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## **Introduction**

The following document provides a synthesis of the most recent November, 2024 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 30<sup>th</sup> November 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 November, Sri Lanka welcomed 184,158 tourists, marking a 35.5% increase from October and a significant 21.6% rise compared to November 2023. By the end of the month, the total number of arrivals reached 1,804,873, reflecting a consistent recovery in the tourism sector. Despite a conservative target of 182,693 for November, the actual figures exceeded expectations, showcasing robust demand and a positive trend in the sector's growth this year.

In November, Sri Lanka's main tourism markets were India, Russia, the United Kingdom, Germany, and China, with notable

growth in tourist arrivals from these countries driving the sector's growth.

According to the latest UNWTO Barometer, international tourist arrivals (overnight visitors) reached approximately 790 million in the first seven months of 2024, marking an 11% increase from 2023, though still 4% below 2019 levels. Geopolitical uncertainties, including the Russian invasion of Ukraine, the Hamas-Israel conflict, and other rising tensions, continue to pose significant risks for the global tourism sector. However, the UN Tourism Confidence Index indicates optimistic expectations for the remainder of the year.

**Table 1. Monthly tourist arrivals, November 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		
<b>TOTAL</b>	<b>1,487,303</b>	<b>1,804,873</b>	



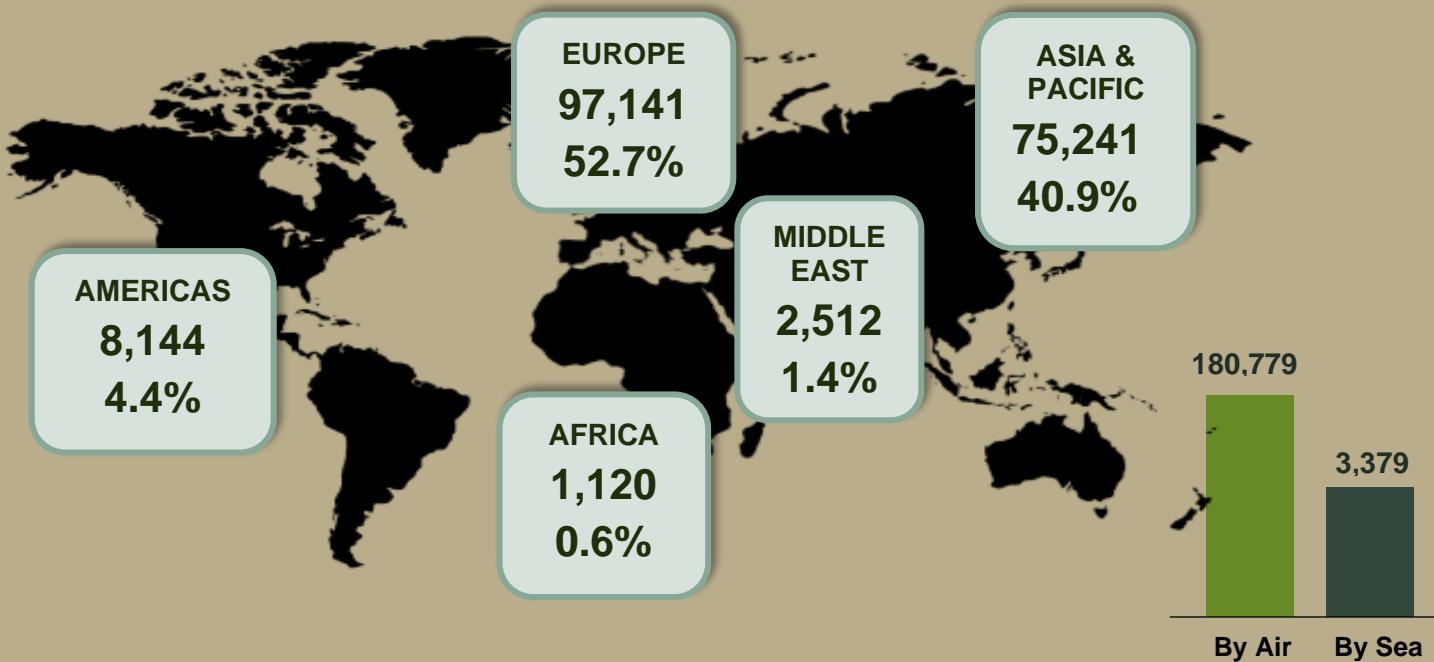
**Tourist Arrivals | November 2024**

**184.158**

# Tourist arrivals by region and percentage share

**November 2024**

**Map 1. Tourist arrivals by region and percentage share**



Europe has become a dominant force in Sri Lanka's tourism industry, accounting for 52.7% of total visitors, while Asia and the Pacific follow closely with 40.9% of arrivals. This shift underscores the changing dynamics within the sector, with both regions playing key roles in driving growth. The rise in demand from key markets such as the Russian Federation, the UK, Germany, and France has significantly supported Sri Lanka's tourism, aided by strong travel connections and favorable conditions. In contrast, the Americas represent 4.4% of arrivals, while the Middle East and Africa contribute 1.4% and 0.6%, respectively, enriching the diversity of the tourism landscape.

The strong presence of visitors from Europe and Asia-Pacific highlights their consistent demand, whereas the relatively smaller contributions from the Americas, the Middle East, and Africa offer valuable opportunities for focused marketing and diversification. Strengthening connections with these regions could further bolster Sri Lanka's tourism industry, improving its resilience and supporting ongoing recovery and growth.

## Top primary markets and top potential markets

### Top primary markets, November 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, November 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.



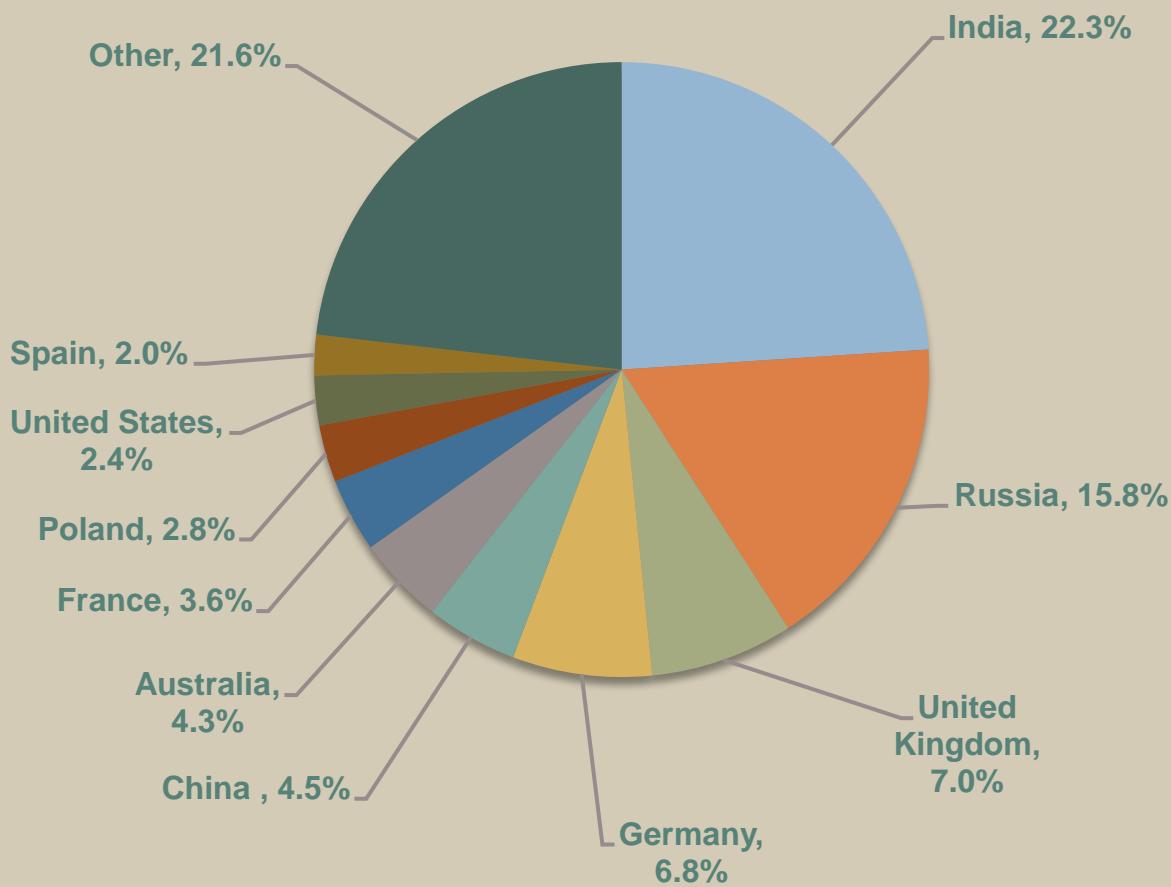


# Top ten source markets

## November 2024

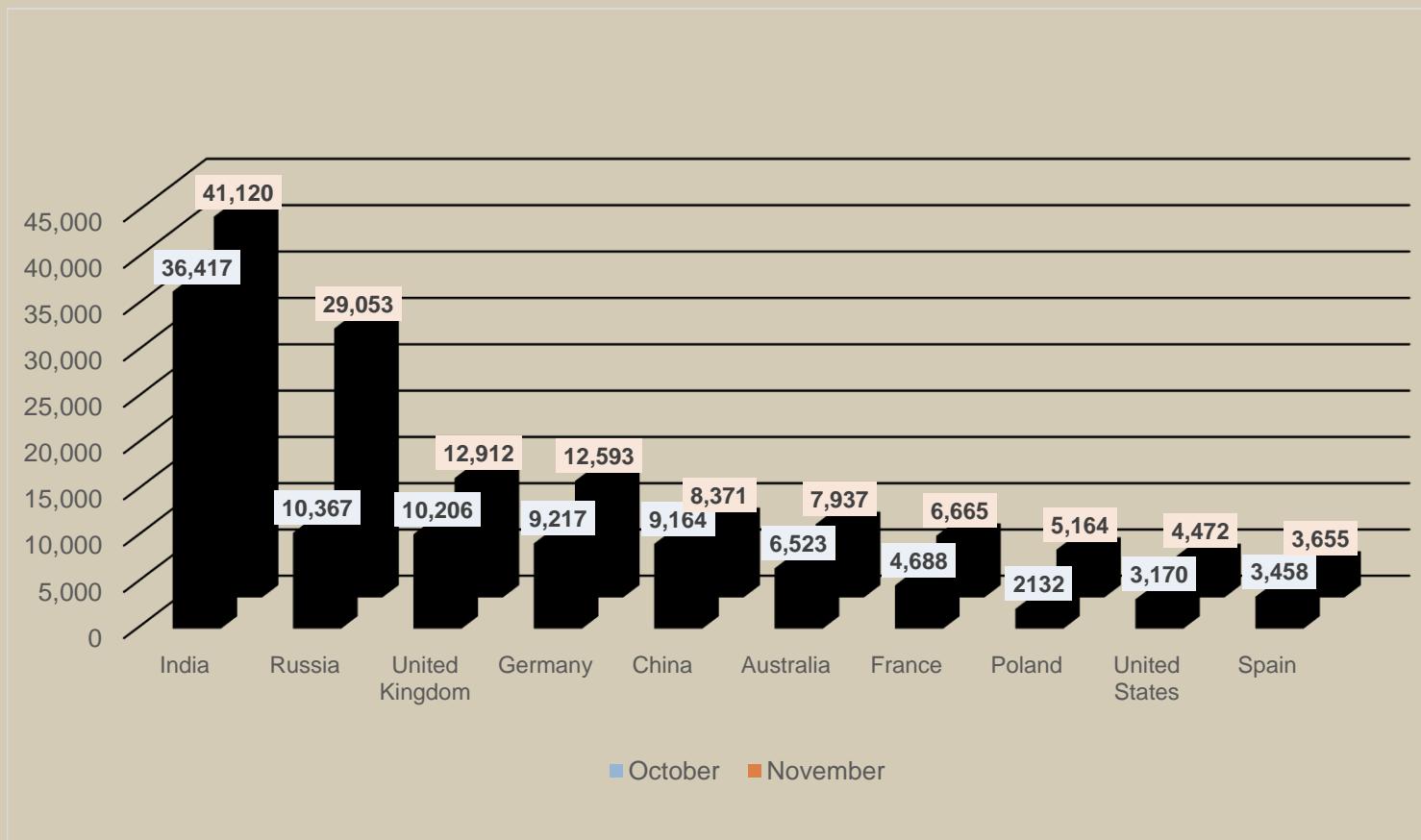
In November, India emerged as the leading source market for tourists to Sri Lanka, accounting for 24% of total arrivals. It was followed by the Russian Federation at 17%, the United Kingdom and Germany at 7% each, and China at 5%. These statistics highlight changing travel patterns, with a significant rise in visitors from emerging markets like Poland and renewed interest from established markets such as France and Spain compared to the previous year. The growing prominence of markets like France signals evolving trends in Sri Lanka's tourism landscape, offering opportunities to broaden and diversify its visitor base.

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



**Table 2. Top ten source markets to Sri Lanka, November**

Rank	Country of Residence	Tourist Arrivals (November 2024)			Tourist Arrivals (November 2023)
		By Air	By Sea	Total	
1	India	40,954	166	41,120	30,339
2	Russian Federation	29,049	04	29,053	24,912
3	United Kingdom	11,974	938	12,912	11,526
4	Germany	11,993	600	12,593	12,331
5	China	8,364	07	8,371	7,226
6	Australia	7,465	472	7,937	7,900
7	France	6,631	34	6,665	3,882
8	Poland	5,148	16	5,164	3,343
9	United States	4,060	412	4,472	4,299
10	Spain	3,646	09	3,655	2,673

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

\* In line with the One China Policy, tourist arrivals from Taiwan are included in the total count of tourist arrivals from China.



# Top ten source markets

## January to November 2024

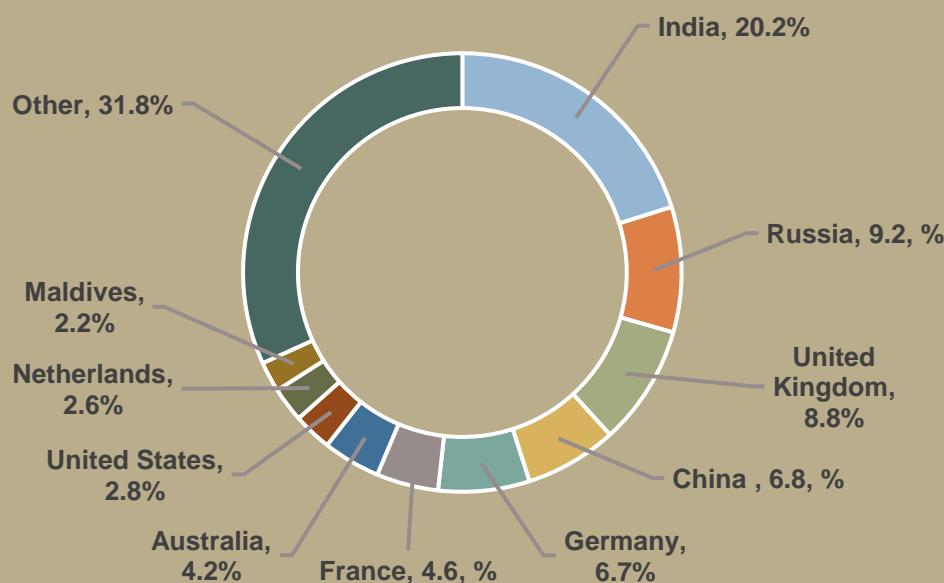
From January to November this year, Sri Lanka saw a significant rise in tourist arrivals from India, the Russian Federation, the UK, China, and Germany, solidifying these countries as the top five international visitor markets. Additionally, visitor numbers from the Netherlands and France showed notable growth, highlighting Sri Lanka's growing popularity in these regions. However, a decline in arrivals from Russia signals a notable shift in the country's visitor demographics.

This mix of growth and decline underscores the need for Sri Lanka to diversify its tourism markets, strengthening resilience and promoting sustainable growth in a shifting global travel environment. Expanding its reach to include emerging and varied markets will enable Sri Lanka to better navigate regional fluctuations and establish a more robust foundation for long-term success in the tourism industry.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ Nov. 2024)	Tourist Arrivals (Jan ~ Nov. 2023)
1	India	364,093	258,871
2	Russian Federation	166,652	167,841
3	United Kingdom	159,582	110,823
4	China	121,757	65,140
5	Germany	121,381	88,792
6	France	82,443	50,742
7	Australia	76,464	56,589
8	United States	51,320	38,300
9	Netherlands	46,223	26,384
10	Maldives	40,319	31,360
11	Other	574,639	382,109
<b>Total</b>		<b>1,804,873</b>	<b>1,276,951</b>

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



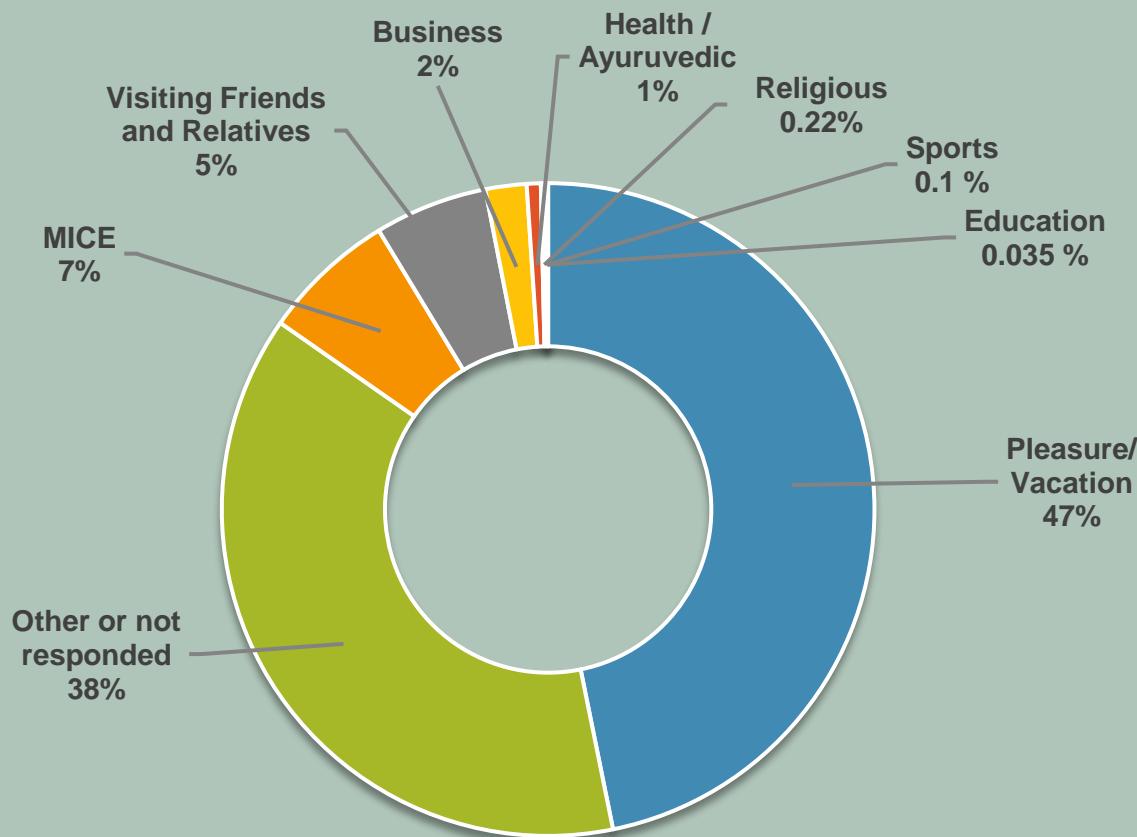
# Tourist arrivals by purpose of visit

## November 2024

A detailed examination of tourist motivations for visiting Sri Lanka identifies several key factors. Leisure and vacations top the list, representing 47% of arrivals and emphasizing Sri Lanka's appeal as a premier destination for recreation. Furthermore, 5% of visitors travel to reconnect with friends and family, highlighting its attractiveness for personal and social engagements.

Only 2% of tourists visit Sri Lanka for business purposes, reflecting a relatively small focus on professional travel. However, 7% of arrivals are attributed to MICE (Meetings, Incentives, Conferences, and Exhibitions), showcasing Sri Lanka's increasing prominence as a hub for corporate events. Additionally, niche segments are gaining traction, with 1% of visitors seeking Ayurvedic or wellness experiences and 0.1% arriving for sports and educational pursuits. These statistics highlight Sri Lanka's diverse tourism offerings and its potential to expand into emerging markets such as wellness tourism, MICE, and specialized activities, further diversifying its visitor base.

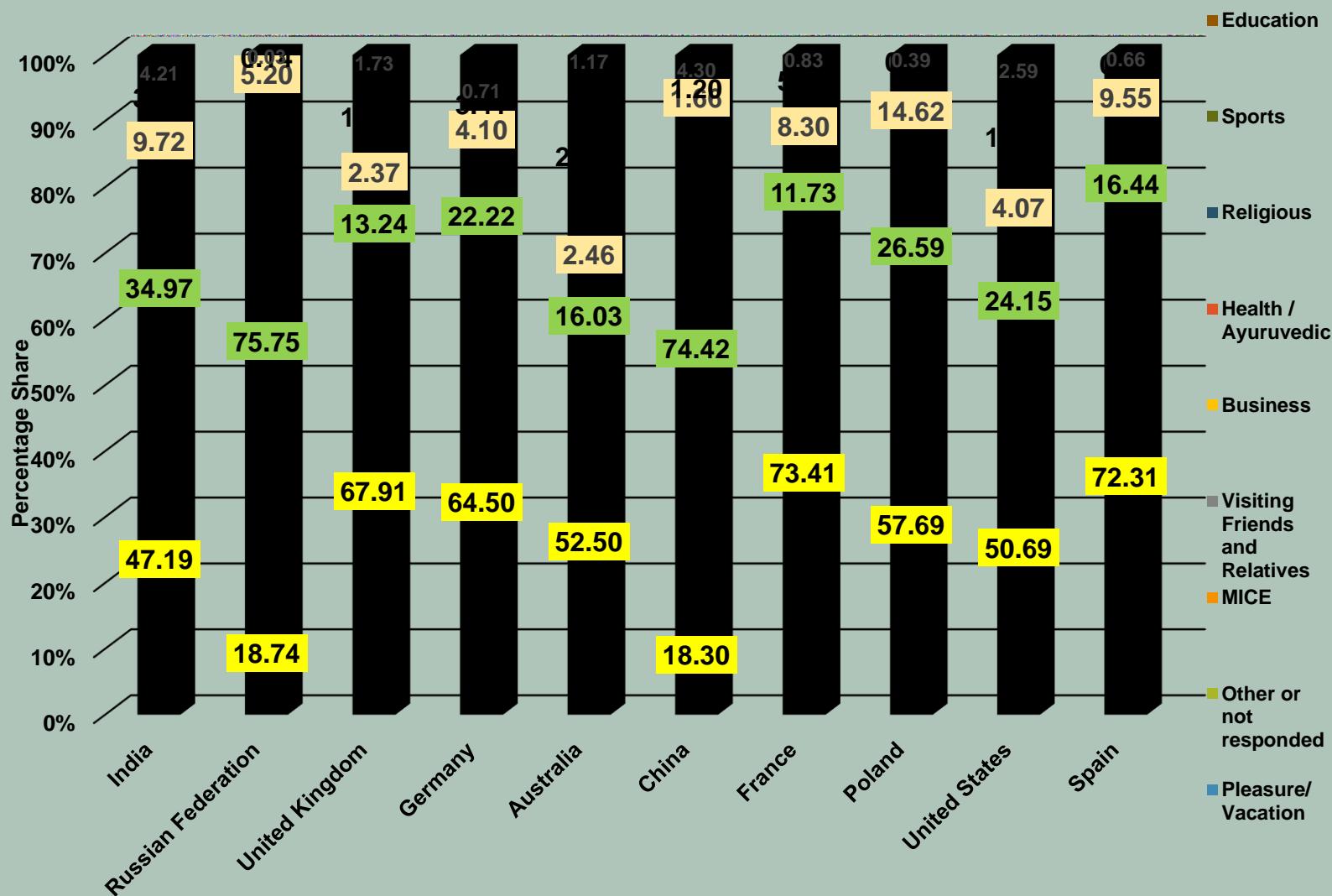
**Chart 4: Purpose of visit**



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 include tourists who had visited for other purposes also.

### Chart 5: Purpose of visit vs main source markets

Percentage share of purpose of visit - 2024 ( Month of November)



An analysis of the purposes behind tourist visits from key markets reveals that leisure is the primary motivator for visiting Sri Lanka. Among Indian tourists, 47.19% came for pleasure, while 9.7% visited for MICE purposes. For UK tourists, 14.36% came for VFR (Visiting Friends and Relatives), and 67.9% traveled for pleasure or vacation. German visitors showed an interest in health and Ayurvedic tourism, with 0.71% selecting this as their purpose, while 64.5% visited for leisure. In Australia, 27.4% of tourists came for VFR purposes. Polish visitors showed a preference for MICE activities, with 14.62% citing this reason. Among US tourists, 17.44% came for VFR, and 72.3% of Spanish visitors traveled for pleasure or vacation.





# Catalysts of Change: The Transformative Impact of the Sri Lanka Tourism Awards 2024

The Sri Lanka Tourism Awards 2024, set for December, is a key event in the nation's tourism calendar. It aims to honour achievements across multiple categories, promoting innovation, sustainability, and excellence in service within the tourism industry. Lessons from other countries illustrate the powerful role tourism awards play in enhancing regional tourism, supporting sustainability, and safeguarding cultural heritage. For example, Spain's "Tourism Excellence Awards" have boosted local traditions and gastronomy, drawing niche markets. New Zealand's eco-focused tourism awards have integrated sustainable practices within the sector, aligning growth with environmental goals. Thailand's "Amazing Thailand Tourism Awards" have helped solidify the country's position as a global tourism leader, spotlighting unique cultural and luxury travel experiences. In Australia, the recognition of Indigenous tourism initiatives has promoted cultural preservation and provided economic benefits to Indigenous communities. Launched in 2008, the Sri Lanka Tourism Awards have the potential to fulfill several key roles.

## Raising Industry Standards:

Recognizing accomplishments in accommodation, tourist restaurants, and specified tourist services motivates service providers to enhance the quality of their offerings. This ripple effect improves the overall visitor experience, making Sri Lanka a more competitive global destination.

## Promoting Sustainability:

The inclusion of awards for sustainable practices highlights the importance of balancing tourism growth with environmental stewardship. Initiatives like reducing carbon footprints, preserving biodiversity, and promoting eco-tourism become focal points for stakeholders aiming for recognition.

## Encouraging Economic Synergies:

Categories such as MICE, airlines' contributions, and cruise line operators emphasize collaboration across industries. By recognizing the interdependence of sectors, the awards drive collective efforts that stimulate economic growth through improved connectivity and services.

## Nurturing Talent and Education:

Honouring efforts in tourism education and training ensures that the next generation of industry professionals are equipped with the skills and knowledge necessary to adapt to evolving market demands.

## Fostering Excellence in Service:

The award for excellence in service recognizes the front-line professionals whose dedication and expertise directly impact visitor satisfaction, ensuring that Sri Lanka continues to uphold its reputation for warm hospitality.

By acknowledging achievements across these categories, the awards serve as both a benchmark and an inspiration for stakeholders to innovate, collaborate, and achieve excellence. This event not only celebrates current successes but also sets the stage for sustained growth and global recognition of Sri Lanka as a leading travel destination.



## International tourist arrivals by country of residence

	November 2024			Tourist Arrivals November 2023	% Change November (24/23)	Total Tourist Arrivals Up to November 2024	Total Tourist Arrivals Up to November 2023	% Change Up to November (24/23)					
	Tourist Arrivals												
	By Air	By Sea	Total										
<b>AMERICAS</b>	7,348	796	8,144	7,448	9.3	95,960	82,858	15.8					
<b>North America</b>	6,859	785	7,644	7,059	8.3	90,682	79,249	14.4					
Canada	2,726	359	3,085	2,678	15.2	38,431	40,304	(4.6)					
Mexico	73	14	87	82	6.1	931	645	44.3					
United States	4,060	412	4,472	4,299	4.0	51,320	38,300	34.0					
<b>Caribbean &amp; Central America</b>	97	1	98	73	34.2	926	605	53.1					
Costa Rica	09	0	09	06	50.0	87	52	67.3					
Jamaica	04	01	05	05	0.0	91	47	93.6					
Others	84	0	84	62	35.5	748	506	47.8					
<b>South America</b>	392	10	402	316	27.2	4,352	3,004	44.9					
Argentina	66	0	66	56	17.9	832	620	34.2					
Brazil	183	03	186	117	59.0	1,737	1,101	57.8					
Chile	32	02	34	31	9.7	505	353	43.1					
Colombia	50	02	52	56	(7.1)	607	460	32.0					
Others	61	03	64	56	14.3	671	470	42.8					
<b>AFRICA</b>	1,113	7	1,120	860	30.2	11,930	7,919	50.7					
<b>North Africa</b>	255	0	255	283	(9.9)	3,009	2,286	31.6					
Morocco	74	0	74	64	15.6	921	655	40.6					
Sudan	111	0	111	147	(24.5)	854	769	11.1					
Others	70	0	70	72	(2.8)	1,234	862	43.2					
<b>Sub-Saharan Africa</b>	858	7	865	577	49.9	8,921	5,633	58.4					
Kenya	62	0	62	30	106.7	670	487	37.6					
Mauritius	118	02	120	40	200.0	504	277	81.9					
Nigeria	19	0	19	13	46.2	83	87	(4.6)					
South Africa	317	03	320	274	16.8	3,783	2,543	48.8					
Others	342	02	344	220	56.4	3,881	2,239	73.3					



	November 2024			Tourist Arrivals November 2023	% Change November (24/23)	Total Tourist Arrivals Up to November 2024	Total Tourist Arrivals Up to November 2023	% Change Up to November (24/23)
	By Air	By Sea	Total					
<b>ASIA &amp; PACIFIC</b>	<b>74,502</b>	<b>729</b>	<b>75,241</b>	<b>60,954</b>	<b>23.4</b>	<b>758,878</b>	<b>511,676</b>	<b>48.3</b>
<b>North East Asia</b>	<b>11,736</b>	<b>6</b>	<b>11,752</b>	<b>10,982</b>	<b>7.0</b>	<b>158,231</b>	<b>88,626</b>	<b>78.5</b>
China (add Taiwan)	8,364	07	8,371	7,226	22.9	121,757	65,140	88.5
Japan	2,177	01	2,178	2,875	(76.5)	26,830	17,029	(50.2)
South Korea	1,180	08	1,188	867	151.2	9,534	6,341	323.1
Others	15	0	15	14	7.1	110	116	(5.2)
Taiwan (pr. of China)	1,180	08	1,188	553	114.8	9,534	4,625	106.1
<b>South East Asia</b>	<b>4,685</b>	<b>11</b>	<b>4,696</b>	<b>3,652</b>	<b>28.6</b>	<b>47,414</b>	<b>30,967</b>	<b>53.1</b>
Cambodia	53	0	53	42	26.2	1,124	491	128.9
Indonesia	531	01	532	217	145.2	3,365	2,075	62.2
Malaysia	1,466	01	1,467	1,084	35.3	16,533	9,156	80.6
Myanmar	65	0	65	138	(52.9)	1,433	1,027	39.5
Philippines	396	02	398	296	34.5	4,782	3,716	28.7
Singapore	1,193	04	1,197	1,140	5.0	10,580	7,950	33.1
Thailand	619	03	622	380	63.7	6,598	4,285	54.0
Vietnam	346	0	346	335	3.3	2,805	2,105	33.3
Others	16	0	16	20	(20.0)	194	162	19.8
<b>Oceania</b>	<b>8,347</b>	<b>546</b>	<b>8,893</b>	<b>8,673</b>	<b>2.5</b>	<b>86,518</b>	<b>63,381</b>	<b>36.5</b>
Australia	7,465	472	7,937	7,900	0.5	76,464	56,589	35.1
New Zealand	841	74	915	749	22.2	9,720	6,570	47.9
Others	41	0	41	24	70.8	334	222	50.5
<b>South Asia</b>	<b>49,734</b>	<b>166</b>	<b>49,900</b>	<b>37,647</b>	<b>32.5</b>	<b>466,715</b>	<b>328,702</b>	<b>42.0</b>
Afghanistan	05	0	05	25	(80.0)	137	165	(17.0)
Bangladesh	3,375	0	3,375	2,674	26.2	35,401	14,661	141.5
Bhutan	80	0	80	33	142.4	625	365	71.2
India	40,954	166	41,120	30,339	35.5	364,093	258,871	40.6
Iran	804	0	804	783	2.7	10,064	9,422	6.8
Maldives	2,982	0	2,982	2,420	23.2	40,319	31,360	28.6
Nepal	386	0	386	411	(6.1)	4,014	4,282	(6.3)
Pakistan	1,148	0	1,148	962	19.3	12,062	9,576	26.0
<b>EUROPE</b>	<b>95,304</b>	<b>2,672</b>	<b>97,141</b>	<b>80,146</b>	<b>21.2</b>	<b>911,533</b>	<b>649,14</b>	<b>40.4</b>
<b>Northern Europe</b>	<b>16,156</b>	<b>1,837</b>	<b>17,158</b>	<b>14,720</b>	<b>16.6</b>	<b>203,917</b>	<b>140,263</b>	<b>45.4</b>
Denmark	1,025	11	1,036	764	35.6	13,239	8,906	48.7
Finland	534	0	534	352	51.7	3,502	1,814	93.1
Norway	783	0	783	622	25.9	9,921	7,712	28.6
Sweden	1,122	10	1,132	948	19.4	9,737	6,525	49.2
United Kingdom	11,974	938	12,912	11,526	12.0	159,582	110,823	44.0
Others	718	43	761	508	49.8	7,936	4,483	77.0

\* In line with the One China Policy, tourist arrivals from Taiwan are included in the total count of tourist arrivals from China.



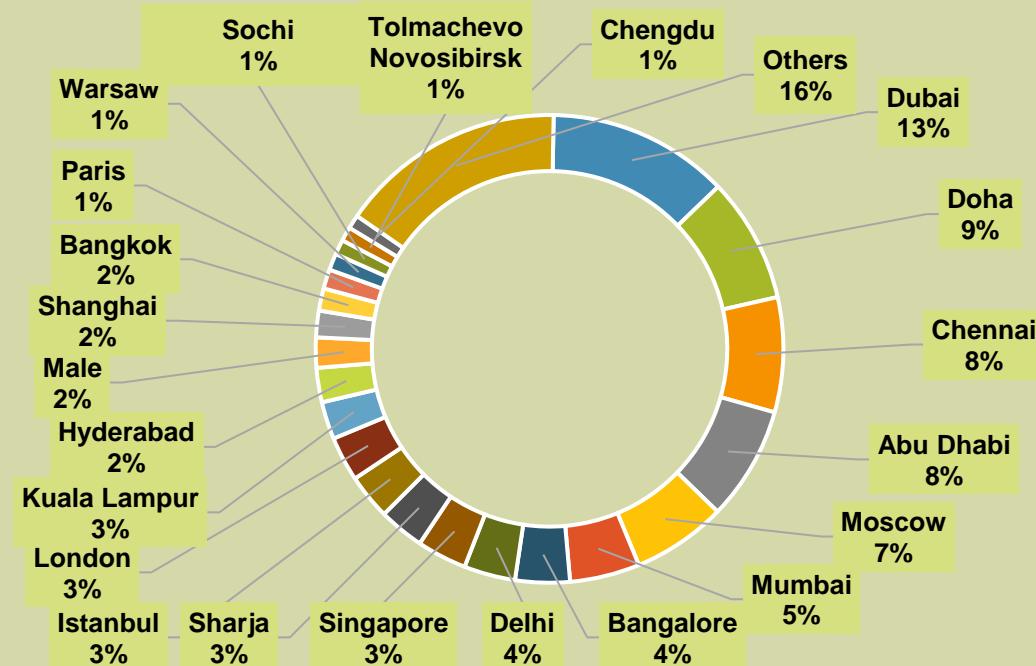
	November 2024			Tourist Arrivals November 2023	% Change Nov: (24/23)	Total Tourist Arrivals Up to Nov: 2024	Total Tourist Arrivals Up to November 2023	% Change Up to Nov: (24/23)
	By Air	By Sea	Total					
<b>Western Europe</b>	<b>27,600</b>	<b>707</b>	<b>28,307</b>	<b>22,571</b>	<b>25.4</b>	<b>308,002</b>	<b>205,763</b>	<b>49.7</b>
Austria	1,673	32	1,705	1,212	40.7	14,702	8,711	68.8
Belgium	1,385	05	1,390	769	80.8	15,882	9,672	64.2
France	6,631	34	6,665	3,882	71.7	82,443	50,742	62.5
Germany	11,993	600	12,593	12,331	2.1	121,381	88,792	36.7
Netherlands	3,374	13	3,387	2,370	42.9	46,223	26,384	75.2
Switzerland	2,467	23	2,490	1,970	26.4	26,583	20,902	27.2
Others	77	0	77	37	108.1	788	560	40.7
<b>Central/ Eastern Europe</b>	<b>42,353</b>	<b>46</b>	<b>42,399</b>	<b>36,395</b>	<b>16.5</b>	<b>285,754</b>	<b>230,341</b>	<b>24.1</b>
Belarus	1,429	0	1,429	1,508	(5.2)	9,525	9,403	1.3
Czech Republic	1,355	02	1,357	2,373	(42.8)	16,980	9,590	77.1
Estonia	234	0	234	229	2.2	3,224	1,102	192.6
Hungary	647	01	648	505	28.3	5,602	2,746	104.0
Kazakhstan	289	0	289	193	49.7	9,451	2,731	246.1
Lithuania	487	01	488	396	23.2	5,528	2,232	147.7
Poland	5,148	16	5,164	3,343	54.5	37,932	14,729	157.5
Romania	511	20	531	516	2.9	5,164	3,137	64.6
Russia	29,049	04	29,053	24,912	16.6	166,652	167,841	(0.7)
Slovakia	736	0	736	617	19.3	5,997	4,002	49.9
Ukraine	553	01	554	479	15.7	5,943	4,040	47.1
Others	1,915	01	1,916	1,324	44.7	13,756	8,788	56.5
<b>Southern/ Mediterranean Europe</b>	<b>9,195</b>	<b>82</b>	<b>9,277</b>	<b>6,460</b>	<b>43.6</b>	<b>113,860</b>	<b>72,776</b>	<b>56.5</b>
Greece	254	06	260	187	39.0	2,320	1,472	57.6
Italy	2,229	08	2,237	1,662	34.6	33,014	18,853	75.1
Portugal	813	43	856	557	53.7	5,853	3,416	71.3
Spain	3,646	09	3,655	2,673	36.7	35,127	21,238	65.4
Turkey	614	06	620	566	9.5	5,870	3,224	82.1
Israel	878	0	878	187	369.5	22,791	19,096	19.3
Others	761	10	771	628	22.8	8,885	5,477	62.2
<b>MIDDLE EAST</b>	<b>2,512</b>	<b>0</b>	<b>2,512</b>	<b>2,088</b>	<b>20.3</b>	<b>26,572</b>	<b>25,355</b>	<b>4.8</b>
Bahrain	86	0	86	82	4.9	1,088	1,128	(3.5)
Egypt	456	0	456	344	32.6	3,578	2,619	36.6
Iraq	79	0	79	37	113.5	916	808	13.4
Jordan	224	0	224	152	47.4	2,465	3,300	(25.3)
Kuwait	96	0	96	66	45.5	1,735	1,805	(3.9)
Lebanon	332	0	332	171	94.2	3,017	2,863	5.4
Oman	170	0	170	122	39.3	2,634	1,930	36.5
Qatar	34	0	34	27	25.9	664	789	(15.8)
Saudi Arabia	644	0	644	872	(26.1)	5,534	6,504	(14.9)
United Arab Emirates	282	0	282	148	90.5	3,970	2,603	52.5
Others	109	0	109	67	62.7	971	1,006	(3.5)
<b>TOTAL</b>	<b>180,779</b>	<b>3,379</b>	<b>184,158</b>	<b>151,496</b>	<b>21.6</b>	<b>1,804,873</b>	<b>1,276,951</b>	<b>41.3</b>

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

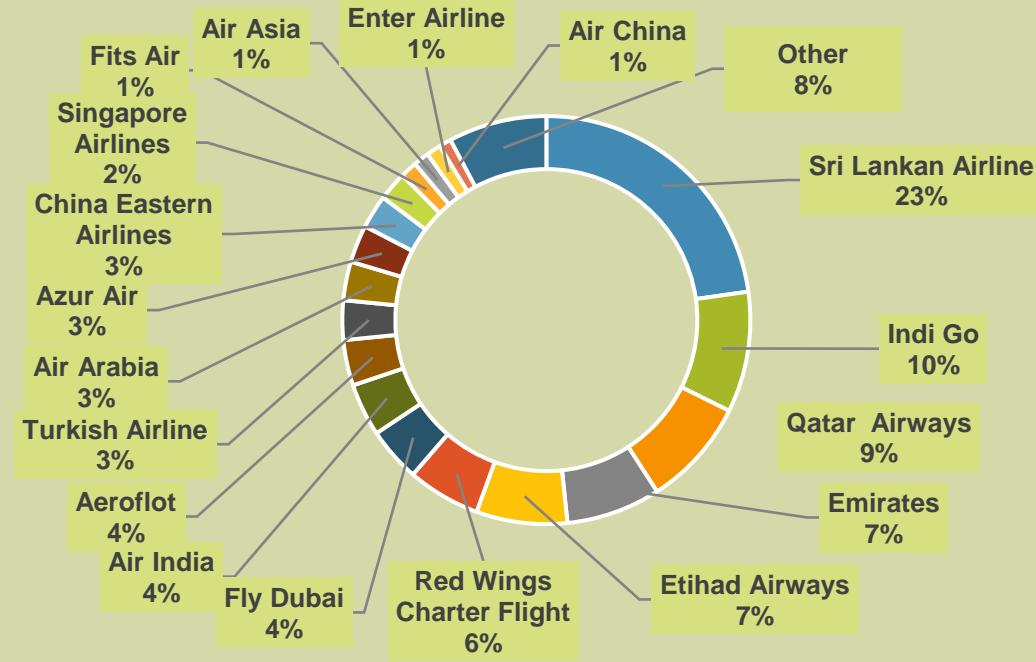
An examination of travel trends among tourists visiting Sri Lanka highlights the critical importance of air travel in bolstering the country's tourism sector. Approximately 30% of travelers completed their final layovers in Dubai, Doha, and Chennai before reaching Sri Lanka. Furthermore, Sri Lankan Airlines, IndiGo, and Qatar Airways collectively facilitated 42% of all tourist arrivals, emphasizing the significant role of these airlines and transit hubs in attracting visitors to the island.

The concentration of tourist arrivals via specific airlines and key transit hubs highlights the critical role of strategic air connectivity and partnerships in shaping Sri Lanka's tourism landscape. Enhancing these connections and fostering strong collaborations with major airlines can improve accessibility and drive sustainable growth in the tourism industry.

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



**Chart 7. Main airlines to Sri Lanka, November 2024**





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

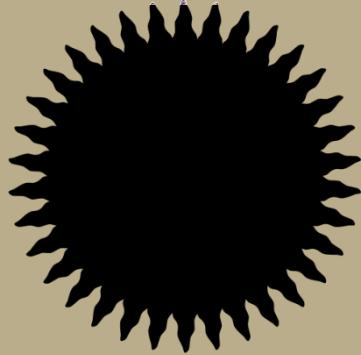
## November 2024

The airline preferences of travelers significantly influence their experiences in Sri Lanka and are often linked to their country of origin. Indian tourists commonly choose Sri Lankan Airlines and IndiGo, leveraging the strong air connectivity between India and Sri Lanka. Chinese visitors primarily fly with China Eastern Airlines. Meanwhile, Sri Lankan Airlines remains a popular choice among travelers from the UK and Australia. Qatar Airways, with its Doha hub offering convenient connections, is favored by visitors from the United States, Germany, France, and Spain.

Chennai is the primary departure point for Indian travelers, while Doha acts as the main hub for those coming from France, the US, and Spain. Moscow and London are key transit cities for travelers from the Russian Federation and the UK. This underscores the significance of accessibility in driving Sri Lanka's tourism sector, as travelers' decisions are largely influenced by their departure locations and the available routes. Maintaining strong travel connections and enhancing links with these major transit hubs is crucial for attracting international visitors and fostering the growth of Sri Lanka's tourism industry.

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

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



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