
Introduction

The following document provides a synthesis of the most recent July, 2024 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st July 2024, and subject to change. The data provides an overview of month-on-month and annual changes in visitor arrivals to Sri Lanka from international source markets. The data is meant to provide an overview of how travel and tourism is performing to Sri Lanka.

This report is developed by the Research & International Relations Division at Sri Lanka Tourism Development Authority (SLTDA). Questions, comments and feedback are welcome and will support the future amendment and enhancement of the report to ensure it meets the data and insights needs of Sri Lanka's Government and industry stakeholders.

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Summary

In July, Sri Lanka recorded 187,810 tourist arrivals, reflecting a significant 65.5% increase compared to June and a 31.3% growth compared to July 2023. The total number of arrivals by the end of July reached 1,198,059.

In July, Sri Lanka's primary source markets were India, the United Kingdom, China, the Netherlands, and Germany, with notable increases in visitors from these countries driving the growth of the tourism sector.

The latest UNWTO Barometer indicates a generally positive outlook for international tourism from May to August 2024, with strong recovery expected. However, the recovery remains constrained by various factors, including ongoing economic challenges like inflation and high fuel costs, as well as geopolitical uncertainties. Moreover, travel restrictions, including visa requirements, low consumer confidence, and lingering COVID-19 concerns, continue to impact the pace of recovery.

Table 1. Monthly tourist arrivals, July 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	112,128	34.6
June	100,388	113,470	13.0
July	143,039	187,810	31.30
August	136,405		
September	111,938		
October	109,199		
November	151,496		
December	210,352		
TOTAL	1,487,303	1,198,059	



Tourist Arrivals | July 2024

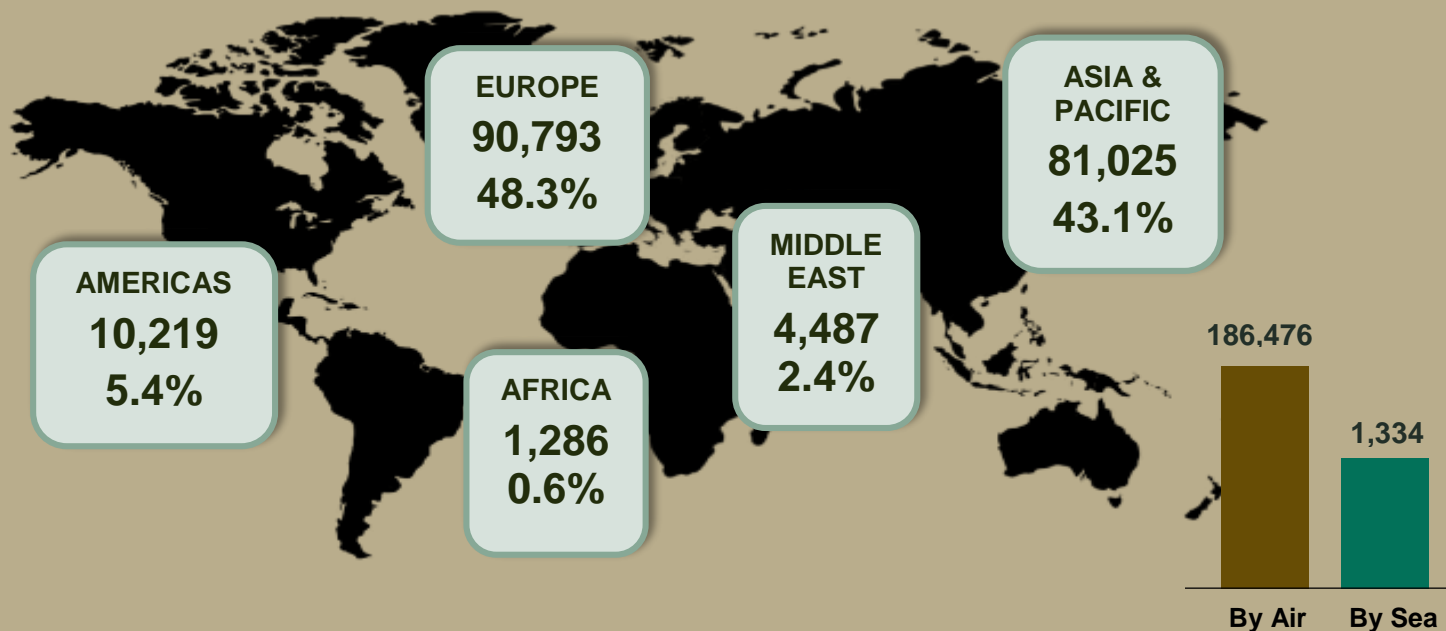
187,810



Tourist arrivals by region and percentage share

July 2024

Map 1. Tourist arrivals by region and percentage share



Europe remains a major influence on Sri Lanka's tourism, contributing 48.3% of total arrivals. At the same time, Asia and the Pacific have emerged as substantial contributors, accounting for 43.1% of visitors. This shift highlights the changing dynamics of Sri Lanka's tourism industry, with both Europe and the Asia-Pacific region playing pivotal roles.

The growth in tourism is driven by higher demand from India, the UK, the Netherlands, and Germany, which have significantly strengthened Sri Lanka's tourism sector. The Americas accounted for 5.4% of arrivals, while the Middle East and Africa contributed 2.4% and 0.6%, respectively, shaping the distinct profile of Sri Lanka's tourism industry.

Top primary markets and top potential markets

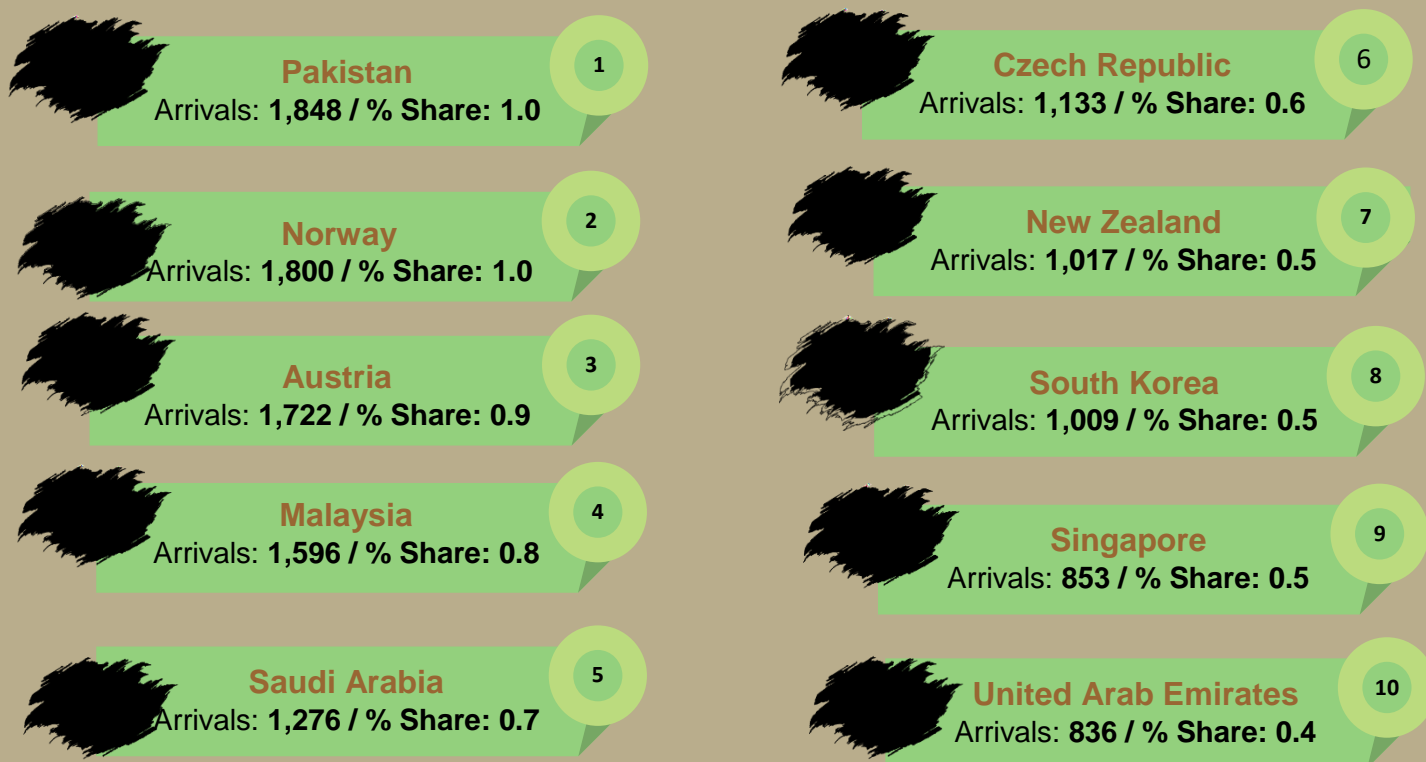
Top primary markets, July 2024



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, July 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

July 2024

In July, India emerged as the top source of tourists to Sri Lanka, making up 21.9% of total arrivals while United Kingdom Contributed 11.1% . China and the Netherlands followed with 6.9% and 6.1%, respectively, while Germany accounted for 5.7%. These figures highlight shifting travel preferences. Notably, there was a significant rise in arrivals from India and the Netherlands compared to the previous year, indicating a move towards emerging destinations. The decline in Canadian tourist arrivals might be linked to fewer visits for the purpose of visiting friends and relatives. The emergence of markets like the Netherlands and Switzerland, along with the absence of Russia in the top markets, is particularly noteworthy.

The synergy of better air connectivity, advantageous local conditions, close geographical proximity and geopolitical factors has markedly increased the role of these countries as key contributors to Sri Lanka's tourism industry.

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

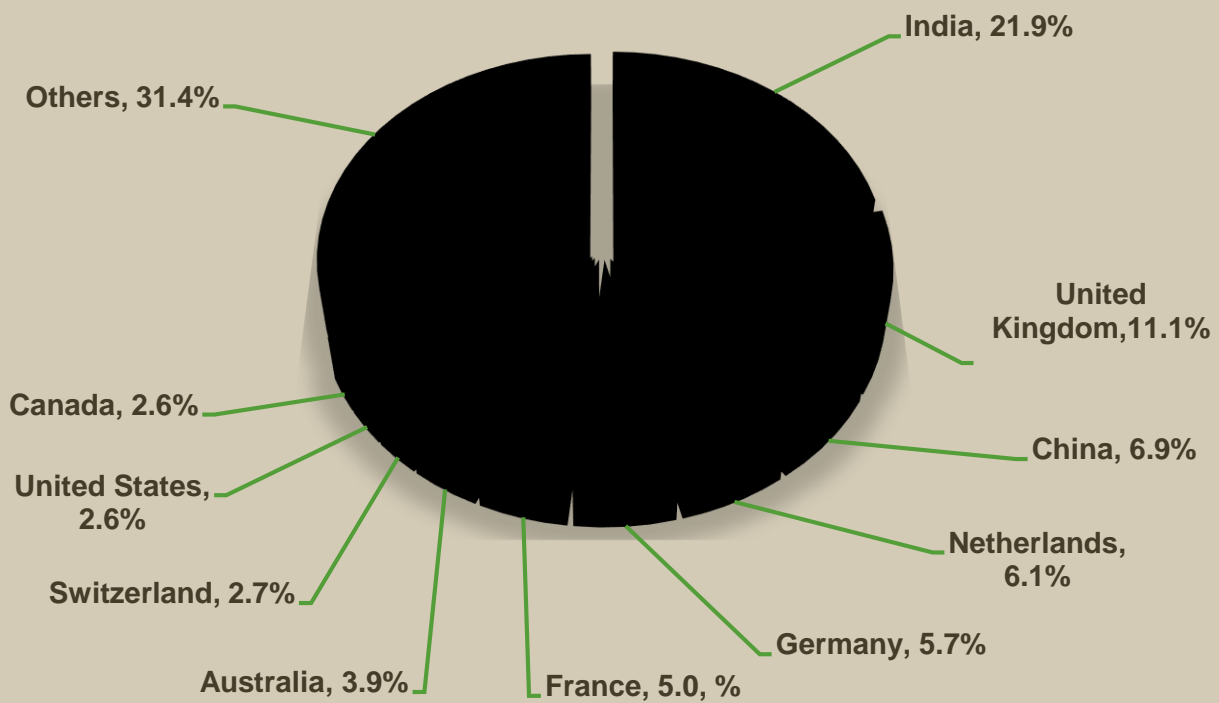
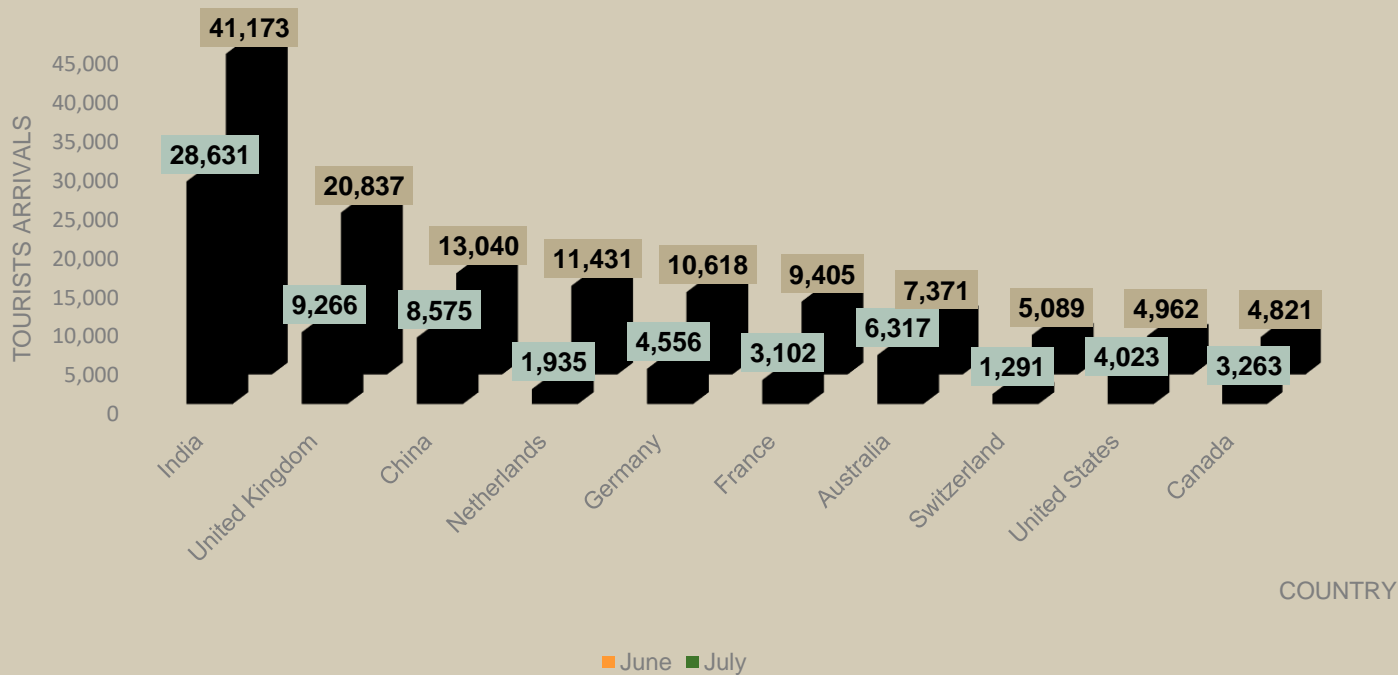




Table 2. Top ten source markets to Sri Lanka, July

Rank	Country of Residence	Tourist Arrivals (July 2024)			Tourist Arrivals (July 2023)
		By Air	By Sea	Total	
1	India	39,870	1,303	41,173	23,461
2	United Kingdom	20,827	10	20,837	17,482
3	China	13,040	0	13,040	10,062
4	Netherlands	11,431	0	11,431	6,796
5	Germany	10,618	0	10,618	8,013
6	France	9,405	0	9,405	7,432
7	Australia	7,371	0	7,371	5,323
8	Switzerland	5,089	0	5,089	4,329
9	United States	4,941	21	4,962	4,120
10	Canada	4,821	0	4,821	5,737

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





Top ten source markets

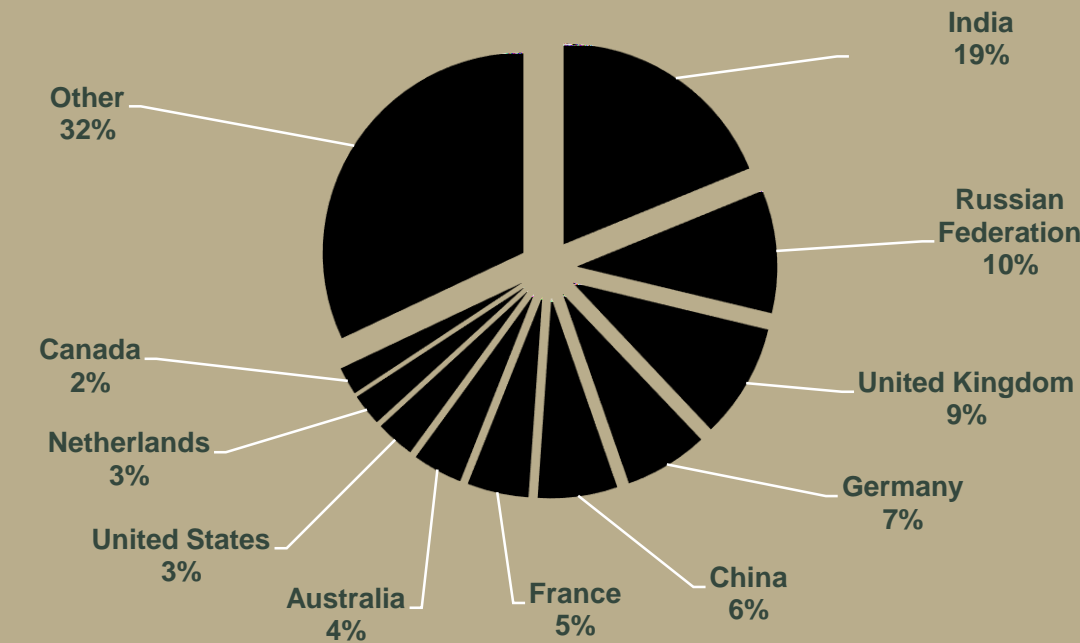
January to July 2024

From January to July this year, Sri Lanka saw a marked increase in tourist arrivals from India, the Russian Federation, the United Kingdom, Germany, and China, making these the top five international tourist sources. Noteworthy was the substantial rise in visitors from China and the Netherlands during this period. In contrast, the Russian Federation experienced the least growth in arrivals, while Canada saw a decline compared to the other countries.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ July 2024)	Tourist Arrivals (Jan ~ July 2023)
1	India	225,641	139,654
2	Russian Federation	118,682	118,284
3	United Kingdom	110,189	68,304
4	Germany	80,688	53,210
5	China	76,856	29,924
6	France	58,745	35,020
7	Australia	48,117	32,221
8	United States	37,679	25,886
9	Netherlands	30,897	15,291
10	Canada	27,044	28,163
11	Other	383,521	221,956
Total		1,198,059	767,913

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





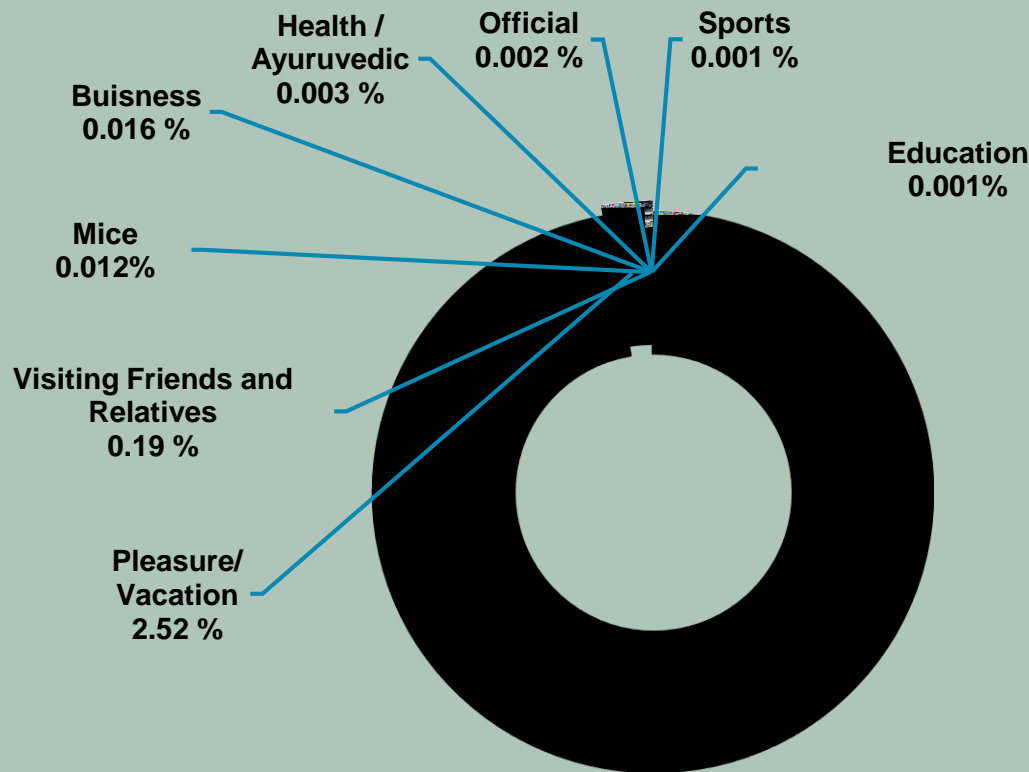
Tourist arrivals by purpose of visit

July 2024

A detailed analysis of tourist motivations for choosing Sri Lanka reveals several key reasons. The primary motivation, accounting for 2.52% of visits, is leisure and vacation, highlighting the country's strong appeal as a leisure destination. Additionally, 0.19% of tourists come to reconnect with friends and family, showing Sri Lanka's attractiveness for personal gatherings.

Conversely, only 0.016% of tourists visit for business, indicating a relatively minor focus on professional activities. Furthermore, 0.012% come for MICE (Meetings, Incentives, Conferences, and Exhibitions) events, reflecting Sri Lanka's growing reputation as a venue for corporate events. There is also a small but notable interest in niche areas, with 0.003% of travelers seeking health or Ayurvedic experiences and 0.001% visiting for sports and educational reasons.

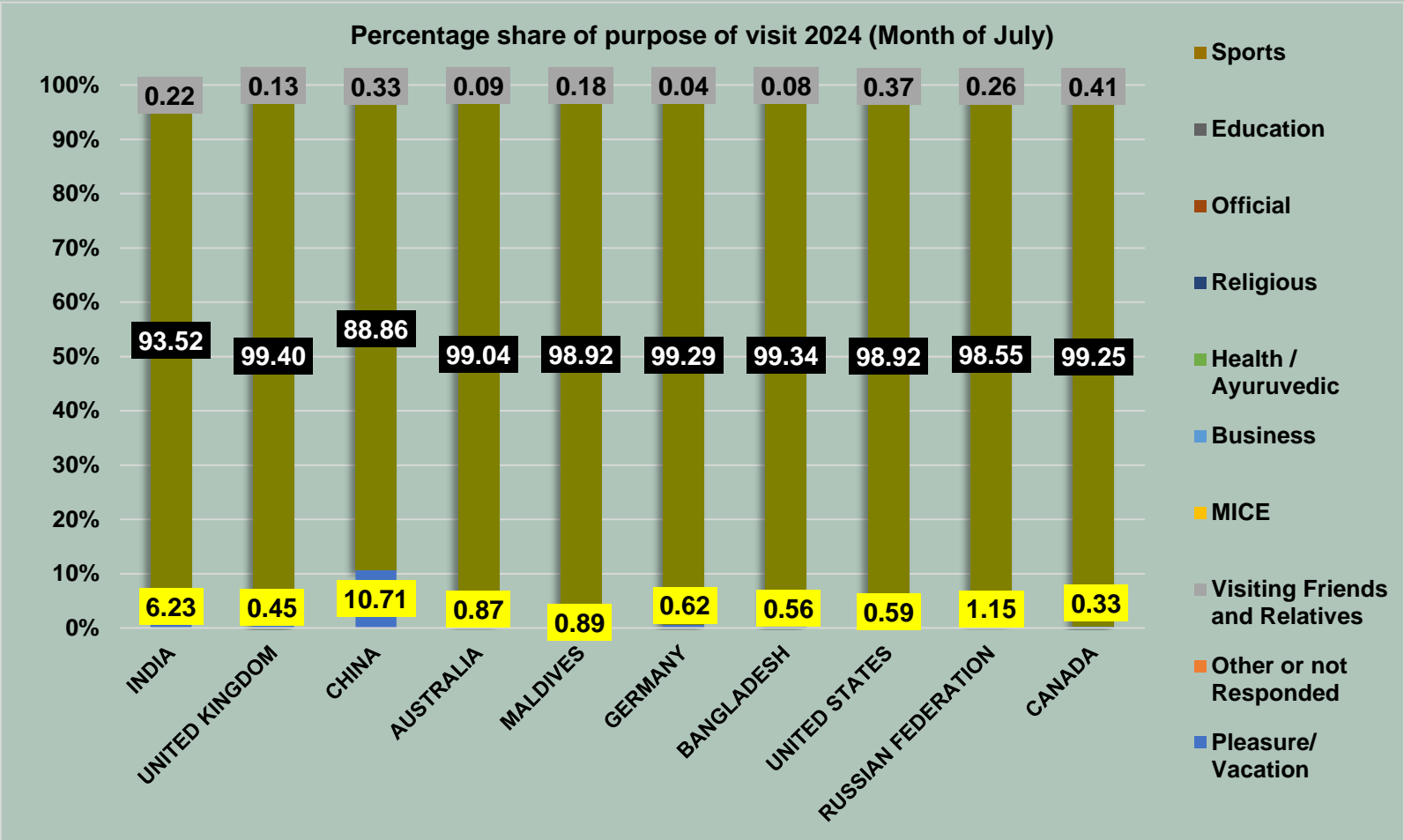
Chart 4: Purpose of visit



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





Trends and Opportunities in the Russian Tourism Market

Russian outbound travel

Russian outbound travel has seen a notable increase, with an 8.8% rise in the first quarter of 2024, resulting in 5.3 million trips made by Russians for tourism and other purposes during this period (Asia 2024) Over the first three quarters of 2023, the total number of outbound trips from Russia reached 21,020,012, marking a 12.4% increase compared to the same period in 2022 (russtd.com, n.d.). The Russian outbound travel market, recognized as the ninth largest in the world in terms of expenditure, contributes significantly to global tourism with \$22.3 billion spent abroad annually (Statistica).

Russian Tourist Arrivals to Sri Lanka

Sri Lanka has recently celebrated a significant milestone in its tourism sector by reaching 118,682 Russian tourist arrivals by 31st July 2024. The Russian tourist arrivals for the consecutive years of 2021, 2022, and 2023 were 16,894, 91,272, and 197,498 respectively. This achievement was made possible through direct flights operated by Aeroflot, Azur Air, and Redwings, which together brought a considerable number of Russian visitors. This influx of Russian tourists represents a crucial boost for Sri Lanka's economy, especially in the wake of the economic challenges the country has faced in recent years. However, As depicted in the below charts, the arrivals are gradually declining from the month of May 2024.

Monthly distribution of Russian tourist arrivals, 2021, 2022, 2023 & 2024





Ranking of Russia as a source market, January to July 2024

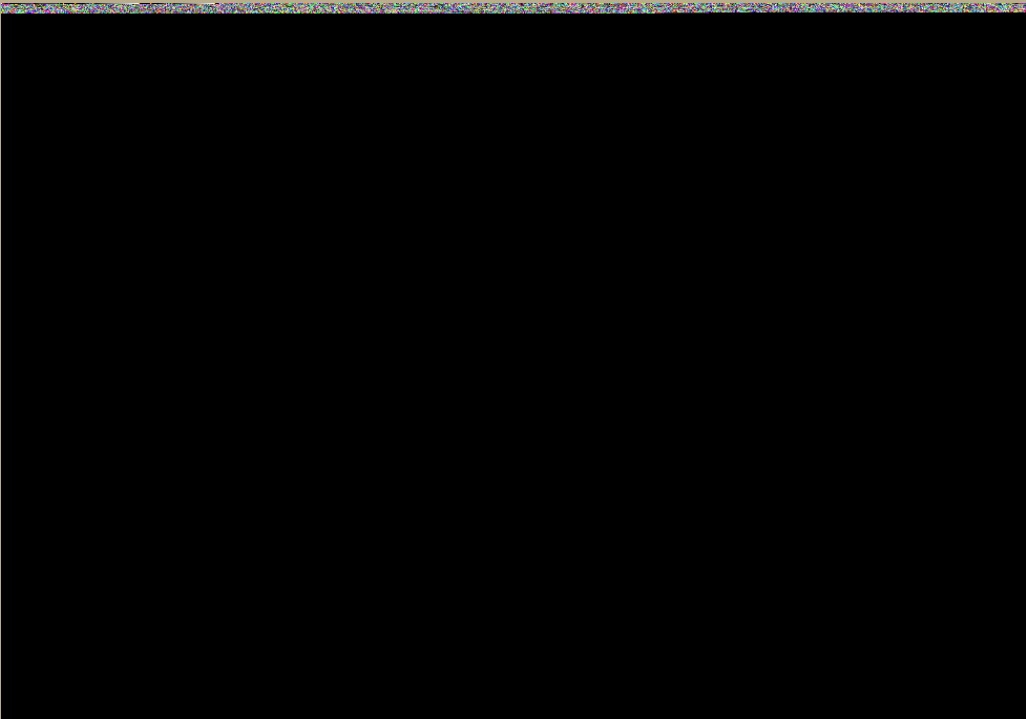


As shown in the chart, Russia's position as a key source market has gradually declined from second place in January to 12th place in July 2024.

Air Accessibility

Air accessibility for Russian tourists to Sri Lanka has seen both expansions and challenges throughout the years. The tables below illustrate the distribution of Russian tourist arrivals via key airlines for the years 2023 and 2024. In 2023, the main airlines used by Russian tourists were Azur Air, Aeroflot, and Red Wings Airlines. For 2024, the prominent airlines included Rossiya Airlines, Red Wings, State Transport of Russia, Aeroflot, and Azur Air.

Distribution of tourists from Russia among airlines to Sri Lanka, 1st to 25th July 2024





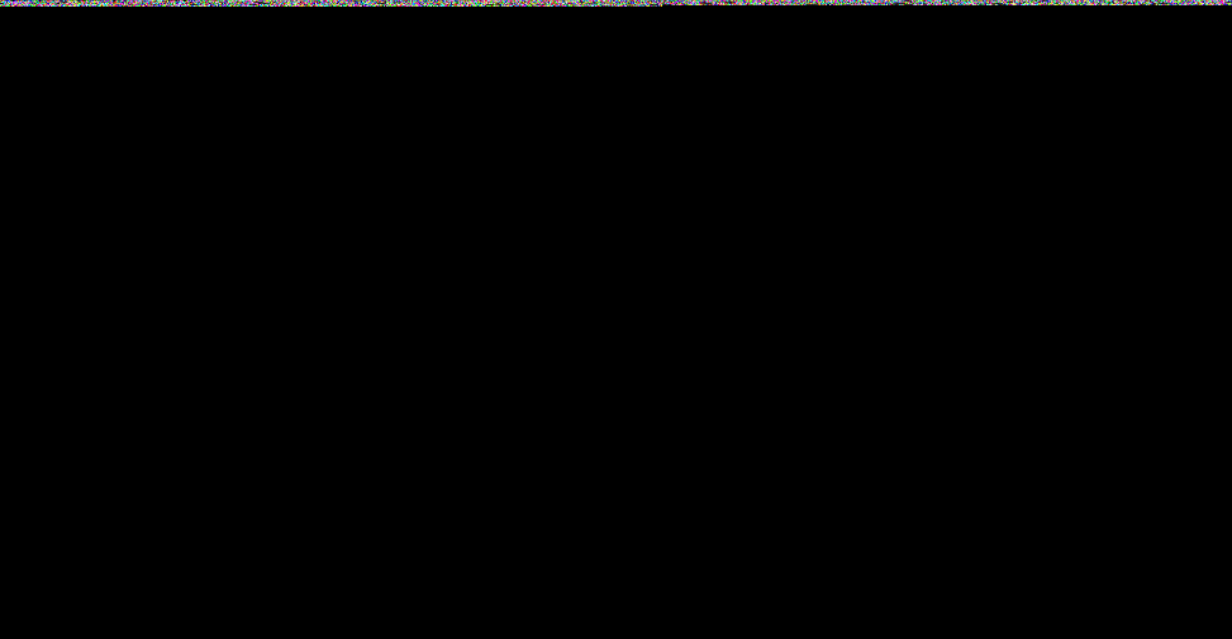
An analysis of Russian tourist arrivals by airline shows that 54% of tourists traveled to Sri Lanka with Aeroflot, departing from Moscow in July 2024. Other key airlines used by Russian tourists include Air Arabia, Fly Dubai, Etihad, and Emirates, with final departure ports including Sharjah, Dubai, Abu Dhabi, and Doha.

Distribution of tourists from Russia among airlines to Sri Lanka, January to June 2024



An analysis of airlines used by Russian tourists from January to June 2024 shows that Red Wings accounted for 27% of tourist arrivals, while Rossiya contributed 26%. Other significant contributors were Azur Air with 15%, Aeroflot with 2%, and Sri Lankan Airlines with 2%. Notably, 72% of Russian tourists preferred direct flights.

Distribution of Russian Tourists among last departure airports, January to June 2024





An analysis of Russian tourists' departure airports from January to June shows that the majority chose direct flights from Russia.

Monthly distribution of Russian tourist arrivals with key airlines - 2023

Months	Azur Air	Aeroflot	Red Wings Airline	Air Arabia	Air Asia
January	31.37	15.85	12.1	—	—
February	28.93	12.04	17.32	—	—
March	30.13	15.09	24.09	—	—
April	15.8	20.4	33.4	10.9	—
May	—	30.34	44.06	—	—
June	—	30.81	42.04	10.58	—
July	—	31.09	42.13	—	—
August	—	31.58	42.16	—	—
September	—	37.14	—	—	—
October	—	35.31	29.51	15.85	—
November	22.67	21.68	32.95	—	—
December	—	19.95	28.2	10.07	17.75

Measures to incentivize the Russian Tourists

Facilitating Charter operations from Russia

Following the COVID-19 pandemic, the embarkation tax at Mattala International Airport was initially lifted. This tax was lifted again in December 2022. Landing and parking fees are waived for scheduled flights at Mattala International Airport for two years from the start. However, charter flights do not receive this benefit, and Red Wings Airlines did not qualify for this exemption as it operated charter flights. Thus, a policy decision either to extend this facility to charter flights as well or to lift the Embarkation Levy could incentivize the tourists from Russia.

Visa

Currently, Sri Lanka offers a free visa facility for tourists from Russia. This initiative has the potential to be a significant incentive for increasing tourist arrivals from Russia. Extending this free visa facility could further boost tourism in several ways:

- Increase Tourist Arrivals: Offering free visas makes Sri Lanka a more attractive destination, potentially increasing tourist arrivals.
- Encourage Repeat Visits: Simplifying the visa process encourages tourists to consider Sri Lanka for repeat visits, fostering long-term tourism growth.
- Enhance Tourist Experience: A hassle-free visa process improves the overall travel experience, making Sri Lanka more competitive compared to other destinations.





Extending the free visa facility for Russian tourists can thus play a crucial role in revitalizing and sustaining Sri Lanka's tourism sector.

Acceptance of native currencies for transaction in trade and tourism

Russians face challenges transacting in leading currencies, such as the dollar and euro, due to economic sanctions and banking restrictions. To mitigate these issues, it is essential to create opportunities for Russians to transact in their own currency. By allowing transactions in rubles, their spending power can significantly increase, boosting their confidence and ability to spend more freely during their travels.

An agreement between countries to accept each other's currencies can be mutually beneficial, fostering stronger economic ties and simplifying financial transactions for tourists. Facilitating transactions in their native currency could lead to an increase in daily expenditure, as tourists will feel more comfortable and secure in their financial dealings. Moreover, improving the accessibility and modes of transaction will not only enhance the overall travel experience but also potentially double the number of tourist arrivals, as the ease of spending in familiar currency attracts more visitors. Ensuring that financial infrastructure supports these transactions is crucial for realizing these benefits and maximizing the economic impact of tourism.

Way forward

To significantly increase the number of Russian tourists visiting Sri Lanka, it's essential to implement measures that reduce the financial burden of travel. One such measure is the exemption of embarkation fees and landing and parking costs for flights, landing especially at Mattala Rajapaksa International Airport, which has proven effective in the past. These financial incentives can make Sri Lanka a more attractive destination for airlines and tourists alike.

Extending the visa waiver for a longer period could serve as an additional incentive to facilitate hassle-free travel for Russian tourists. Continuing the waiver would help maximize the benefits from the influx of Russian tourists.

Additionally, accepting native currencies for transactions in trade and tourism would attract more Russian tourists who face restrictions when using their own currencies.



LET'S GO TRAVEL



International tourist arrivals by country of residence

	July 2024 Tourist Arrivals			Tourist Arrivals July 2023	% Change July (24/23) 2024	Total Tourist Arrivals Up to July 2024	Total Tourist Arrivals Up to July 2023	% Change Up to July (24/23) 2024
	By Air	By Sea	Total					
AMERICAS	10,198	21	10,219	10,143	0.75	68,924	56,709	21.54
North America	9,806	21	9,827	9,901	(0.75)	65,319	54,394	20.08
Canada	4,821	0	4,821	5,737	(15.97)	27,044	28,163	(3.97)
Mexico	44	0	44	44	0.00	596	345	72.75
United States	4,941	21	4,962	4,120	20.44	37,679	25,886	45.56
Caribbean & Central America	77	0	77	37	108.11	607	359	69.08
Costa Rica	03	0	03	03	0.00	60	31	93.55
Jamaica	07	0	07	03	133.33	69	25	176.00
Others	67	0	67	31	116.13	478	303	57.76
South America	315	0	315	205	53.66	2,998	1,956	53.27
Argentina	50	0	50	34	47.06	587	421	39.43
Brazil	134	0	134	69	94.20	1,197	731	63.75
Chile	36	0	36	27	33.33	357	245	45.71
Colombia	51	0	51	22	131.82	416	273	52.38
Others	44	0	44	53	(16.98)	441	286	54.20
AFRICA	1,286	0	1,286	1,059	21.44	7,637	4,585	66.56
North Africa	342	0	342	338	1.18	1,845	1,424	29.56
Morocco	87	0	87	81	7.41	557	415	34.22
Sudan	122	0	122	157	(22.29)	488	464	5.17
Others	133	0	133	100	33.00	800	545	46.79
Sub-Saharan Africa	944	0	944	721	30.93	5,792	3,161	83.23
Kenya	128	0	128	44	190.91	433	269	60.97
Mauritius	33	0	33	21	57.14	286	163	75.46
Nigeria	09	0	09	09	0.00	34	46	(26.09)
South Africa	333	0	333	232	43.53	2,581	1,514	70.48
Others	441	0	441	415	6.27	2,458	1,169	110.27



Monthly Tourist Arrivals Report July 2024

	July 2024			Tourist Arrivals July 2023	% Change July (24/23) 2024	Total Tourist Arrivals Up to July 2024	Total Tourist Arrivals Up to July 2023	% Change Up to July (24/23) 2024
	By Air	By Sea	Total					
ASIA & PACIFIC	79,722	1,303	81,025	55,102	47.05	478,536	278,616	71.75
North East Asia	16,906	0	16,906	12,566	34.54	103,317	44,042	134.59
China	13,040	0	13,040	10,062	29.60	76,856	29,924	156.84
Japan	2,202	0	2,202	1,454	51.44	14,632	8,425	73.67
South Korea	1,009	0	1,009	628	60.67	6,164	3,548	73.73
Taiwan	645	0	645	411	56.93	5,593	2,084	168.38
Others	10	0	10	11	(9.09)	72	61	18.03
South East Asia	4,222	0	4,222	3,254	29.75	30,314	18,050	67.94
Cambodia	24	0	24	47	(48.94)	932	344	170.93
Indonesia	275	0	275	249	10.44	1,814	1,210	49.92
Malaysia	1,596	0	1,596	915	74.43	10,528	5,153	104.31
Myanmar	194	0	194	93	108.60	836	424	97.17
Philippines	500	0	500	448	11.61	3,114	2,306	35.04
Singapore	853	0	853	656	30.03	6,741	4,547	48.25
Thailand	483	0	483	633	(23.70)	4,413	2,705	63.14
Vietnam	279	0	279	195	43.08	1,781	1,265	40.79
Others	18	0	18	18	0.00	155	96	61.46
Oceania	8,407	0	8,407	6,082	38.23	54,288	36,381	49.22
Australia	7,371	0	7,371	5,323	38.47	48,117	32,221	49.33
New Zealand	1,017	0	1,017	734	38.56	5,981	4,037	48.15
Others	19	0	19	25	(24.00)	190	123	54.47
South Asia	50,187	1,303	51,490	33,200	55.09	290,617	180,143	61.33
Afghanistan	15	0	15	30	(50.00)	102	73	39.73
Bangladesh	4,607	0	4,607	1,520	203.09	20,239	6,557	208.66
Bhutan	29	0	29	41	(29.27)	408	201	102.99
India	39,870	1,303	41,173	23,461	75.50	225,641	139,654	61.57
Iran	339	0	339	264	28.41	6,559	6,237	5.16
Maldives	3,097	0	3,097	6,286	(50.73)	26,900	20,195	33.20
Nepal	382	0	382	375	1.87	2,590	2,170	19.35
Pakistan	1,848	0	1,848	1,223	51.10	8,178	5,056	61.75
EUROPE	90,783	10	90,793	72,134	25.87	625,001	411,379	51.93
Northern Europe	26,328	10	26,338	22,056	19.41	143,386	88,674	61.70
Denmark	2,147	0	2,147	1,721	24.75	10,292	6,562	56.84
Finland	94	0	94	106	(11.32)	2,488	1,072	132.09
Norway	1,800	0	1,800	1,643	9.56	7,767	5,668	37.03
Sweden	716	0	716	560	27.86	7,254	4,316	68.07
United Kingdom	20,827	10	20,837	17,482	19.19	110,189	68,304	61.32
Others	744	0	744	544	36.76	5,396	2,752	96.08



Monthly Tourist Arrivals Report July 2024

	July 2024			Tourist Arrivals July 2023	% Change July (24/23) 2024	Total Tourist Arrivals Up to July 2024	Total Tourist Arrivals Up to July 2023	% Change Up to July (24/2) 2024
	By Air	By Sea	Total					
Western Europe	41,791	0	41,791	29,879	39.87	209,909	129,074	62.63
Austria	1,722	0	1,722	979	75.89	10,173	5,129	98.34
Belgium	3,435	0	3,435	2,259	52.06	10,225	5,846	74.91
France	9,405	0	9,405	7,432	26.55	58,745	35,020	67.75
Germany	10,618	0	10,618	8,013	32.51	80,688	53,210	51.64
Netherlands	11,431	0	11,431	6,796	68.20	30,897	15,291	102.06
Switzerland	5,089	0	5,089	4,329	17.56	18,643	14,203	31.26
Others	91	0	91	71	28.17	538	375	43.47
Central/ Eastern Europe	10,056	0	10,056	11,829	(14.99)	208,507	156,006	33.65
Belarus	203	0	203	453	(55.19)	7,216	5,796	24.50
Czech Republic	1,133	0	1,133	789	43.60	13,576	5,598	142.52
Estonia	24	0	24	15	60.00	2,799	701	299.29
Hungary	210	0	210	200	5.00	4,125	1,767	133.45
Kazakhstan	168	0	168	106	58.49	8,779	2,206	297.96
Lithuania	174	0	174	113	53.98	4,552	1,406	223.76
Poland	2,257	0	2,257	999	125.93	26,153	7,340	256.31
Romania	264	0	264	172	53.49	3,689	1,852	99.19
Russia	4,578	0	4,578	8,009	(42.84)	118,682	118,284	0.34
Slovakia	292	0	292	254	14.96	4,277	2,506	70.67
Ukraine	214	0	214	185	15.68	4,645	2,840	63.56
Others	539	0	539	558	(3.41)	10,014	5,710	75.38
Southern/ Mediterranean Europe	12,608	0	12,608	8,346	51.07	63,199	37,625	67.97
Greece	119	0	119	101	17.82	1,473	792	85.98
Italy	3,630	0	3,630	2,370	53.16	17,858	9,857	81.17
Portugal	351	0	351	282	24.47	3,287	1,901	72.91
Spain	4,224	0	4,224	2,751	53.54	16,586	9,208	80.13
Turkey	403	0	403	251	60.56	4,032	1,791	125.13
Israel	2,962	0	2,962	1,919	54.35	14,125	10,891	29.69
Others	919	0	919	672	36.76	5,838	3,185	83.30
MIDDLE EAST	4,487	0	4,487	4,601	(2.48)	17,961	16,624	8.04
Bahrain	162	0	162	204	(20.59)	744	764	(2.62)
Egypt	326	0	326	292	11.64	2,343	1,578	48.48
Iraq	119	0	119	100	19.00	520	546	(4.76)
Jordan	275	0	275	545	(49.54)	1,602	2,299	(30.32)
Kuwait	198	0	198	259	(23.55)	1,243	1,214	2.39
Lebanon	283	0	283	321	(11.84)	2,168	1,882	15.20
Oman	685	0	685	427	60.42	1,651	1,271	29.90
Qatar	156	0	156	179	(12.85)	476	558	(14.70)
Saudi Arabia	1,276	0	1,276	1,564	(18.41)	3,990	4,303	(7.27)
United Arab Emirates	836	0	836	576	45.14	2,552	1,658	53.92
Others	171	0	171	134	27.61	672	551	21.96
TOTAL	186,476	1,334	187,810	143,039	31.30	1,198,059	767,913	56.01



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

An examination of tourists' departure airports and preferred airlines for travel to Sri Lanka reveals the essential role of air travel in the country's tourism sector. Approximately 39% of tourists passed through Dubai, Doha, and Chennai airports as their last transit points before reaching Sri Lanka. Furthermore, the leading airlines Sri Lankan Airlines, Qatar Airways, and Emirates collectively made up 49% of all tourist arrivals. This highlights the crucial impact of air travel, with specific airports and airlines handling a significant share of the tourist traffic to Sri Lanka.

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

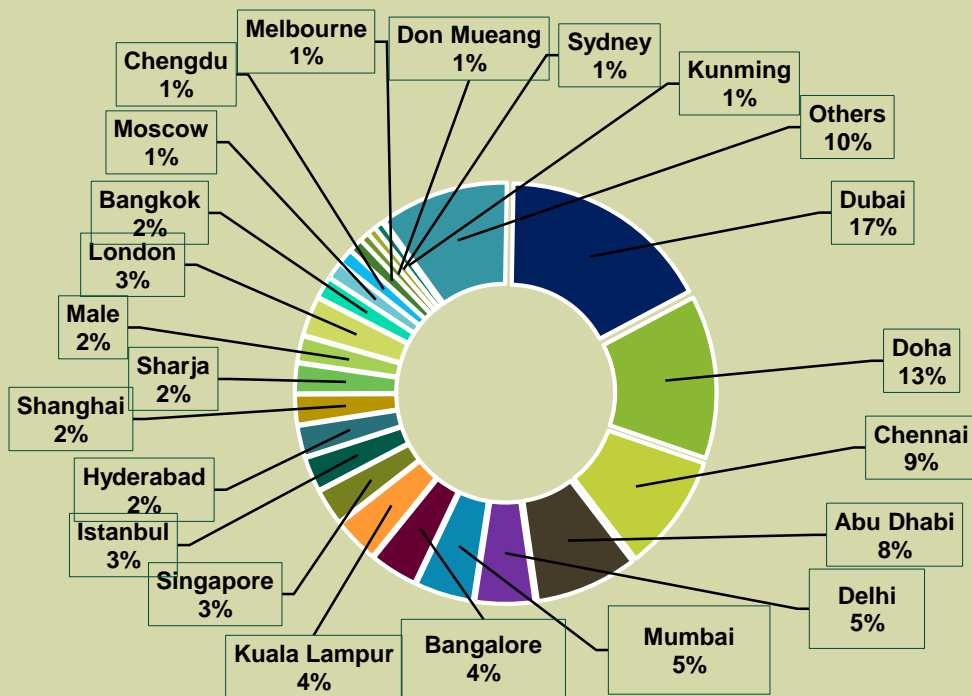
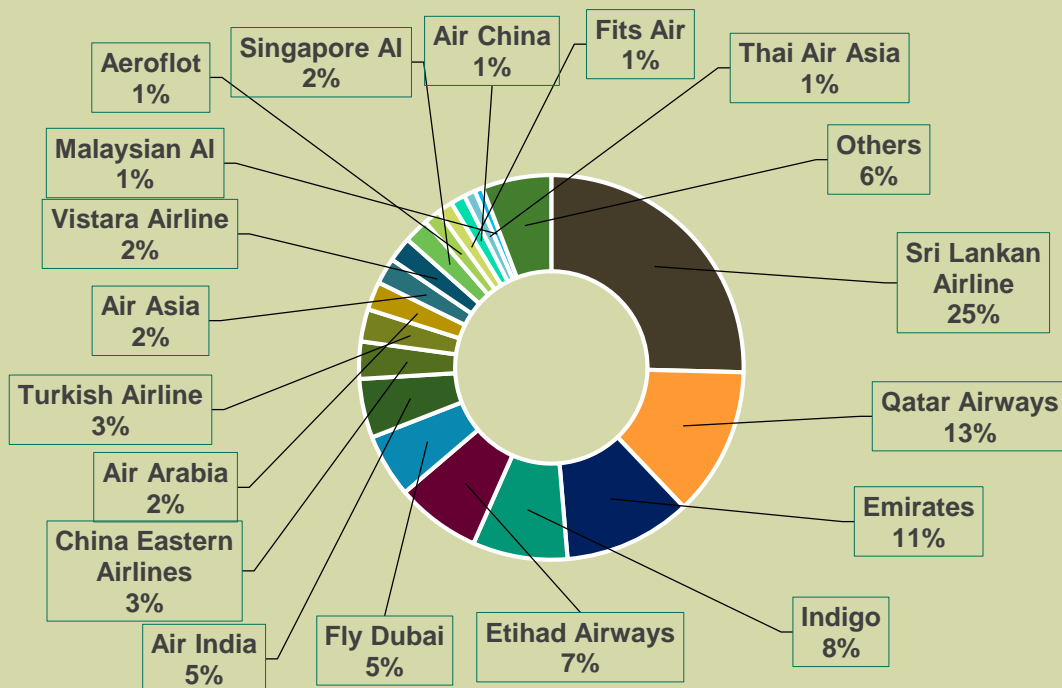


Chart 7. Main airlines to Sri Lanka, July 2024





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

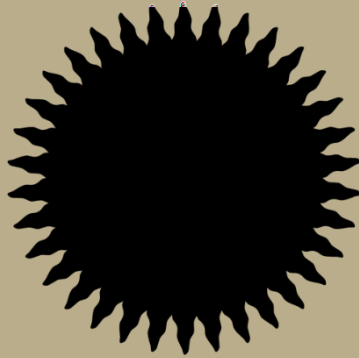
July 2023

The choice of airlines significantly impacts tourists' experiences when traveling to Sri Lanka, reflecting their nationalities and airline preferences. Indian tourists often select Sri Lankan Airlines and IndiGo, while Chinese travelers favour China Eastern Airlines. On the other hand, Sri Lankan Airlines is commonly chosen by visitors from the UK, Australia, Switzerland, and Canada. Dutch tourists generally prefer Emirates, whereas Qatar Airways is a popular choice among travelers from Germany, France, and the United States.

Chennai is the primary departure airport for travelers from India, while Doha acts as the main gateway for tourists from the United Kingdom, Germany, France, and the USA. Australian and Chinese travelers commonly depart from Singapore and Shanghai airports, respectively. Dubai is a key final departure point for visitors from the Netherlands, Switzerland, and Canada. This underscores the critical role of accessibility in enhancing Sri Lanka's tourism, demonstrating how travelers' choices of airlines and airports are influenced by their home countries, and highlighting the importance of smooth travel connections in attracting visitors.

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

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



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