
Introduction

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

April saw a decline in tourist arrivals, with 148,867 visitors, marking it as the month with the lowest arrivals so far this year, experiencing a 28.8% decrease compared to March. However, these figures still fall short when compared to April 2018's 180,429 arrivals and the conservative forecast of 168,539. The total arrivals until April reached 784,651.

Sri Lanka's key source markets in April included India, Russia, the United Kingdom, Germany, and France, with significant increases in visitors from these countries contributing to the growth of the tourism sector.

In 2024, it is anticipated that international tourist arrivals will bounce back entirely, surpassing the levels seen in 2019 with a projected growth rate of 2%. The latest UNWTO Tourism Confidence Index survey reflects a positive outlook, with 67% of industry experts expressing optimism for 2024 compared to the preceding year. The expected full recovery by the conclusion of 2024 is attributed to the release of pent-up demand, improvements in air connectivity, and the revitalization of Asian markets and destinations.

Table 1. Monthly tourist arrivals, April 2024

Month	2023	2024	% Change 2024/23
January	102,545	208,253	103.08
February	107,639	218,350	102.09
March	125,495	209,181	66.7
April	105,498	148,867	41.1
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	784,651	



Tourist Arrivals | April 2024

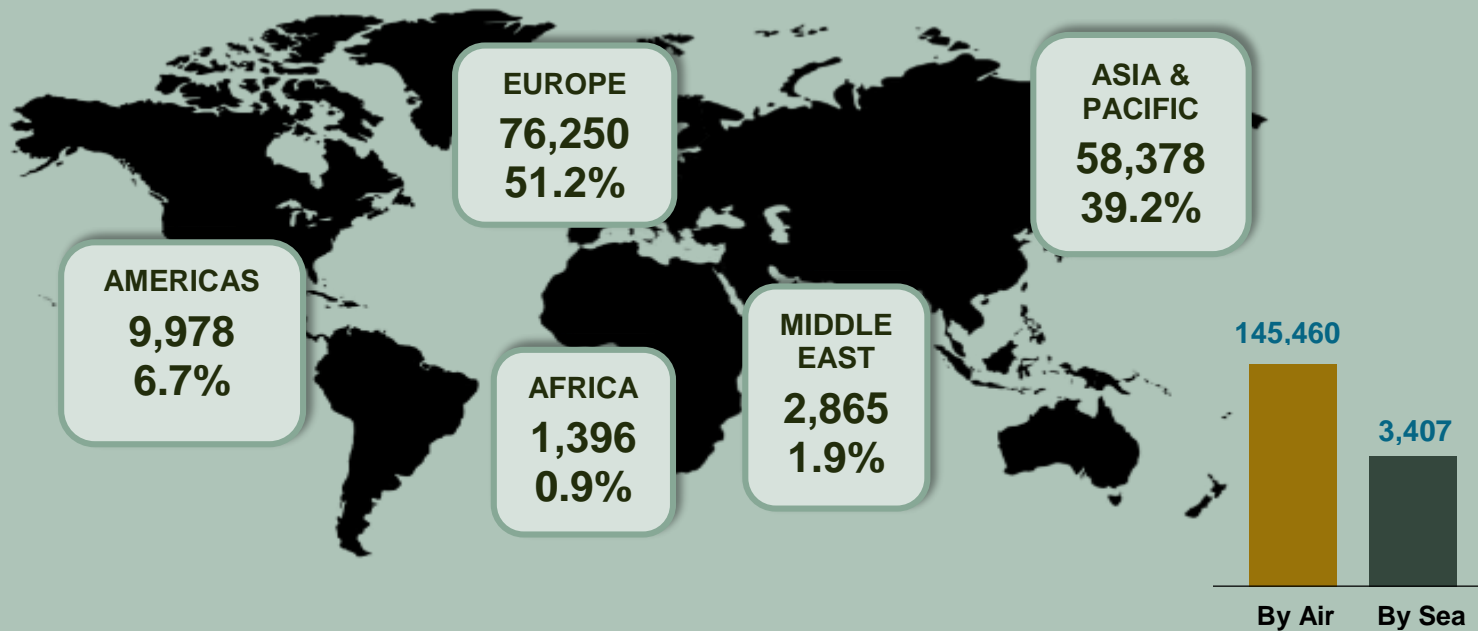
148,867



Tourist arrivals by region and percentage share

April 2024

Map 1. Tourist arrivals by region and percentage share



Europe significantly shaped Sri Lanka's tourism landscape, comprising 51.2% of total arrivals, while Asia and the Pacific emerged as significant contributors, making up 39.2% of visitors. This shift highlights the evolving dynamics of Sri Lanka's tourism, with Europe and Asia-Pacific playing crucial roles.

The increase in tourism can be credited to growing demand from India, Russia, Germany, the UK, and France, which have strengthened Sri Lanka's tourism sector. The Americas accounted for 6.7% of arrivals, while the Middle East and Africa contributed 1.9% and 0.9%, respectively, giving Sri Lanka's tourism profile a distinctive shape.



Top primary markets and top potential markets

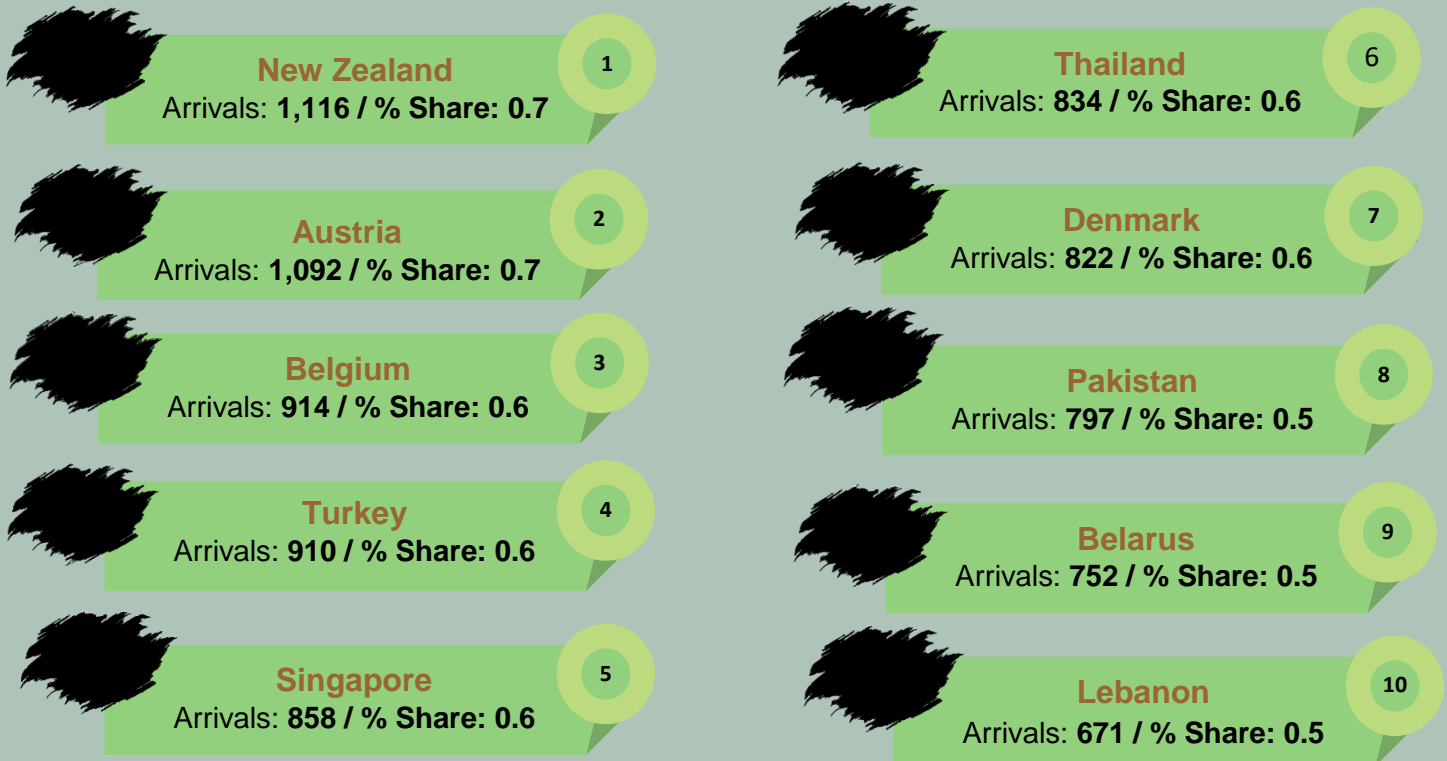
Top primary markets, April 2024



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, April 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

April 2024

In April, India led the influx of tourists to Sri Lanka, comprising 18% of the total arrivals, with Russia, the UK, Germany, and France closely trailing at 10%, 9%, 7%, and 6%, respectively. These statistics highlight evolving travel preferences. Notably, there was an increase in arrivals from China and the Netherlands compared to the previous year, indicating a shift towards emerging destinations. The decrease in arrivals from Russia compared to April last year could be attributed to changes in the travel season of Russian tourists or their attraction to other tourist destinations.

The collective impact of factors such as the current peak season, improved air connections, favorable local conditions, geographical proximity, and geopolitical circumstances has greatly amplified the significance of these nations as key contributors to Sri Lanka's tourism sector.

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

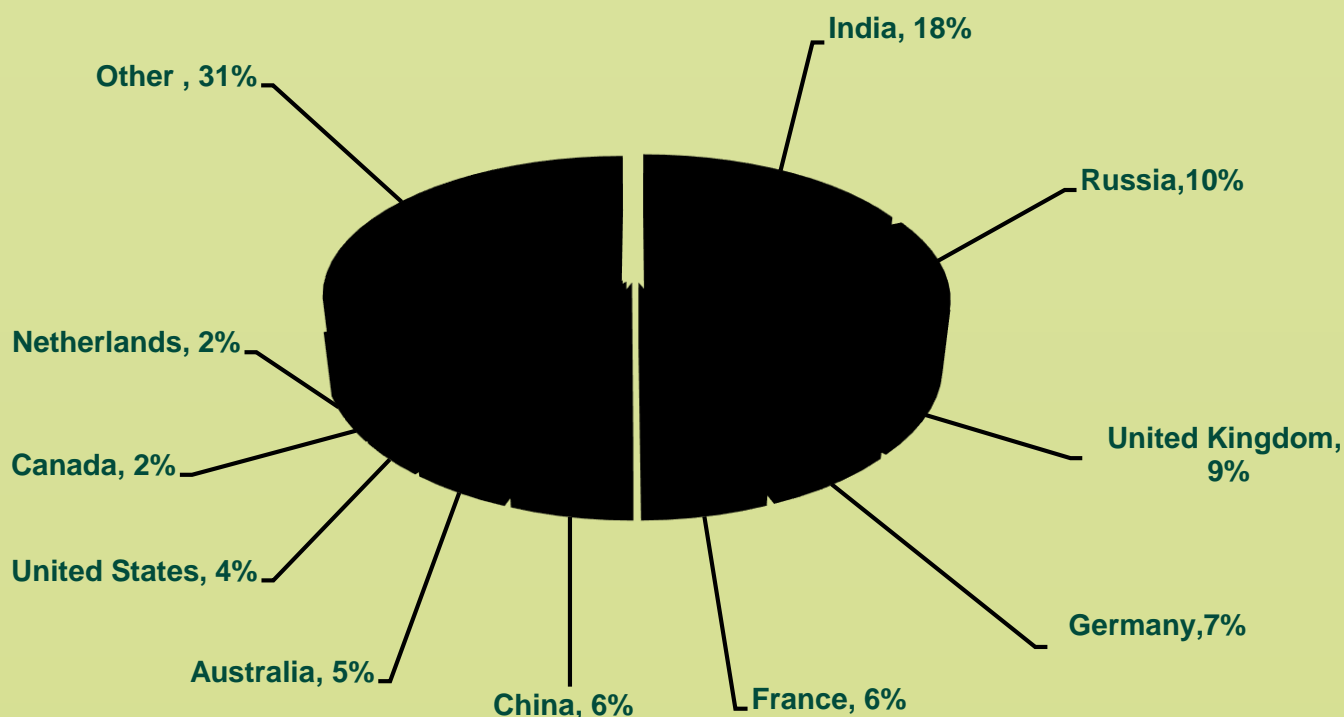
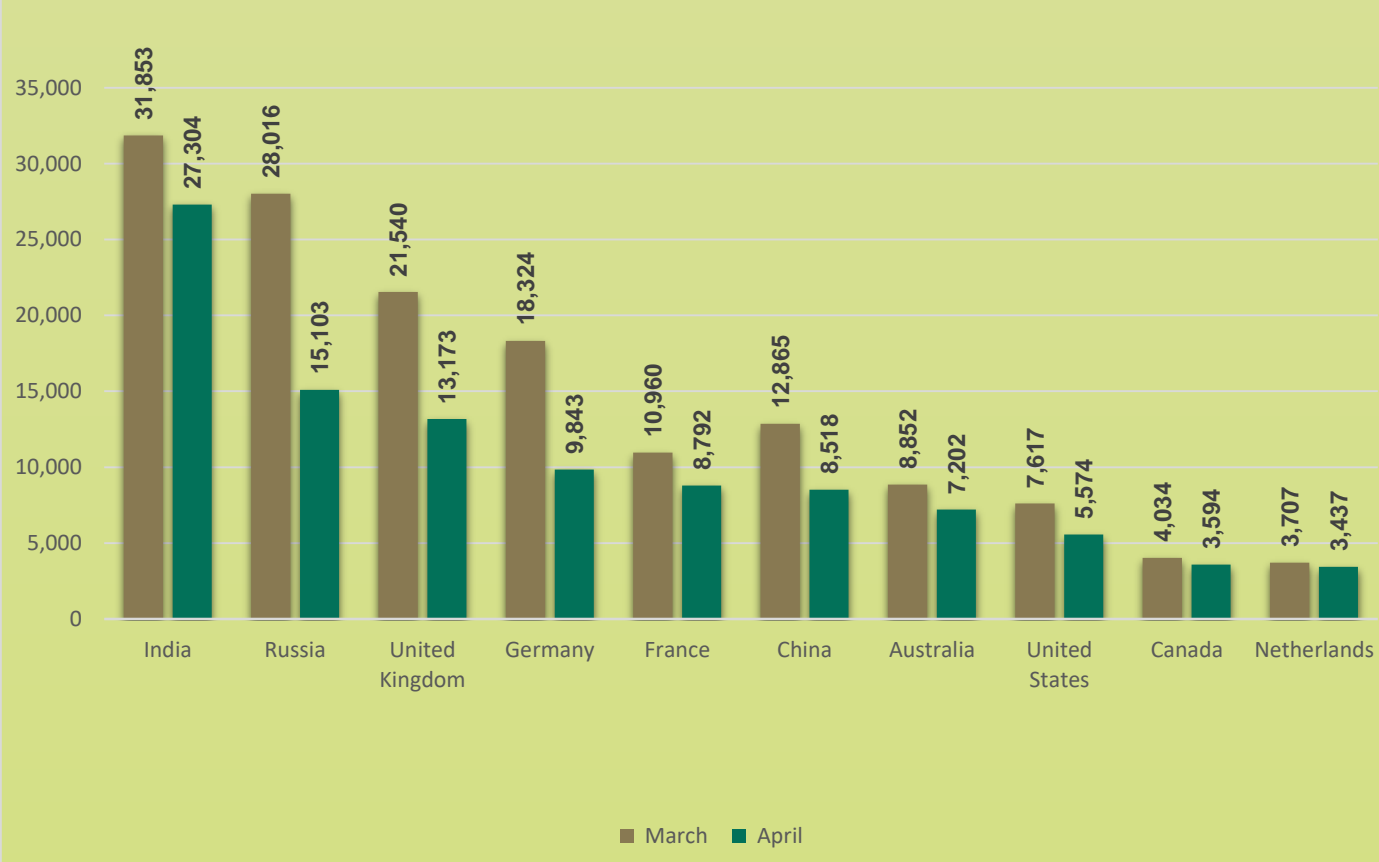




Table 2. Top ten source markets to Sri Lanka, April

Rank	Country of Residence	Tourist Arrivals (April 2024)			Tourist Arrivals (April 2023)
		By Air	By Sea	Total	
1	India	27,304	0	27,304	19,915
2	Russian Federation	15,086	17	15,103	14,656
3	United Kingdom	13,171	02	13,173	8,743
4	Germany	9,479	364	9,843	7,404
5	France	8,155	637	8,792	5,535
6	China	8,518	0	8,518	5,118
7	Australia	7,166	36	7,202	4,996
8	United States	4,622	952	5,574	3,940
9	Canada	3,552	42	3,594	3,310
10	Netherlands	3,421	16	3,437	1,593

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





Top ten source markets

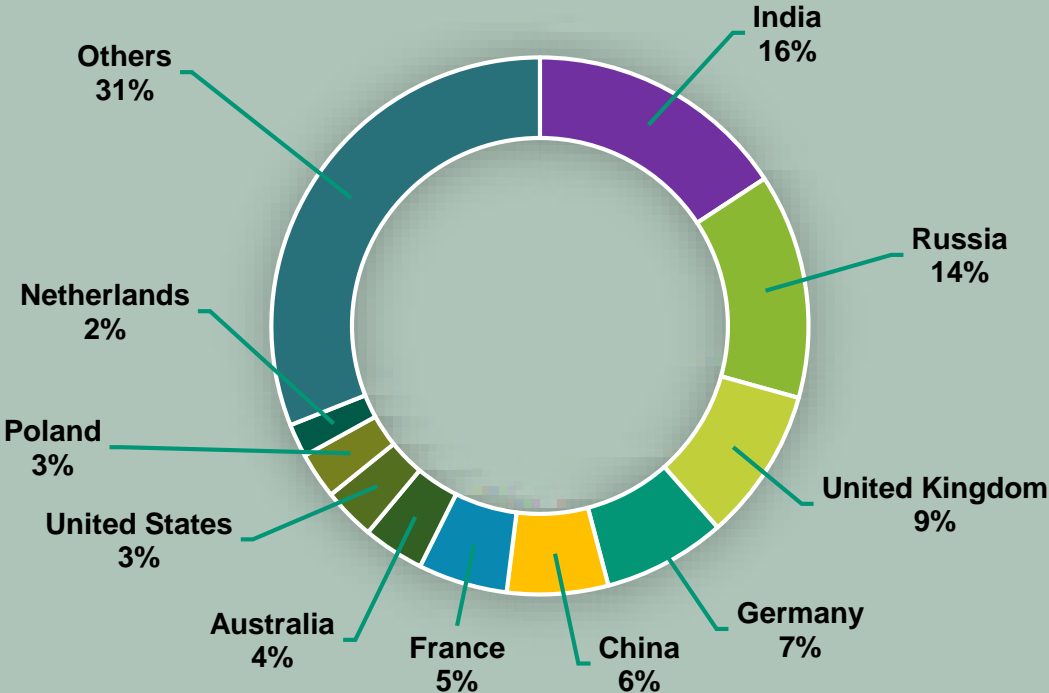
January to April 2024

During the first four months of this year, Sri Lanka experienced significant tourist influx from India, the Russian Federation, the United Kingdom, Germany, and China, positioning them as the leading five international tourist source markets. Particularly noteworthy was the substantial increase in arrivals from China, Poland, the Netherlands, the United Kingdom, and France during this period. It is important to highlight that among these countries, the Russian Federation had the least growth in tourist arrivals compared to others in this timeframe.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ April 2024)	Tourist Arrivals (Jan ~ April 2023)
1	India	123,583	66,347
2	Russian Federation	106,308	94,547
3	United Kingdom	71,992	36,854
4	Germany	58,019	33,253
5	China	47,730	10,584
6	France	42,174	22,279
7	Australia	28,964	16,502
8	United States	24,612	14,720
9	Poland	21,847	5,023
10	Netherlands	15,686	6,165
11	Other	243,736	134,903
Total		784,651	441,177

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





Tourist arrivals by purpose of visit

April 2024

An in-depth examination of the reasons behind tourists selecting Sri Lanka as their destination reveals a variety of travel motivations. The primary factor, accounting for 58% of all visits, is leisure and vacation, underscoring the country's allure as a leisure destination. Additionally, 8% of travelers come to reunite with friends and family, showcasing Sri Lanka's ability to attract individuals looking for personal connections.

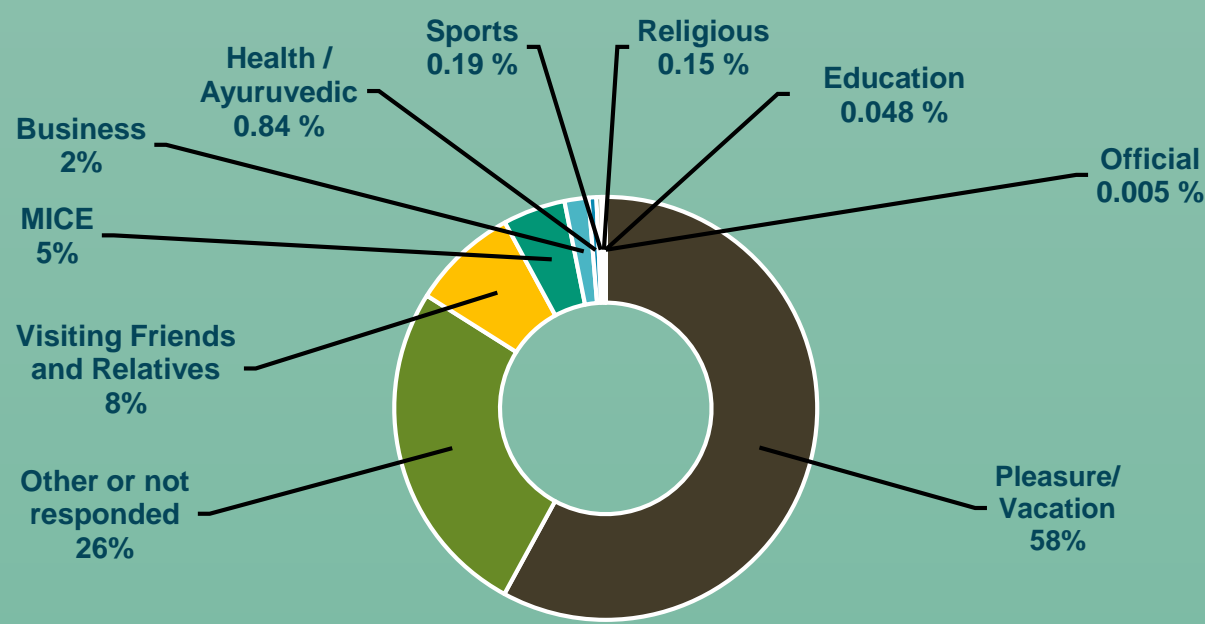
In contrast, a mere 2% of visits are for business purposes, suggesting a relatively minor focus on professional engagements. Furthermore, 5% of travelers visit for MICE (Meetings, Incentives, Conferences, and Exhibitions) reasons, signaling Sri Lanka's growing prominence as a destination for corporate events. Niche interests are also apparent, with 0.8% and 0.04% of travelers seeking health/Ayurvedic and educational experiences, respectively.

In April, leisure and vacation emerged as the predominant reason for travelers from major source markets to select Sri Lanka as their destination. Notably, a significant proportion of tourists from India (51.4%), Russia (50.5%), the United Kingdom (62.4%), Germany (70.4%), China (68.2%), France (71%), Australia (52.7%), USA (65.3%), Netherlands (77.5%), and Canada (34.3%) chose Sri Lanka for recreational activities, further solidifying its reputation as a destination offering relaxation and enjoyable experiences.

In April, the attraction of visiting friends and relatives in Sri Lanka waned, evident from the decreased interest among tourists. Specifically, 26% of Australian visitors, 45.8% of Canadian travelers, and 17.3% of British tourists opted for such connections during their trips to the country.

Additionally, a portion of travelers from India (3.6%) selected Sri Lanka for MICE activities, with 5.1% of Indian visitors arriving for business purposes. Moreover, 4.2% of German tourists sought health-related services in Sri Lanka, showcasing the diverse motivations influencing tourism to the country.

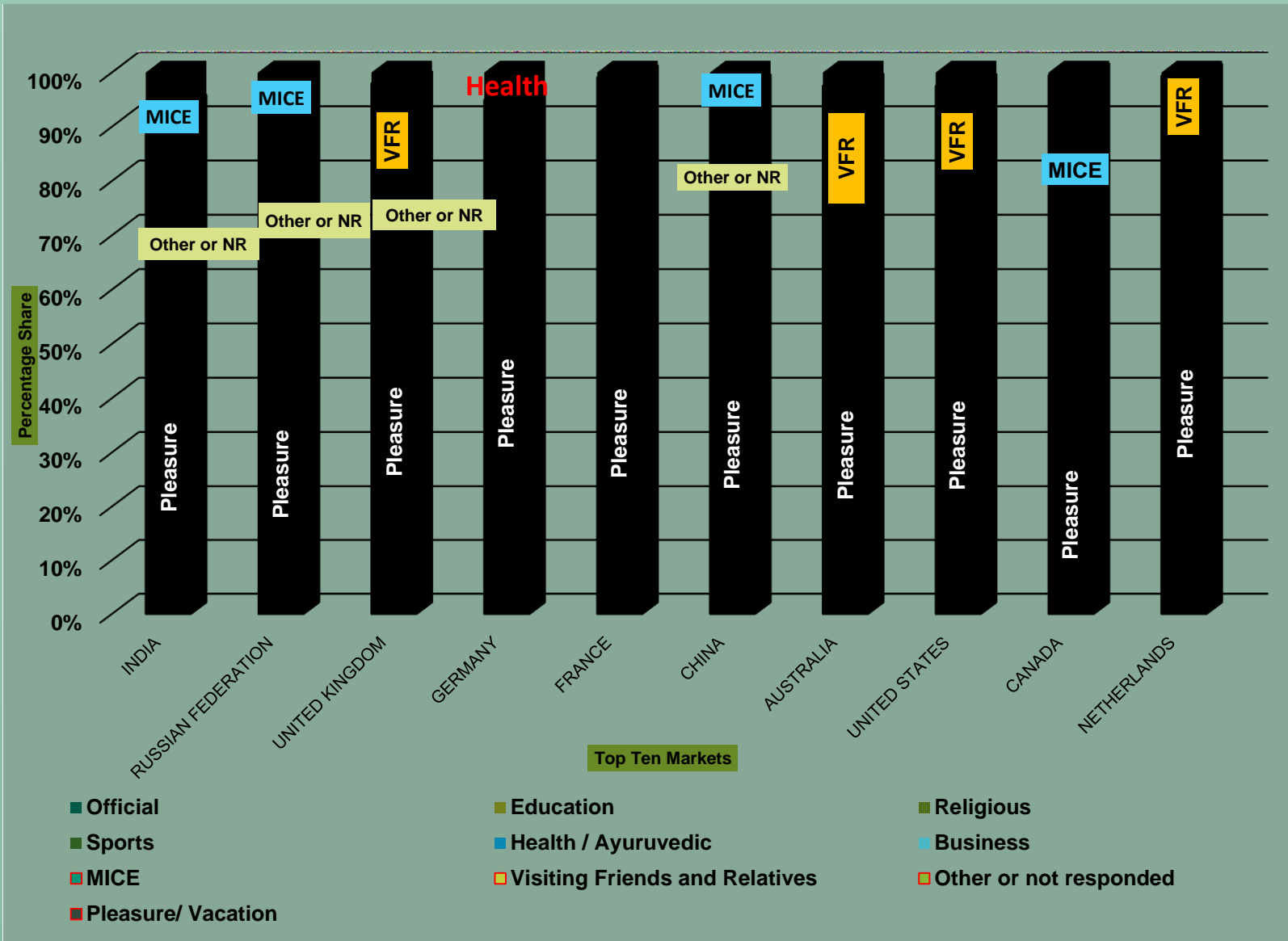
Chart 4: Purpose of visit



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





The importance of visa openness to a tourist destination

Visa policies and openness are pivotal in shaping global travel dynamics, influencing tourism, business, and international relations. Governments use visa policies to regulate entry, stay duration, and activities of travelers, serving purposes like security and immigration management. Visa openness measures how easily travelers can enter a country. Understanding these concepts is crucial for assessing a nation's appeal for tourism and business, as well as its global integration. Regional agreements have emerged to waive visa requirements for certain travelers, enhancing tourism. According to the UNWTO's 2023 report, only 21% of the global population can travel visa-free for tourism, with Asia-Pacific leading in openness. South-East Asia, East Africa, and the Caribbean are the most open sub regions, while Central and North Africa, North America, and Northern and Western Europe remain the most restrictive. Since 2018, South Asia and West Africa have notably improved in openness, while North America remains the most restrictive globally. Visas serve various purposes, including ensuring security, managing immigration by regulating entry, stay duration, and activities, generating revenue, applying reciprocity measures, and controlling tourism demand to prevent destinations from exceeding their carrying capacity. While security is often highlighted as the primary rationale for visa requirements, all these functions are commonly observed and justify the implementation or maintenance of visa systems.

Countries adopt open visa policies for a multitude of reasons, ranging from economic incentives to diplomatic cooperation and social integration. For instance, nations like the Maldives prioritize promoting tourism by offering visa-free entry to tourists from numerous countries, while the Schengen Area in Europe enhances diplomatic relations among member states by facilitating unrestricted travel within the zone. Economic goals, such as attracting foreign investment and addressing labor shortages, drive policies like those seen in Singapore and Germany, which offer visa-free access to foster trade, investment, and skilled migration. Moreover, initiatives like the Economic Community of West African States (ECOWAS) promote regional integration and cooperation through visa-free travel. These policies not only improve global image and cultural exchange, as demonstrated by Iceland and Japan, but also facilitate family reunification and respond to reciprocal arrangements, as seen in the visa waiver programs of the United States, Canada, New Zealand, and Australia. Overall, open visa policies serve as strategic tools for countries to achieve diverse objectives on economic, diplomatic, and social fronts.

Visa-free travel offers a plethora of benefits for both tourists and destinations alike. For tourists, it simplifies travel planning, saves time and money, and allows for spontaneity and flexibility in their journeys. With fewer bureaucratic obstacles, tourists can fully immerse themselves in their travel experiences, fostering a deeper connection with the destination's culture and enhancing their overall trip satisfaction. For destinations, visa-free travel translates into increased tourism revenue, economic stimulus, and a positive global image. It boosts demand for accommodation, dining, and local goods, stimulating economic growth and job creation (Malay Mail, 2024). Moreover, visa-free destinations are perceived as welcoming and inclusive, attracting diverse visitors and fostering cultural exchanges, which ultimately promote global unity and understanding. Additionally, technological transfers facilitated by visa-free travel further enhance collaboration and knowledge exchange, supporting the continuous improvement of tourism infrastructure and services. Overall, visa-free travel serves as a catalyst for economic development, cultural exchange, and global cooperation, benefiting both tourists and destinations alike (Partners, 2024).



High visa costs and complex application procedures pose significant challenges for potential tourists, particularly those from economically disadvantaged regions, leading to a decline in tourist arrivals. This reduction in visitors directly impacts revenue streams from tourism-related activities, such as accommodation and transportation, causing economic repercussions across sectors like hospitality and retail. Moreover, countries with cumbersome visa processes risk losing competitiveness in the tourism market, potentially shifting tourist preferences towards destinations with easier entry requirements. Additionally, stringent visa policies hinder cultural exchange and international cooperation, while also deterring business travel due to increased costs and administrative burdens. Furthermore, such policies contribute to a perception of inaccessibility, tarnishing a country's image and reputation as a welcoming tourist destination, ultimately resulting in lost potential revenue from tourism-related spending.

In conclusion, visa policies play a crucial role in shaping global travel dynamics, influencing tourism, business, and International relations. Countries that adopt open visa policies, such as offering visa-free entry or e-visas, reap significant benefits, including increased tourism revenue, economic growth, and cultural exchange. Conversely, high Visa costs and complex application procedures can lead to a decline in tourist arrivals, negatively impacting various Sectors of the economy. As the world becomes increasingly interconnected, it is evident that visa openness serves as a strategic tool for countries to achieve diverse objectives on economic, diplomatic, and social fronts. By fostering welcoming and inclusive environment for travelers, nations can unlock the full potential of tourism as a driver of Sustainable development and global cooperation.

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Malay Mail. (2024). Visa-free travel is a boon for tourists and destinations alike. [online] Available at: <https://www.malaymail.com/news/life/2024/01/09/visa-free-travel-is-a-boon-for-tourists-and-destinations-alike/111331> [Accessed 9 Apr. 2024].





International tourist arrivals by country of residence

	April 2024			Tourist Arrivals April 2023	Change April (24/23) 2024	Total Tourist Arrivals Up to April 2024	Total Tourist Arrivals Up to April 2023	Change Up to April (24/23) 2024
	By Air	By Sea	Total					
AMERICAS	8,922	1,056	9,978	7,826	27.5	43,229	30,607	49.4
North America	8,313	1,010	9,323	7,332	27.2	40,735	29,105	48.5
Canada	3,552	42	3,594	3,310	8.6	15,666	14,164	10.6
Mexico	139	16	155	82	89.0	457	221	106.8
United States	4,622	952	5,574	3,940	41.5	24,612	14,720	67.2
Caribbean & Central America	78	0	78	50	56.0	383	226	69.5
Costa Rica	11	0	11	0	0.0	56	18	211.1
Jamaica	01	0	01	06	(83.3)	34	12	183.3
Others	66	0	66	44	50.0	293	196	49.5
South America	531	46	577	444	30.0	2,111	1,276	65.4
Argentina	89	13	102	71	43.7	442	284	55.6
Brazil	217	22	239	208	14.9	846	504	67.9
Chile	50	03	53	45	17.8	247	143	72.7
Colombia	84	04	88	56	57.1	281	176	59.7
Others	91	04	95	64	48.4	295	169	74.6
AFRICA	1,396	0	1,396	761	83.4	4,587	2,260	103.0
North Africa	389	0	389	248	56.9	987	723	36.5
Morocco	131	0	131	65	101.5	331	208	59.1
Sudan	68	0	68	44	54.5	181	194	(6.7)
Others	190	0	190	139	36.7	475	321	48.0
Sub-Saharan Africa	1,007	0	1,007	513	96.3	3,600	1,537	134.2
Kenya	45	0	45	52	(13.5)	231	166	39.2
Mauritius	59	0	59	20	195.0	203	88	130.7
Nigeria	09	0	09	03	200.0	24	18	33.3
South Africa	474	0	474	315	50.5	1,704	846	101.4
Others	420	0	420	123	241.5	1,438	419	243.2



	April 2024			Tourist Arrivals April 2023	Change April (24/23) 2024	Total Tourist Arrivals Up to April 2024	Total Tourist Arrivals Up to April 2023	Change Up to April (24/23) 2024
	By Air	By Sea	Total					
ASIA & PACIFIC	58,320	58	58,378	39,734	46.9	269,691	131,163	126.2
North East Asia	11,555	4	11,559	8,169	41.5	64,832	18,434	251.7
China	8,518	0	8,518	5,118	66.4	47,730	10,584	351.0
Japan	1,946	03	1,949	2,318	(15.9)	9,183	5,078	80.8
South Korea	637	0	637	469	35.8	4,005	1,906	110.1
Taiwan	450	01	451	244	84.8	3,882	825	370.5
Others	04	0	04	20	(80.0)	32	41	(22.0)
South East Asia	4,335	4	4,339	2,390	81.5	18,012	8,604	109.3
Cambodia	162	0	162	12	1250.0	776	147	427.9
Indonesia	244	04	248	173	43.4	1,049	619	69.5
Malaysia	1,277	0	1,277	735	73.7	6,344	2,564	147.4
Myanmar	125	0	125	44	184.1	442	188	135.1
Philippines	578	0	578	369	56.6	1,675	1,148	45.9
Singapore	858	0	858	500	71.6	3,690	2,036	81.2
Thailand	834	0	834	406	105.4	2,983	1,203	148.0
Vietnam	235	0	235	141	66.7	975	645	51.2
Others	22	0	22	10	120.0	78	54	44.4
Oceania	8,306	47	8,353	5,633	48.3	32,530	18,468	76.1
Australia	7,166	36	7,202	4,996	44.2	28,964	16,502	75.5
New Zealand	1,105	11	1,116	627	78.0	3,447	1,910	80.5
Others	35	0	35	10	250.0	119	56	112.5
South Asia	34,124	3	34,127	23,542	45.0	154,317	85,657	80.2
Afghanistan	0	0	0	01	-	65	13	400.0
Bangladesh	2,352	02	2,354	960	145.2	8,380	2,820	197.2
Bhutan	24	0	24	25	(4.0)	294	100	194.0
India	27,304	0	27,304	19,915	37.1	123,583	66,347	86.3
Iran	426	0	426	420	1.4	5,622	5,384	4.4
Maldives	2,938	0	2,938	1,596	84.1	10,654	7,391	44.1
Nepal	284	0	284	226	25.7	1,726	1,060	62.8
Pakistan	796	01	797	399	99.7	3,993	2,542	57.1
EUROPE	73,957	2,293	76,250	54,739	39.3	458,862	269,473	70.3
Northern Europe	16,103	77	16,180	11,093	45.9	94,582	48,243	96.1
Denmark	785	37	822	727	13.1	7,021	3,813	84.1
Finland	238	0	238	123	93.5	2,105	757	178.1
Norway	524	24	548	487	12.5	4,136	2,400	72.3
Sweden	533	04	537	509	5.5	5,692	2,847	99.9
United Kingdom	13,171	02	13,173	8,743	50.7	71,992	36,854	95.3
Others	852	10	862	504	71.0	3,636	1,572	131.3



Monthly Tourist Arrivals Report April 2024

	April 2024			Tourist Arrivals April 2023	Change April (24/23) 2024	Total Tourist Arrivals Up to April 2024	Total Tourist Arrivals Up to April 2023	Change Up to April (24/23) 2024
	By Air	By Sea	Total					
Western Europe	25,442	1,28	26,729	18,016	48.4	140,081	75,412	85.8
Austria	989	103	1,092	649	68.3	7,523	3,411	120.6
Belgium	898	16	914	636	43.7	5,369	2,729	96.7
France	8,155	637	8,792	5,535	58.8	42,174	22,279	89.3
Germany	9,479	364	9,843	7,404	32.9	58,019	33,253	74.5
Netherlands	3,421	16	3,437	1,593	115.8	15,686	6,165	154.4
Switzerland	2,407	150	2,557	2,091	22.3	10,918	7,332	48.9
Others	93	01	94	108	(13.0)	392	243	61.3
Central/ Eastern Europe	22,774	388	23,162	19,663	17.8	185,096	123,519	49.9
Belarus	752	0	752	627	19.9	6,643	4,474	48.5
Czech Republic	1,271	08	1,279	820	56.0	11,603	4,273	171.5
Estonia	236	0	236	60	293.3	2,734	632	332.6
Hungary	232	05	237	189	25.4	3,677	1,397	163.2
Kazakhstan	152	0	152	159	(4.4)	8,450	1,929	338.1
Lithuania	400	01	401	223	79.8	4,236	1,157	266.1
Poland	2,337	12	2,349	1,129	108.1	21,847	5,023	334.9
Romania	652	03	655	315	107.9	3,086	1,369	125.4
Russia	15,086	17	15,103	14,656	3.0	106,308	94,547	12.4
Slovakia	534	01	535	475	12.6	3,649	1,951	87.0
Ukraine	98	339	437	326	34.0	4,022	2,288	75.8
Others	1,024	02	1,026	684	50.0	8,841	4,479	97.4
Southern/ Mediterranean Europe	9,638	541	10,179	5,967	70.6	39,103	22,299	75.4
Greece	305	01	306	148	106.8	1,139	605	88.3
Italy	1,935	310	2,245	1,384	62.2	11,426	5,542	106.2
Portugal	520	10	530	486	9.1	2,341	1,283	82.5
Spain	1,954	212	2,166	1,619	33.8	8,912	4,371	103.9
Turkey	908	02	910	289	214.9	2,763	1,124	145.8
Israel	3,169	0	3,169	1,432	121.3	8,142	7,253	12.3
Others	847	06	853	609	40.1	4,380	2,121	106.5
MIDDLE EAST	2,865	0	2,865	2,438	17.5	8,282	7,674	7.9
Bahrain	85	0	85	86	(1.2)	317	311	1.9
Egypt	458	0	458	309	48.2	1,429	862	65.8
Iraq	58	0	58	84	(31.0)	207	303	(31.7)
Jordan	313	0	313	376	(16.8)	805	1,109	(27.4)
Kuwait	225	0	225	191	17.8	737	673	9.5
Lebanon	671	0	671	616	8.9	1,361	1,121	21.4
Oman	125	0	125	64	95.3	505	539	(6.3)
Qatar	99	0	99	62	59.7	201	209	(3.8)
Saudi Arabia	360	0	360	414	(13.0)	1,511	1,772	(14.7)
United Arab Emirates	378	0	378	169	123.7	896	523	71.3
Others	93	0	93	67	38.8	313	252	24.2
TOTAL	145,460	3,407	148,867	105,498	41.1	784,651	441,177	77.9



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

An analysis of tourists' departure airports and preferred airlines when traveling to Sri Lanka emphasizes the central importance of air travel in the country's tourism industry. Approximately 33% of tourists selected Dubai, Doha, and Chennai airports as their final transit hubs before arriving in Sri Lanka. Furthermore, the leading airlines chosen for travel to Sri Lanka were Sri Lankan Airlines, Qatar Airways, and Emirates, collectively accounting for 43% of total tourist arrivals. This underscores the vital role of air transportation in enabling tourism, with specific airports and airlines serving a substantial portion of visitors.

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

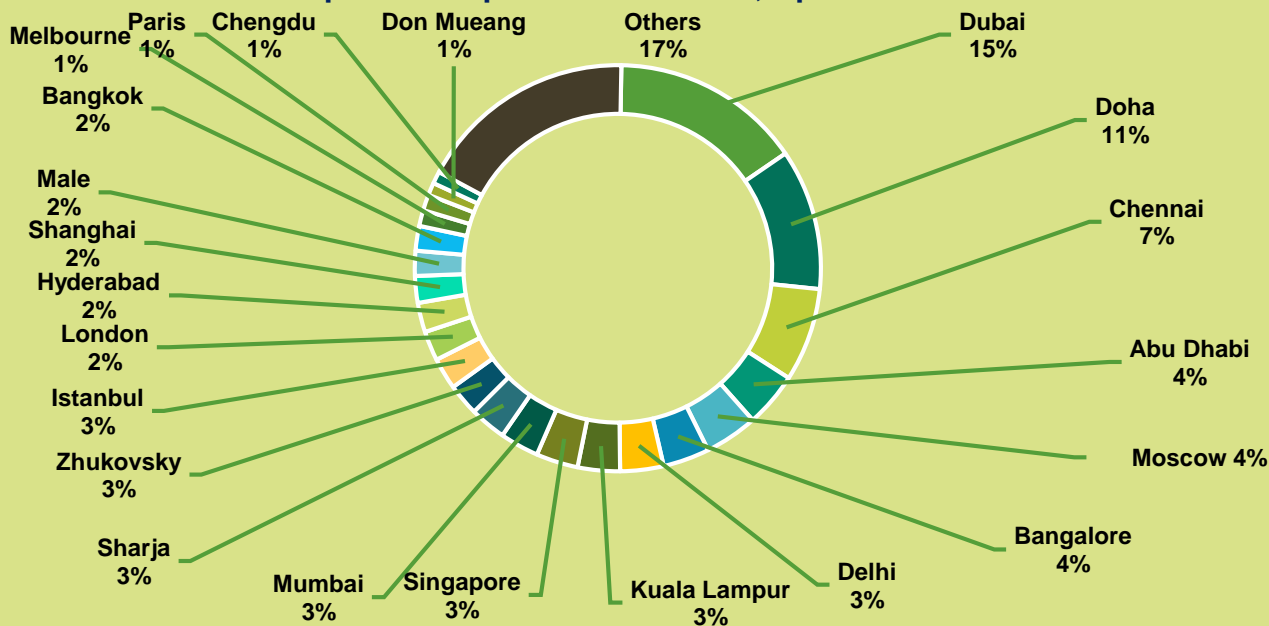
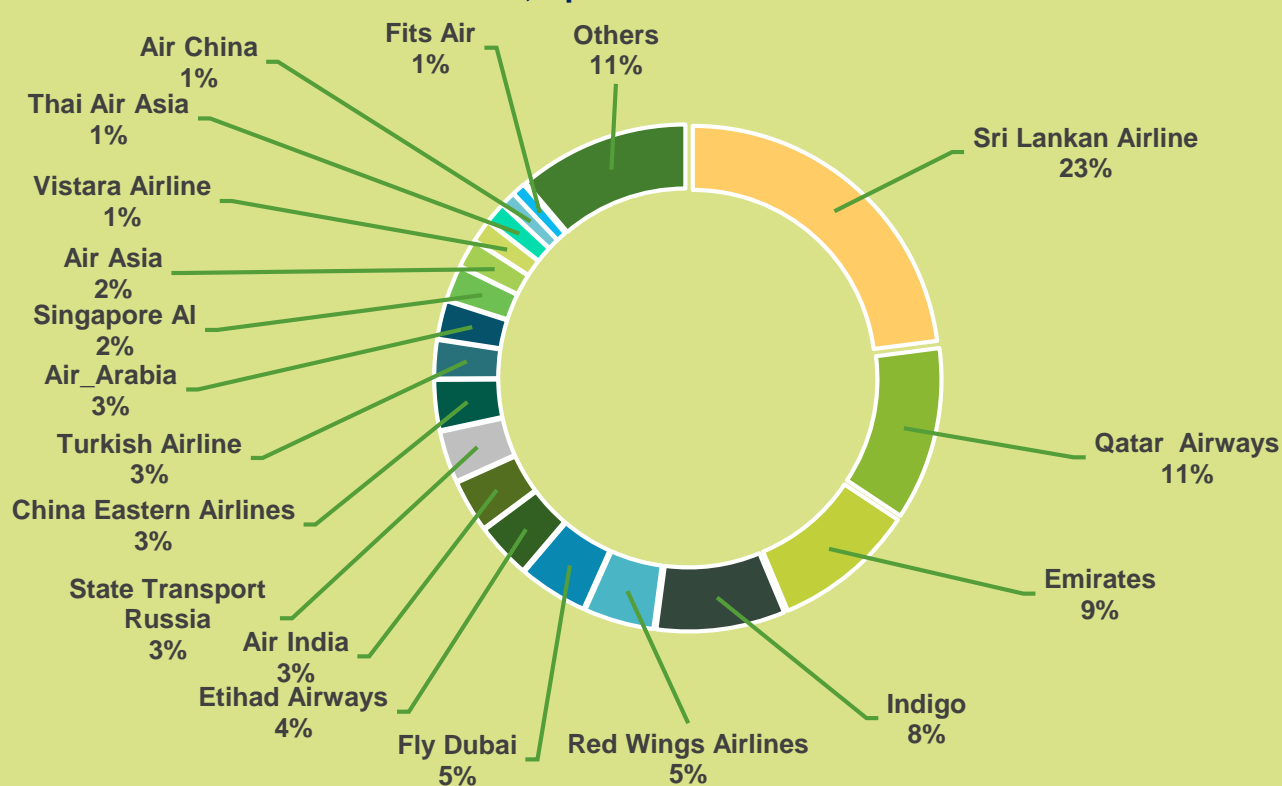


Chart 7. Main airlines to Sri Lanka, April 2024





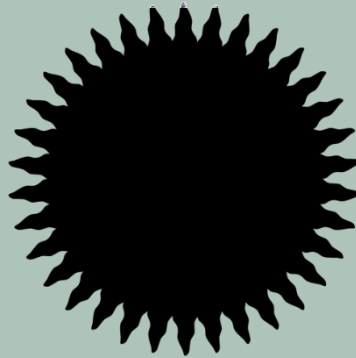
April 2023

The choice of airlines significantly impacts tourists' travel experiences when heading to Sri Lanka, often reflecting their nationalities and varied airline preferences. Indian visitors commonly select IndiGo and Sri Lankan Airlines while Red Wings is favored by Russian tourists. Conversely, Sri Lankan Airlines is preferred by travelers from the UK, France, Australia, and Canada. Chinese tourists typically opt for China Eastern, whereas Qatar Airways is favored by visitors from Germany and the United States

Regarding departure airports, Chennai is the primary choice for Indian travelers, while Doha serves as the principal gateway for tourists from the United Kingdom and USA. Australians, Russians, and Chinese travelers often use Singapore, Moscow, and Shanghai airports, respectively, as their departure points. This underscores the crucial role of accessibility in promoting Sri Lanka's tourism, demonstrating how travelers' airline and airport preferences are influenced by their home countries, emphasizing the significance of smooth travel connections in attracting visitors.

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

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



Research & International Relations Division

011 2426800 Ext. 151/155

research@srilanka.travel

www.sltda.gov.lk