
Introduction

The following document provides a synthesis of the most recent June, 2024 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 30th June 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

Tourist arrivals for June were recorded at 113,470, marking a 13% increase compared to June 2023. Despite this growth, the numbers remain below June 2018's figure of 146,828 and the conservative forecast of 148,695. The total arrivals up to June reached 1,010,249.

Key source markets for Sri Lanka in June included India, the United Kingdom, China, Australia, and the Maldives. These countries showed significant increases in visitor numbers, contributing to the growth of the tourism sector.

According to the latest UNWTO Barometer, an estimated 285 million tourists traveled internationally

in the first three months of 2024, marking an increase of about 20% compared to the same period in 2023. International arrivals reached 97% of 2019 levels in the first quarter of 2024, indicating a near-complete recovery to pre-pandemic figures. The positive results were driven by sustained high demand, improved air connectivity, and facilitated visa processes, as highlighted in the latest Tourism Visa Openness report. However, several factors continue to weigh on the recovery of international tourism. These include persistent economic challenges, such as inflation and high fuel prices, as well as geopolitical uncertainties (UNWTO, 2024).

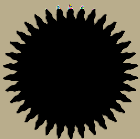
Table 1. Monthly tourist arrivals, June 2024

Month	2023	2024	% Change 2024/23
January	102,545	208,253	103.08
February	107,639	218,350	102.85
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		
August	136,405		
September	111,938		
October	109,199		
November	151,496		
December	210,352		
TOTAL	1,487,303	1,010,249	



Tourist Arrivals | June 2024

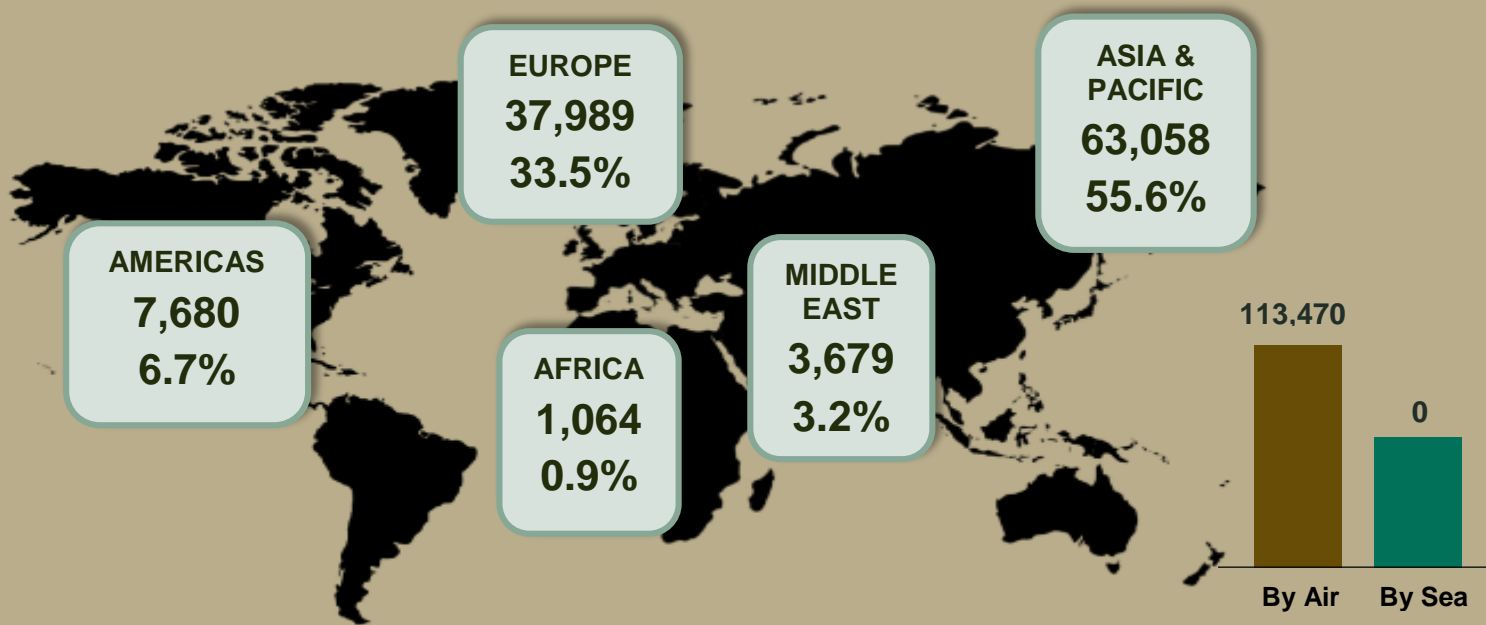
113,470



Tourist arrivals by region and percentage share

June 2024

Map 1. Tourist arrivals by region and percentage share



The Asia-Pacific region has significantly influenced Sri Lanka's tourism, contributing 55.6% of total arrivals. Europe has also become a major contributor, accounting for 33.5% of visitors. This shift highlights the evolving dynamics of Sri Lanka's tourism industry, with both the Asia-Pacific and Europe playing crucial roles.

The growth in tourism is driven by increased demand from India, the UK, Maldives, China, and Germany, strengthening Sri Lanka's tourism sector. The Americas accounted for 6.7% of arrivals, while the Middle East and Africa contributed 3.2% and 0.9%, respectively, shaping Sri Lanka's distinctive tourism profile.



Top primary markets and top potential markets

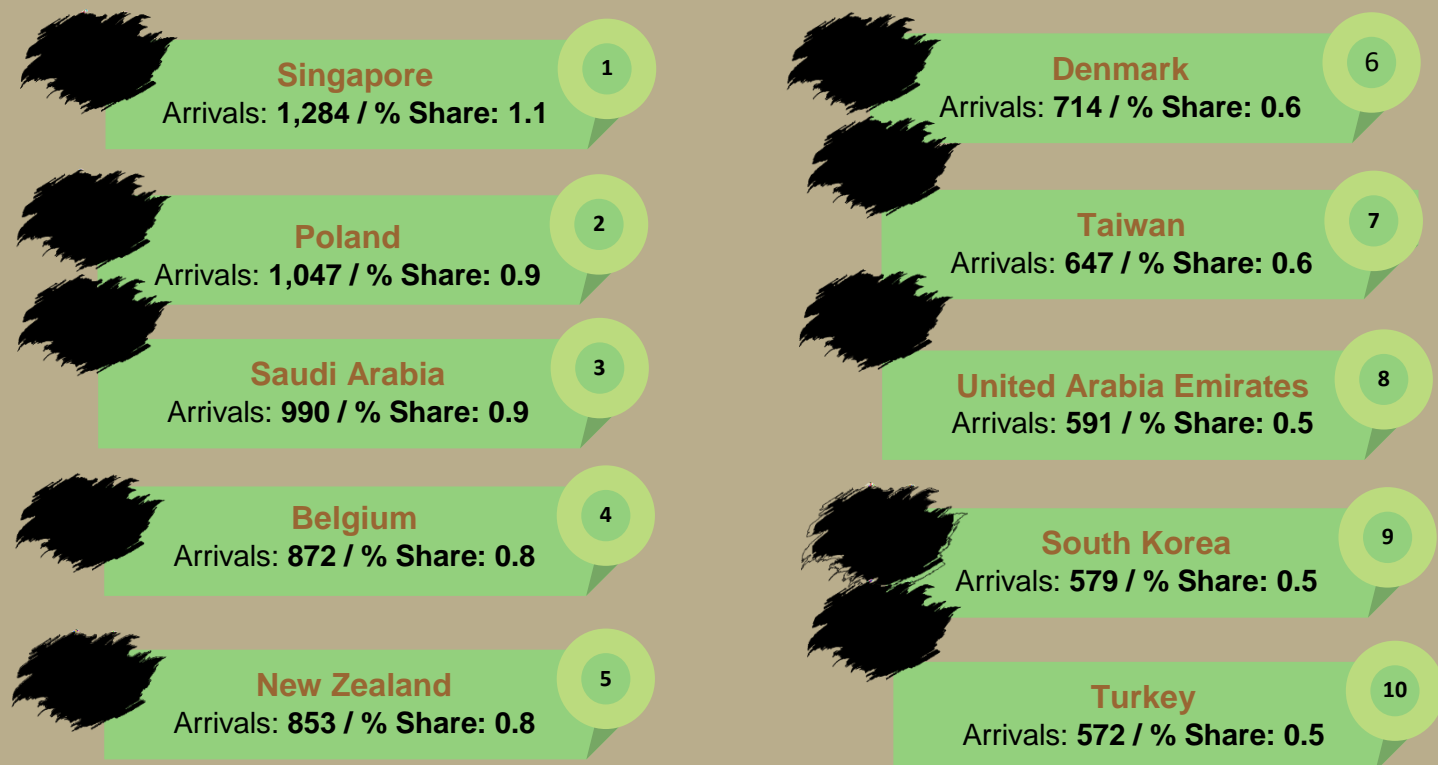
Top primary markets, June 2024



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, June 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

June 2024

In June, India emerged as the top source of tourists to Sri Lanka, comprising 25.2% of total arrivals. The United Kingdom and China followed with 8.2% and 7.6%, respectively, while Australia contributed 5.6%. These figures indicate shifting travel preferences. Notably, there were significant increases in visitors from Bangladesh and China compared to the previous year, indicating a trend toward emerging destinations. Conversely, declines in tourists from Russia, Canada, and Germany compared to last June may be attributed to seasonal travel changes or preferences for alternative destinations. Additionally, the reduction in Canadian arrivals could be linked to fewer visits for the purpose of seeing friends and relatives.

The enhanced significance of these countries as key contributors to Sri Lanka's tourism sector can be attributed to the combined impact of improved air connectivity, favorable local conditions, geographical proximity, and geopolitical factors.

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

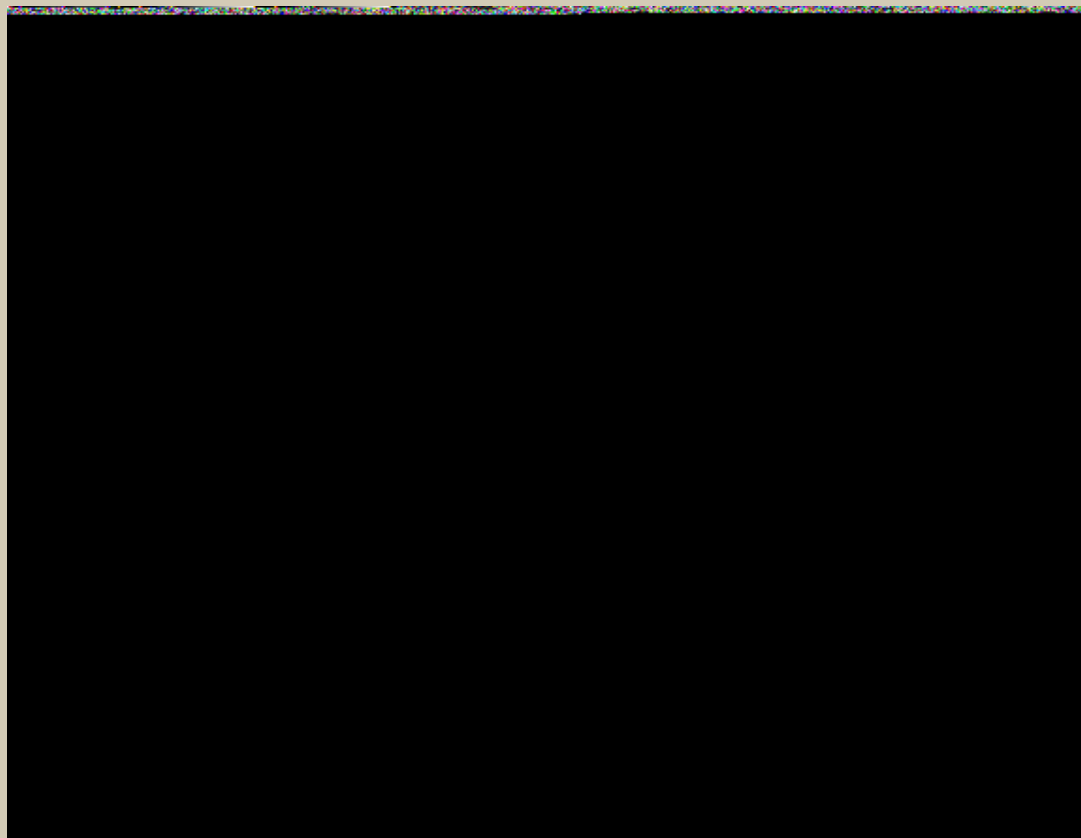
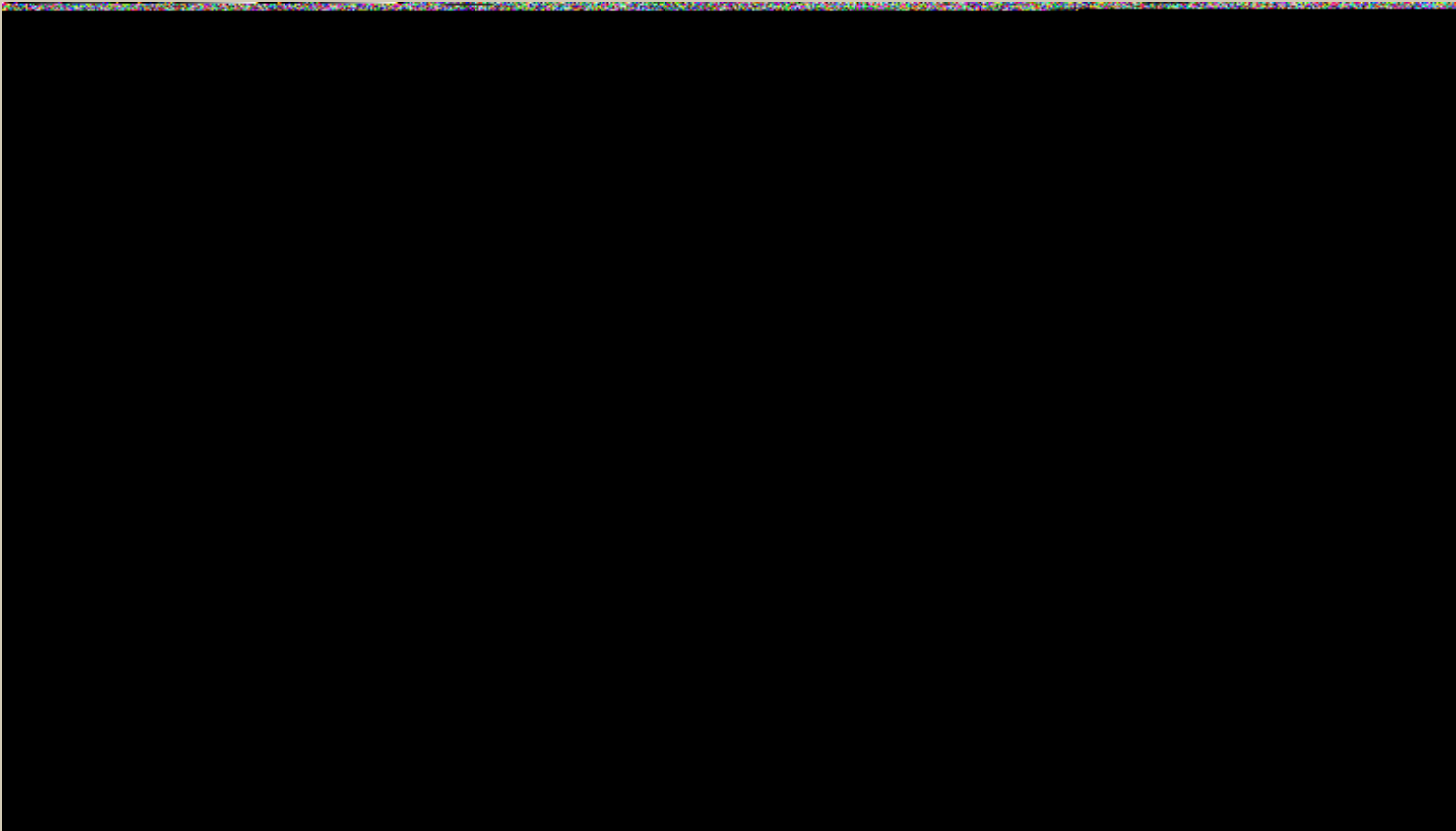




Table 2. Top ten source markets to Sri Lanka, June

Rank	Country of Residence	Tourist Arrivals (June 2024)			Tourist Arrivals
		By Air	By Sea	Total	(June 2023)
1	India	28,631	0	28,631	26,830
2	United Kingdom	9,266	0	9,266	7,981
3	China	8,575	0	8,575	5,105
4	Australia	6,317	0	6,317	6,195
5	Maldives	5,109	0	5,109	4,080
6	Germany	4,556	0	4,556	5,090
7	Bangladesh	4,374	0	4,374	1,072
8	United States	4,023	0	4,023	3,806
9	Russia	3,412	0	3,412	7,968
10	Canada	3,263	0	3,263	4,509

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





Top ten source markets

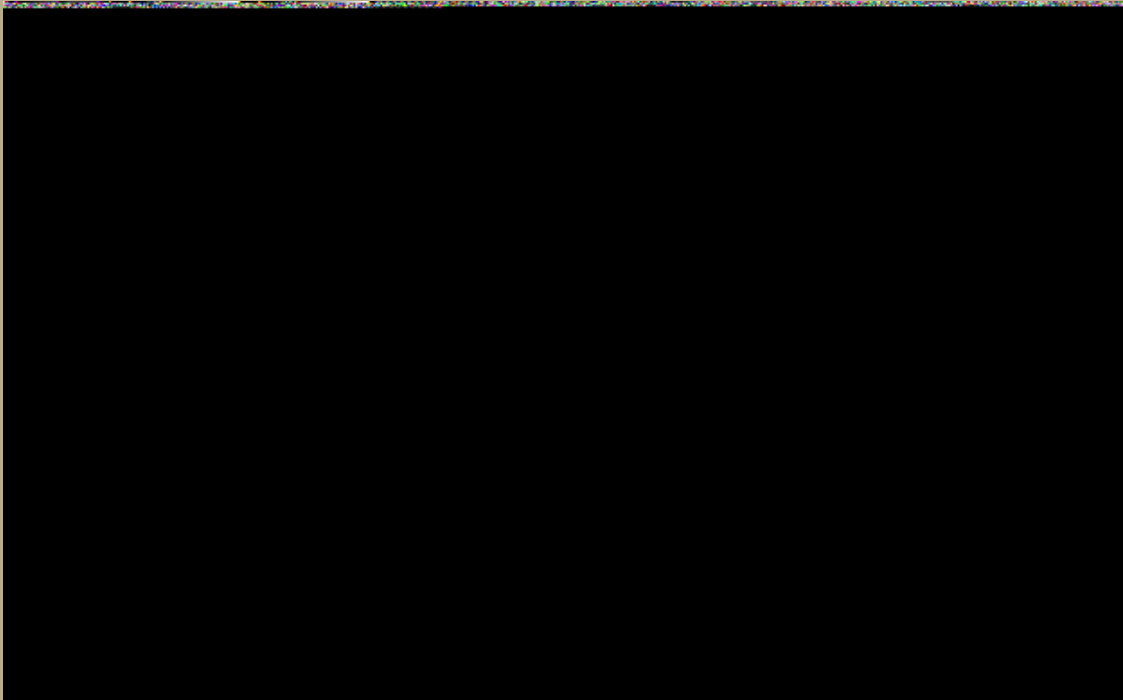
January to June 2024

In the first half of this year, Sri Lanka experienced a notable increase in tourists from India, the Russian Federation, the United Kingdom, Germany, and China, making these countries the top five international markets. There was a particularly significant rise in arrivals from China and Poland. It is important to note that among these countries, the Russian Federation had the least growth in tourist arrivals during this period.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ June 2024)	Tourist Arrivals (Jan ~ June 2023)
1	India	184,468	116,193
2	Russian Federation	114,104	110,275
3	United Kingdom	89,352	50,822
4	Germany	70,070	45,197
5	China	63,816	19,862
6	France	49,340	27,588
7	Australia	40,746	26,898
8	United States	32,717	21,766
9	Poland	23,896	6,341
10	Maldives	23,803	13,909
11	Other	317,937	438,851
Total		1,010,249	624,874

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





Tourist arrivals by purpose of visit

June 2024

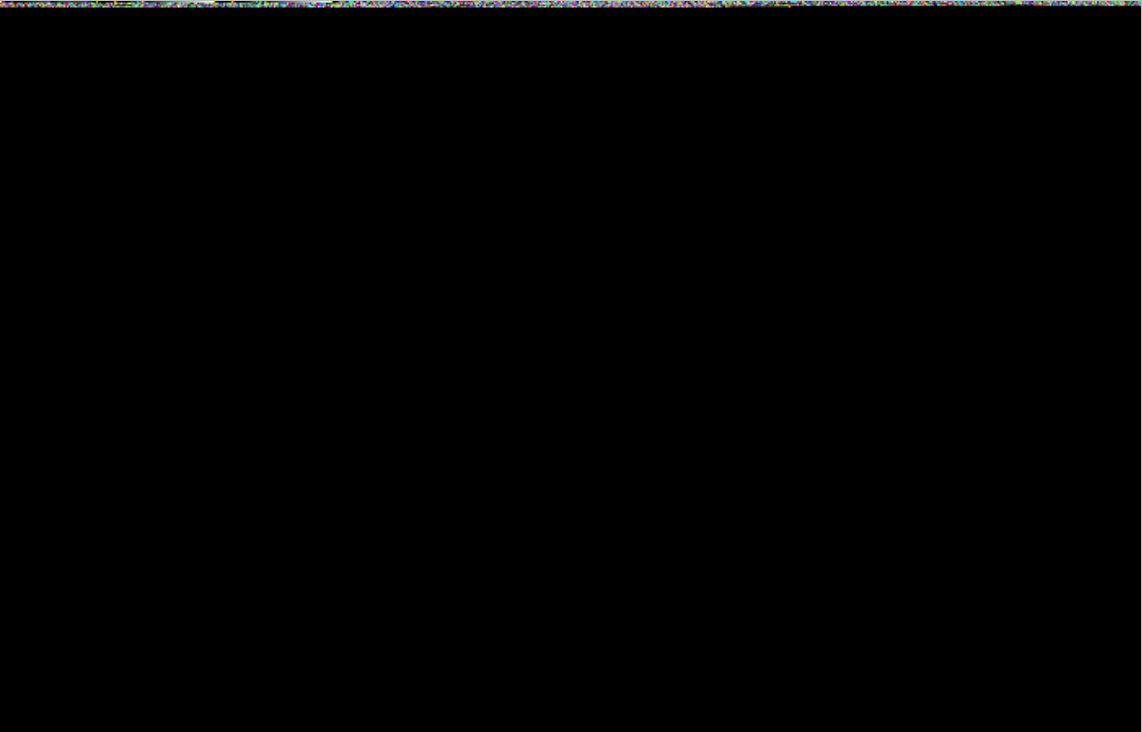
An in-depth analysis of tourist motivations for choosing Sri Lanka as their destination reveals several key reasons. According to the available data, leisure and vacation account for the majority of visits, representing 3% of the total, highlighting the country's strong appeal as a leisure destination. Additionally, 1% of visitors travel to reunite with friends and family, showcasing Sri Lanka's ability to attract individuals seeking personal connections.

Conversely, only 0.08% of visits are for business purposes, indicating a minimal focus on professional activities. Furthermore, 0.12% of travelers attend MICE (Meetings, Incentives, Conferences, and Exhibitions) events, underscoring Sri Lanka's growing reputation as a destination for corporate events.

In June, the primary reason for travelers from major source markets to visit Sri Lanka was for leisure and vacation. A significant number of tourists from all key markets, except Canada, came for leisure, underscoring Sri Lanka's reputation as a destination for relaxation and enjoyment.

The interest in visiting friends and relatives in Sri Lanka decreased in June, with only 3% of Canadian travelers opting to connect with friends and family during their trips.

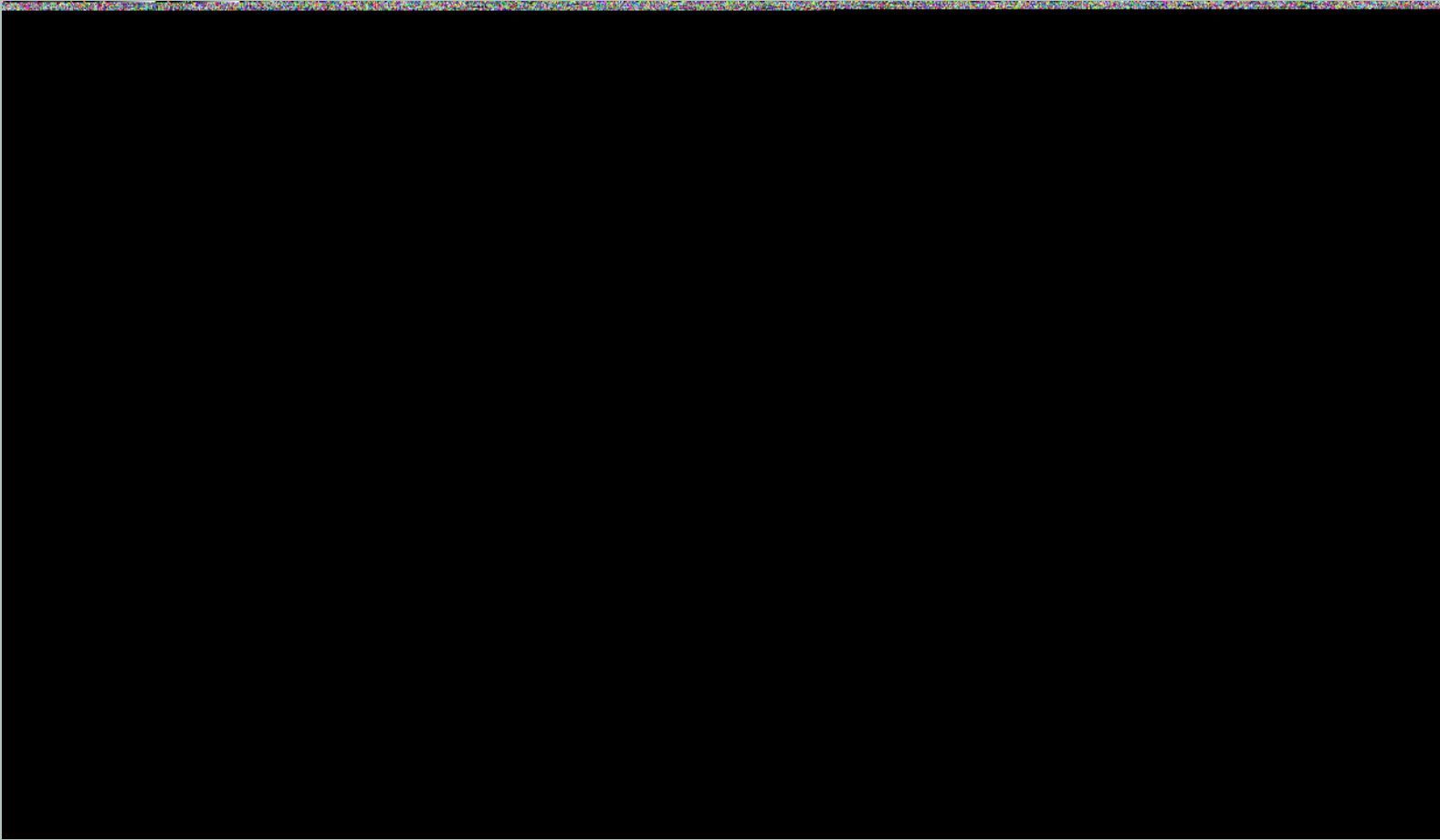
Chart 4: Purpose of visit



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





Tourism tale: Sri Lanka’s path to a million tourists

In 2024, Sri Lanka is on track to meet an ambitious target of attracting 2.3 million tourists, marking significant growth from the 1,487,303 tourists it welcomed in 2023. By June 2024, the country had already received 1,010,249 tourists, indicating a strong upward trend in tourism. However, these numbers are still lower than the 1,164,647 tourists recorded in the same period in 2018. Monthly forecasts for 2024 show a positive trend, but actual tourist arrivals consistently fall short of these optimistic projections. When compared to 2018 figures, the number of tourists from January to June 2024 has decreased, indicating that Sri Lanka has not yet fully returned to pre-COVID levels.

January 2024 experienced the most substantial year-on-year increase compared to 2023, showing a remarkable rise of 103.08%. Conversely, June 2024 recorded the sharpest decline in arrivals when compared to the same month in 2018, also marking the lowest growth rate compared to 2023.

Comparing arrivals for the first six months of 2024, there has been a 61.6% increase compared to 2023. However, when compared to 2018, there is a noticeable decline of 13.25%. These figures underscore the imperative to attract more tourists. Even under an optimistic scenario, the current arrivals still lag behind by 169,208.

Month	Tourist Arrivals 2018	Tourist Arrivals 2023	Tourist Arrivals 2024	Percentage change 24/18	Percentage change 24/23	Optimistic Scenario 2024
January	238,924	102,545	208,253	-12.83	103.08%	241,962
February	235,618	107,639	218,350	-7.32	102.85%	238,614
March	233,382	125,495	209,181	-10.36	66.70%	236,350
April	180,429	105,498	148,867	-17.49	41.10%	182,724
May	129,466	83,309	112,128	-13.39	34.60%	131,112
June	146,828	100,388	113,470	-22.71	13%	148,695
Total Arrivals	1,164,647	624,874	1,010,249	-13.25	61.6	1,179,457

In conclusion, while Sri Lanka's tourism sector in 2024 shows promising signs of recovery and growth compared to the previous year, it has not fully rebounded to pre-pandemic levels seen in 2018. The substantial year-on-year increase in January 2024 highlights potential for recovery, but the sharp decline observed in May 2024 indicates ongoing challenges. Monthly forecasts suggest optimism, yet actual arrivals often fall short, emphasizing the need for targeted strategies to meet the ambitious target of 2.3 million tourists for the year. Addressing these challenges effectively will be crucial for sustaining and accelerating tourism growth in Sri Lanka.





International tourist arrivals by country of residence

	June 2024 Tourist Arrivals			Tourist Arrivals June 2023	% Change June (24/23) 2024	Total Tourist Arrivals Up to June 2024	Total Tourist Arrivals Up to June 2023	% Change Up to June (24/23) 2024
	By Air	By Sea	Total					
AMERICAS	7,680	0	7,680	8,644	(11.15)	58,694	46,566	26.0
North America	7,324	0	7,324	8,349	(12.28)	55,492	44,493	24.7
Canada	3,263	0	3,263	4,509	(27.63)	22,223	22,426	(0.9)
Mexico	38	0	38	34	11.76	552	301	83.4
United States	4,023	0	4,023	3,806	5.70	32,717	21,766	50.3
Caribbean & Central America	84	0	84	54	55.56	530	322	64.6
Costa Rica	03	0	03	07	(57.14)	66	28	135.7
Jamaica	12	0	12	07	71.43	53	22	140.9
Others	69	0	69	40	72.50	411	272	51.1
South America	272	0	272	241	12.86	2,672	1,751	52.6
Argentina	51	0	51	37	37.84	537	387	38.8
Brazil	111	0	111	84	32.14	1,063	662	60.6
Chile	32	0	32	42	(23.81)	321	218	47.2
Colombia	44	0	44	42	4.76	365	251	45.4
Others	34	0	34	36	(5.56)	386	233	65.7
AFRICA	1,064	0	1,064	818	30.07	6,351	3,526	80.1
North Africa	303	0	303	235	28.94	1,503	1,086	38.4
Morocco	80	0	80	86	(6.98)	470	334	40.7
Sudan	116	0	116	74	56.76	366	307	19.2
Others	107	0	107	75	42.67	667	445	49.9
Sub-Saharan Africa	761	0	761	583	30.53	4,848	2,440	98.7
Kenya	29	0	29	35	(17.14)	305	225	35.6
Mauritius	25	0	25	29	(13.79)	253	142	78.2
Nigeria	01	0	01	15	(93.33)	25	37	(32.4)
South Africa	349	0	349	291	19.93	2,248	1,282	75.4
Others	357	0	357	213	67.61	2,017	754	167.5



Monthly Tourist Arrivals Report June 2024

	June 2024			Tourist Arrivals June 2023	% Change June (24/23) 2024	Total Tourist Arrivals Up to June 2024	Total Tourist Arrivals Up to June 2023	% Change Up to June (24/23) 2024
	By Air	By Sea	Total					
ASIA & PACIFIC	63,058	0	63,058	51,102	23.40	397,522	223,514	77.9
North East Asia	11,489	0	11,489	7,282	57.77	86,411	31,476	174.5
China	8,575	0	8,575	5,105	67.97	63,816	19,862	221.3
Japan	1,666	0	1,666	1,017	63.82	12,430	6,971	78.3
South Korea	579	0	579	516	12.21	5,155	2,920	76.5
Taiwan	647	0	647	637	1.57	4,948	1,673	195.8
Others	22	0	22	07	214.29	62	50	24.0
South East Asia	4,288	0	4,288	3,303	29.82	26,092	14,796	76.3
Cambodia	50	0	50	75	(33.33)	908	297	205.7
Indonesia	272	0	272	200	36.00	1,539	961	60.1
Malaysia	1,384	0	1,384	779	77.66	8,932	4,238	110.8
Myanmar	117	0	117	53	120.75	642	331	94.0
Philippines	544	0	544	410	32.68	2,614	1,858	40.7
Singapore	1,284	0	1,284	1,164	10.31	5,888	3,891	51.3
Thailand	364	0	364	414	(12.08)	3,930	2,072	89.7
Vietnam	237	0	237	192	23.44	1,502	1,070	40.4
Others	36	0	36	16	125.00	137	78	75.6
Oceania	7,215	0	7,215	7,075	1.98	45,892	30,299	51.5
Australia	6,317	0	6,317	6,195	1.97	40,746	26,898	51.5
New Zealand	853	0	853	853	0.00	4,964	3,303	50.3
Others	45	0	45	27	66.67	182	98	85.7
South Asia	40,066	0	40,066	33,442	19.81	239,127	146,943	62.7
Afghanistan	02	0	02	06	(66.67)	87	43	102.3
Bangladesh	4,374	0	4,374	1,072	308.02	15,632	5,037	210.3
Bhutan	33	0	33	39	(15.38)	379	160	136.9
India	28,631	0	28,631	26,830	6.71	184,468	116,193	58.8
Iran	318	0	318	330	(3.64)	6,220	5,973	4.1
Maldives	5,109	0	5,109	4,080	25.22	23,803	13,909	71.1
Nepal	200	0	200	374	(46.52)	2,208	1,795	23.0
Pakistan	1,399	0	1,399	711	96.77	6,330	3,833	65.1
EUROPE	37,989	0	37,989	37,002	2.67	534,208	339,245	57.5
Northern Europe	12,809	0	12,890	11,114	15.98	117,048	66,618	75.7
Denmark	714	0	714	680	5.00	8,145	4,841	68.3
Finland	130	0	130	116	12.07	2,394	966	147.8
Norway	1,452	0	1,452	1,281	13.35	5,967	4,025	48.2
Sweden	568	0	568	622	-8.68	6,538	3,756	74.1
United Kingdom	9,266	0	9,266	7,981	16.10	89,352	50,822	75.8
Others	679	0	679	434	56.45	4,652	2,208	110.7



	June 2024			Tourist Arrivals June 2023	% Change June (24/23) 2024	Total Tourist Arrivals Up to June 2024	Total Tourist Arrivals Up to June 2023	% Change Up to June (24/2) 2024
	By Air	By Sea	Total					
Western Europe	12,156	0	12,156	11,332	7.27	168,118	99,195	69.5
Austria	384	0	384	299	28.43	8,451	4,150	103.6
Belgium	872	0	872	438	99.09	6,790	3,587	89.3
France	3,102	0	3,102	2,895	7.15	49,340	27,588	78.8
Germany	4,556	0	4,556	5,090	(10.49)	70,070	45,197	55.0
Netherlands	1,935	0	1,935	1,258	53.82	19,466	8,495	129.1
Switzerland	1,291	0	1,291	1,334	(3.22)	13,554	9,874	37.3
Others	16	0	16	18	(11.11)	447	304	47.0
Central/ Eastern Europe	6,398	0	6,398	10,498	(39.06)	198,451	144,153	37.7
Belarus	175	0	175	441	(60.32)	7,013	5,343	31.3
Czech Republic	526	0	526	277	89.89	12,443	4,809	158.7
Estonia	30	0	30	19	57.89	2,775	686	304.5
Hungary	160	0	160	98	63.27	3,915	1,567	149.8
Kazakhstan	96	0	96	96	0.00	8,611	2,100	310.0
Lithuania	73	0	73	77	(5.19)	4,378	1,293	238.6
Poland	1,047	0	1,047	702	49.15	23,896	6,341	276.8
Romania	192	0	192	148	29.73	3,425	1,680	103.9
Russia	3,412	0	3,412	7,968	(57.18)	114,104	110,275	3.5
Slovakia	163	0	163	129	26.36	3,985	2,252	77.0
Ukraine	206	0	206	200	3.00	4,431	2,655	66.9
Others	318	0	318	343	(7.29)	9,475	5,152	83.9
Southern/ Mediterranean Europe	6,626	0	6,626	4,058	63.28	50,591	29,279	72.8
Greece	82	0	82	38	115.79	1,354	691	95.9
Italy	1,792	0	1,792	1,265	41.66	14,228	7,487	90.0
Portugal	281	0	281	181	55.25	2,936	1,619	81.3
Spain	2,081	0	2,081	1,229	69.32	12,362	6,457	91.5
Turkey	572	0	572	275	108.00	3,629	1,540	135.6
Israel	1,515	0	1,515	856	76.99	11,163	8,972	24.4
Others	303	0	303	214	41.59	4,919	2,513	95.7
MIDDLE EAST	3,679	0	3,679	2,822	30.37	13,474	12,023	12.1
Bahrain	197	0	197	171	15.20	582	560	3.9
Egypt	365	0	365	260	40.38	2,017	1,286	56.8
Iraq	93	0	93	85	9.41	401	446	(10.1)
Jordan	373	0	373	396	(5.81)	1,327	1,754	(24.3)
Kuwait	231	0	231	183	26.23	1,045	955	9.4
Lebanon	308	0	308	279	10.39	1,885	1,561	20.8
Oman	322	0	322	212	51.89	966	844	14.5
Qatar	80	0	80	145	(44.83)	320	379	(15.6)
Saudi Arabia	990	0	990	595	66.39	2,714	2,739	(0.9)
United Arab Emirates	591	0	591	404	46.29	1,716	1,082	58.6
Others	129	0	129	92	40.22	501	417	20.1
TOTAL	113,470	0	113,470	100,388	13.03	1,010,249	624,874	61.7



Main last departure airports and airlines to Sri Lanka,

June 2024

An analysis of tourists' departure airports and preferred airlines traveling to Sri Lanka underscores the vital role of air travel in the country's tourism sector. Approximately 33% of tourists used Dubai, Doha, and Chennai airports as their final transit points before arriving in Sri Lanka. Additionally, Sri Lankan Airlines, IndiGo, and Emirates were the top airlines, collectively accounting for 47% of all tourist arrivals. This highlights the importance of specific airports and airlines in facilitating a significant portion of tourism to Sri Lanka.

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

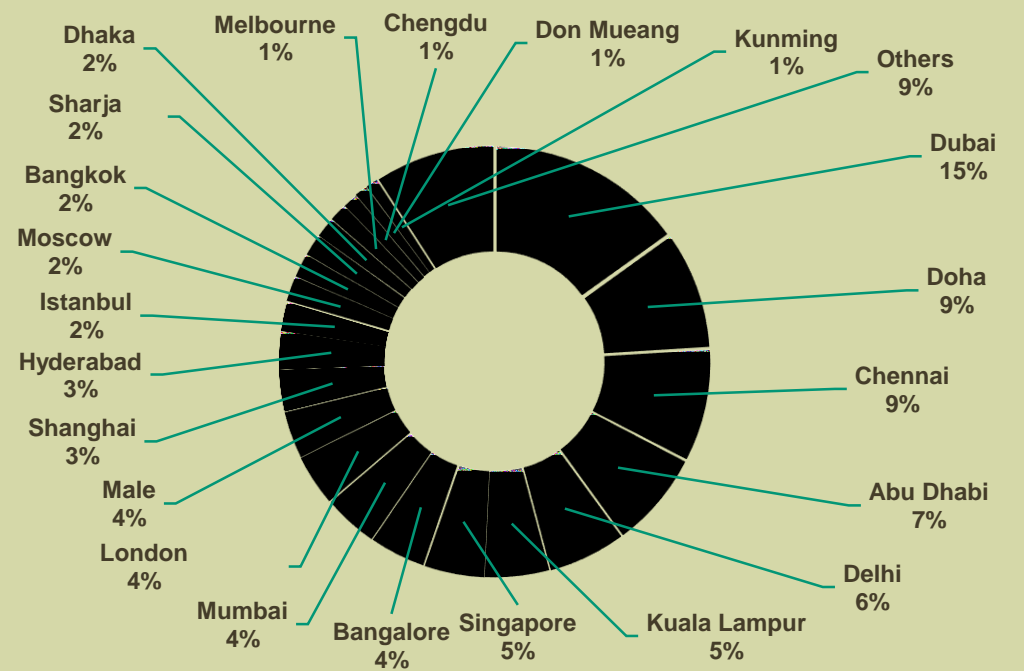
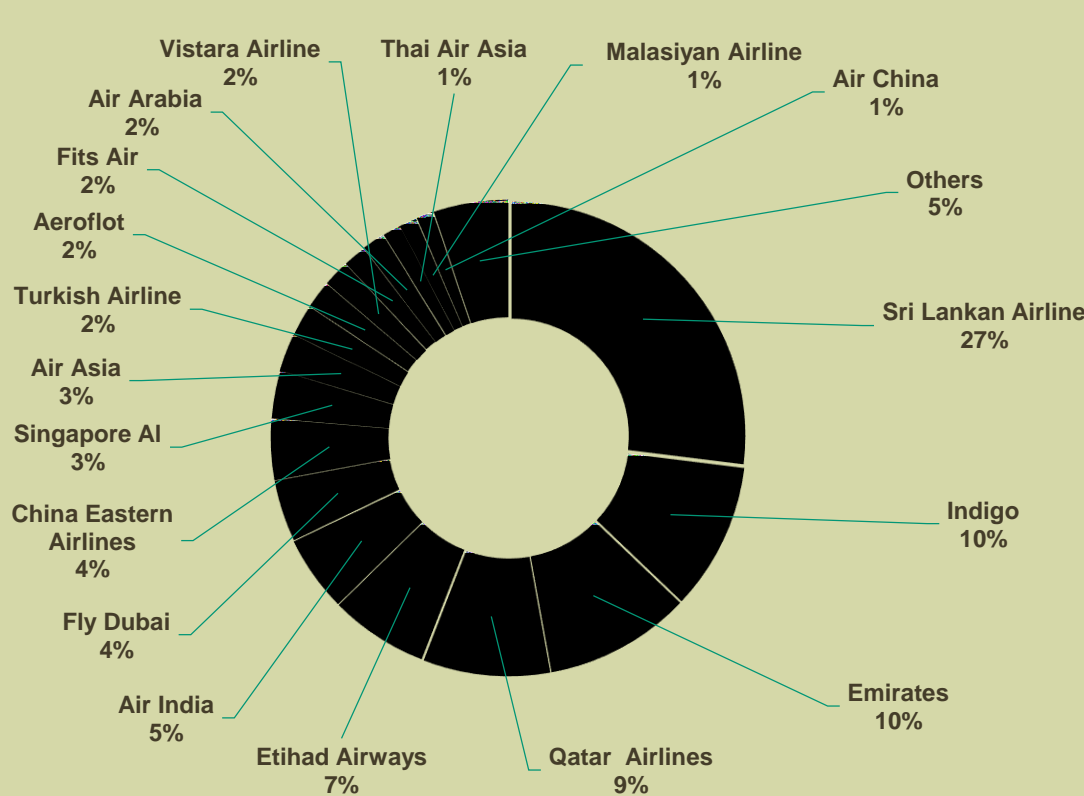


Chart 7. Main airlines to Sri Lanka, June 2024





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

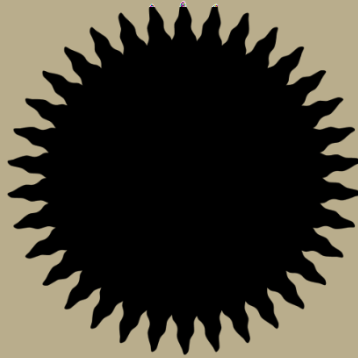
June 2023

Tourists' airline choices significantly impact their travel experiences to Sri Lanka, often reflecting their nationalities and preferences. Indian tourists frequently select IndiGo and Sri Lankan Airlines, while Russian visitors favor Aeroflot. On the other hand, Sri Lankan Airlines is the preferred choice for travelers from the UK, Maldives, Australia, United States, Bangladesh, and Canada. Chinese tourists typically choose China Eastern, while German visitors often opt for Qatar Airways.

Chennai is the primary departure airport for Indian travelers, while Doha serves as the main gateway for tourists from the United Kingdom, Germany, and the USA. Australians, Russians, and Chinese travelers generally depart from Singapore, Moscow, and Shanghai airports, respectively. Emirates is the preferred airline for Germans, with Dubai being their final departure airport. This underscores the crucial role of accessibility in enhancing Sri Lanka's tourism, demonstrating how travelers' airline and airport preferences are influenced by their home countries and highlighting the importance of seamless travel connections in attracting visitors.

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

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



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