

Introduction

The following document provides a synthesis of the most recent December, 2024 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st December 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

Sri Lanka managed to close off 2024 with a positive look towards the future of its tourism industry as in December, 248,592 tourists were welcomed, which is a 35% increase compared to November as well as a 18.18% boost compared to December of 2023. By the end of the month, total arrivals reached 2,053,465 which is an indication of the fact that the industry is recovering steadily. Such growth is indicative of the ongoing tourism strategies and position Sri Lanka well to market it as a tourism hub.

In December, Sri Lanka's primary tourism markets included India, Russia, the United Kingdom, Germany, and Australia. The

significant increase in tourist arrivals from these countries has been a key driver of growth in the sector.

According to the UNWTO, an estimated 1.1 billion international tourist arrivals (overnight visitors) were recorded from January to September 2024, representing an 11% increase compared to the same period in 2023. International arrivals reached 98% of 2019 levels during these nine months. While international tourist arrivals are anticipated to match 2019 figures by the end of 2024, this recovery occurs within a challenging economic and geopolitical landscape.

Table 1. Monthly tourist arrivals, December 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	184,158	21.6
December	210,352	248,592	18.18
TOTAL	1,487,303	2,053,465	38.07



Tourist Arrivals | December 2024

248,592

Tourist arrivals by region and percentage share

December 2024

Map 1. Tourist arrivals by region and percentage share



Europe has emerged as a dominant player in Sri Lanka's tourism sector, accounting for 51.9% of total visitors, while Asia and the Pacific closely follow with 41% of arrivals. This trend highlights the evolving dynamics within the industry, with both regions significantly contributing to growth. The increasing demand from key markets such as India, the Russian Federation, the UK, Germany, and France has greatly supported Sri Lanka's tourism, bolstered by strong travel connections and favourable conditions. In contrast, the Americas represent 5.1% of arrivals, while the Middle East and Africa contribute 1.1% and 1%, respectively, adding to the diversity of the tourism landscape.

The significant influx of visitors from Europe and the Asia-Pacific region underscores their steady demand, while the comparatively smaller contributions from the Americas, the Middle East, and Africa present valuable opportunities for targeted marketing and diversification. Enhancing connections with these regions could further strengthen Sri Lanka's tourism industry, enhancing its resilience and supporting ongoing recovery and growth.

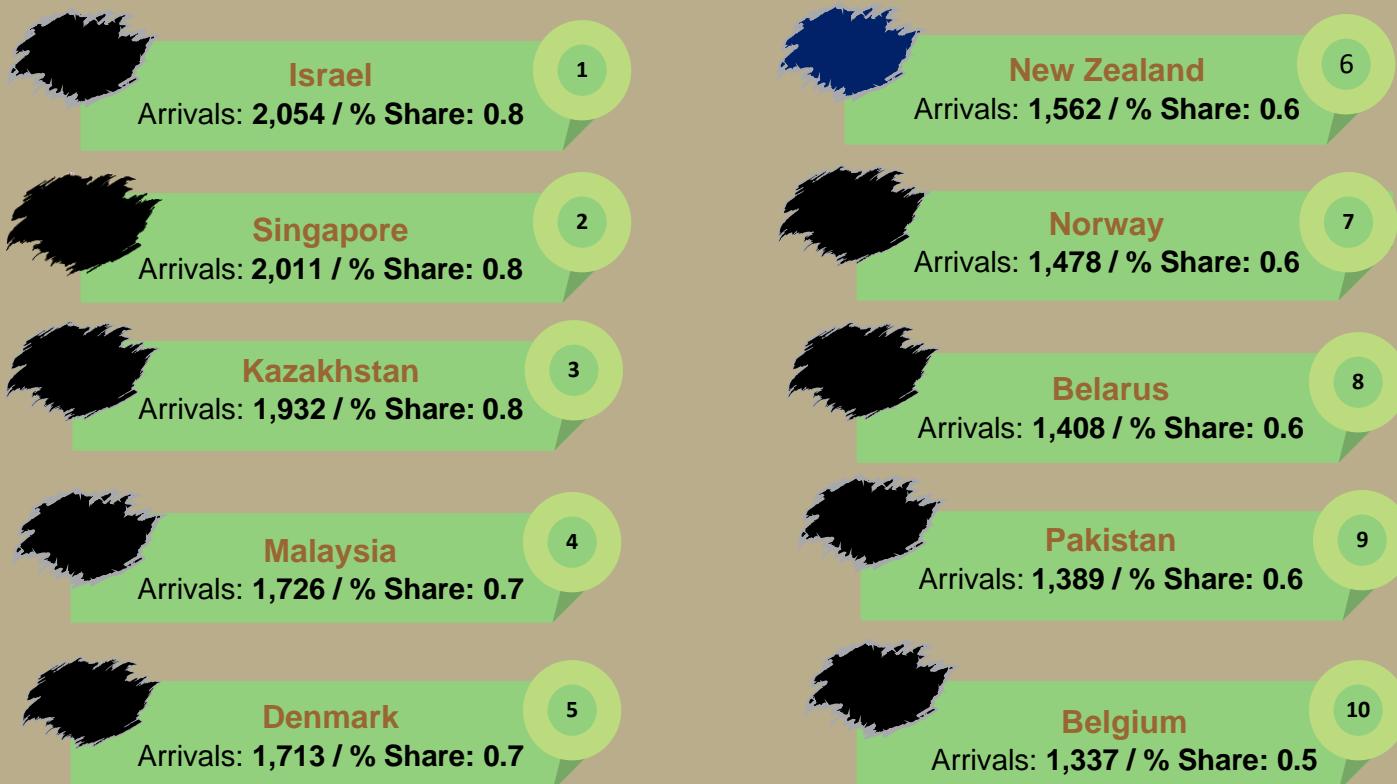
Top primary markets and top potential markets

Top primary markets, December 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, December 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

December 2024

In December, India emerged as the top source market for tourists visiting Sri Lanka, accounting for 21.3% of total arrivals. It was followed by the Russian Federation at 14.2%, with the United Kingdom and Germany contributing 7.5% and 5.9%, respectively, and Australia at 5.3%. These statistics reflect evolving travel trends, showcasing a significant increase in visitors from emerging markets such as Poland, alongside traditional markets like Germany, compared to the previous year.

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

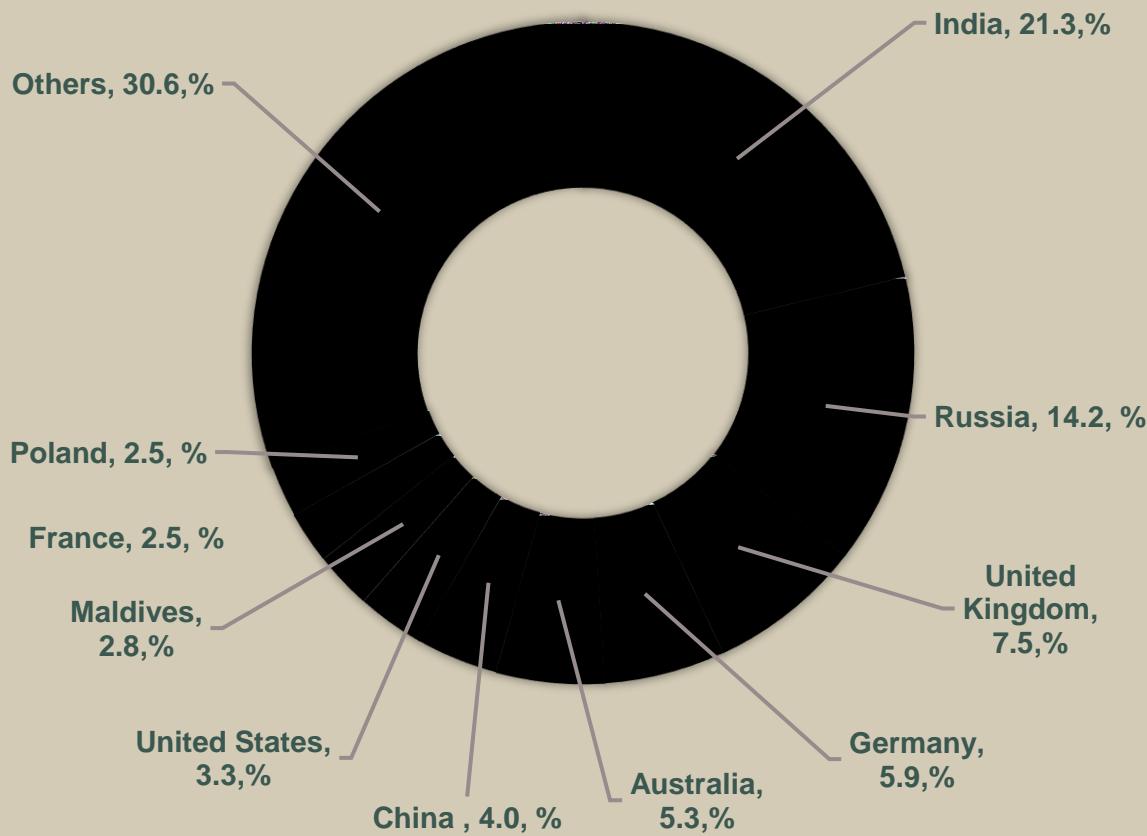
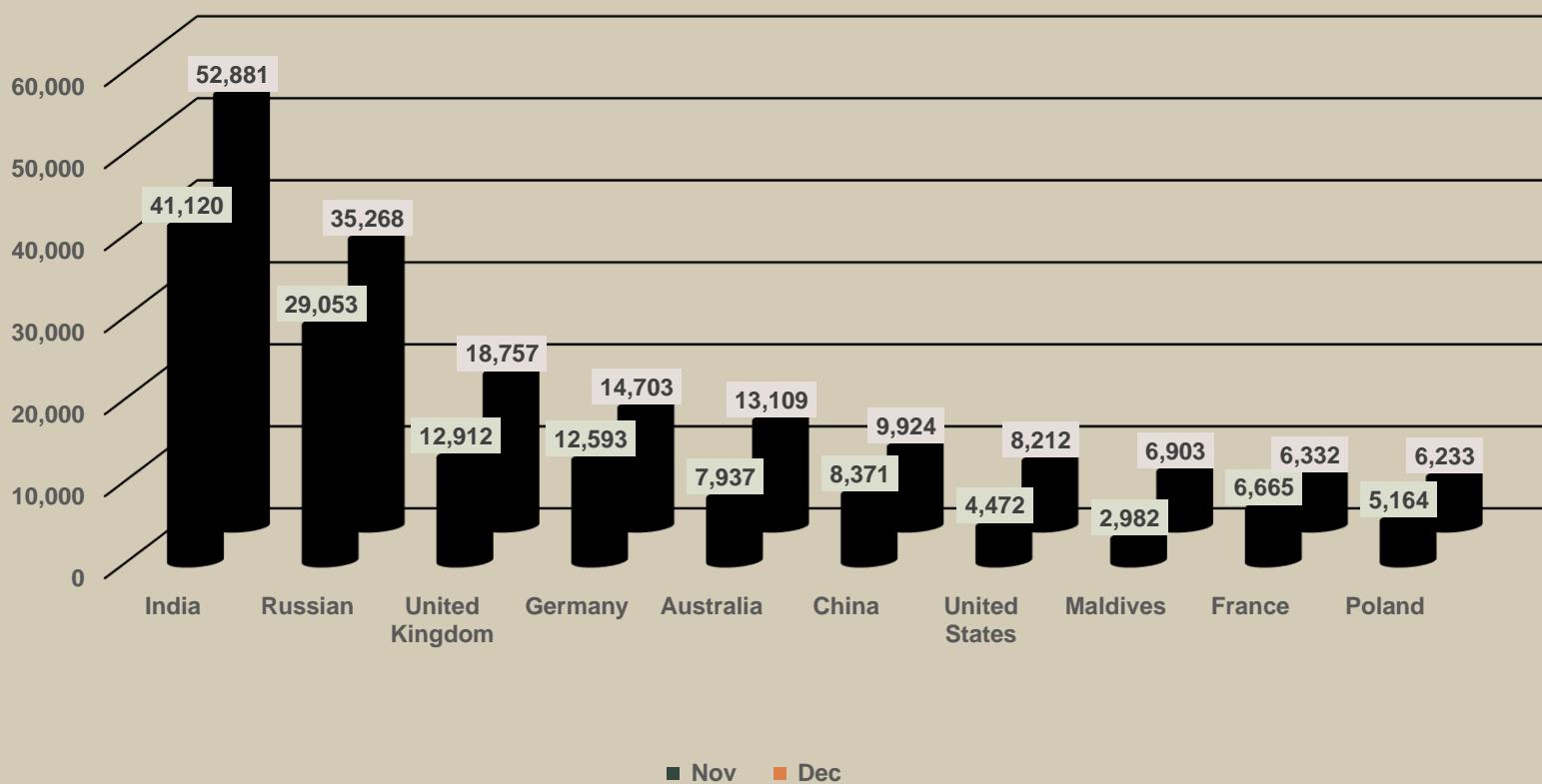


Table 2. Top ten source markets to Sri Lanka, December

Rank	Country of Residence	Tourist Arrivals (December 2024)			Tourist Arrivals (December 2023)
		By Air	By Sea	Total	
1	India	52,835	46	52,881	43,973
2	Russian Federation	35,173	95	35,268	29,657
3	United Kingdom	17,865	892	18,757	19,265
4	Germany	12,868	1,835	14,703	13,747
5	Australia	12,678	431	13,109	10,847
6	China	9,917	7	9,924	8,648
7	United States	7,516	696	8,212	8,044
8	Maldives	6,903	0	6,903	5,968
9	France	6,312	20	6,332	5,509
10	Poland	6,210	23	6,233	3,217

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



Top ten source markets

January to December 2024

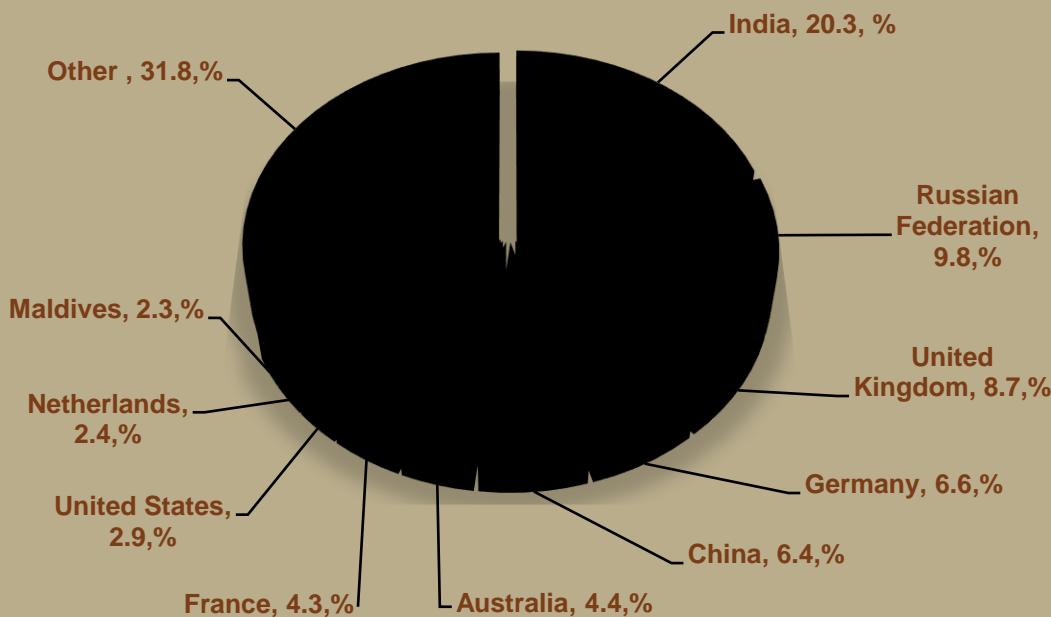
From January to December this year, Sri Lanka experienced a notable increase in tourist arrivals from India, the Russian Federation, the UK, Germany, and China, solidifying these nations as the top five international visitor markets. Additionally, there was significant growth in visitor numbers from the Netherlands and France, reflecting Sri Lanka's rising popularity in these regions.

This combination of growth and decline represents the importance for Sri Lanka to diversify its tourism markets, which in turn can bolster resilience whilst also creating a sustainable tourism approach in a changing travel climate. By widening its scope to more emerging and diverse markets, Sri Lanka can better weather regional disruptions and build a stronger platform for sustained tourism sector growth.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ Dec. 2024)	Tourist Arrivals (Jan ~ Dec. 2023)
1	India	416,974	302,844
2	Russian Federation	201,920	197,498
3	United Kingdom	178,339	130,088
4	Germany	136,084	102,539
5	China	131,681	73,788
6	Australia	89,573	67,436
7	France	88,775	56,251
8	United States	59,532	46,344
9	Netherlands	50,116	29,056
10	Maldives	47,222	37,328
11	Other	653,252	449,130
Total		2,053,465	1,487,303

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



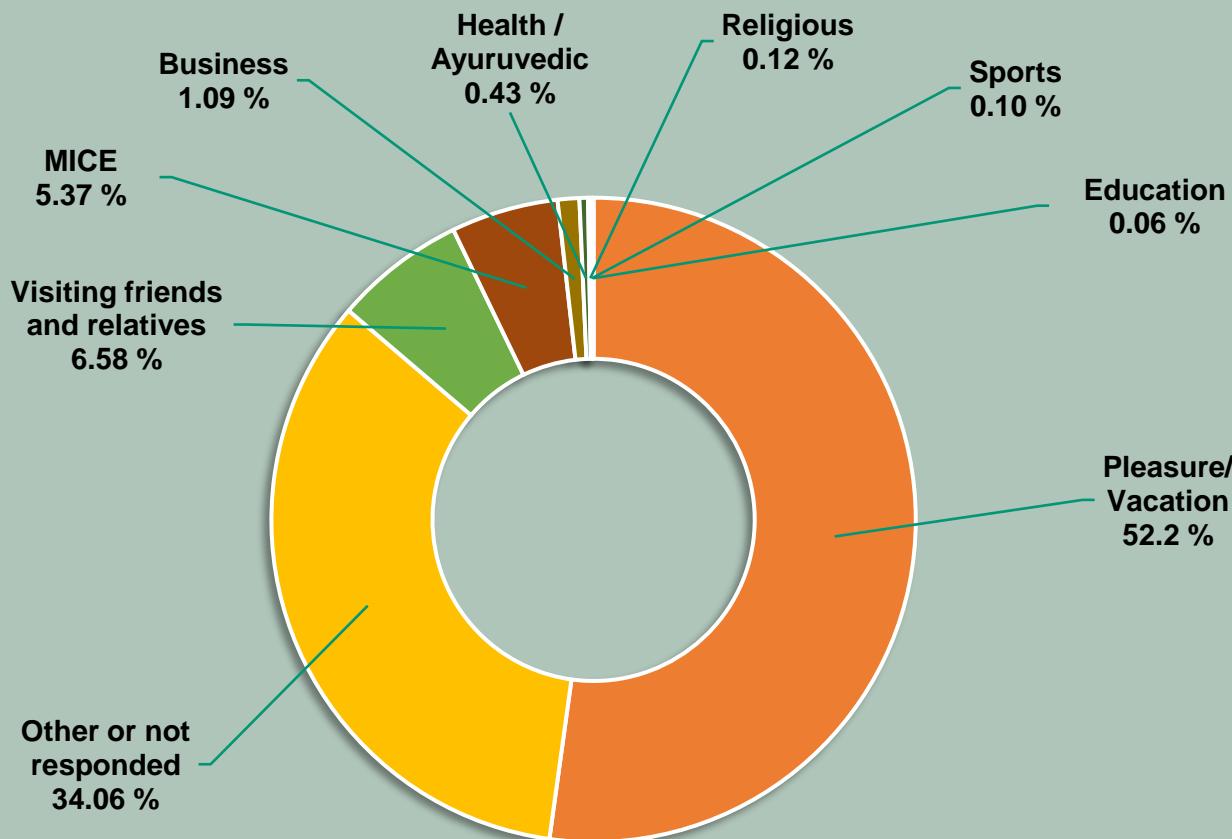
Tourist arrivals by purpose of visit

December 2024

An analysis of tourist motivations for visiting Sri Lanka reveals several key factors. Leisure and vacations are the primary reasons, accounting for 52% of arrivals, which underscores Sri Lanka's status as a premier destination for recreation. Additionally, 7% of visitors travel to reconnect with friends and family, highlighting the country's appeal for personal and social engagements.

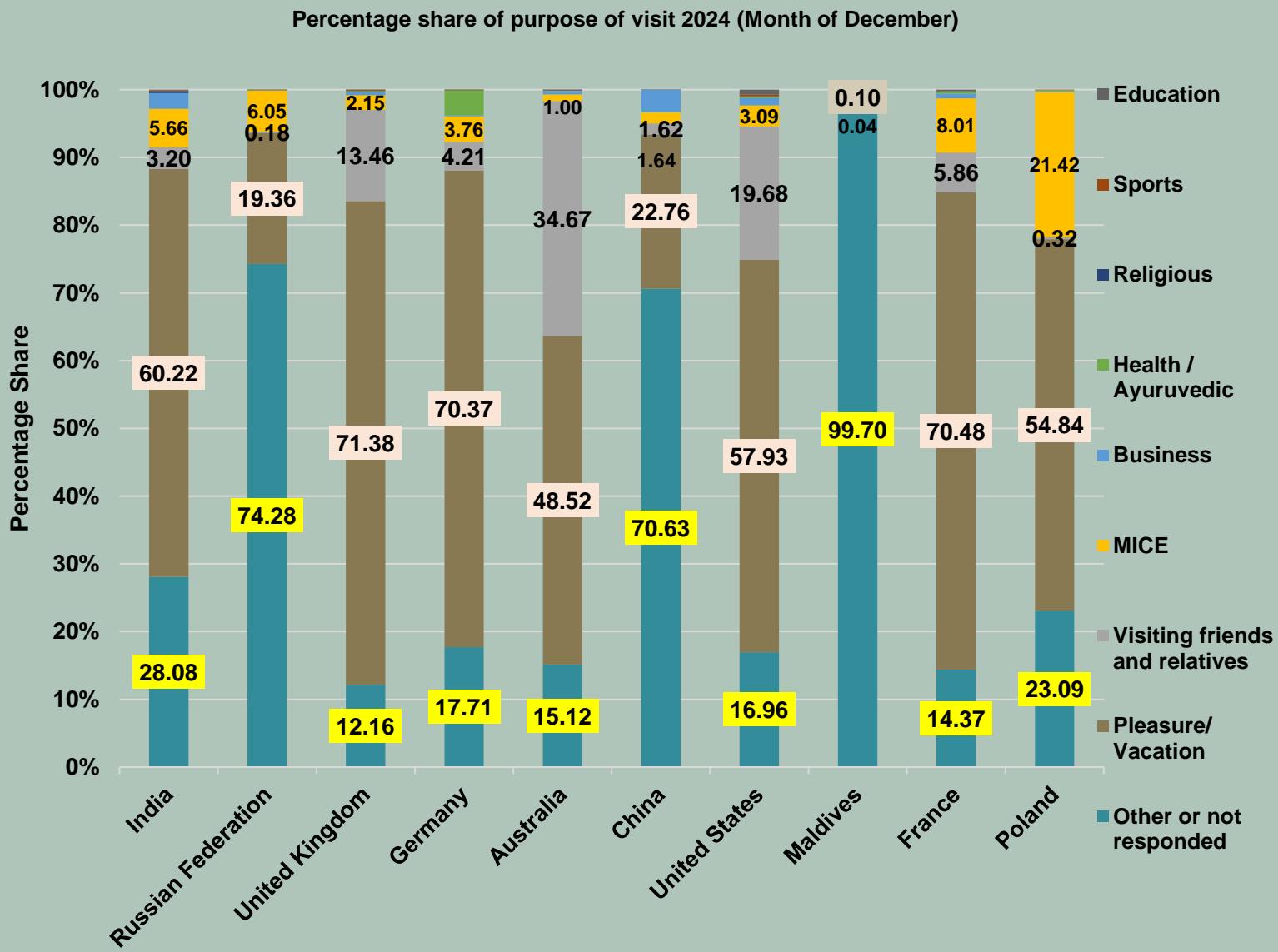
Only 1% of tourists visit Sri Lanka for business purposes, indicating a relatively minor emphasis on professional travel. However, 5% of arrivals are attributed to MICE (Meetings, Incentives, Conferences, and Exhibitions), highlighting Sri Lanka's growing recognition as a venue for corporate events. Additionally, niche segments are gaining traction, with 0.4% of visitors seeking Ayurvedic or wellness experiences and 0.1% arriving for sports and educational activities. These statistics underscore the diversity of Sri Lanka's tourism offerings and its potential to expand into emerging markets such as wellness tourism, MICE, and specialized activities, thereby further diversifying its visitor base.

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



An analysis of the motivations behind tourist visits from key markets reveals that leisure is the primary reason for traveling to Sri Lanka. Among Indian tourists, 60.2% visited for pleasure, while 5.6% came for MICE (Meetings, Incentives, Conferences, and Exhibitions) purposes. For UK tourists, 13.4% traveled for VFR (Visiting Friends and Relatives), with 71.3% visiting for leisure or vacation. German visitors showed interest in health and Ayurvedic tourism, with 3.6% citing this as their purpose, while 70.3% traveled for leisure. In Australia, 34.6% of tourists visited for VFR purposes. Polish visitors displayed a preference for MICE activities, with 21.4% indicating this reason. Among US tourists, 19.6% came for VFR, and 70.4% of French visitors traveled for pleasure or vacation.



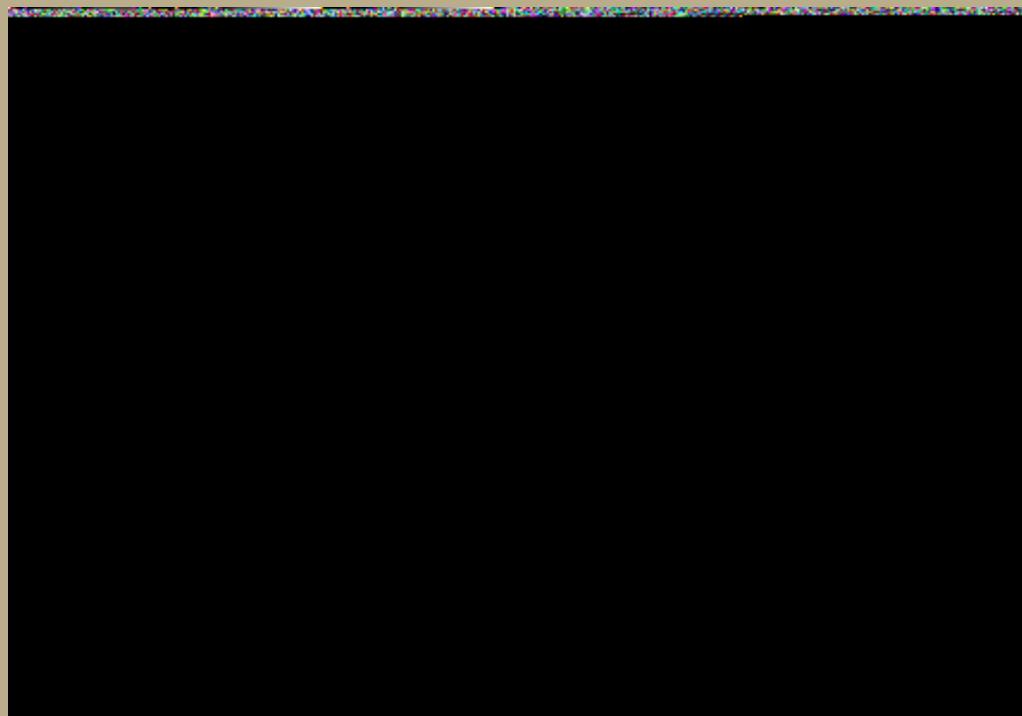


Tourism recovery in 2024

World tourism recovery

The year 2024 marked a significant milestone in the global tourism industry's recovery from the disruptions caused by the COVID-19 pandemic and other challenges. The United Nations World Tourism Organization (UNWTO) projected that international tourism would fully recover to pre-pandemic levels by the end of 2024, with initial estimates indicating a 2% growth above 2019 figures. This positive trajectory was supported by increased traveler confidence and the lifting of travel restrictions in various regions. The World Travel & Tourism Council (WTTC) anticipated a record-breaking year for the sector, with the global economic contribution expected to reach an all-time high of \$11.1 trillion.

International tourism demonstrated a robust recovery in the first nine months of 2024 with an estimated 1.1 billion overnight visitors globally—an 11% increase compared to the same period in 2023. This surge brought international arrivals to 98% of 2019 levels, indicating a near-complete rebound to pre-pandemic figures. The Middle East emerged as the fastest-growing region, recording a 29% increase in international arrivals compared to 2019. This growth is attributed to factors such as visa facilitation, investment in major tourism projects, enhanced air capacity, strong marketing, hosting of events, and product diversification. Africa experienced a 6% rise in tourist arrivals over the same period in 2019. Notably, North Africa led this growth with an 18% increase in international arrivals, driven by destinations like Morocco and Egypt. Europe's international arrivals exceeded pre-pandemic numbers by 1%, indicating a full recovery. The region benefited from robust intra-regional demand, with countries such as Greece, Portugal, and Spain contributing significantly to this growth. The Americas reached 97% of their 2019 international arrival levels, reflecting a near-complete rebound. Central America stood out with a 16% increase in arrivals compared to pre-pandemic figures, highlighting the region's growing appeal to international tourists. Asia and the Pacific achieved 85% of their 2019 arrival numbers, indicating a steady recovery. The gradual easing of travel restrictions and the reopening of key markets have contributed to this upward trend.



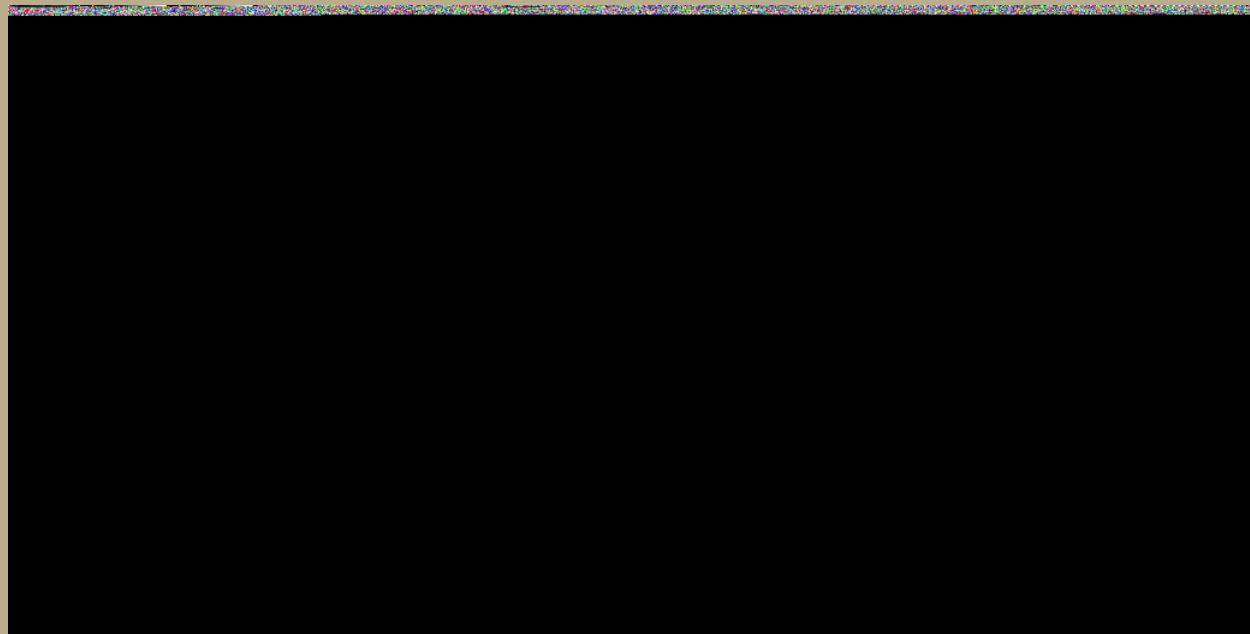


Tourism recovery in Sri Lanka

Sri Lanka's tourism industry has demonstrated a steady recovery and resilience throughout 2024, rebounding from recent challenges to reestablish itself as a premier travel destination. Sri Lanka surpassed 2 million tourist arrivals, marking the fourth instance of reaching this milestone, following similar achievements in 2016, 2017, and 2018. Notably, 2024 set a new record with the highest number of annual tourist arrivals since 2018. In December alone, the country welcomed 248,592 with projections suggesting the figure would reach the conservative scenario of 236,485 by the month's end.



Tourist Arrivals Performance by Month 2018- 2024



An analysis of monthly growth rates indicates that February achieved a 102.8% increase compared to January's 103%, marking them as the months with the highest growth rates of the year. March, April, May, and July also experienced moderate growth, while September recorded the lowest growth rates. Overall, the year saw a 38.01% growth compared to 2023; however, there was a 12% decline when compared to 2018.



In 2024, Sri Lanka set ambitious targets for tourist arrivals, aiming for 2,180,000 visitors in the conservative scenario and 2,363,475 in the optimistic scenario. However, the actual arrivals fell short, with a deficit of 126,535 compared to the conservative target and 310,010 below the optimistic projection. This shortfall can be attributed to several challenges that impacted the tourism sector throughout the year.

Challenges affecting tourism growth

Introduction of the New Visa System: The implementation of a new visa system may have caused confusion and delays, potentially deterring potential visitors.

Elections and Political Instability: The political climate, including elections and associated uncertainties, might have influenced travelers' decisions, leading to a decline in tourist arrivals during certain periods.

Travel Warnings and Safety Concerns: Travel advisories and warnings, such as those issued regarding potential terrorist threats targeting popular tourist locations, could have deterred tourists from visiting Sri Lanka.

Delays in Infrastructure Development: Ongoing infrastructure projects and delays in development may have affected the quality of services and facilities available to tourists, impacting their overall experience and potentially reducing the number of visitors.

Geopolitical Factors: Regional geopolitical tensions and global economic uncertainties might have influenced travelers' choices, leading them to opt for alternative destinations perceived as more stable or cost-effective.

Competition from Other Destinations: The introduction of visa-free access by competitor destinations and other marketing strategies could have attracted potential tourists away from Sri Lanka, further contributing to the shortfall in arrivals.

Despite these challenges, Sri Lanka's tourism sector demonstrated resilience. Looking ahead, addressing these challenges and capitalizing on the sector's strengths will be crucial for achieving and surpassing future tourism targets.



International tourist arrivals by country of residence

	December 2024			Tourist Arrivals December 2023	% Change December (24/23)	Total Tourist Arrivals Up to December 2024	Total Tourist Arrivals Up to December 2023	% Change Up to December (24/23)					
	Tourist Arrivals												
	By Air	By Sea	Total										
AMERICAS	11,806	912	12,718	12,405	2.5	108,678	95,263	14.1					
North America	11,248	882	12,130	11,831	2.5	102,812	91,080	12.9					
Canada	3,627	154	3,781	3,640	3.9	42,212	43,944	(3.9)					
Mexico	105	32	137	147	(6.8)	1,068	792	34.8					
United States	7,516	696	8,212	8,044	2.1	59,532	46,344	28.5					
Caribbean & Central America	114	4	118	96	22.9	1,044	701	48.9					
Costa Rica	04	0	04	10	(60.0)	95	62	53.2					
Jamaica	10	01	11	10	10.0	98	57	71.9					
Others	100	03	103	76	35.5	851	582	46.2					
South America	444	26	470	478	(1.7)	4,822	3,482	38.5					
Argentina	93	06	99	67	47.8	931	687	35.5					
Brazil	202	06	208	236	(11.9)	1,945	1,337	45.5					
Chile	39	08	47	41	14.6	552	394	40.1					
Colombia	57	02	59	79	(25.3)	666	539	23.6					
Others	53	04	57	55	3.6	728	525	38.7					
AFRICA	2,360	151	2,511	2,031	23.6	14,441	9,950	45.1					
North Africa	360	2	362	335	8.1	3,371	2,621	28.6					
Morocco	119	02	121	134	(9.7)	1,042	789	32.1					
Sudan	96	0	96	65	47.7	950	834	13.9					
Others	145	0	145	136	6.6	1,379	998	38.2					
Sub-Saharan Africa	2,000	149	2,149	1,696	26.7	11,070	7,329	51.0					
Kenya	133	04	137	126	8.7	807	613	31.6					
Mauritius	119	132	251	194	29.4	755	471	60.3					
Nigeria	13	0	13	06	116.7	96	93	3.2					
South Africa	1,076	13	1,089	901	20.9	4,872	3,444	41.5					
Others	659	0	659	469	40.5	4,540	2,708	67.7					



	December 2024			Tourist Arrivals December 2023	% Change December (24/23)	Total Tourist Arrivals Up to December 2024	Total Tourist Arrivals Up to December 2023	% Change Up to December (24/23)
	By Air	By Sea	Total					
ASIA & PACIFIC	101,245	573	101,818	85,257	19.4	860,696	596,933	44.2
North East Asia	14,796	12	14,808	12,164	21.7	173,039	100,790	71.7
China	9,917	07	9,924	8,648	14.8	131,681	73,788	78.5
Japan	3,596	03	3,599	2,554	40.9	30,429	19,583	55.4
South Korea	1,264	02	1,266	957	32.3	10,800	7,298	48.0
Others	19	0	19	05	280.0	129	121	6.6
South East Asia	5,542	31	5,573	5,093	9.4	52,987	36,060	46.9
Cambodia	59	0	59	28	110.7	1,183	519	127.9
Indonesia	379	0	379	277	36.8	3,744	2,352	59.2
Malaysia	1,718	08	1,726	1,784	(3.3)	18,259	10,940	66.9
Myanmar	81	01	82	103	(20.4)	1,515	1,130	34.1
Philippines	481	04	485	448	8.3	5,267	4,164	26.5
Singapore	2,000	11	2,011	1,601	25.6	12,591	9,551	31.8
Thailand	642	06	648	637	1.7	7,246	4,922	47.2
Vietnam	157	01	158	202	(21.8)	2,963	2,307	28.4
Others	25	0	25	13	92.3	219	175	25.1
Oceania	14,232	484	14,716	12,254	20.1	101,234	75,635	33.8
Australia	12,678	431	13,109	10,847	20.9	89,573	67,436	32.8
New Zealand	1,509	53	1,562	1,343	16.3	11,282	7,913	42.6
Others	45	0	45	64	(29.7)	379	286	32.5
South Asia	66,675	46	66,721	55,746	19.7	533,436	384,448	38.8
Afghanistan	61	0	61	16	281.3	198	181	9.4
Bangladesh	4,154	0	4,154	3,185	30.4	39,555	17,846	121.6
Bhutan	90	0	90	68	32.4	715	433	65.1
India	52,835	46	52,881	43,973	20.3	416,974	302,844	37.7
Iran	794	0	794	900	(11.8)	10,858	10,322	5.2
Maldives	6,903	0	6,903	5,968	15.7	47,222	37,328	26.5
Nepal	449	0	449	468	(4.1)	4,463	4,750	(6.0)
Pakistan	1,389	0	1,389	1,168	18.9	13,451	10,744	25.2
EUROPE	150,941	3,461	128,912	108,184	19.2	1,040,445	757,327	37.4
Northern Europe	52,083	939	27,532	25,222	9.2	231,449	165,485	39.9
Denmark	1,710	03	1,713	1,440	19.0	14,952	10,346	44.5
Finland	771	03	774	473	63.6	4,276	2,287	87.0
Norway	1,474	04	1,478	1,035	42.8	11,399	8,747	30.3
Sweden	3,670	06	3,676	2,118	73.6	13,413	8,643	55.2
United Kingdom	17,865	892	18,757	19,265	(2.6)	178,339	130,088	37.1
Others	26,593	31	1,134	891	27.3	9,070	5,374	68.8



	December 2024			Tourist Arrivals December 2023	% Change Dec: (24/23)	Total Tourist Arrivals Up to Dec: 2024	Total Tourist Arrivals Up to December 2023	% Change Up to Dec: (24/23)
	By Air	By Sea	Total					
Western Europe	29,830	2,184	32,014	27,534	16.3	340,016	233,297	45.7
Austria	2,309	92	2,401	1,883	27.5	17,103	10,594	61.4
Belgium	1,312	25	1,337	995	34.4	17,219	10,667	61.4
France	6,312	20	6,332	5,509	14.9	88,775	56,251	57.8
Germany	12,868	1,835	14,703	3,747	292.4	136,084	102,539	32.7
Netherlands	3,818	75	3,893	2,672	45.7	50,116	29,056	72.5
Switzerland	3,112	134	3,246	2,654	22.3	29,829	23,556	26.6
Others	99	03	102	74	37.8	890	634	40.4
Central/ Eastern Europe	54,897	232	55,129	46,580	18.4	340,883	276,921	23.1
Belarus	1,401	07	1,408	1,566	(10.1)	10,933	10,969	(0.3)
Czech Republic	2,295	04	2,299	2,466	(6.8)	19,279	12,056	59.9
Estonia	572	04	576	706	(18.4)	3,800	1,808	110.2
Hungary	952	26	978	1,040	(6.0)	6,580	3,786	73.8
Kazakhstan	1,908	24	1,932	2,399	(19.5)	11,383	5,130	121.9
Lithuania	865	02	867	490	76.9	6,395	2,722	134.9
Poland	6,210	23	6,233	3,217	93.8	44,165	17,946	146.1
Romania	1,234	09	1,243	955	30.2	6,407	4,092	56.6
Russia	35,173	95	35,268	29,657	18.9	201,920	197,498	2.2
Slovakia	697	16	713	462	54.3	6,710	4,464	50.3
Ukraine	1,151	05	1,156	1,042	10.9	7,099	5,082	39.7
Others	2,439	17	2,456	2,580	(4.8)	16,212	11,368	42.6
Southern/ Mediterranean Europe	14,131	106	14,237	8,848	60.9	128,097	81,624	56.9
Greece	523	10	533	344	54.9	2,853	1,816	57.1
Italy	5,669	26	5,695	3,389	68.0	38,709	22,242	74.0
Portugal	629	07	636	527	20.7	6,489	3,943	64.6
Spain	2,778	23	2,801	2,667	5.0	37,928	23,905	58.7
Turkey	787	16	803	515	55.9	6,673	3,739	78.5
Israel	2,054	0	2,054	421	387.9	24,845	19,517	27.3
Others	1,691	24	1,715	985	74.1	10,600	6,462	64.0
MIDDLE EAST	2,632	1	2,633	2,475	6.4	29,205	27,830	4.9
Bahrain	81	0	81	104	(22.1)	1,169	1,232	(5.1)
Egypt	491	0	491	472	4.0	4,069	3,091	31.6
Iraq	96	0	96	94	2.1	1,012	902	12.2
Jordan	358	0	358	304	17.8	2,823	3,604	(21.7)
Kuwait	150	0	150	150	0.0	1,885	1,955	(3.6)
Lebanon	420	01	421	484	(13.0)	3,438	3,347	2.7
Oman	141	0	141	108	30.6	2,775	2,038	36.2
Qatar	82	0	82	33	148.5	746	822	(9.2)
Saudi Arabia	353	0	353	293	20.5	5,887	6,797	(13.4)
United Arab Emirates	326	0	326	342	(4.7)	4,296	2,945	45.9
Others	134	0	134	91	47.3	1,105	1,097	0.7
TOTAL	243,494	5,098	248,592	210,352	18.2	2,053,465	14,87,303	38.1

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

Air travel is a cornerstone of Sri Lanka's tourism industry, serving as the primary conduit for international visitors to the island nation. The significance of aviation in this sector is underscored by the fact that approximately 29% of travelers make their final layovers in key transit hubs such as Dubai, Doha, and Chennai before arriving in Sri Lanka. Furthermore, airlines like Sri Lankan Airlines, IndiGo, and Qatar Airways collectively accounted for 42% of all tourist arrivals, highlighting their pivotal role in facilitating access to the country.

The concentration of tourist arrivals through specific airlines and key transit hubs underscores the vital role of strategic air connectivity and partnerships in shaping Sri Lanka's tourism landscape. Recent developments, such as the introduction of charter flights from Poland, Ukraine and Uzbekistan, along with additional flights from main airlines like Emirates, further enhance these connections. Strengthening collaborations with major airlines can improve accessibility and promote sustainable growth within the tourism industry.

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

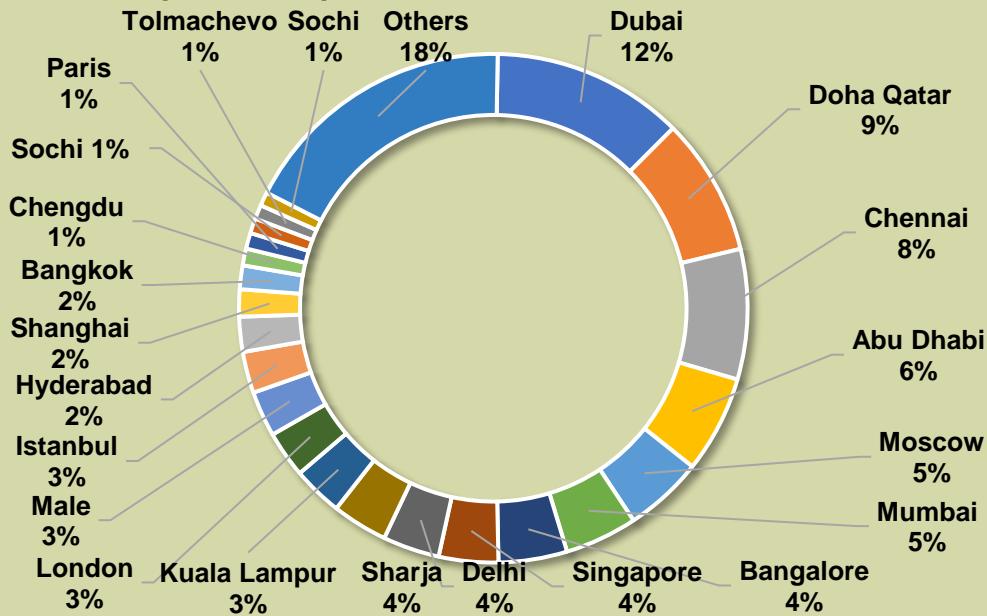
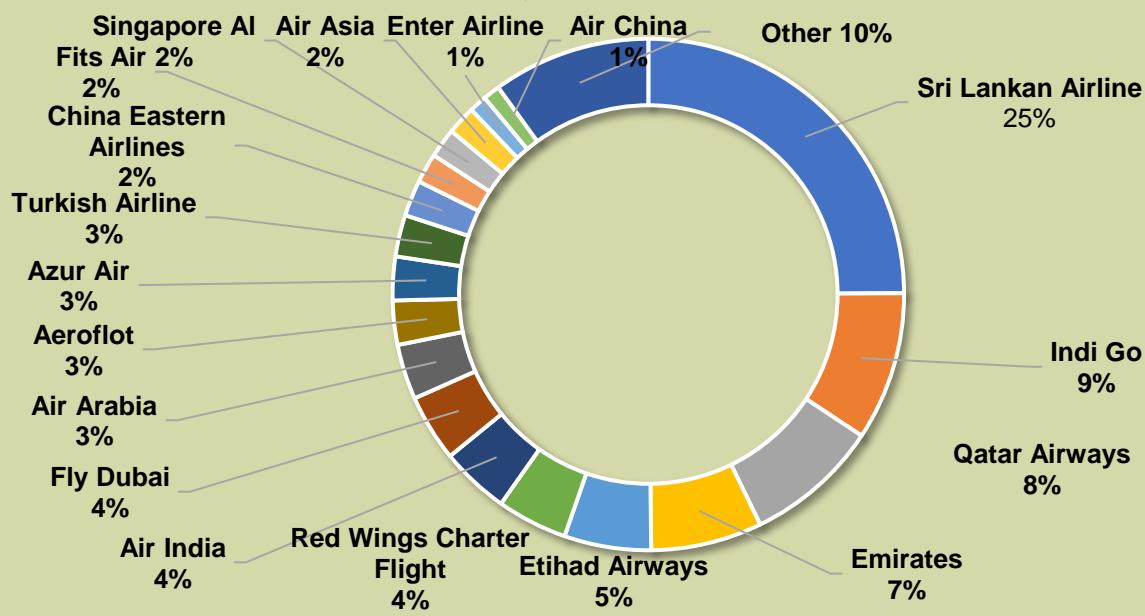


Chart 7. Main airlines to Sri Lanka, December 2024



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

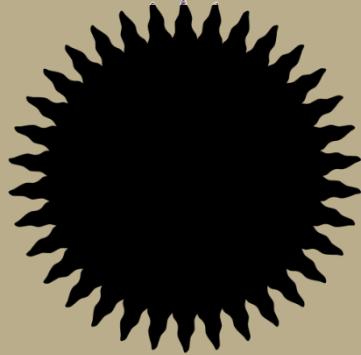
December 2024

Travelers' airline preferences significantly influence their experiences in Sri Lanka and are often linked to their countries of origin. Indian tourists typically choose Sri Lankan Airlines and IndiGo, reflecting strong air connectivity between the two nations. Russian visitors prefer Red Wings, while Chinese travelers favor China Eastern Airlines and Air China, indicating a tendency to select familiar national carriers. Visitors from Poland primarily fly with Enter Airlines which is a cheater flight. Meanwhile, Sri Lankan Airlines remains a popular choice among travelers from the UK, Germany, Australia, the United States, France, and the Maldives.

Chennai serves as the primary departure point for travelers from India, while Doha is the main gateway for tourists from Germany, the United States, and France. Key transit cities for travelers from the Russian Federation, United Kingdom, China, and Maldives include Moscow, London, Shanghai, and Male. This underscores the importance of accessibility in enhancing Sri Lanka's tourism sector, as travelers' choices are significantly influenced by their departure locations and available flight options. Strengthening travel connections and expanding links with key international hubs is crucial for attracting global visitors and supporting the ongoing growth of Sri Lanka's tourism industry

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

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



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