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## Introduction

The following document provides a synthesis of the most recent January, 2024 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31<sup>st</sup> January 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 experienced a notable surge in international tourist arrivals in January 2024, with a remarkable increase of 103.08% compared to the previous year January, totaling 208,253 visitors. This surge was attributed to the continuation of the peak tourism season and favorable local and international conditions, contributing to the overall revitalization of the tourism sector.

During the month of January, Sri Lanka saw a significant rise in visitors from key source markets such as India, Russia, the United Kingdom, Germany, and China. These countries played a crucial role in driving the increase in tourist arrivals, further bolstering Sri Lanka's tourism industry.

According to the UNWTO World Tourism Barometer, global international tourist arrivals reached an estimated 1,286 million in 2023, marking a 34% increase from 2022. With strong pent-up demand, international tourism has rebounded to 88% of pre-pandemic levels, and it is anticipated to fully recover by 2024, with a projected 2% growth above 2019 levels. Positive sentiments are reflected in the latest UNWTO Tourism Confidence Index survey, with 67% of industry professionals expressing optimism for 2024 compared to 2023. The expected full recovery by the end of 2024 is attributed to the release of pent-up demand, improved air connectivity, and the stronger rebound of Asian markets and destinations.

Table 1. Monthly tourist arrivals, January 2024

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



Tourist Arrivals | January 2024

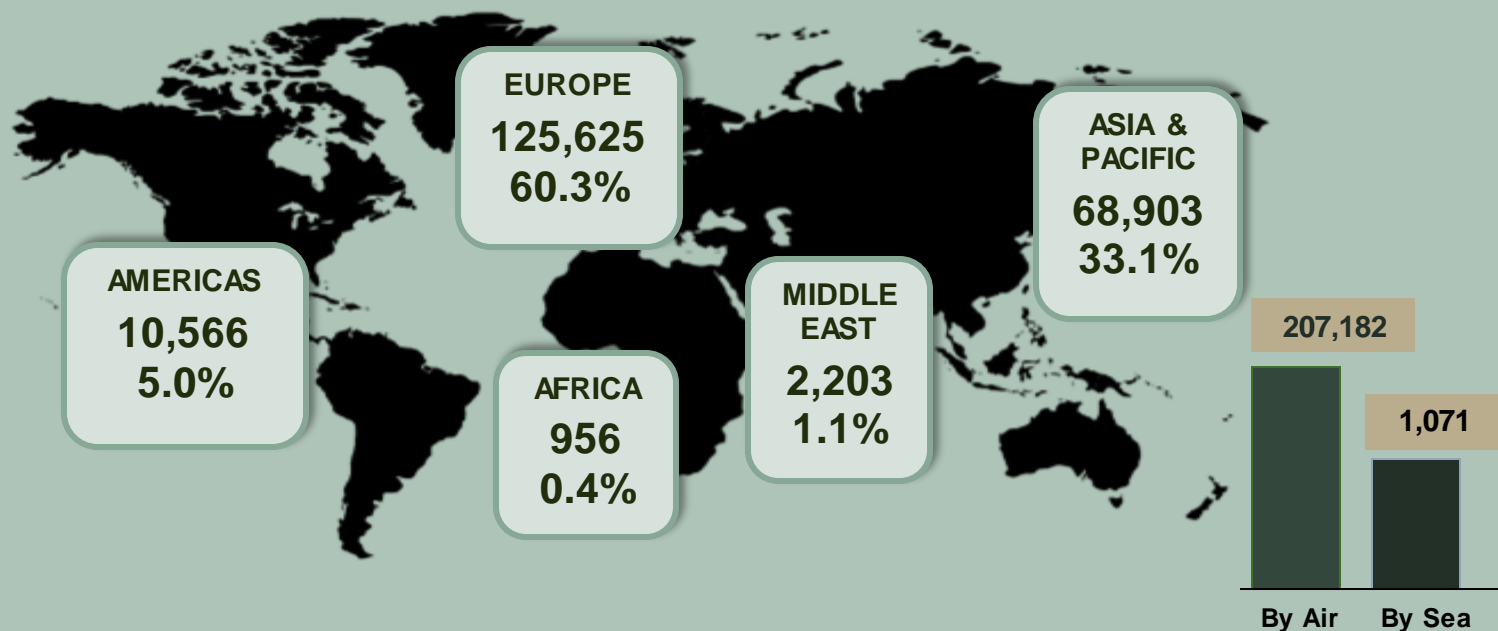
**208,253**



## Tourist arrivals by region and percentage share

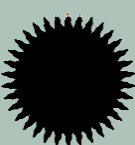
### January 2024

Map 1. Tourist arrivals by region and percentage share



Europe significantly impacted Sri Lanka's tourism landscape, representing 60.3% of total arrivals, while Asia and the Pacific emerged as leading sources, contributing 33.1% of visitors. This shift highlights evolving dynamics in Sri Lanka's tourism, with Europe and Asia-Pacific as key players.

The surge in tourism owes to rising demand from India, Russia, Germany, the UK, and China, bolstering Sri Lanka's tourism. The Americas comprised 5% of arrivals, while the Middle East and Africa contributed 1.1% and 0.4% respectively, shaping Sri Lanka's tourism distinctively.



## Top primary markets and top potential markets

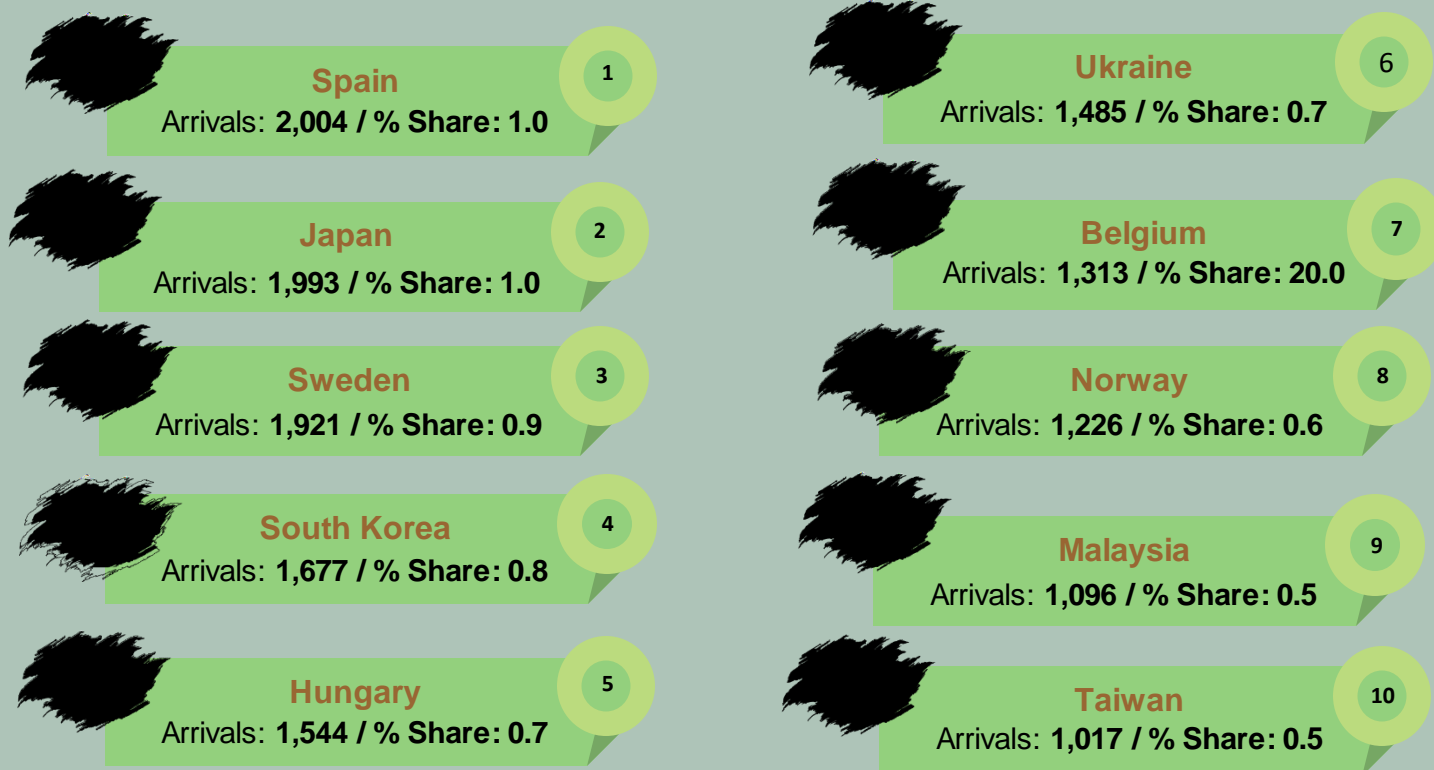
### Top primary markets, January 2024



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, January 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

## January 2024

January saw India leading tourist arrivals to Sri Lanka, comprising 16% of the total, followed closely by Russia, the UK, Germany, and China, contributing 15%, 8%, 6%, and 6%, respectively. These statistics highlight evolving travel preferences. Notably, there was an increase in arrivals from the Netherlands, India, USA, and France compared to the previous year, indicating a shift towards emerging destinations. Poland's and Netherland's notable presence in the top ten source markets is also significant.

Various factors such as the ongoing peak season, improved air connectivity, favorable local conditions, geographical proximity, and geopolitical factors have collectively elevated these countries as key contributors to Sri Lanka's tourism sector.

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

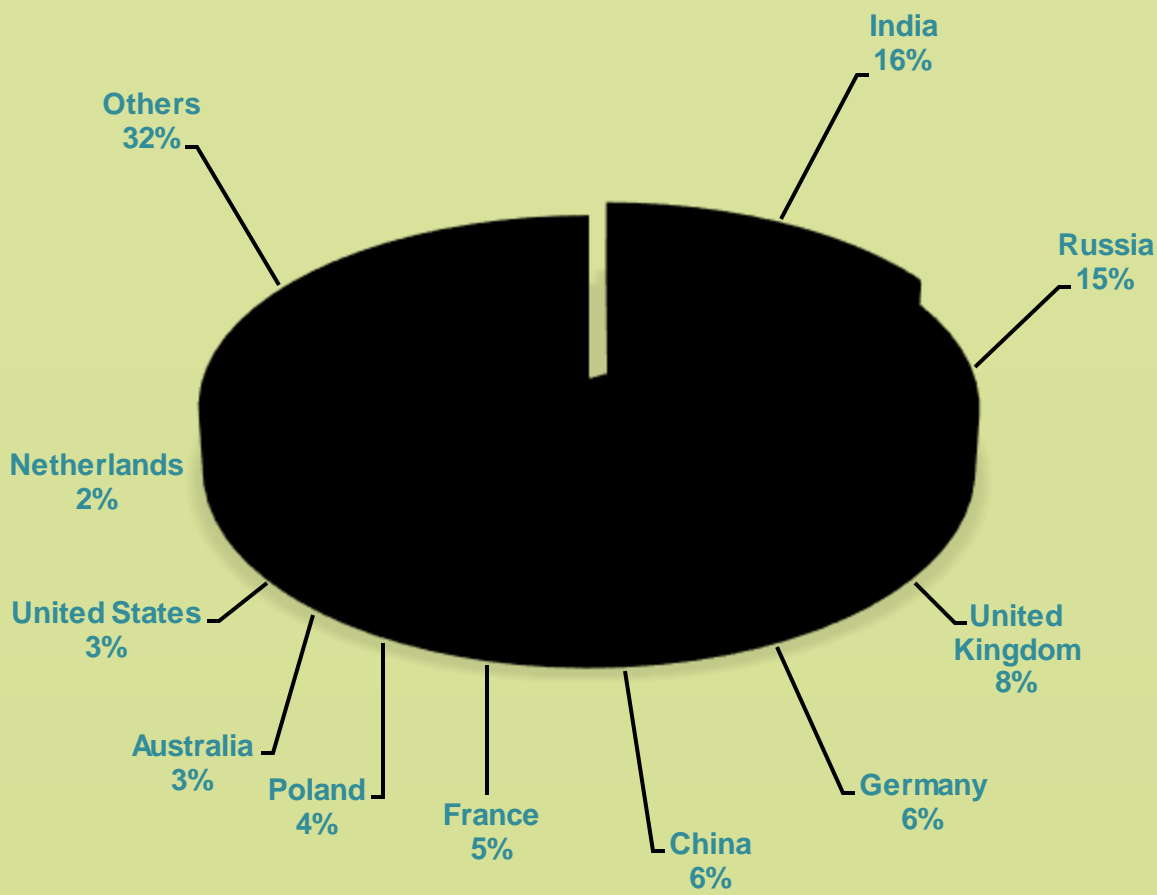
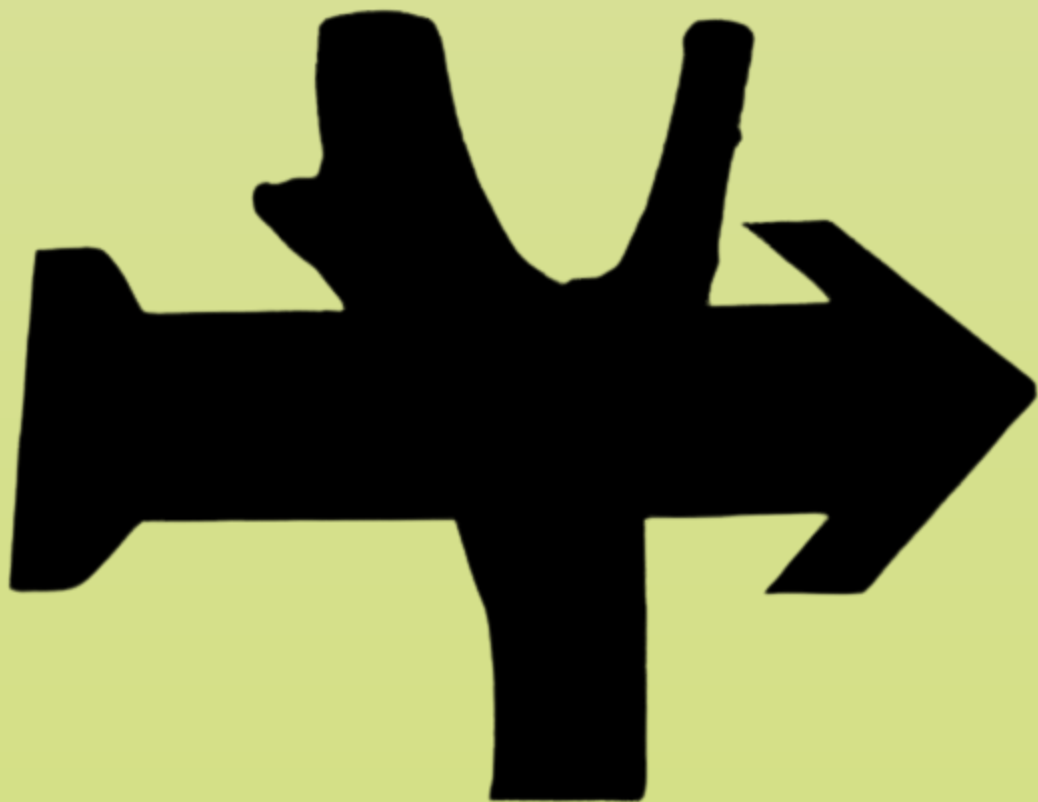






Table 2. Top ten source markets to Sri Lanka, January

Rank	Country of Residence	Tourist Arrivals (January 2024)			Tourist Arrivals (January 2023)
		By Air	By Sea	Total	
1	India	34,397	02	34,399	13,759
2	Russian Federation	31,159	0	31,159	25,254
3	United Kingdom	16,552	113	16,665	8,483
4	Germany	13,568	25	13,593	8,217
5	China	11,511	0	11,511	835
6	France	9,911	08	9,919	4,840
7	Poland	7,800	0	7,800	4,840
8	Australia	6,610	35	6,645	3,668
9	United States	5,032	680	5,712	2,636
10	Netherlands	4,523	08	4,531	1,514





# Tourist arrivals by purpose of visit

## January 2024

A detailed examination of tourist motivations for visiting Sri Lanka reveals diverse travel purposes. The majority, accounting for 65% of all visits, opt for leisure and vacation, indicating the country's popularity as a relaxation destination. Additionally, 8% visit to reconnect with friends and family, showcasing Sri Lanka's ability to attract those with personal ties.

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

In January, leisure emerged as the predominant motive for visiting Sri Lanka across key source markets. Notably, significant proportions of tourists from India (57.8%), Russia (66%), the United Kingdom (68%), Germany (69%), China (87%), France (76%), Poland (76%), USA (60%), and the Netherlands (81%) selected Sri Lanka for recreational purposes, affirming its reputation as a destination for relaxation and enjoyable experiences.

January proved favorable also for visiting friends and relatives in Sri Lanka, with 40% of Australian tourists and 19% of British tourists choosing the country for such connections.

Moreover, a portion of Russian tourists (15%) and Polish tourists (11%) traveled to Sri Lanka for MICE purposes, while 6.4% of Indian visitors arrived for business reasons. Additionally, 7% of German tourists visited Sri Lanka specifically for health-related services, reflecting the diverse motivations driving tourism to the country.

**Chart 2: Purpose of visit**

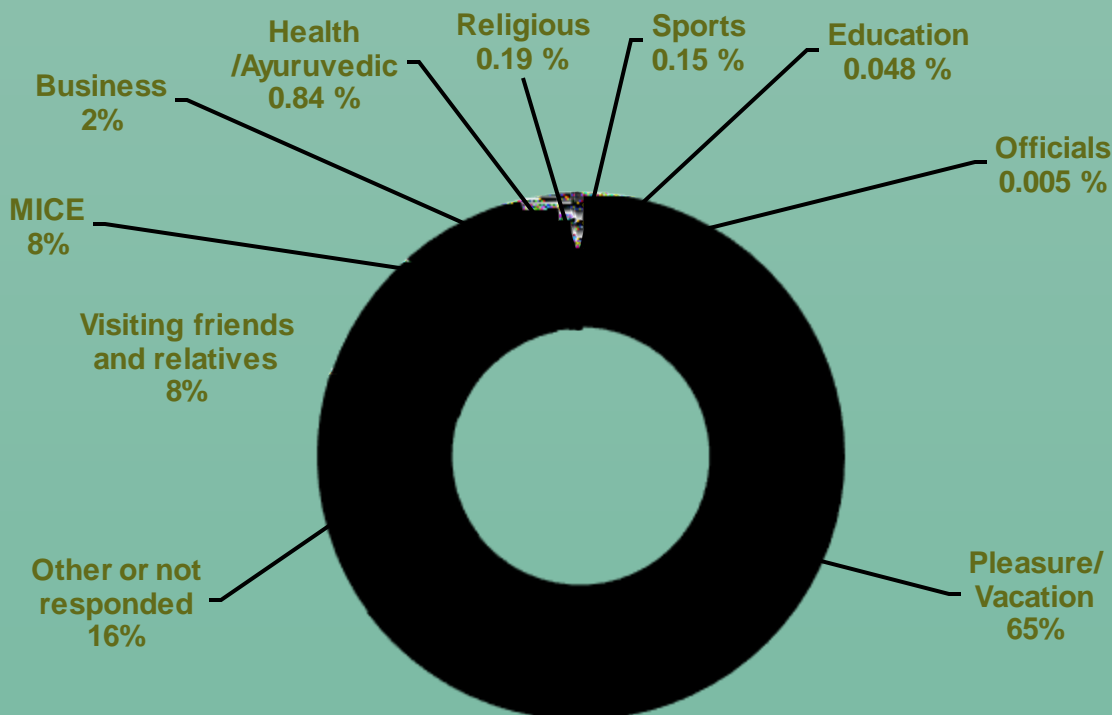
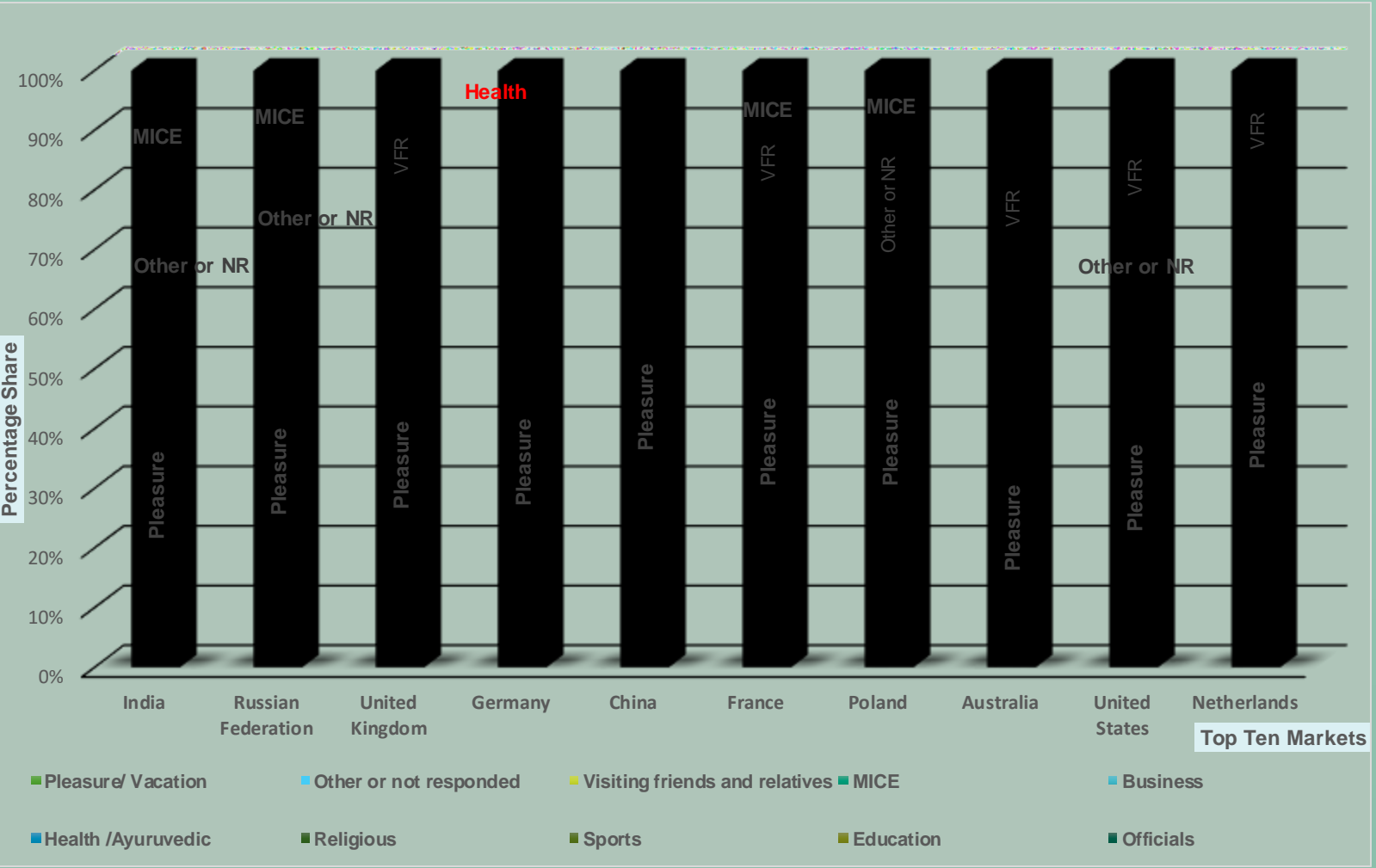


Chart 3: Purpose of visit vs main source markets





## International tourist arrivals by country of residence

	January 2024 Tourist Arrivals			Tourist Arrivals January 2023	% Change January ( 24/23)
	By Air	By Sea	Total		
<b>AMERICAS</b>	<b>9,763</b>	<b>803</b>	<b>10,566</b>	<b>6,652</b>	<b>58.84</b>
<b>North America</b>	<b>9,144</b>	<b>790</b>	<b>9,934</b>	<b>6,336</b>	<b>56.79</b>
Canada	4,025	101	4,126	3,681	12.09
Mexico	87	09	96	19	-
United States	5,032	680	5,712	2,636	116.69
<b>Caribbean &amp; Central America</b>	<b>84</b>	<b>1</b>	<b>85</b>	<b>48</b>	<b>77.08</b>
Costa Rica	20	0	20	06	-
Jamaica	04	0	04	01	-
Others	60	01	61	41	48.78
<b>South America</b>	<b>535</b>	<b>12</b>	<b>547</b>	<b>268</b>	<b>104.10</b>
Argentina	141	0	141	76	85.53
Brazil	228	08	236	101	133.66
Chile	53	03	56	26	115.38
Colombia	54	0	54	36	50.00
Others	59	01	60	29	106.90
<b>AFRICA</b>	<b>953</b>	<b>3</b>	<b>956</b>	<b>459</b>	<b>108.28</b>
<b>North Africa</b>	<b>193</b>	<b>0</b>	<b>193</b>	<b>172</b>	<b>12.21</b>
Morocco	62	0	62	47	31.91
Sudan	57	0	57	61	( 6.56)
Others	74	0	74	64	15.63
<b>Sub-Saharan Africa</b>	<b>760</b>	<b>3</b>	<b>763</b>	<b>287</b>	<b>165.85</b>
Kenya	42	0	42	23	82.61
Mauritius	48	0	48	19	152.63
Nigeria	01	0	01	10	(90.00)
South Africa	330	02	332	125	165.60
Others	339	01	340	110	209.09

	January 2024 Tourist Arrivals			Tourist Arrivals January 2023	% Change January ( 24/23)
	By Air	By Sea	Total		
<b>ASIA &amp; PACIFIC</b>	<b>68,852</b>	<b>51</b>	<b>68,903</b>	<b>26,009</b>	<b>164.92</b>
<b>North East Asia</b>	<b>16,212</b>	<b>1</b>	<b>16,213</b>	<b>2,182</b>	<b>-</b>
China	11,511	0	11,511	835	-
Japan	1,993	0	1,993	744	167.88
South Korea	1,677	0	1,677	450	272.67
Taiwan	1,016	1	1,017	151	-
Others	15	0	15	02	-
<b>South East Asia</b>	<b>3,214</b>	<b>0</b>	<b>3,214</b>	<b>1,715</b>	<b>87.41</b>
Cambodia	42	0	42	31	35.48
Indonesia	224	0	224	138	62.32
Malaysia	1,096	0	1,096	496	120.97
Myanmar	106	0	106	35	-
Philippines	262	0	262	188	39.36
Singapore	804	0	804	414	94.20
Thailand	505	0	505	279	81.00
Vietnam	166	0	166	117	41.88
Others	09	0	09	17	(47.06)
<b>Oceania</b>	<b>7,351</b>	<b>48</b>	<b>7,399</b>	<b>4,070</b>	<b>81.79</b>
Australia	6,610	35	6,645	3,668	81.16
New Zealand	719	13	732	394	85.79
Others	22	0	22	8	175.00
<b>South Asia</b>	<b>42,075</b>	<b>2</b>	<b>42,077</b>	<b>18,042</b>	<b>133.22</b>
Afghanistan	26	0	26	09	188.89
Bangladesh	2,329	0	2,329	717	-
Bhutan	135	0	135	32	-
India	34,397	2	34,399	13,759	150.01
Iran	688	0	688	435	58.16
Maldives	2,919	0	2,919	2,203	32.50
Nepal	625	0	625	292	114.04
Pakistan	956	0	956	595	60.67
<b>EUROPE</b>	<b>125,411</b>	<b>214</b>	<b>125,625</b>	<b>67,855</b>	<b>85.14</b>
<b>Northern Europe</b>	<b>23,802</b>	<b>127</b>	<b>23,929</b>	<b>11,667</b>	<b>105.10</b>
Denmark	2,540	02	2,542	1,081	135.15
Finland	737	0	737	257	186.77
Norway	1,221	05	1,226	698	75.64
Sweden	1,919	02	1,921	871	120.55
United Kingdom	16,552	113	16,665	8,483	96.45
Others	833	05	838	277	-



	January 2024 Tourist Arrivals			Tourist Arrivals January 2023	% Change January ( 24/23)
	By Air	By Sea	Total		
<b>Western Europe</b>	<b>34,715</b>	<b>59</b>	<b>34,774</b>	<b>17,984</b>	<b>93.36</b>
Austria	2,384	01	2,385	956	149.48
Belgium	1,305	08	1,313	646	103.25
France	9,911	08	9,919	4,840	104.94
Germany	13,568	25	13,593	8,217	65.43
Netherlands	4,523	08	4,531	1,514	199.27
Switzerland	2,944	07	2,951	1,769	66.82
Others	80	02	82	42	95.24
<b>Central/ Eastern Europe</b>	<b>58,028</b>	<b>03</b>	<b>58,031</b>	<b>32,738</b>	<b>77.26</b>
Belarus	2,341	01	2,342	1,204	94.52
Czech Republic	3,484	0	3,484	960	-
Estonia	910	0	910	182	-
Hungary	1,544	0	1,544	400	-
Kazakhstan	3,350	0	3,350	470	-
Lithuania	1,015	0	1,015	278	-
Poland	7,800	0	7,800	1,269	-
Romania	853	0	853	316	-
Russia	31,159	0	31,159	25,254	23.38
Slovakia	990	0	990	351	182.05
Ukraine	1,485	0	1,485	884	67.99
Others	3,097	02	3,099	1,170	164.87
<b>Southern/ Mediterranean Europe</b>	<b>8,866</b>	<b>25</b>	<b>8,891</b>	<b>5,466</b>	<b>62.66</b>
Greece	263	01	264	151	74.83
Italy	3,484	01	3,485	1,477	135.95
Portugal	485	02	487	230	111.74
Spain	1,989	15	2,004	857	133.84
Turkey	715	02	717	362	98.07
Israel	773	0	773	1,868	(58.62)
Others	1,157	04	1,161	521	122.84
<b>MIDDLE EAST</b>	<b>2,203</b>	<b>0</b>	<b>2,203</b>	<b>1,570</b>	<b>40.32</b>
Bahrain	122	0	122	134	(8.96)
Egypt	396	0	396	127	-
Iraq	54	0	54	63	(14.29)
Jordan	180	0	180	261	(31.03)
Kuwait	231	0	231	162	42.59
Lebanon	155	0	155	111	39.64
Oman	236	0	236	183	28.96
Qatar	41	0	41	34	20.59
Saudi Arabia	511	0	511	340	50.29
United Arab Emirates	219	0	219	101	116.83
Others	58	0	58	54	7.41
<b>TOTAL</b>	<b>207,182</b>	<b>1,071</b>	<b>208,253</b>	<b>102,545</b>	<b>103.08</b>



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

Analysis of tourists' departure airports and preferred airlines when traveling to Sri Lanka emphasizes the critical role of air travel in the country's tourism industry. Notably, approximately 35% of tourists selected departure airports in Dubai, Doha, and Chennai as their final transit points before arriving in Sri Lanka. Furthermore, the primary airlines of choice for reaching Sri Lanka were Sri Lankan Airlines, Qatar Airways, and Emirates, collectively representing 48% of total tourist arrivals. The introduction of Cathay Pacific Airlines is anticipated to further boost tourist arrivals in Sri Lanka. This underscores the vital importance of air transportation in facilitating tourism, with specific airports and airlines significantly accommodating a substantial portion of visitors.

Chart 3. Main last departure airports to Sri Lanka, January 2024

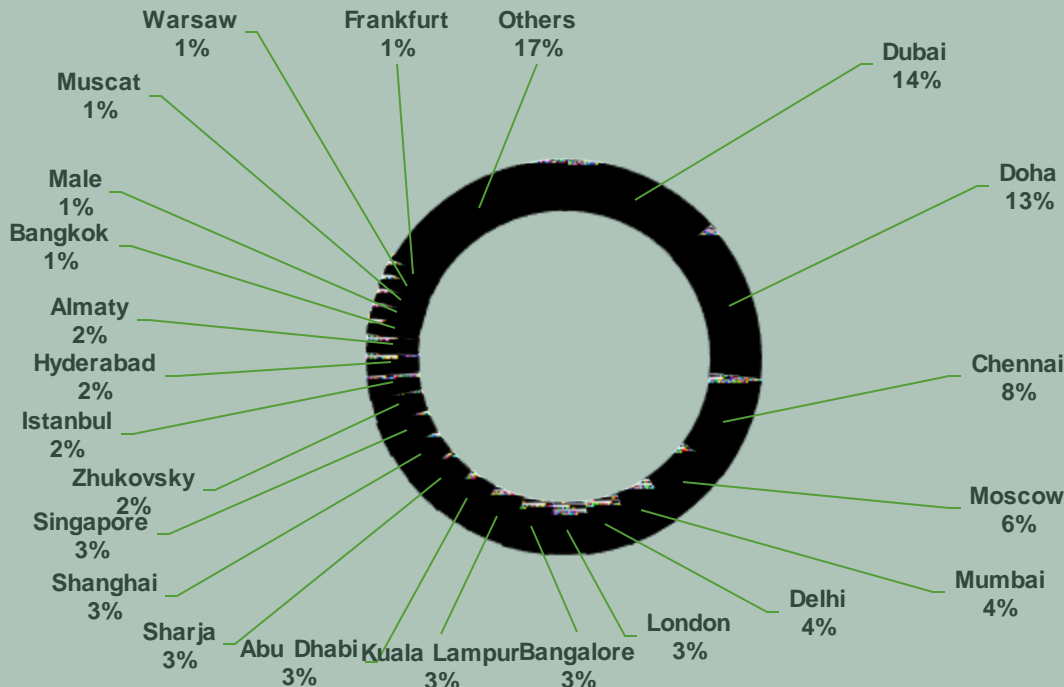
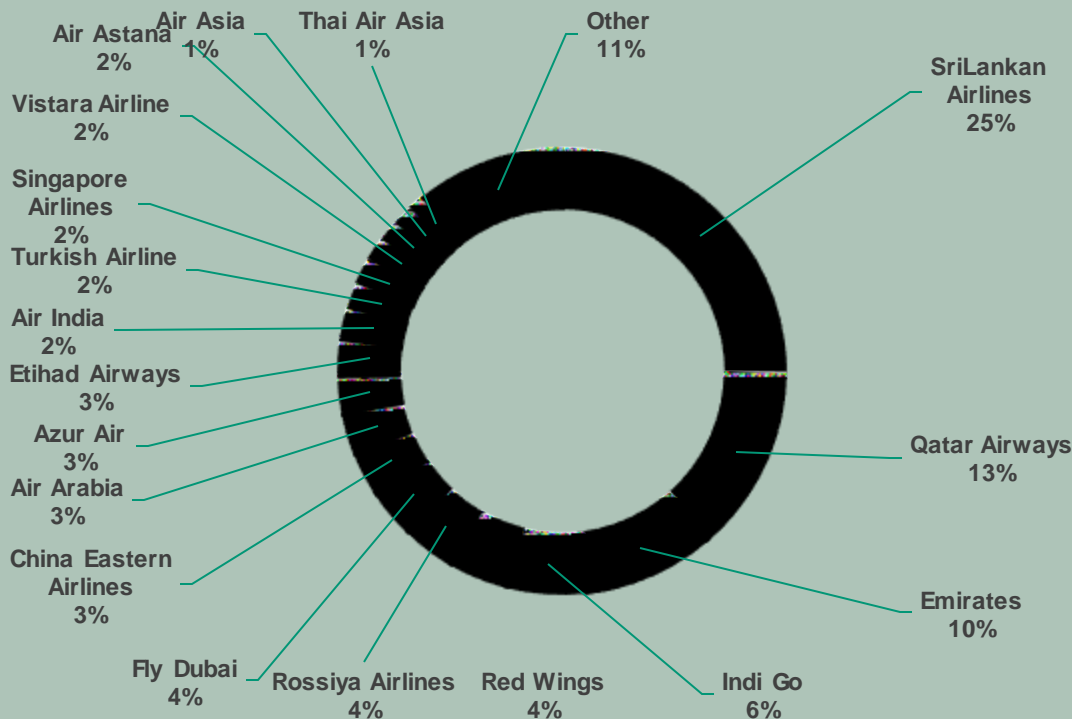


Chart 4. Main airlines to Sri Lanka, January 2024





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

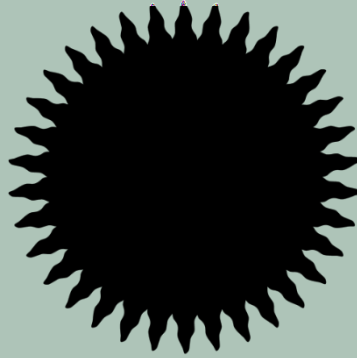
## January 2023

The selection of airlines significantly influences the travel experiences of tourists bound for Sri Lanka, often reflecting their national origins and diverse airline preferences. Indian travelers commonly opt for Sri Lankan Airlines and IndiGo, while Russian tourists favor Red Wings and Rossia. Conversely, Sri Lankan Airlines is a preferred choice among visitors from the United Kingdom, Germany, Australia, and the United States. Chinese tourists tend to choose China Eastern, while Qatar Airways is favored by tourists from France, Poland, and the Netherlands. In terms of final departure airport, Chennai serves as the primary airport for Indian travelers. Doha serves as the principal gateway for tourists from Germany, France, USA and Netherlands. Australians, Russians, and Polish travelers often utilize Singapore, Moscow, and Warsaw airports, respectively, as their final departure airports. This underscores the vital role of accessibility in promoting tourism in Sri Lanka, highlighting how travelers' airline and airport choices are influenced by their home countries, emphasizing the importance of seamless travel connections in attracting visitors to the country.

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

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





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