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## **Introduction**

The following document provides a synthesis of the most recent October, 2024 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31<sup>st</sup> October 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 October, Sri Lanka recorded 135,907 tourist arrivals, showing an 11.3% rise from September and a notable 24.5% increase compared to October 2023. This brought the cumulative total to 1,620,715 arrivals by the end of October, underscoring a steady recovery in tourism. Although October's conservative target was set at 143,032, the near-achievement highlights strong demand and a positive trajectory in the sector's growth this year.

In October, Sri Lanka's key tourism markets included India, the Russian Federation, the United Kingdom, Germany, and China, with significant growth in visitors from these countries fueling the sector's expansion.

**Table 1. Monthly tourist arrivals, October 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	122,140	9.11
October	109,199	135,907	24.5
November	151,496		
December	210,352		
<b>TOTAL</b>	<b>1,487,303</b>	<b>1,620,715</b>	

The latest UNWTO Barometer offers a largely optimistic forecast for international tourism from May to October 2024, with robust recovery anticipated. However, the rebound faces challenges from various factors, including economic pressures like inflation and high fuel costs, geopolitical instability, travel restrictions, visa requirements, low consumer confidence, and ongoing COVID-19 concerns. These hurdles continue to influence the pace of tourism's recovery.



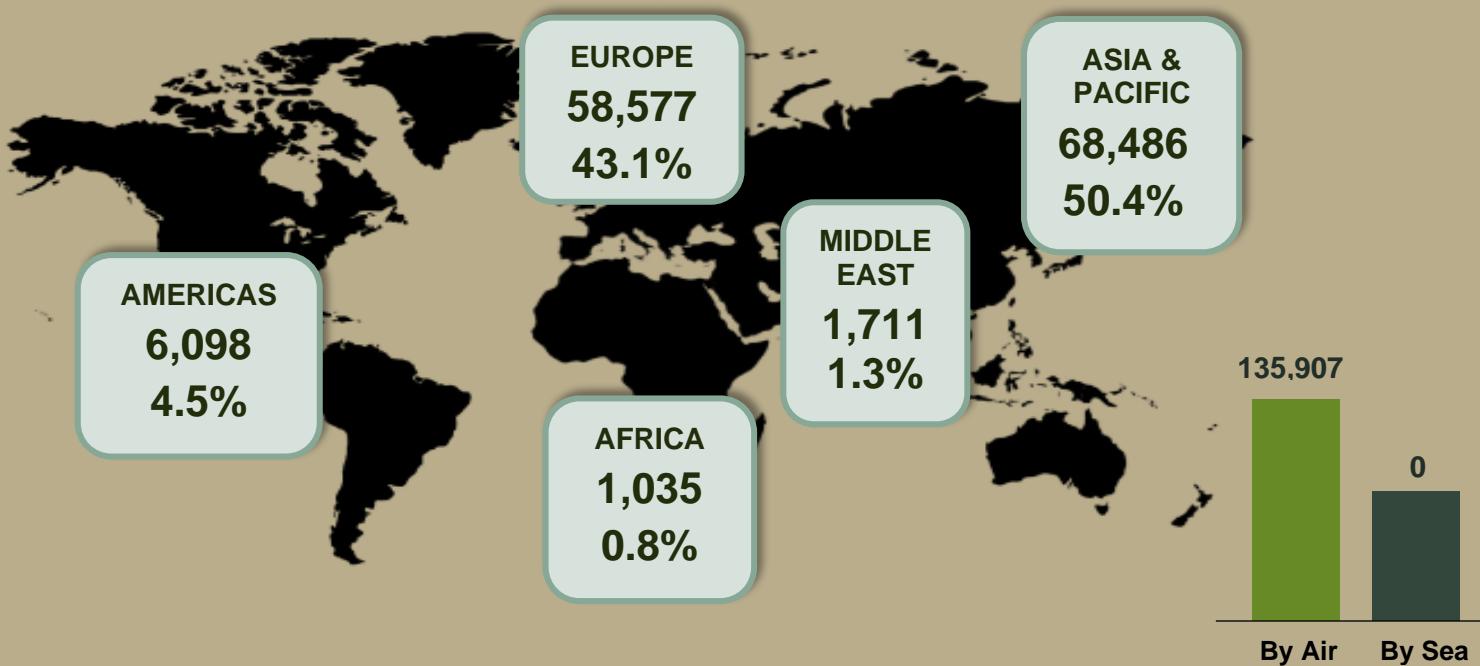
**Tourist Arrivals | October 2024**

**135.907**

## Tourist arrivals by region and percentage share

**October 2024**

**Map 1. Tourist arrivals by region and percentage share**



Asia and the Pacific have emerged as key players in Sri Lanka's tourism sector, contributing 50.4% of total visitors, while Europe follows closely with 43.1% of arrivals. This trend highlights the shifting dynamics within the industry, with both regions serving as significant drivers of growth. Increased demand from major markets like India, the Russian Federation, the UK, Germany, and China has substantially bolstered Sri Lanka's tourism, supported by strong travel connections and favorable conditions. Meanwhile, the Americas make up 4.5% of arrivals, with the Middle East and Africa contributing 1.3% and 0.8%, respectively, adding diversity to the tourism landscape.

The substantial presence of European and Asia-Pacific visitors reflects their steady demand, while the smaller shares from the Americas, the Middle East, and Africa present strategic opportunities for targeted marketing and diversification. Expanding engagement with these regions could help Sri Lanka further strengthen the tourism sector, enhancing resilience and driving continued recovery and growth.

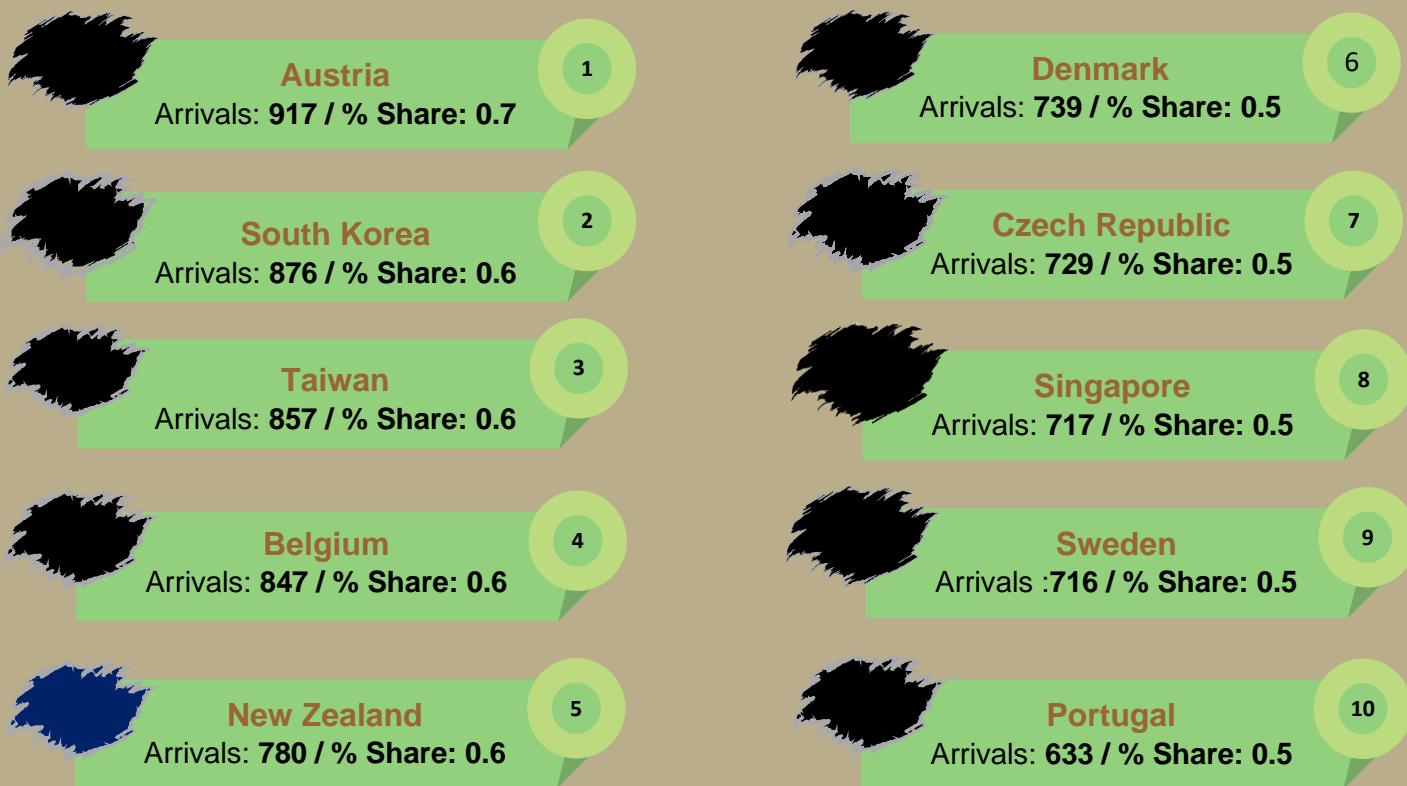
## Top primary markets and top potential markets

### Top primary markets, October 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, October 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.

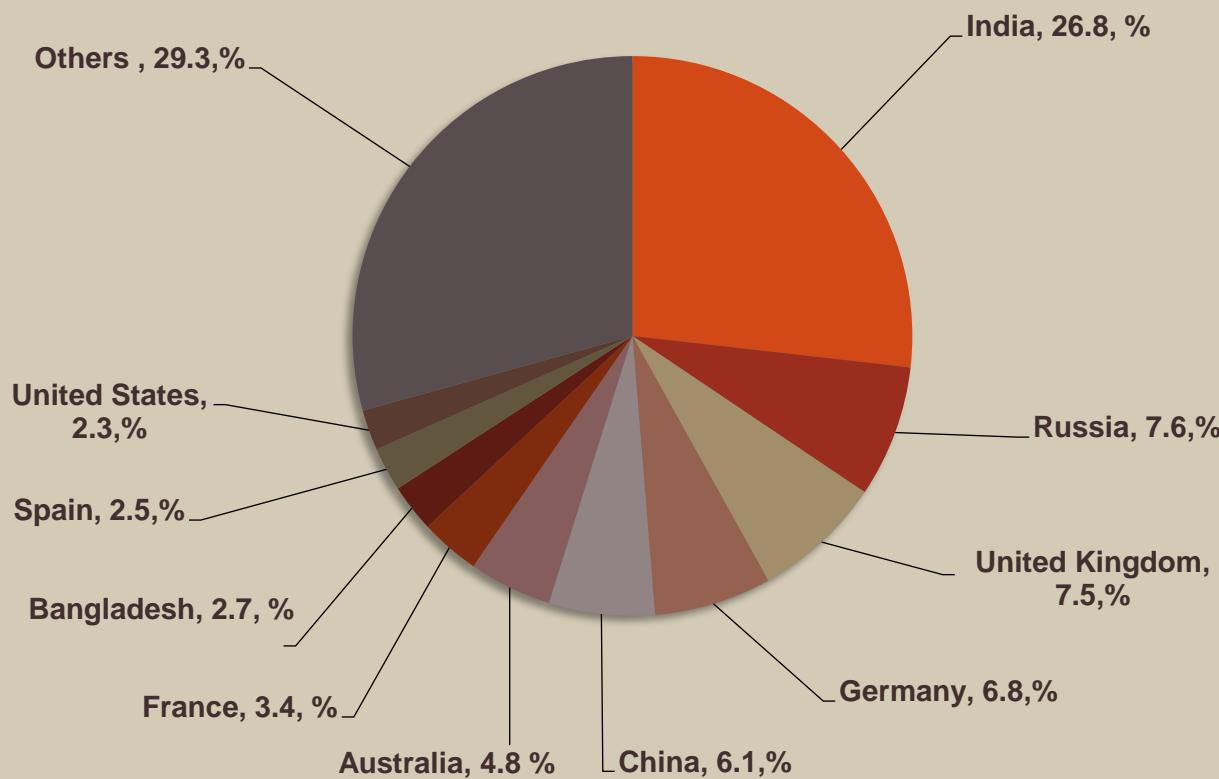


# Top ten source markets

## October 2024

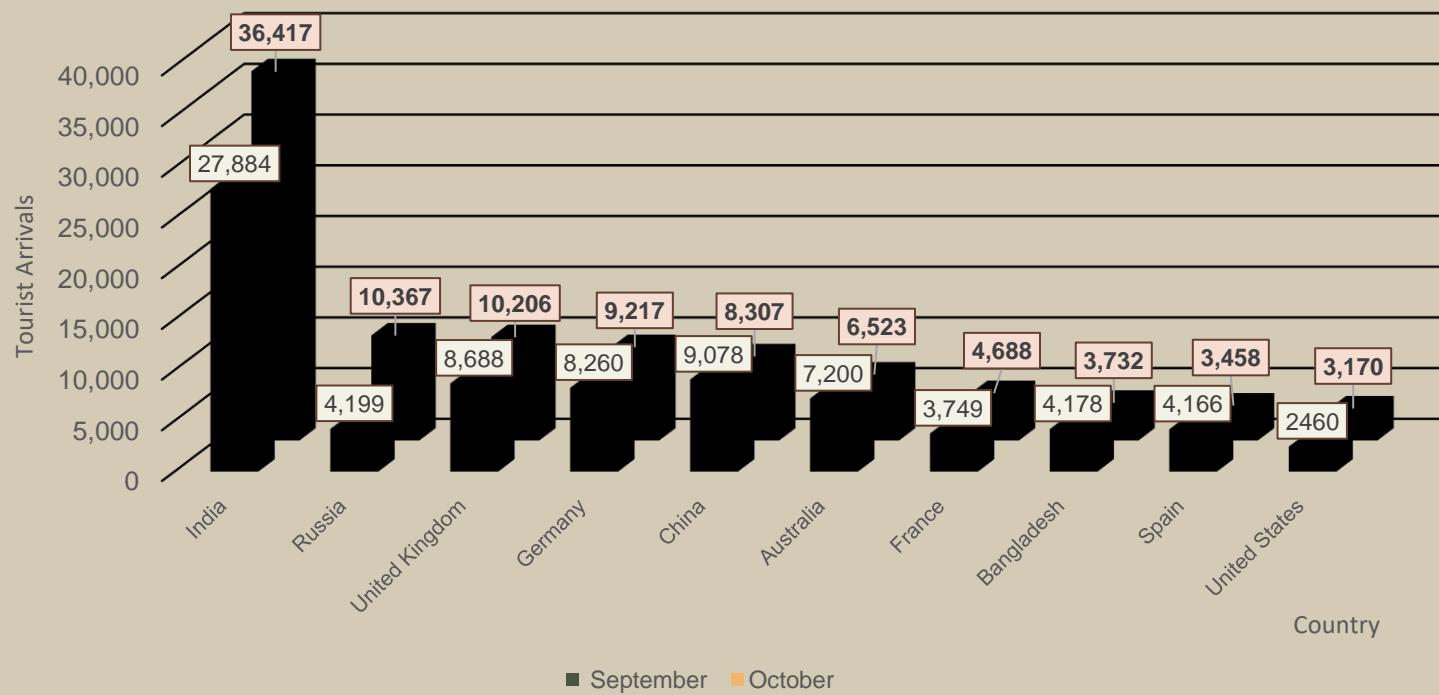
In October, India ranked as the top source market for tourists to Sri Lanka, contributing 26.8% of total arrivals. This was followed by the Russian Federation with 7.6%, the United Kingdom at 7.5%, Germany at 6.8%, and China at 6.1%. These figures underscore evolving travel preferences and reveal a notable increase in visitors from emerging markets like Bangladesh, along with renewed interest from established markets such as France compared to the previous year. The rising significance of markets like France points to shifting trends in Sri Lanka's tourist sources, creating valuable opportunities to expand and diversify the visitor base. The decline in visitors from Russia is noteworthy, though the introduction of charter flights in November is expected to stimulate recovery in that market, strengthening Sri Lanka's appeal and accessibility.

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



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

Rank	Country of Residence	Tourist Arrivals (October 2024)			Tourist Arrivals (October 2023)
		By Air	By Sea	Total	
1	India	36,417	0	36,417	28,222
2	Russian Federation	10,367	0	10,367	10,629
3	United Kingdom	10,206	0	10,206	8,454
4	Germany	9,217	0	9,217	7,548
5	China	8,307	0	8,307	6,211
6	Australia	6,523	0	6,523	4,977
7	France	4,688	0	4,688	2,956
8	Bangladesh	3,732	0	3,732	2,456
9	Spain	3,458	0	3,458	2,488
10	United States	3,170	0	3,170	2,651

**Chart 2: Comparison of arrivals from top ten markets to Sri Lanka, September / October 2024**



# Top ten source markets

## January to October 2024

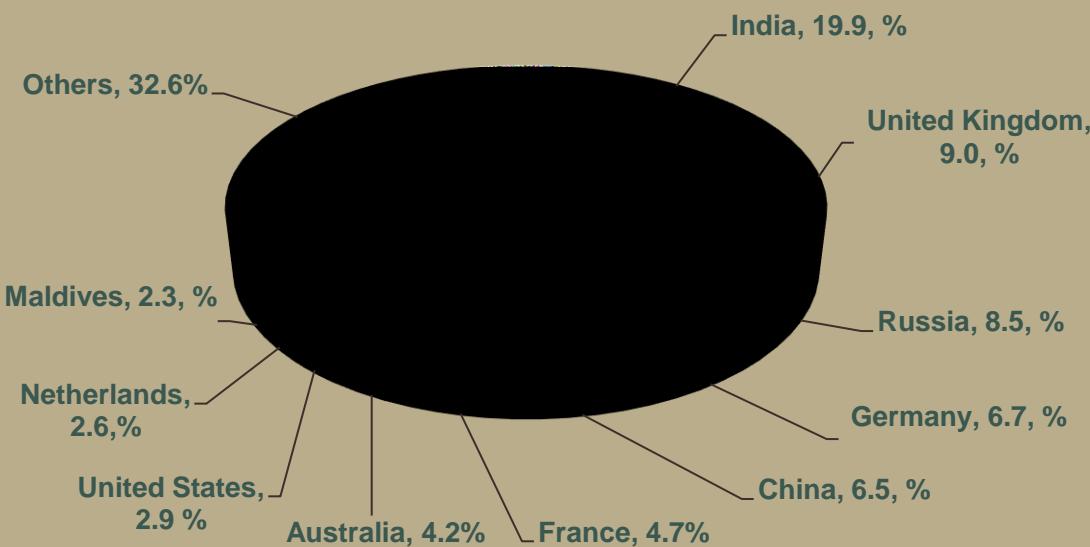
From January to October this year, Sri Lanka experienced a marked increase in tourist arrivals from India, the UK, the Russian Federation, Germany, and China, establishing these countries as the top five international visitor sources. Visitor numbers from China, the Netherlands, and France also showed significant growth, underscoring Sri Lanka's expanding appeal in these markets. However, a decline in arrivals from Russia stands out, signaling a shift in the country's visitor demographics.

This combination of growth and decline highlights the importance for Sri Lanka to diversify its tourism markets, enhancing resilience and ensuring sustainable growth amid an evolving global travel landscape. By broadening its reach to include emerging and diverse markets, Sri Lanka can better weather fluctuations in specific regions and build a stronger foundation for continued success in the tourism sector.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ October 2024)	Tourist Arrivals (Jan ~ October 2023)
1	India	322,973	228,532
2	United Kingdom	146,670	99,297
3	Russian Federation	137,599	142,929
4	Germany	108,788	76,461
5	China	105,574	53,842
6	France	75,775	46,860
7	Australia	68,527	48,689
8	United States	46,848	34,001
9	Netherlands	42,836	24,014
10	Maldives	37,337	28,940
11	Other	5,27,788	3,41,890
<b>Total</b>		<b>1,620,715</b>	<b>1,125,455</b>

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



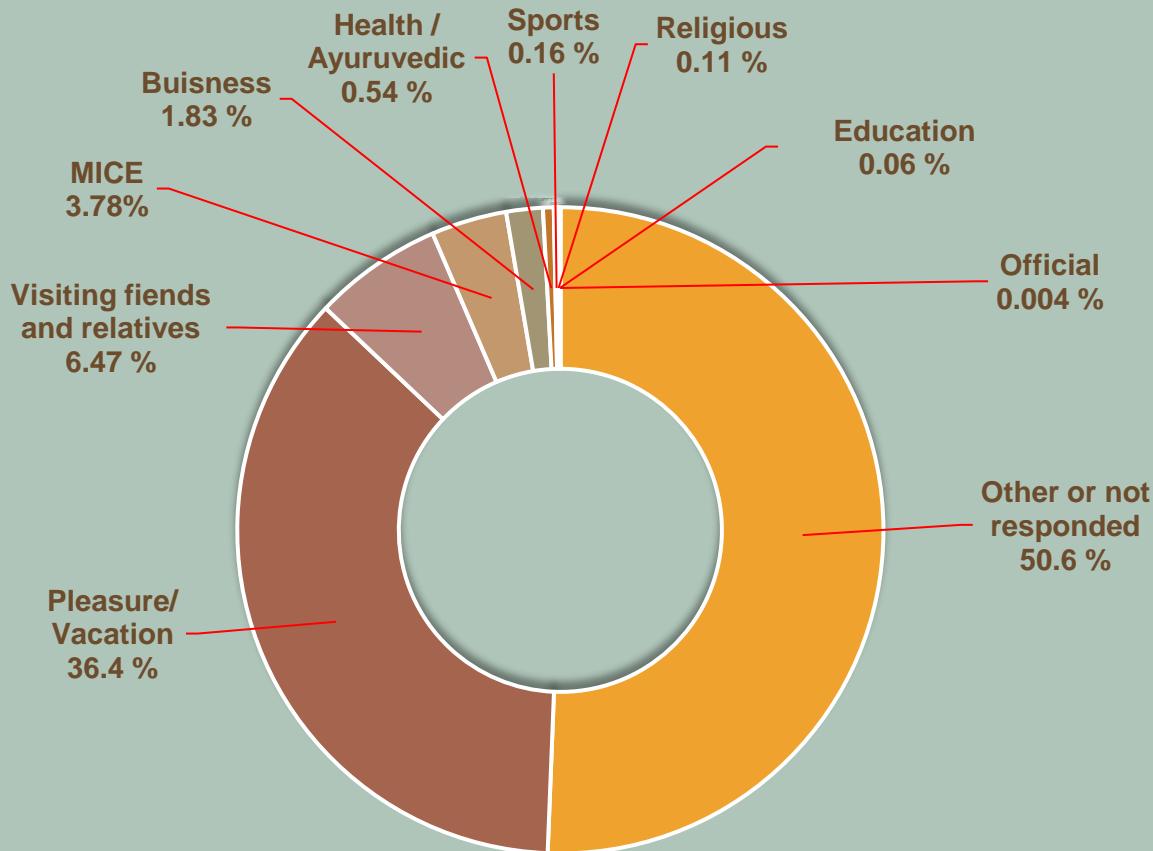
# Tourist arrivals by purpose of visit

## October 2024

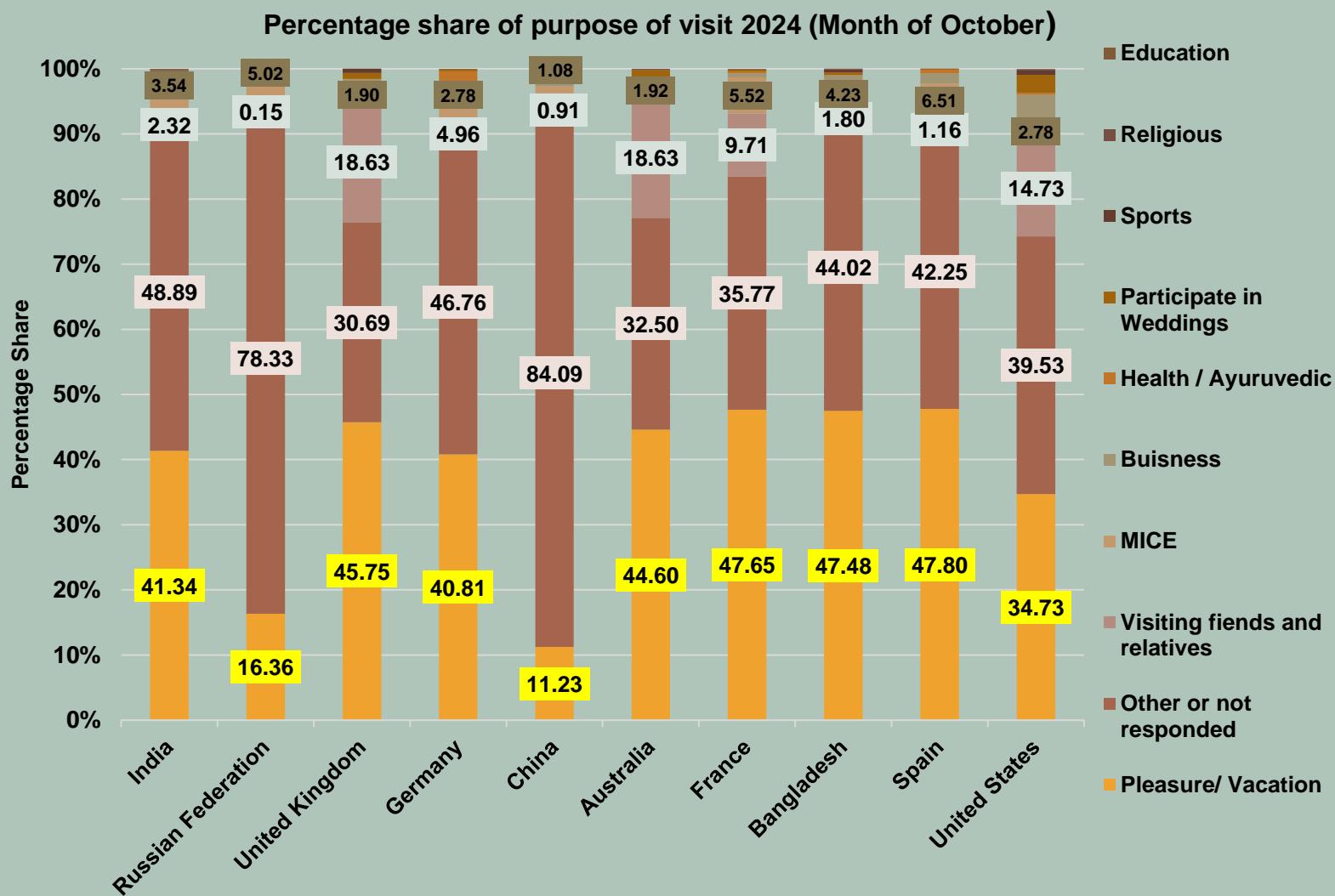
An in-depth analysis of tourist motivations for visiting Sri Lanka reveals several core drivers. Leisure and vacations lead the list, accounting for 36.4% of arrivals, highlighting Sri Lanka's strong reputation as a prime recreational destination. Additionally, 6.47% of visitors come to reconnect with friends and family, underscoring its appeal for personal and social gatherings.

On the other hand, only 1.83% of tourists visit for business purposes, indicating a limited emphasis on professional travel. Meanwhile, 3.78% come for MICE (Meetings, Incentives, Conferences, and Exhibitions), pointing to Sri Lanka's growing role as a destination for corporate events. The country also attracts niche travelers, with 0.54% visiting for Ayurvedic or wellness experiences and 0.22% arriving for sports and educational activities. These figures illustrate Sri Lanka's diverse tourism offerings and potential to further tap into emerging segments like wellness, MICE, and specialized activities to broaden its market reach.

**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 includes tourists who had visited for other purposes also.

**Chart 5: Purpose of visit vs main source markets**

## International tourist arrivals by country of residence

	October 2024			Tourist Arrivals October 2023	% Change October (24/23) 2024	Total Tourist Arrivals Up to October 2024	Total Tourist Arrivals Up to October 2023	% Change Up to October (24/23) 2024					
	Tourist Arrivals												
	By Air	By Sea	Total										
<b>AMERICAS</b>	6,098	0	6,098	5,308	14.9	87,816	75,410	16.5					
North America	5,599	0	5,599	5,007	11.8	83,038	72,190	15.0					
Canada	2,339	0	2,339	2,302	1.6	35,346	37,626	(6.1)					
Mexico	90	0	90	54	66.7	844	563	49.9					
United States	3,170	0	3,170	2,651	19.6	46,848	34,001	37.8					
<b>Caribbean &amp; Central America</b>	109	0	109	56	94.6	828	532	55.6					
Costa Rica	05	0	05	08	(37.5)	78	46	69.6					
Jamaica	09	0	09	07	28.6	86	42	104.8					
Others	95	0	95	41	131.7	664	444	49.5					
<b>South America</b>	390	0	390	245	59.2	3,950	2,688	46.9					
Argentina	91	0	91	49	85.7	766	564	35.8					
Brazil	125	0	125	94	33.0	1,551	984	57.6					
Chile	40	0	40	30	33.3	471	322	46.3					
Colombia	62	0	62	30	106.7	555	404	37.4					
Others	72	0	72	42	71.4	607	414	46.6					
<b>AFRICA</b>	1,035	0	1,035	777	33.2	10,810	7,059	53.1					
<b>North Africa</b>	406	0	406	166	144.6	2,754	2,003	37.5					
Morocco	100	0	100	45	122.2	847	591	43.3					
Sudan	115	0	115	37	210.8	743	622	19.5					
Others	191	0	191	84	127.4	1,164	790	47.3					
<b>Sub-Saharan Africa</b>	629	0	629	611	2.9	8,056	5,056	59.3					
Kenya	42	0	42	42	0.0	608	457	33.0					
Mauritius	21	0	21	22	(4.5)	384	237	62.0					
Nigeria	07	0	07	15	(53.3)	64	74	(13.5)					
South Africa	259	0	259	232	11.6	3,463	2,269	52.6					
Others	300	0	300	300	0.0	3,537	2,019	75.2					



	October 2024			Tourist Arrivals October 2023	% Change October (24/23) 2024	Total Tourist Arrivals Up to October 2024	Total Tourist Arrivals Up to October 2023	% Change Up to October (24/23) 2024
	By Air	By Sea	Total					
<b>ASIA &amp; PACIFIC</b>	<b>68,486</b>	<b>0</b>	<b>68,486</b>	<b>53,709</b>	<b>27.5</b>	<b>683,637</b>	<b>450,722</b>	<b>51.7</b>
<b>North East Asia</b>	<b>12,434</b>	<b>0</b>	<b>12,434</b>	<b>8,889</b>	<b>39.9</b>	<b>146,479</b>	<b>77,644</b>	<b>88.7</b>
China	8,307	0	8,307	6,211	33.7	105,574	53,842	96.1
Japan	2,392	0	2,392	1,295	84.7	24,652	14,154	74.2
South Korea	876	0	876	604	45.0	8,346	5,474	52.5
Taiwan	857	0	857	761	12.6	7,812	4,072	91.8
Others	02	0	02	18	(88.9)	95	102	(6.9)
<b>South East Asia</b>	<b>3,362</b>	<b>0</b>	<b>3,362</b>	<b>2,609</b>	<b>28.9</b>	<b>42,718</b>	<b>27,315</b>	<b>56.4</b>
Cambodia	59	0	59	70	(15.7)	1,071	449	138.5
Indonesia	297	0	297	256	16.0	2,833	1,858	52.5
Malaysia	1,013	0	1,013	788	28.6	15,066	8,072	86.6
Myanmar	82	0	82	63	30.2	1,368	889	53.9
Philippines	407	0	407	318	28.0	4,384	3,420	28.2
Singapore	717	0	717	600	19.5	9,383	6,810	37.8
Thailand	581	0	581	394	47.5	5,976	3,905	53.0
Vietnam	202	0	202	113	78.8	2,459	1,770	38.9
Others	04	0	04	07	(42.9)	178	142	25.4
<b>Oceania</b>	<b>7,330</b>	<b>0</b>	<b>7,330</b>	<b>5,562</b>	<b>31.8</b>	<b>77,625</b>	<b>54,708</b>	<b>41.9</b>
Australia	6,523	0	6,523	4,977	31.1	68,527	48,689	40.7
New Zealand	780	0	780	561	39.0	8,805	5,821	51.3
Others	27	0	27	24	12.5	293	198	48.0
<b>South Asia</b>	<b>45,360</b>	<b>0</b>	<b>45,360</b>	<b>36,649</b>	<b>23.8</b>	<b>416,815</b>	<b>291,055</b>	<b>43.2</b>
Afghanistan	07	0	07	05	40.0	132	140	(5.7)
Bangladesh	3,732	0	3,732	2,456	52.0	32,026	11,987	167.2
Bhutan	41	0	41	39	5.1	545	332	64.2
India	36,417	0	36,417	28,222	29.0	322,973	228,532	41.3
Iran	591	0	591	530	11.5	9,260	8,639	7.2
Maldives	2,880	0	2,880	3,862	(25.4)	37,337	28,940	29.0
Nepal	552	0	552	632	(12.7)	3,628	3,871	(6.3)
Pakistan	1,140	0	1,140	903	26.2	10,914	8,614	26.7
<b>EUROPE</b>	<b>58,577</b>	<b>0</b>	<b>58,577</b>	<b>47,774</b>	<b>22.6</b>	<b>814,392</b>	<b>568,997</b>	<b>43.1</b>
<b>Northern Europe</b>	<b>13,044</b>	<b>0</b>	<b>13,044</b>	<b>10,747</b>	<b>21.4</b>	<b>186,759</b>	<b>125,543</b>	<b>48.8</b>
Denmark	739	0	739	556	32.9	12,203	8,142	49.9
Finland	215	0	215	197	9.1	2,968	1,462	103.0
Norway	442	0	442	394	12.2	9,138	7,090	28.9
Sweden	716	0	716	617	16.0	8,605	5,577	54.3
United Kingdom	10,206	0	10,206	8,454	20.7	146,670	99,297	47.7
Others	726	0	726	529	37.2	7,175	3,975	80.5



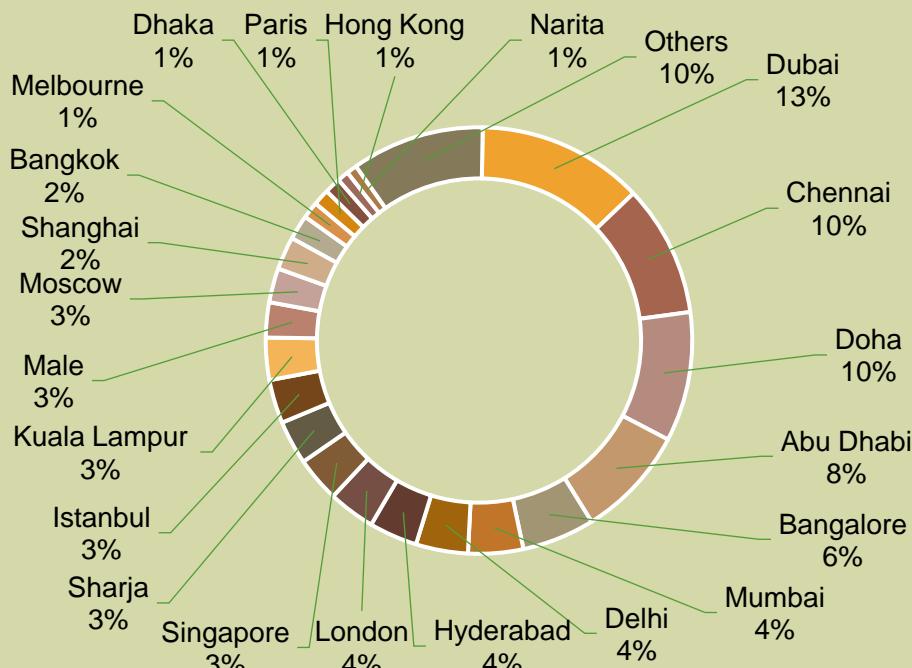
	October 2024			Tourist Arrivals October 2023	% Change Oct: (24/23) 2024	Total Tourist Arrivals Up to Oct: 2024	Total Tourist Arrivals Up to October 2023	% Change Up to Oct: (24/2) 2024
	By Air	By Sea	Total					
<b>Western Europe</b>	<b>20,383</b>	<b>0</b>	<b>20,383</b>	<b>15,700</b>	<b>29.8</b>	<b>279,695</b>	<b>183,192</b>	<b>52.7</b>
Austria	917	0	917	778	17.9	12,997	7,499	73.3
Belgium	847	0	847	666	27.2	14,492	8,903	62.8
France	4,688	0	4,688	2,956	58.6	75,778	46,860	61.7
Germany	9,217	0	9,217	7,548	22.1	108,788	76,461	42.3
Netherlands	2,859	0	2,859	2,117	35.0	42,836	24,014	78.4
Switzerland	1,816	0	1,816	1,608	12.9	24,093	18,932	27.3
Others	39	0	39	27	44.4	711	523	35.9
<b>Central/ Eastern Europe</b>	<b>16,973</b>	<b>0</b>	<b>16,973</b>	<b>16,077</b>	<b>5.6</b>	<b>243,355</b>	<b>193,946</b>	<b>25.5</b>
Belarus	504	0	504	824	(38.8)	8,096	7,895	2.5
Czech Republic	729	0	729	681	7.0	15,623	7,217	116.5
Estonia	131	0	131	99	32.3	2,990	873	242.5
Hungary	431	0	431	211	104.3	4,954	2,241	121.1
Kazakhstan	213	0	213	166	28.3	9,162	2,538	261.0
Lithuania	285	0	285	226	26.1	5,040	1,836	174.5
Poland	2,132	0	2,132	1,418	50.4	32,768	11,386	187.8
Romania	354	0	354	299	18.4	4,633	2,621	76.8
Russia	10,367	0	10,367	10,629	(2.5)	137,599	142,929	(3.7)
Slovakia	439	0	439	394	11.4	5,261	3,385	55.4
Ukraine	350	0	350	305	14.8	5,389	3,561	51.3
Others	1,038	0	1,038	825	25.8	11,840	7,464	58.6
<b>Southern/ Mediterranean Europe</b>	<b>8,177</b>	<b>0</b>	<b>8,177</b>	<b>5,250</b>	<b>55.8</b>	<b>104,583</b>	<b>66,316</b>	<b>57.7</b>
Greece	142	0	142	135	5.2	2,060	1,285	60.3
Italy	1,431	0	1,431	967	48.0	30,777	17,191	79.0
Portugal	633	0	633	304	108.2	4,997	2,859	74.8
Spain	3,458	0	3,458	2,488	39.0	31,472	18,565	69.5
Turkey	409	0	409	349	17.2	5,250	2,658	97.5
Israel	1,398	0	1,398	460	203.9	21,913	18,909	15.9
Others	706	0	706	547	29.1	8,114	4,849	67.3
<b>MIDDLE EAST</b>	<b>1,711</b>	<b>0</b>	<b>1,711</b>	<b>1,631</b>	<b>4.9</b>	<b>24,060</b>	<b>23,267</b>	<b>3.4</b>
Bahrain	64	0	64	54	18.5	1,002	1,046	(4.2)
Egypt	282	0	282	269	4.8	3,122	2,275	37.2
Iraq	64	0	64	49	30.6	837	771	8.6
Jordan	315	0	315	218	44.5	2,241	3,148	(28.8)
Kuwait	70	0	70	85	(17.6)	1,639	1,739	(5.8)
Lebanon	110	0	110	268	(59.0)	2,685	2,692	(0.3)
Oman	155	0	155	77	101.3	2,464	1,808	36.3
Qatar	33	0	33	47	(29.8)	630	762	(17.3)
Saudi Arabia	251	0	251	290	(13.4)	4,890	5,632	(13.2)
United Arab Emirates	304	0	304	190	60.0	3,688	2,455	50.2
Others	63	0	63	84	(25.0)	862	939	(8.2)
<b>TOTAL</b>	<b>135,907</b>	<b>0</b>	<b>135,907</b>	<b>109,199</b>	<b>24.5</b>	<b>1,620,715</b>	<b>1,125,455</b>	<b>44.0</b>

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

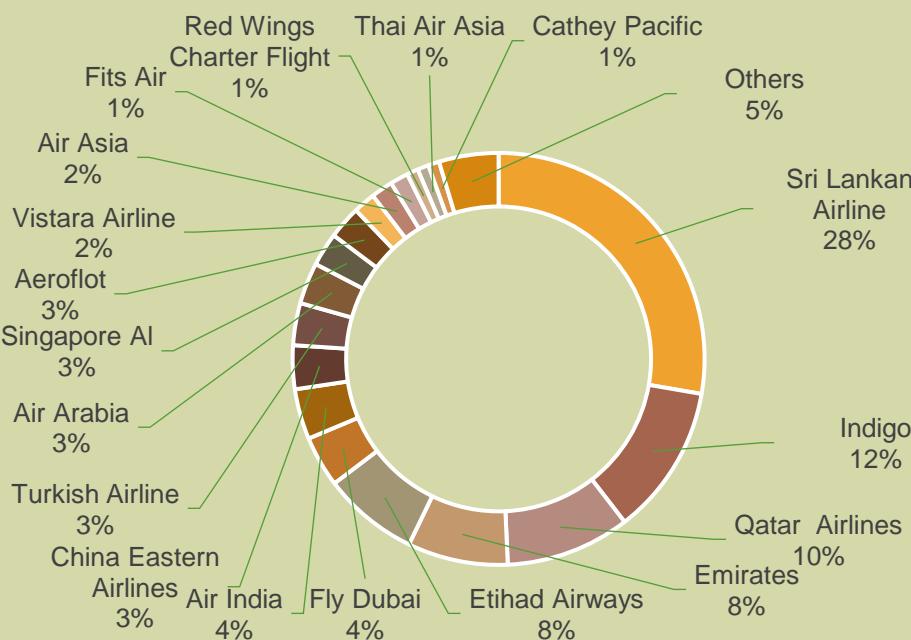
An analysis of travel patterns among tourists visiting Sri Lanka underscores the pivotal role of air travel in supporting the country's tourism industry. Around 33% of visitors made their final layovers in Dubai, Doha, and Chennai before arriving in Sri Lanka. Additionally, Sri Lankan Airlines, IndiGo, and Qatar Airways collectively accounted for 50% of all tourist arrivals, highlighting the influence of these carriers and transit hubs in driving tourism to the island.

The concentration of arrivals through specific airlines and major transit points illustrates the importance of strategic air connectivity and partnerships in shaping tourism flows to Sri Lanka. Strengthening these connections, along with maintaining robust partnerships with leading airlines, could further enhance accessibility and support sustainable growth in the tourism sector.

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



**Chart 7. Main airlines to Sri Lanka, October 2024**



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

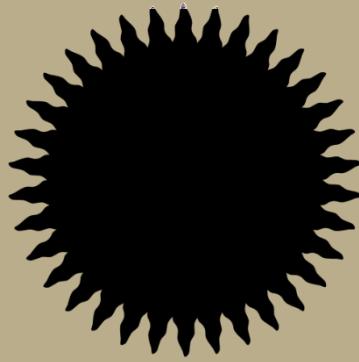
## October 2024

Travelers' experiences in Sri Lanka are shaped by their airline choices, often aligned with their home countries and airline preferences. Indian tourists frequently fly with SriLankan Airlines and IndiGo, benefiting from robust air connections between India and Sri Lanka. Chinese visitors predominantly opt for China Eastern Airlines and Sri Lankan Airlines, while tourists from the UK, Bangladesh, and Australia favor Sri Lankan Airlines, reflecting the airline's popularity in these markets. Qatar Airways is a preferred choice for travelers from the United States, Germany, France, and Spain, due to its Doha hub and convenient routes to Sri Lanka.

Chennai stands as the main departure hub for Indian travelers, while Doha serves as the primary gateway for visitors from Germany, France, the US, and Spain. For travelers from the Russian Federation and the UK, Moscow and London serve as the main transit points. This highlights the importance of accessibility in bolstering Sri Lanka's tourism sector, as travelers' choices are closely tied to their home regions and available routes. Strong travel connections and strategic departure hubs are essential in attracting international visitors, underscoring the need to maintain and strengthen links with these key transit points to support the growth of Sri Lanka's tourism industry.

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

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



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