102.09
March	125,495		
April	105,498		
May	83,309		
June	100,388		
July	143,039		
August	136,405		
September	111,938		
October	109,199		
November	151,496		
December	210,352		
TOTAL	1,487,303	426,603	



**Tourist Arrivals | February 2024**

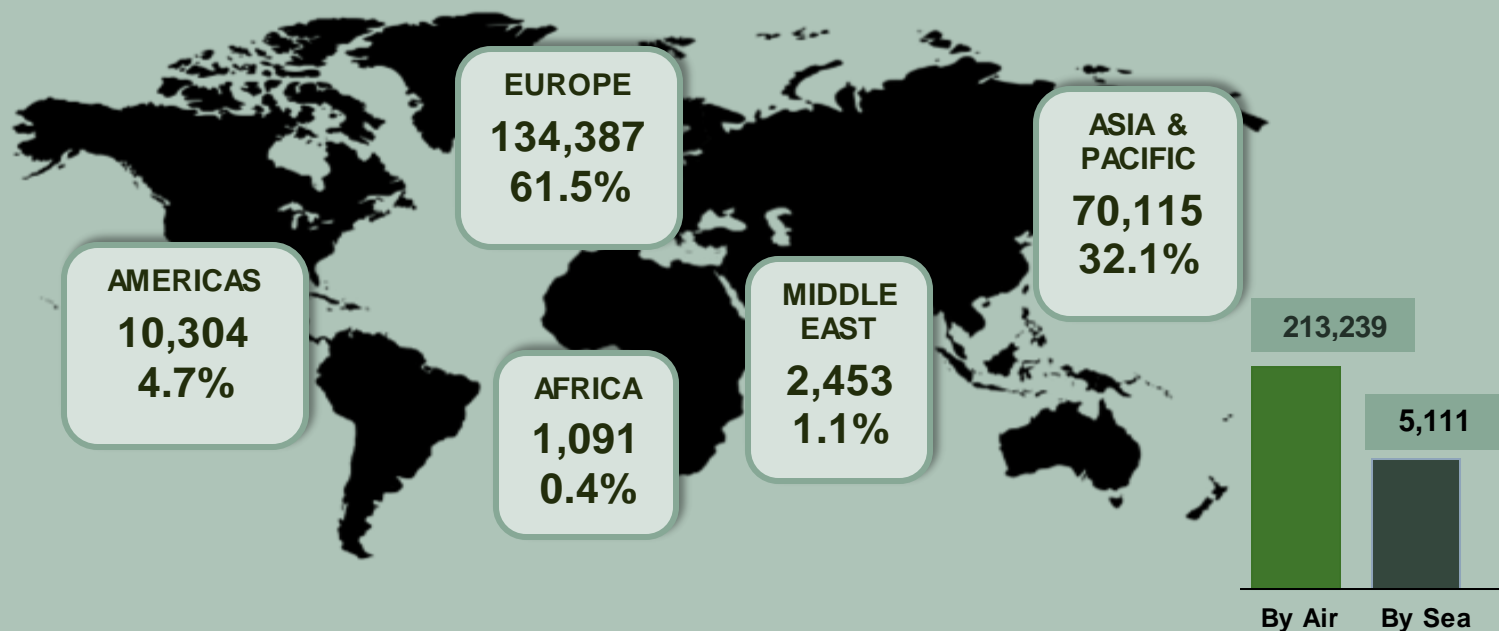
**218,350**



## Tourist arrivals by region and percentage share

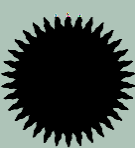
### February 2024

Map 1. Tourist arrivals by region and percentage share



Europe played a significant role in shaping Sri Lanka's tourism landscape, accounting for 61.5% of total arrivals, while Asia and the Pacific emerged as major contributors, comprising 32.1% of visitors. This shift underscores the evolving dynamics within Sri Lanka's tourism sector, with Europe and the Asia-Pacific region being pivotal players.

The increase in tourism can be attributed to growing demand from India, Russia, Germany, the UK, and China, which have all contributed to the enhancement of Sri Lanka's tourism industry. The Americas constituted 4.7% of arrivals, while the Middle East and Africa each contributed 1.1% and 0.4% respectively, each leaving a distinct mark on Sri Lanka's tourism scene.



## Top primary markets and top potential markets

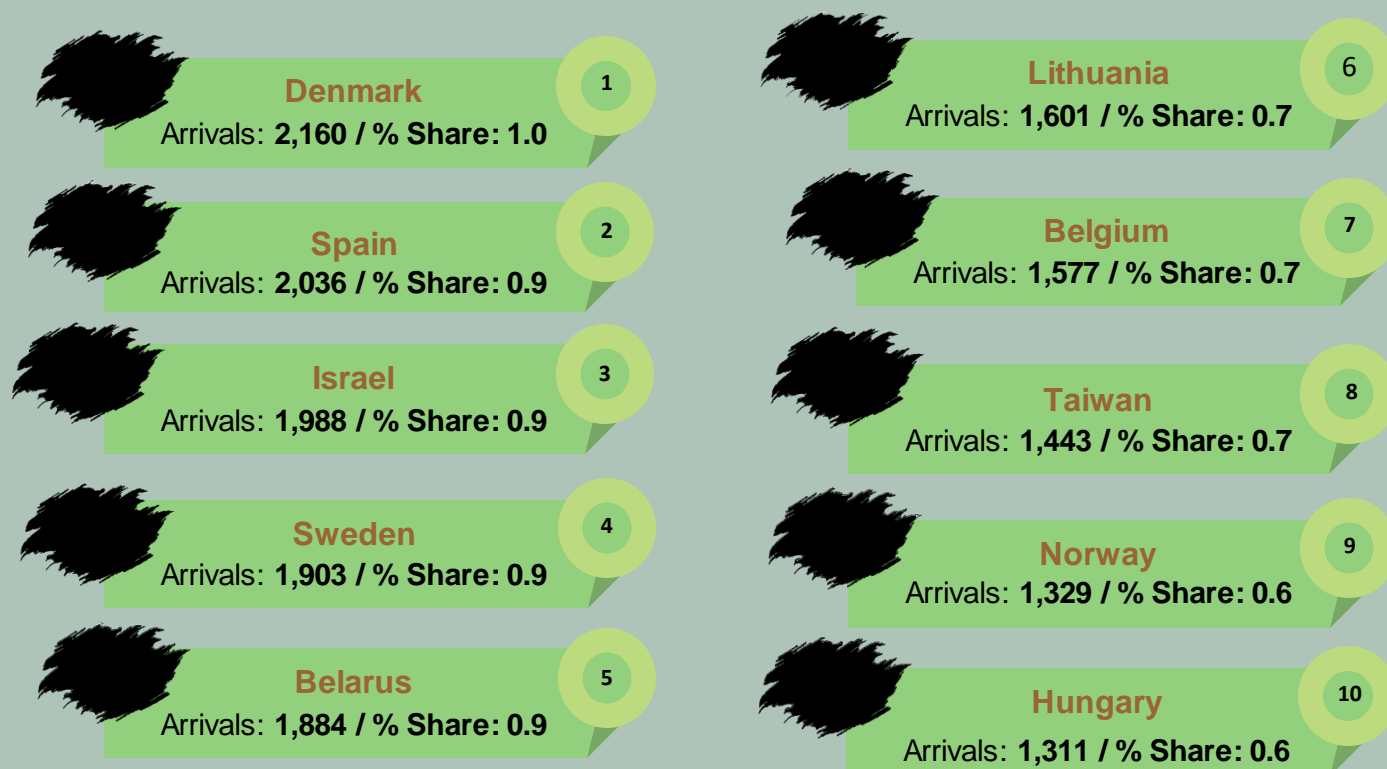
### Top primary markets, February 2024



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, February 2024



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.



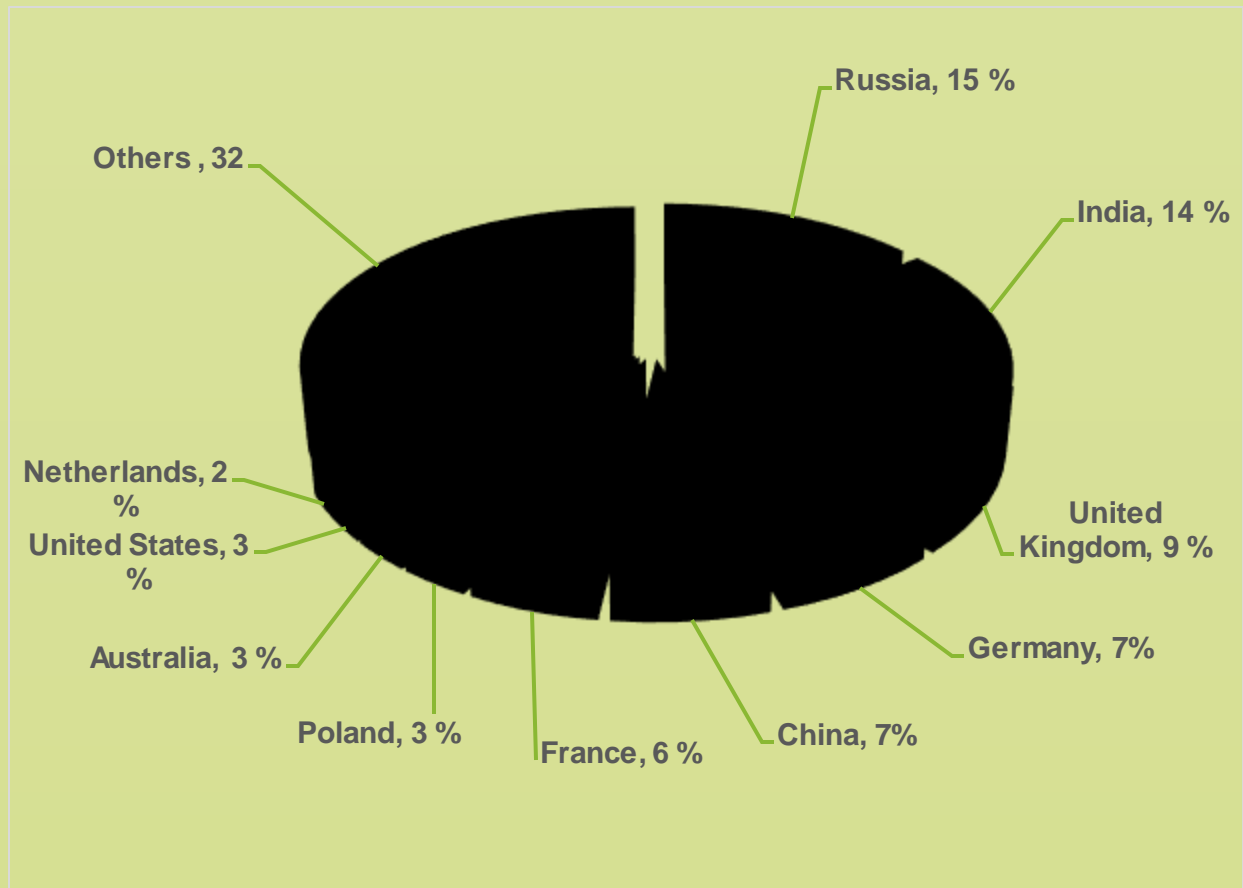


# Top ten source markets

## February 2024

In February, Russia led tourist arrivals to Sri Lanka, representing 15% of the total. Following closely were India, the United Kingdom, Germany, and China, contributing 14%, 9%, 7%, and 7% respectively, showcasing shifting travel preferences. Notably, there was an uptick in arrivals from the UK, China, Poland, Netherlands, India, USA, France, and Germany compared to the previous year, indicating a trend towards emerging destinations. Poland and the Netherlands' significant presence in the top ten source markets is noteworthy. Factors like peak season, enhanced air connectivity, local conditions, proximity, and geopolitical influences collectively boosted these countries' roles in Sri Lanka's tourism sector.

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







**Table 2. Top ten source markets to Sri Lanka, February**

Rank	Country of Residence	Tourist Arrivals (February 2024)			Tourist Arrivals (February 2023)
		By Air	By Sea	Total	
1	Russian Federation	31,960	70	32,030	29,084
2	India	30,001	26	30,027	13,714
3	United Kingdom	18,070	2,544	20,614	8,575
4	Germany	15,831	428	16,259	7,930
5	China	14,834	02	14,836	1,535
6	France	12,394	109	12,503	6,118
7	Poland	6,907	02	6,909	1,118
8	Australia	5,800	465	6,265	3,113
9	United States	4,902	807	5,709	2,443
10	Netherlands	3,972	39	4,011	1,485





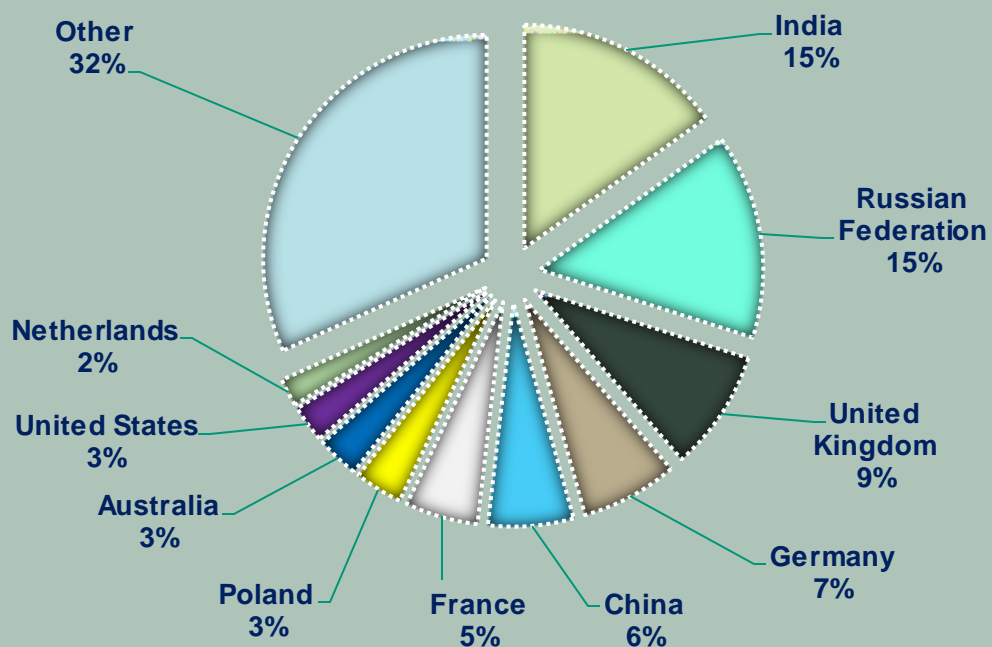
## Top ten source markets January to February 2023

Sri Lanka's leading international tourist-generating markets from January to February this year were India, the Russian Federation, the United Kingdom, Germany, and China. Despite Russia's emergence as a top source market, there was only a 16.3% increase in arrivals compared to the same period in 2023. Notably, significant increases in tourist arrivals were observed from China, Poland, the USA, the Netherlands, India, and the UK during this period.

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

Rank	Country of Residence	Tourist Arrivals (January ~ February 2024)	Tourist Arrivals (January ~ February 2023)
1	India	64,426	27,473
2	Russian Federation	63,189	54,338
3	United Kingdom	37,279	17,058
4	Germany	29,852	16,147
5	China	26,347	2,370
6	France	22,422	10,958
7	Poland	14,709	2,387
8	Australia	12,910	6,781
9	United States	11,421	5,079
10	Netherlands	8,542	2,999
11	Other	135,506	64,594
Total		426,603	210,184

**Chart 2. Top ten source markets to Sri Lanka, January to February 2024**





# Tourist arrivals by purpose of visit

## February 2024

A detailed examination of tourist motivations for visiting Sri Lanka reveals diverse travel purposes. The majority, accounting for 69% of all visits, opt for leisure and vacation, indicating the country's popularity as a relaxation destination. Additionally, 7% visit to reconnect with friends and family, showcasing Sri Lanka's ability to attract those with personal ties.

In contrast, business-related visits constitute only 2%, indicating a smaller segment focusing on professional engagements. Moreover, 8% come for MICE purposes, reflecting Sri Lanka's emerging reputation as a venue for conferences and events. Niche interests are also evident, with 0.8% and 0.04% visiting for health/Ayurvedic and educational reasons, respectively.

In February, tourism in Sri Lanka was predominantly driven by leisure, with significant percentages of visitors from India (56%), Russia (69%), the UK (75%), Germany (76%), China (91%), France (81%), Poland (79%), USA (66%), and the Netherlands (84%) choosing the country for recreational purposes, highlighting its appeal as a destination for relaxation and enjoyable experiences.

Conversely, February saw fewer tourists visiting friends and relatives in Sri Lanka, with 32% of Australian, 15% of British, and 17% of American tourists opting for such connections.

Furthermore, a portion of Russian (14%) and Polish (11%) tourists traveled to Sri Lanka for MICE purposes, while 8% of Indian visitors arrived for business reasons. Additionally, 6% of German tourists visited Sri Lanka specifically for health-related services, showcasing the diverse motivations behind tourism to the country.

Chart 3: Purpose of visit

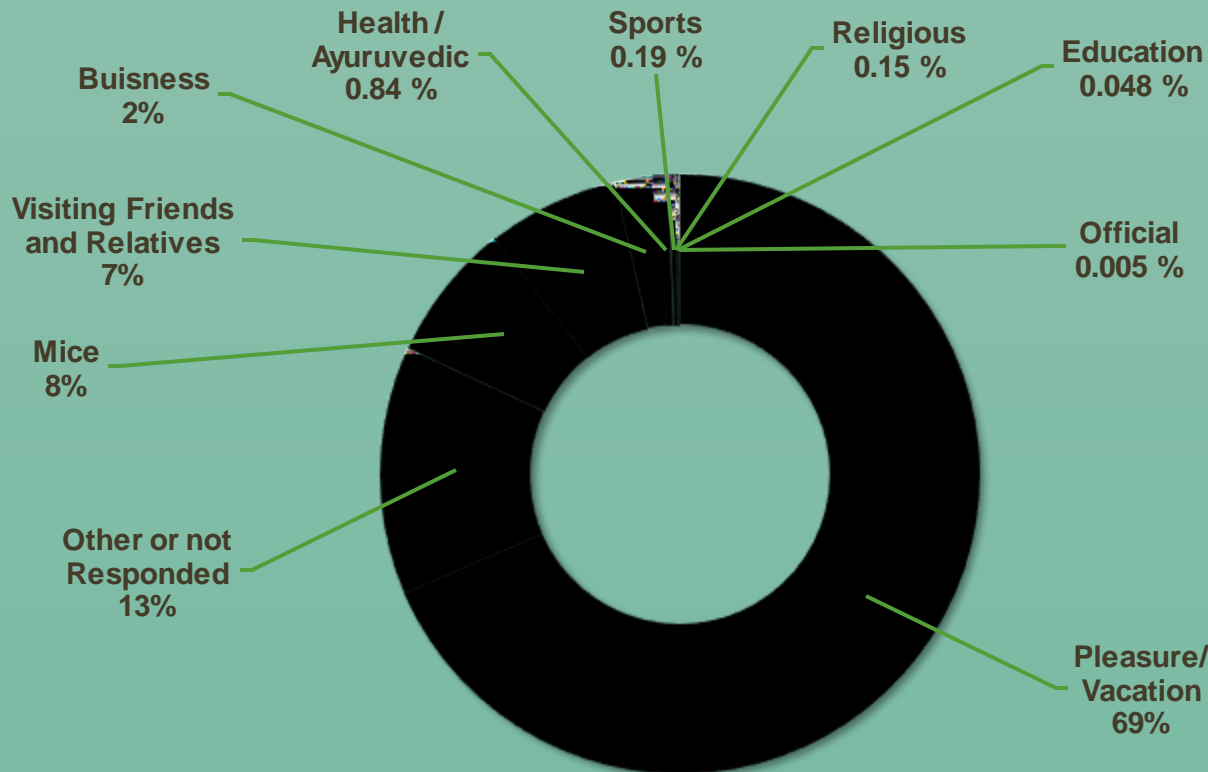
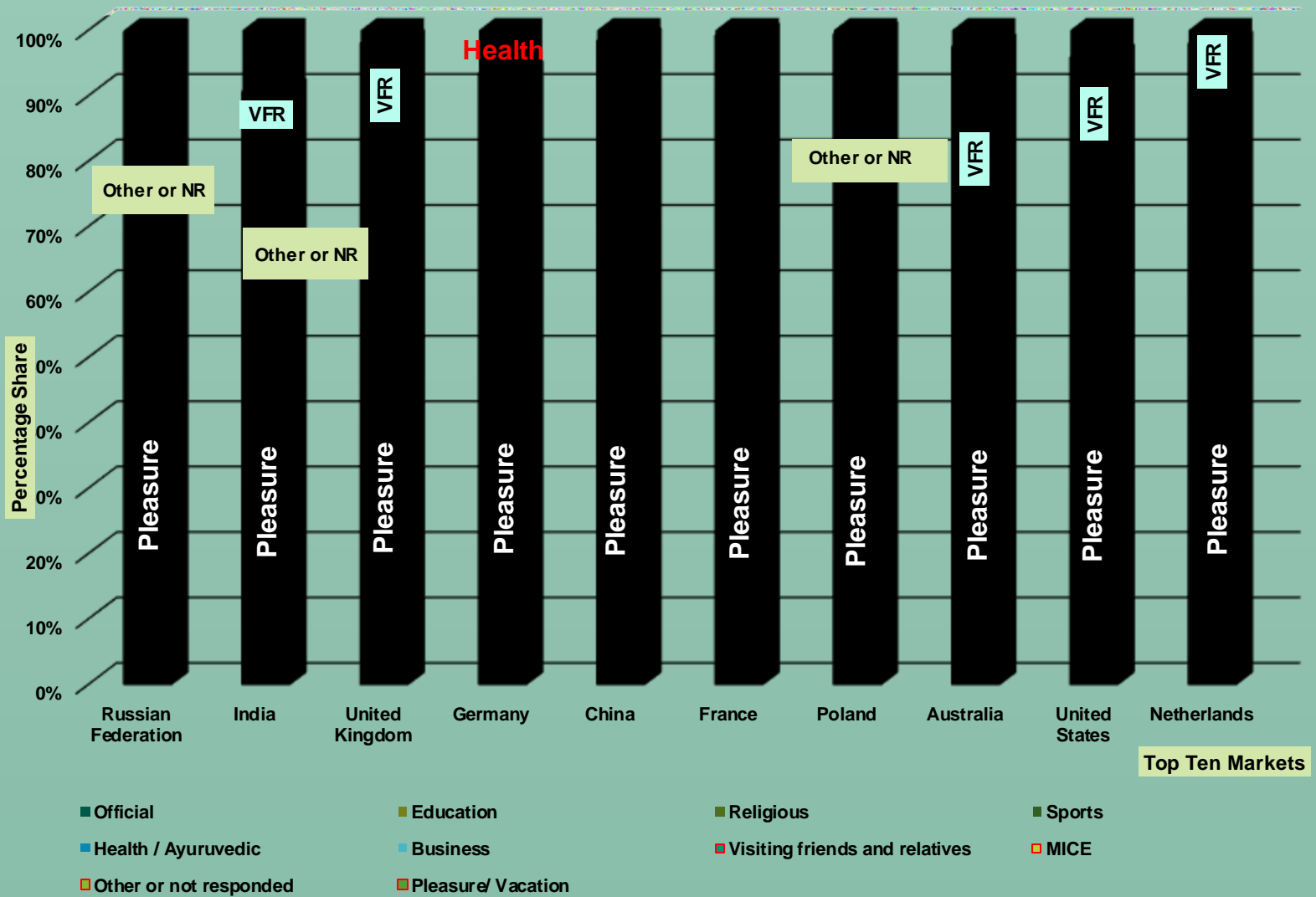




Chart 4: Purpose of visit vs main source markets





## International tourist arrivals by country of residence

	February 2024 Tourist Arrivals			Tourist Arrivals February 2023	% Change February (24/23)	Total Tourist Arrivals Up to Feb 2024	Total Tourist Arrivals Up to Feb 2023	% Change Up to February (24/23)
	By Air	By Sea	Total					
<b>AMERICAS</b>	<b>9,332</b>	<b>972</b>	<b>10,304</b>	<b>5,873</b>	<b>75.4</b>	<b>20,870</b>	<b>12,525</b>	<b>66.6</b>
<b>North America</b>	<b>8,770</b>	<b>946</b>	<b>9,716</b>	<b>5,590</b>	<b>73.8</b>	<b>19,650</b>	<b>11,926</b>	<b>64.8</b>
Canada	3,791	121	3,912	3,107	25.9	8,038	6,788	18.4
Mexico	77	18	95	40	137.5	191	59	-
United States	4,902	807	5,709	2,443	133.7	11,421	5,079	-
<b>Caribbean &amp; Central America</b>	<b>95</b>	<b>2</b>	<b>97</b>	<b>45</b>	<b>115.6</b>	<b>182</b>	<b>93</b>	<b>95.7</b>
Costa Rica	14	0	14	04	250.0	34	10	-
Jamaica	11	0	11	01	-	15	02	-
Others	70	02	72	40	80.0	133	81	64.2
<b>South America</b>	<b>467</b>	<b>24</b>	<b>491</b>	<b>238</b>	<b>106.3</b>	<b>1,038</b>	<b>506</b>	<b>105.1</b>
Argentina	79	0	79	43	83.7	220	119	84.9
Brazil	190	22	212	83	155.4	448	184	143.5
Chile	59	02	61	45	35.6	117	71	64.8
Colombia	70	0	70	38	84.2	124	74	67.6
Others	69	0	69	29	137.9	129	58	122.4
<b>AFRICA</b>	<b>1,079</b>	<b>12</b>	<b>1,091</b>	<b>418</b>	<b>161.0</b>	<b>2,047</b>	<b>877</b>	<b>133.4</b>
<b>North Africa</b>	<b>319</b>	<b>0</b>	<b>319</b>	<b>130</b>	<b>145.4</b>	<b>512</b>	<b>302</b>	<b>69.5</b>
Morocco	103	0	103	38	171.1	165	85	94.1
Sudan	42	0	42	37	13.5	99	98	1.0
Others	174	0	174	55	216.4	248	119	108.4
<b>Sub-Saharan Africa</b>	<b>760</b>	<b>12</b>	<b>772</b>	<b>288</b>	<b>168.1</b>	<b>1,535</b>	<b>575</b>	<b>167.0</b>
Kenya	64	0	64	40	60.0	106	63	68.3
Mauritius	53	0	53	21	152.4	101	40	152.5
Nigeria	11	0	11	02	-	12	12	0.0
South Africa	338	12	350	141	148.2	682	266	156.4
Others	294	0	294	84	250.0	634	194	-



	February 2024			Tourist Arrivals February 2023	% Change February (24/23)	Total Tourist Arrivals Up to Feb 2024	Total Tourist Arrivals Up to Feb 2023	% Change Up to February (24/23)
	By Air	By Sea	Total					
<b>ASIA &amp; PACIFIC</b>	<b>69,539</b>	<b>576</b>	<b>70,115</b>	<b>26,535</b>	<b>164.2</b>	<b>139,018</b>	<b>52,544</b>	<b>-</b>
<b>North East Asia</b>	<b>19,748</b>	<b>33</b>	<b>19,781</b>	<b>3,222</b>	<b>-</b>	<b>35,994</b>	<b>5,404</b>	<b>-</b>
China	14,834	02	14,836	1,535	-	26,347	2,370	
Japan	2,661	05	2,666	974	173.7	4,659	1,718	171.2
South Korea	823	07	830	508	63.4	2,507	958	161.7
Taiwan	1,424	19	1,443	193	-	2,460	344	-
Others	06	0	06	12	(50.0)	21	14	50.0
<b>South East Asia</b>	<b>5,011</b>	<b>13</b>	<b>5,024</b>	<b>1,996</b>	<b>151.7</b>	<b>8,238</b>	<b>3,711</b>	<b>122.0</b>
Cambodia	41	0	41	57	(28.1)	83	88	(5.7)
Indonesia	319	01	320	175	82.9	544	313	73.8
Malaysia	2,249	01	2,250	657	-	3,346	1,153	190.2
Myanmar	100	01	101	36	180.6	207	71	191.5
Philippines	438	02	440	262	67.9	702	450	56.0
Singapore	855	07	862	486	77.4	1,666	900	85.1
Thailand	715	01	716	210	-	1,221	489	149.7
Vietnam	270	0	270	103	-	436	220	98.2
Others	24	0	24	10	-	33	27	22.2
<b>Oceania</b>	<b>6,342</b>	<b>503</b>	<b>6,845</b>	<b>3,471</b>	<b>97.2</b>	<b>14,244</b>	<b>7,541</b>	<b>88.9</b>
Australia	5,800	465	6,265	3,113	101.2	12,910	6,781	90.4
New Zealand	529	38	567	346	63.9	1,299	740	75.5
Others	13	0	13	12	8.3	35	20	75.0
<b>South Asia</b>	<b>38,438</b>	<b>27</b>	<b>38,465</b>	<b>17,846</b>	<b>115.5</b>	<b>80,542</b>	<b>35,888</b>	<b>124.4</b>
Afghanistan	21	0	21	02	-	47	11	-
Bangladesh	2,388	01	2,389	531	-	4,718	1,248	-
Bhutan	67	0	67	19	-	202	51	-
India	30,001	26	30,027	13,714	119.0	64,426	27,473	134.5
Iran	919	0	919	791	16.2	1,607	1,226	31.1
Maldives	3,235	0	3,235	1,818	77.9	6,154	4,021	53.0
Nepal	508	0	508	247	105.7	1,133	539	110.2
Pakistan	1,299	0	1,299	724	79.4	2,255	1,319	71.0
<b>EUROPE</b>	<b>130,836</b>	<b>3,551</b>	<b>134,387</b>	<b>72,957</b>	<b>84.2</b>	<b>260,012</b>	<b>140,812</b>	<b>84.4</b>
<b>Northern Europe</b>	<b>24,894</b>	<b>2,680</b>	<b>27,574</b>	<b>11,604</b>	<b>137.6</b>	<b>51,503</b>	<b>23,271</b>	<b>120.0</b>
Denmark	2,149	11	2,160	1,110	94.6	4,702	2,191	114.6
Finland	655	11	666	204	-	1,403	461	-
Norway	1,272	57	1,329	567	134.4	2,555	1,265	102.0
Sweden	1,896	07	1,903	836	127.6	3,824	1,707	124.0
United Kingdom	18,070	2,544	20,614	8,575	140.4	37,279	17,058	118.5
Others	852	50	902	312	189.1	1,740	589	195.4



	February 2024			Tourist Arrivals February 2023	% Change February (24/23)	Total Tourist Arrivals Up to Feb 2024	Total Tourist Arrivals Up to Feb 2023	% Change Up to February (24/23)
	By Air	By Sea	Total					
<b>Western Europe</b>	<b>39,042</b>	<b>674</b>	<b>39,716</b>	<b>19,050</b>	<b>108.5</b>	<b>74,490</b>	<b>37,034</b>	<b>101.1</b>
Austria	2,342	30	2,372	934	154.0	4,757	1,890	151.7
Belgium	1,546	31	1,577	725	117.5	2,890	1,371	110.8
France	12,394	109	12,503	6,118	104.4	22,422	10,958	104.6
Germany	15,831	428	16,259	7,930	105.0	29,852	16,147	84.9
Netherlands	3,972	39	4,011	1,485	170.1	8,542	2,999	184.8
Switzerland	2,853	35	2,888	1,812	59.4	5,839	3,581	63.1
Others	104	02	106	46	130.4	188	88	113.6
<b>Central/ Eastern Europe</b>	<b>56,726</b>	<b>107</b>	<b>56,833</b>	<b>36,728</b>	<b>54.7</b>	<b>114,864</b>	<b>69,466</b>	<b>65.4</b>
Belarus	1,876	08	1,884	1,244	51.4	4,226	2,448	72.6
Czech Republic	3,852	0	3,852	1,206	-	7,336	2,166	-
Estonia	898	0	898	193	-	1,808	375	-
Hungary	1,306	05	1,311	405	-	2,855	805	-
Kazakhstan	2,680	02	2,682	328	-	6,032	798	-
Lithuania	1,600	01	1,601	296	-	2,616	574	-
Poland	6,907	02	6,909	1,118	-	14,709	2,387	-
Romania	925	15	940	398	136.2	1,793	714	-
Russia	31,960	70	32,030	29,084	10.1	63,189	54,338	16.3
Slovakia	1,179	0	1,179	515	128.9	2,169	866	150.5
Ukraine	1,191	02	1,193	562	112.3	2,678	1,446	85.2
Others	2,352	02	2,354	1,379	70.7	5,453	2,549	113.9
<b>Southern/ Mediterranean Europe</b>	<b>10,174</b>	<b>90</b>	<b>10,264</b>	<b>5,575</b>	<b>84.1</b>	<b>19,155</b>	<b>11,041</b>	<b>73.5</b>
Greece	262	02	264	163	62.0	528	314	68.2
Italy	3,187	07	3,194	1,409	126.7	6,679	2,886	131.4
Portugal	635	19	654	268	144.0	1,141	498	129.1
Spain	2,014	22	2,036	770	164.4	4,040	1,627	148.3
Turkey	653	10	663	246	169.5	1,380	608	127.0
Israel	1,988	0	1,988	2,188	(9.1)	2,761	4,056	(31.9)
Others	1,435	30	1,465	531	175.9	2,626	1,052	149.6
<b>MIDDLE EAST</b>	<b>2,453</b>	<b>0</b>	<b>2,453</b>	<b>1,856</b>	<b>32.2</b>	<b>4,656</b>	<b>3,426</b>	<b>35.9</b>
Bahrain	81	0	81	35	131.4	203	169	20.1
Egypt	476	0	476	241	97.5	872	368	137.0
Iraq	74	0	74	92	(19.6)	128	155	(17.4)
Jordan	227	0	227	227	0.0	407	488	(16.6)
Kuwait	222	0	222	219	1.4	453	381	18.9
Lebanon	293	0	293	188	55.9	448	299	49.8
Oman	116	0	116	229	(49.3)	352	412	(14.6)
Qatar	45	0	45	46	(2.2)	86	80	7.5
Saudi Arabia	549	0	549	365	50.4	1,060	705	50.4
United Arab Emirates	227	0	227	138	64.5	446	239	86.6
Others	143	0	143	76	88.2	201	130	54.6
<b>TOTAL</b>	<b>213,239</b>	<b>5,111</b>	<b>218,350</b>	<b>107,639</b>	<b>102.9</b>	<b>426,603</b>	<b>210,184</b>	<b>103.0</b>



## Main last departure airports and airlines to Sri Lanka, February 2024

The examination of departure airports and preferred airlines of tourists visiting Sri Lanka highlights the pivotal role of air travel in the nation's tourism sector. Around 34% of travelers opted for departure airports in Dubai, Doha, and Chennai before reaching Sri Lanka. Additionally, Sri Lankan Airlines, Qatar Airways, and Emirates emerged as the top airlines, collectively accounting for 47% of total tourist arrivals. This underscores the indispensable role of air transportation in supporting tourism, with specific airports and airlines playing a significant role in welcoming a large number of visitors.

Chart 5. Main last departure airports to Sri Lanka, February 2024

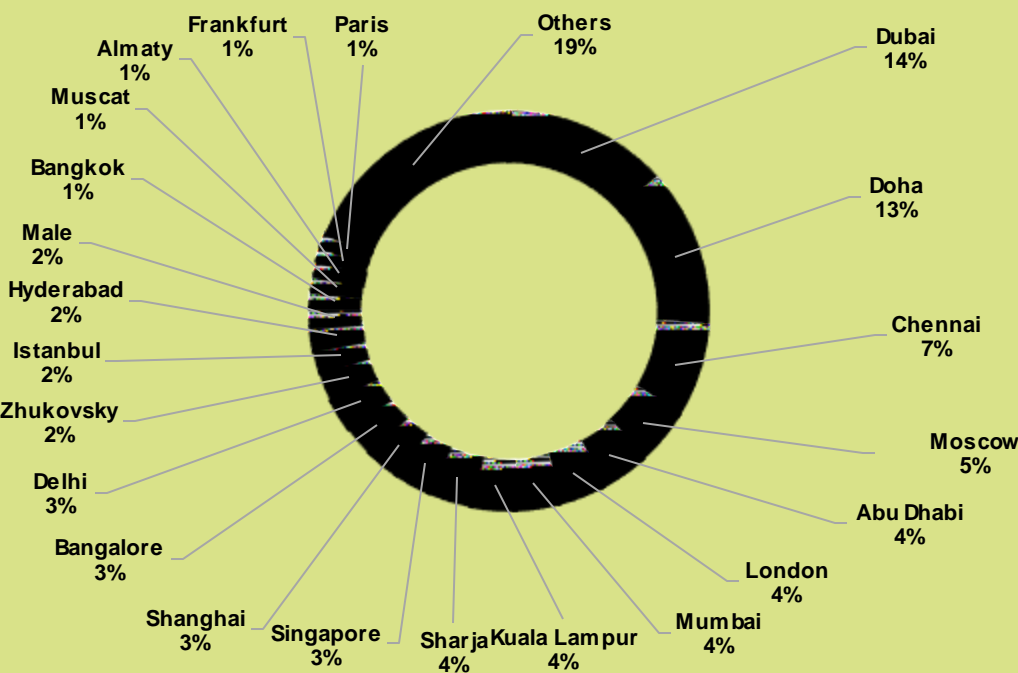
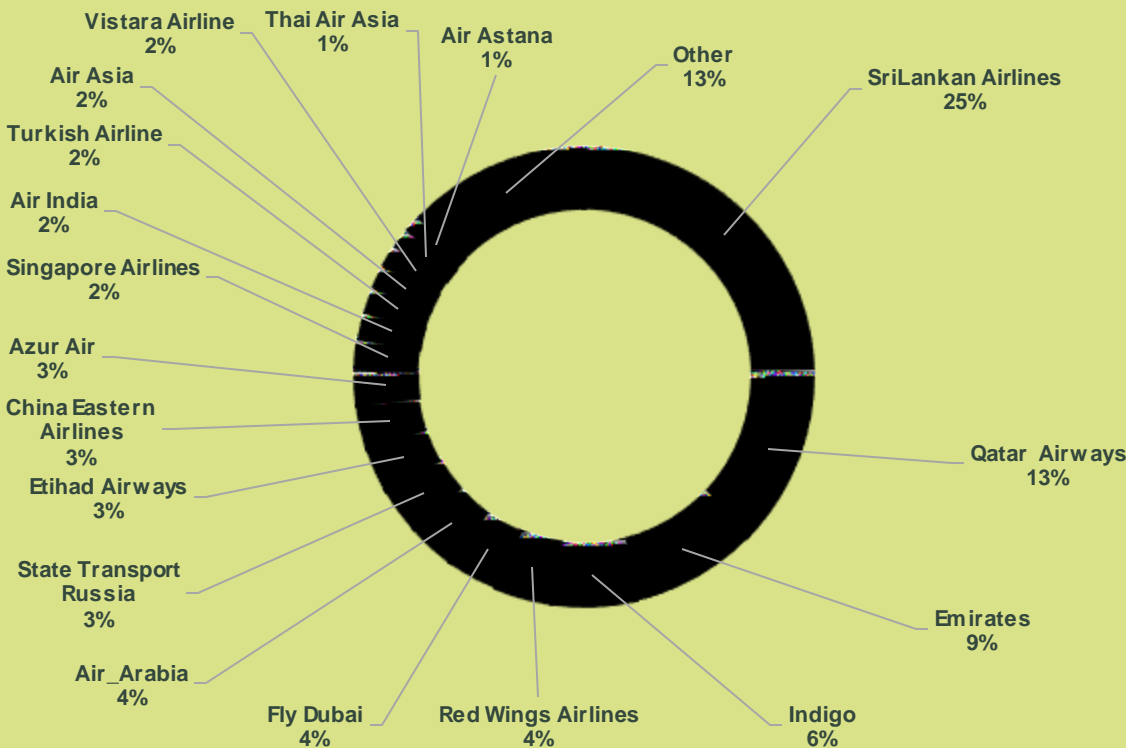


Chart 6. Main airlines to Sri Lanka, February 2024







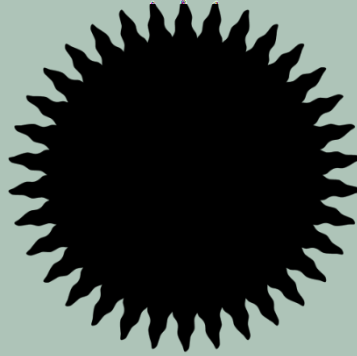
# Top ten markets versus main last departure airports and main airlines to Sri Lanka

## February 2023

The choice of airlines significantly impacts the travel experiences of tourists heading to Sri Lanka, reflecting their nationalities and diverse airline preferences. Indian travelers commonly select Sri Lankan Airlines and IndiGo, while Red Wings is preferred by Russian tourists. Conversely, visitors from the UK, Germany, France, Australia, and the USA often favor Sri Lankan Airlines. Chinese tourists typically opt for China Eastern, while tourists from Poland and the Netherlands prefer Qatar Airways. Regarding departure airports, Chennai is the primary choice for Indian travelers, while Doha serves as the main gateway for tourists from Germany, France, the USA, and the Netherlands. Australian travelers frequently use Singapore, and Polish tourists prefer Warsaw airport at the last departure airport. This underscores the critical role of accessibility in promoting Sri Lanka's tourism, illustrating how travelers' airline and airport preferences are shaped by their home countries and emphasizing the importance of seamless travel connections in attracting visitors.

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

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



**Research & International Relations Division**

**011 2426800 Ext. 151/155**

**research@srilanka.travel**

**[www.sltda.gov.lk](http://www.sltda.gov.lk)**