



YEAR IN REVIEW 2024

Sri Lanka

YOU'LL COME BACK FOR MORE

Sri Lanka Tourism Development Authority

HIGHLIGHT



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- ◆ Tourism investment projects received
- ◆ Investment projects received & approved



HIGHLIGHTS January to June

Tourist arrivals

Tourist arrivals
1,010,249



Tourism revenue

Tourism revenue
1,556.64 * USD Mn
1.5 * billion USD
478.755.8* RS Mn



Average duration of stay

Average duration of stay
8.34* nights



Receipt per tourist per day / average expenditure per day

Receipt per tourist per day / average expenditure per day
181.15 * USD





TOURIST ARRIVALS TO SRI LANKA (January to June)

Chart 01: Tourist arrivals by month, 2023 & 2024

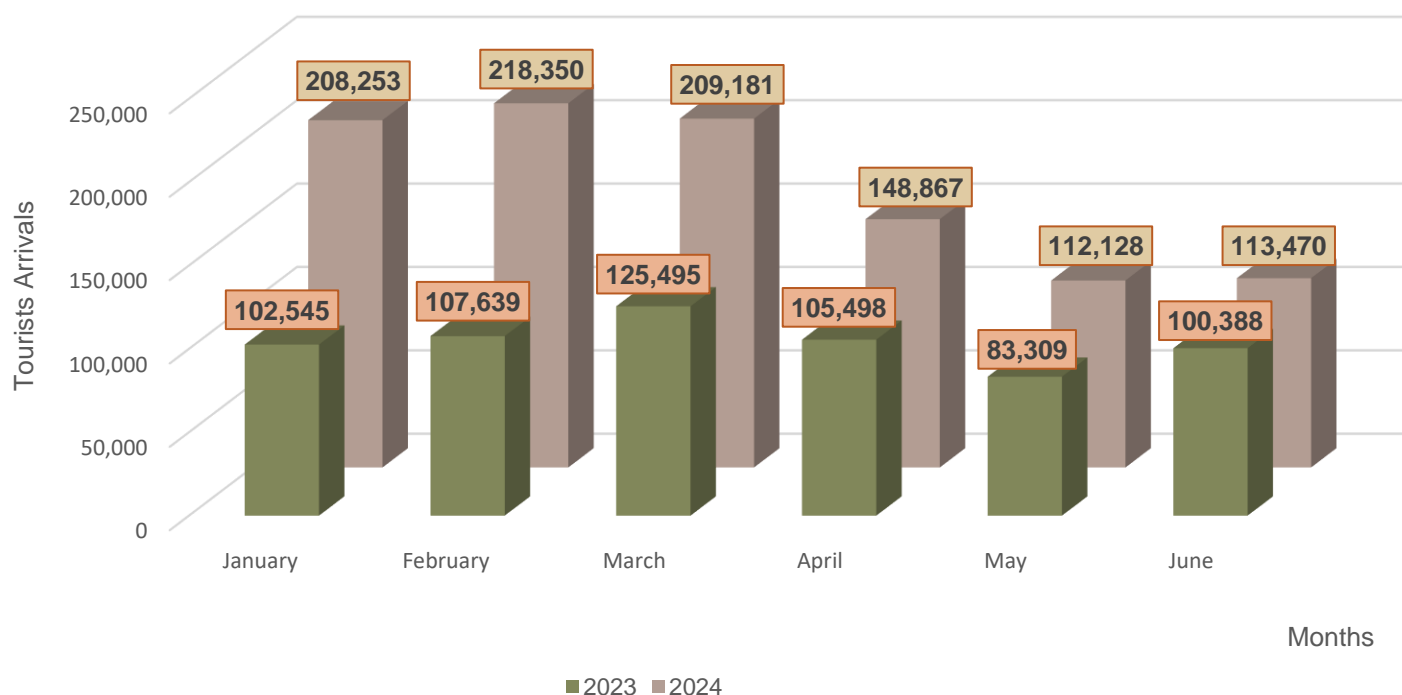


Table 01: Tourist arrivals by month & percentage change, 2023 & 2024

Month	2023	2024	% Cha. 2024/23
January	102,545	208,253	103.08
February	107,639	218,350	102.9
March	125,495	209,181	66.68
April	105,498	148,867	41.1
May	83,309	112,128	34.6
June	100,388	113,470	13
July	143,039	-	-
August	136,405	-	-
September	111,938	-	-
October	109,199	-	-
November	151,496	-	-
December	210,352	-	-
Total	1,487,303	1,010,249	-



Sri Lanka welcomed a total of 1,010,249 tourists in the first six months of 2024, reflecting a substantial growth of 61.6% compared to the same period in 2023. This notable increase indicates a strong recovery in the tourism sector, likely driven by improved global travel conditions, enhanced marketing efforts, and renewed traveler confidence in the destination.

However, when compared to the same period in 2018, the number of arrivals represents a decline of 13.2%. This decrease highlights the ongoing challenges the tourism industry faces in returning to pre-pandemic and pre-crisis levels, influenced by factors such as lingering economic impacts, competition from other destinations, and shifts in global travel trends. Despite the positive growth from 2023, the sector still has some way to go in fully regaining its former momentum seen in 2018.

An analysis of monthly tourist arrivals reveals that January and February experienced the highest growth rates compared to the same months in the previous year, indicating a strong start to 2024. This surge could be attributed to increased travel during the peak tourist season, improved international connectivity, and successful promotional campaigns.

In contrast, June recorded the lowest growth rate, suggesting a slowdown in momentum as the off-peak season set in. This dip could be influenced by seasonal travel patterns and emerging competition from other destinations during this period. Despite the overall positive trend, the variance in monthly growth rates underscores the impact of seasonality and market dynamics on tourism performance.





Tourist arrivals by region



An analysis of tourist arrivals by region shows that Europe remains the leading source of tourists to Sri Lanka, accounting for 52.8% of total arrivals. This dominant share underscores Europe's strong affinity for Sri Lanka as a preferred travel destination, likely driven by cultural ties, effective marketing strategies, and well-established travel routes.

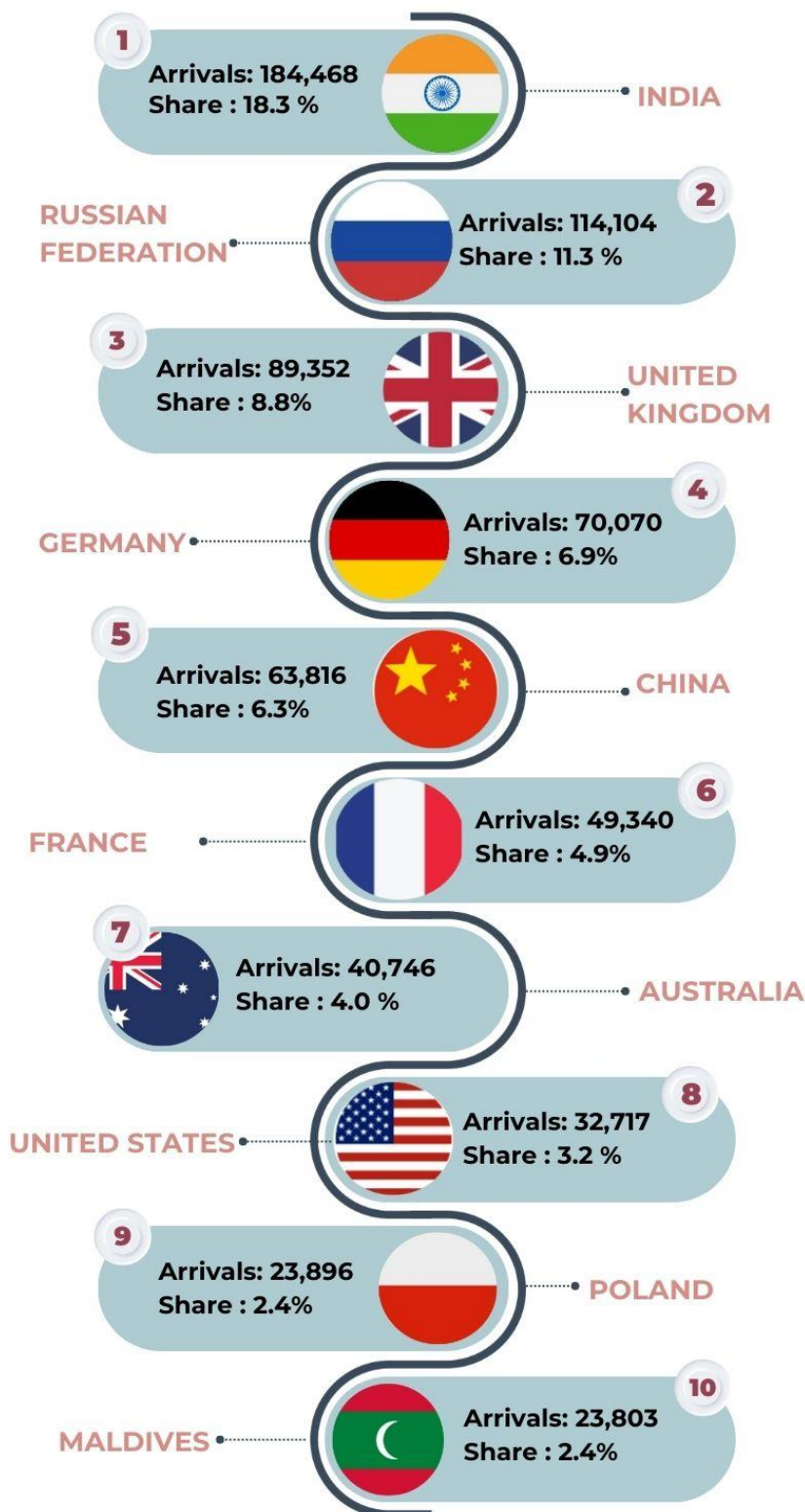
The Asia and Pacific region emerged as the second-largest source market, contributing 39.3% of arrivals. This significant share reflects the growing appeal of Sri Lanka among neighboring countries and highlights the importance of regional connectivity and proximity in driving tourism.

Meanwhile, the Americas accounted for 5.8% of the arrivals, indicating moderate interest from North and South American travelers, possibly influenced by longer travel distances and differing market dynamics. The Middle East and Africa recorded smaller shares of 1.3% and 0.6%, respectively, suggesting that these regions have yet to reach their full potential as source markets, possibly due to limited air connectivity or differing traveler preferences.

Overall, the data highlights the crucial role of regional diversification and targeted marketing strategies to balance the tourism market and mitigate risks associated with over-reliance on specific regions.



Top ten markets to Sri Lanka, January to June 2024



For the first six months of 2024, the top source markets for Sri Lanka were led by India, contributing 18.3% of total tourist arrivals. India's leading position highlights the importance of close geographic proximity, cultural ties, and strong bilateral relations in driving tourism.

The Russian Federation followed with an 11.3% share, reflecting Sri Lanka's growing popularity among Russian travelers, potentially bolstered by targeted marketing and favorable travel conditions between the two countries.

The United Kingdom (8.8%), Germany (6.9%), and China (6.3%) were also significant contributors, underscoring the continued appeal of Sri Lanka as a preferred destination for European and Asian travelers, driven by strong air connectivity and longstanding travel traditions.

Australia (4.0%), France (4.9%), and the United States (3.2%) were also prominent source markets, highlighting Sri Lanka's broad appeal despite the longer travel distances. The presence of a significant diaspora from Sri Lanka in these countries may also contribute to the increased arrivals, as family connections and cultural ties often influence travel decisions. The Maldives and Poland each contributed 2.4%, highlighting their emerging roles in the tourism landscape, possibly due to enhanced travel links and niche tourism segments.

This diverse mix of source markets reflects the global appeal of Sri Lanka but also emphasizes the need to maintain a broad reach in marketing efforts to sustain growth and reduce dependency on any single

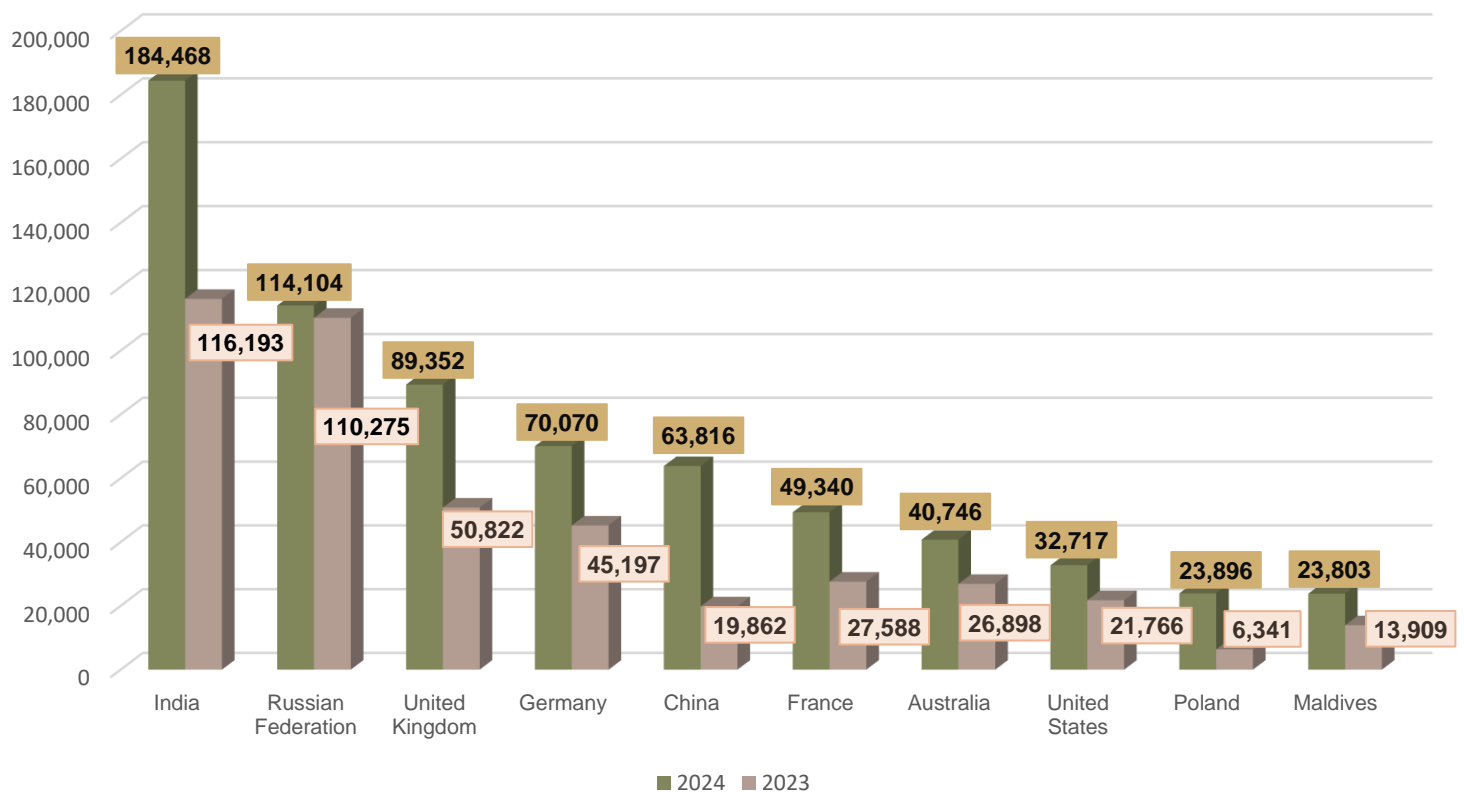


Table 2: Top ten source markets to Sri Lanka, January to June 2024 & 2023

Country of residence	2024	2023
India	184,468	116,193
Russian Federation	114,104	110,275
United Kingdom	89,352	50,822
Germany	70,070	45,197
China	63,816	19,862
France	49,340	27,588
Australia	40,746	26,898
United States	32,717	21,766
Poland	23,896	6,341
Maldives	23,803	13,909
Others	317,937	186,023
Total	1,010,249	624,874

Comparison of top ten source markets

Chart 2: Comparison of top ten source markets





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Analysis of Purpose of Visit

Table 3: Analysis of purpose of visit

Country	Pleasure/ Vacation	Visiting Friends and Relatives	Mice	Business	Other or not responded (or VFS related online Visa)	Total
India	71,464	9,006	7,926	8,622	87,450	184,468
Russian Federation	69,760	786	14,481	41	29,036	114,104
United Kingdom	51,812	12,692	1,453	994	22,401	89,352
Germany	46,618	3,779	2,494	385	16,794	70,070
China	43,141	907	1,576	1,111	17,081	63,816
France	33,910	2,928	3,687	246	8,567	49,338
Australia	17,048	9,526	460	392	13,320	40,746
United States	17,834	3,995	1,052	624	9,212	32,717
Poland	16,484	168	2,502	55	4,687	23,896
Maldives	51	48	6	14	23,684	23,803

Chart 3: Tourist arrivals by purpose of visit – 2024 (Jan ~ June)

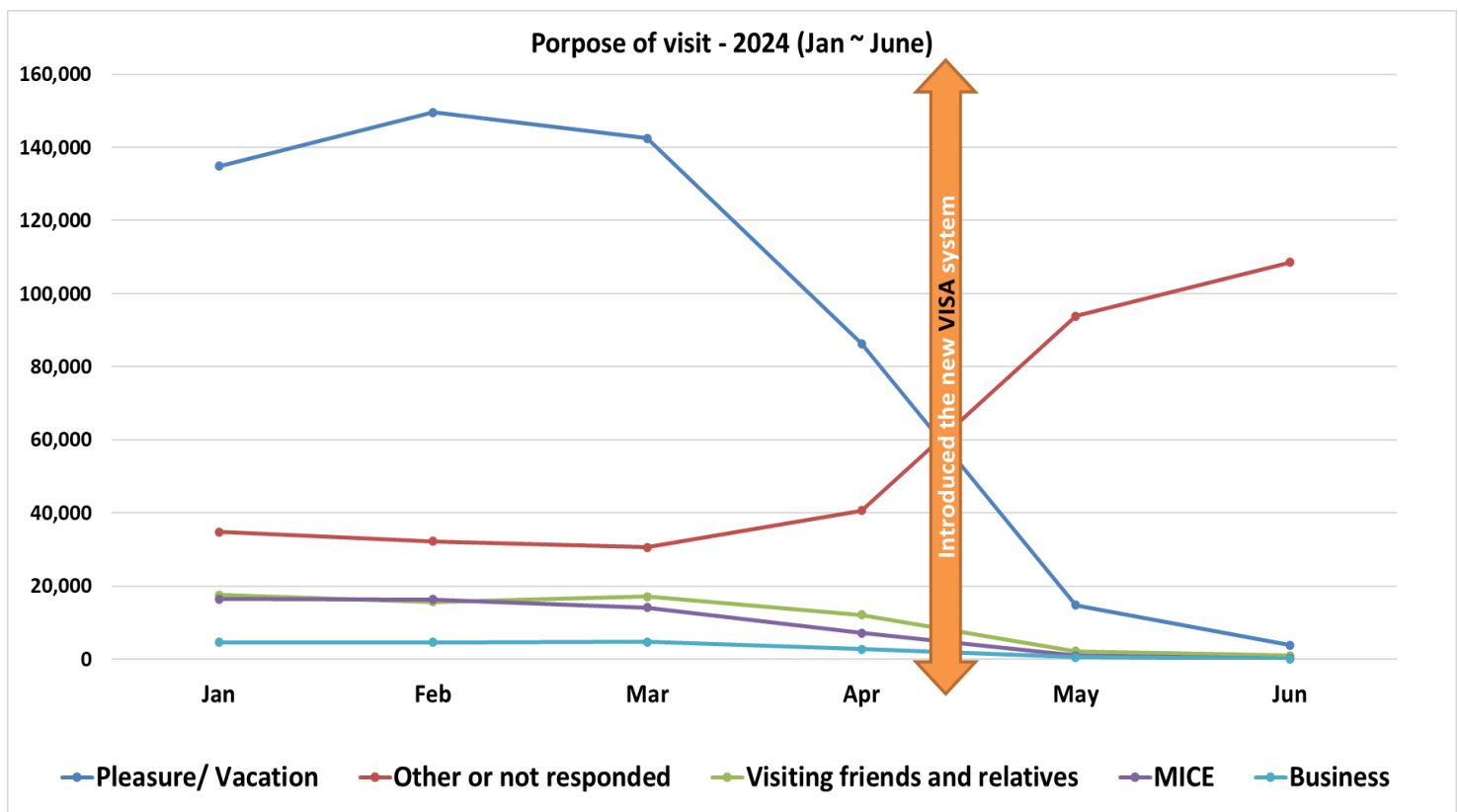




Table 4: Purpose of visit by month – 2024 (Jan ~ June)

Purpose of visit	Jan	Feb	Mar	Apr	May	Jun
Pleasure/ Vacation	134,912	149,575	142,516	86,278	14,769	3,787
Other or not responded	34,812	32,237	30,639	40,641	93,792	108,496
Visiting friends and relatives	17,511	15,627	17,140	12,115	2,135	962
MICE	16,461	16,320	14,133	7,113	926	138
Business	4,557	4,591	4,753	2,720	506	87





Tourist arrivals by age category, 2024 (Jan to June)

Table 5: Tourist arrivals by age category

Age	Number of passengers	% Share
60 or 60 +	199,390	19.7
50-59	156,188	15.5
40-49	176,559	17.5
30-39	229,486	22.7
20-29	145,396	14.4
10-19	55,490	5.5
below 10	47,740	4.7
Total	1,010,249	100.0

An analysis of tourist arrivals by age group reveals that 22.7% of visitors were in the 30-39 age category, making it the largest segment of travelers to Sri Lanka. This suggests that individuals in their 30s, often characterized by stable incomes and a desire for diverse travel experiences, are a key demographic for tourism.

Tourists aged 60 and above accounted for 19.7% of arrivals, indicating a significant interest among older travelers, who may be drawn by Sri Lanka's cultural heritage, scenic landscapes, and wellness offerings.

The 40-49 age group represented 17.5% of visitors, reflecting a strong presence of middle-aged tourists, possibly attracted by family-friendly and adventure-oriented experiences.

Tourists in the 50-59 age bracket made up 15.5% of arrivals, highlighting the appeal of Sri Lanka as a destination for mature travelers looking for relaxation and exploration.

Meanwhile, the 20-29 age group accounted for 14.4%, showing a healthy interest from younger travelers likely seeking adventure, budget-friendly options, and vibrant social experiences. These insights underline the diverse age profile of Sri Lanka's visitors and highlight the importance of catering to varied interests across different stages to sustain tourism growth life.



Chart 4: Tourist arrivals by age 2024 (Jan – June)

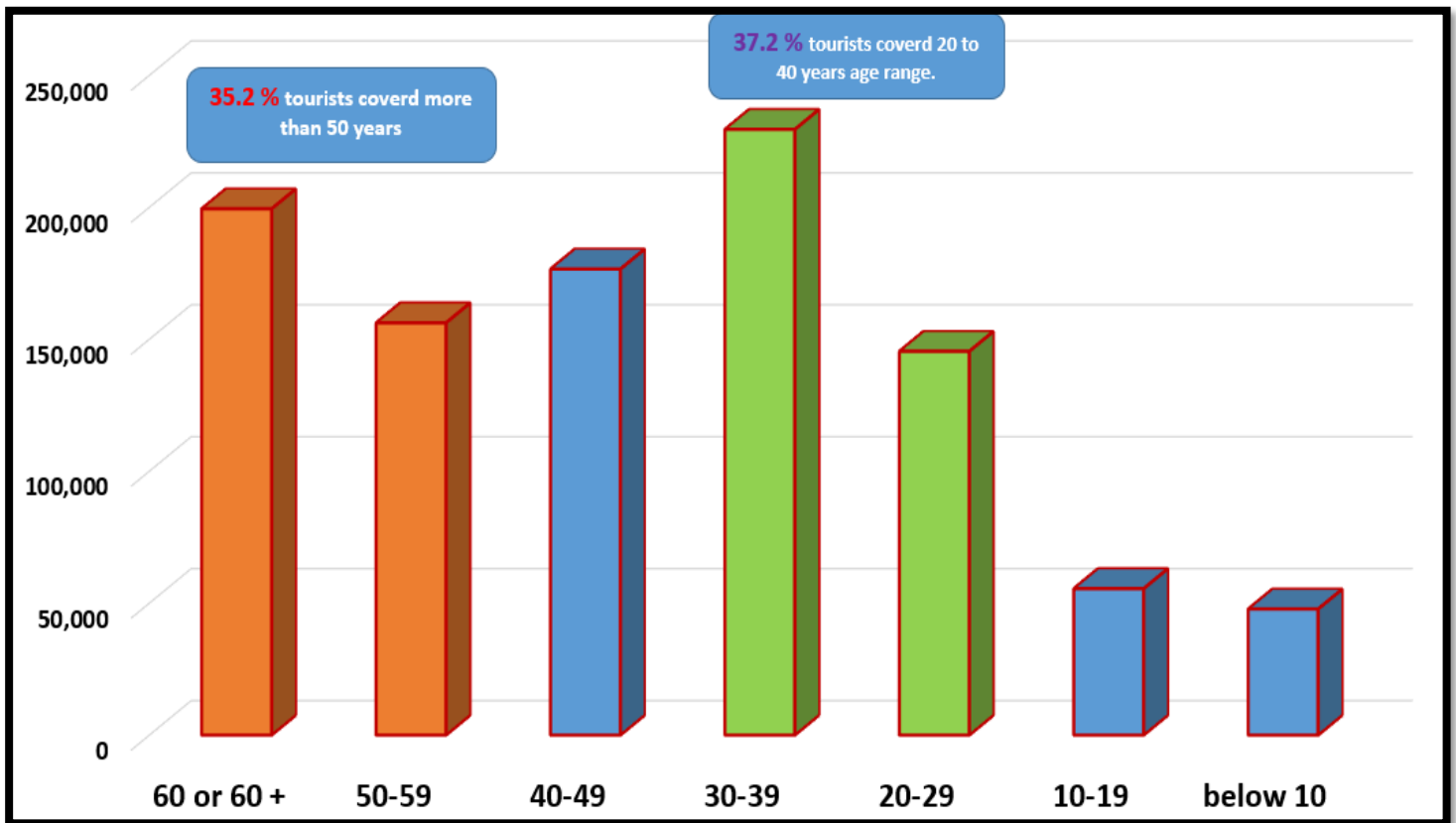


Chart 5: Tourist arrivals by gender -2024 (Jan -June)

Male 51%

Female 49%



An analysis of tourist arrivals by gender indicates that Sri Lanka appeals almost equally to both men and women, with 51% of visitors being male and 49% female. This near-even split suggests that the destination offers a balanced range of attractions and activities that resonate with all genders, from adventure and cultural experiences to relaxation and wellness. The gender parity highlights the broad and inclusive appeal of Sri Lanka's tourism offerings, catering effectively to diverse traveler preferences.



Average duration of stay by source markets

Table 6: Average duration of stay by source markets

Rank	Country	Number of tourists	Duration of stay
1	India	184,468	4.94
2	United Kingdom	114,104	9.83
3	Russian Federation	89,352	10.06
4	Germany	70,070	12.5
5	China	63,816	6.12
6	France	49,340	10.57
7	Australia	40,746	9.82
8	United States	32,717	5.97
9	Netherlands	23,896	14.24
10	Canada	23,803	10.27
11	Maldives	22,223	5.94
12	Poland	19,466	10.26
13	Italy	15,632	9.41
14	Bangladesh	14,228	4.28
15	Spain	13,554	9.27
16	Switzerland	12,443	12.62
17	Japan	12,430	5.06
18	Israel	12,362	11.71
19	Czech Republic	11,163	10.65
20	Malaysia	8,932	6.13

Tourists from the Netherlands and Switzerland tend to stay the longest in Sri Lanka, likely due to their interest in extended vacations or deeper exploration of the country's diverse attractions including niche products. Visitors from Israel, France, the Czech Republic, Russia, and Poland typically stay for 10 to 11 days, possibly indicating that their travel is motivated by tourism-focused itineraries, fitting within a standard vacation period.

Canadian tourists, staying for similar durations, may extend their trips due to visits with friends and relatives. In contrast, tourists from India and Bangladesh have shorter stays, possibly influenced by the geographic proximity, making weekend or short trips more convenient. This proximity reduces the need for extended stays, as they can easily return for subsequent visits.

Chart 6: Tourist arrivals vs duration of stay (Jan to June)

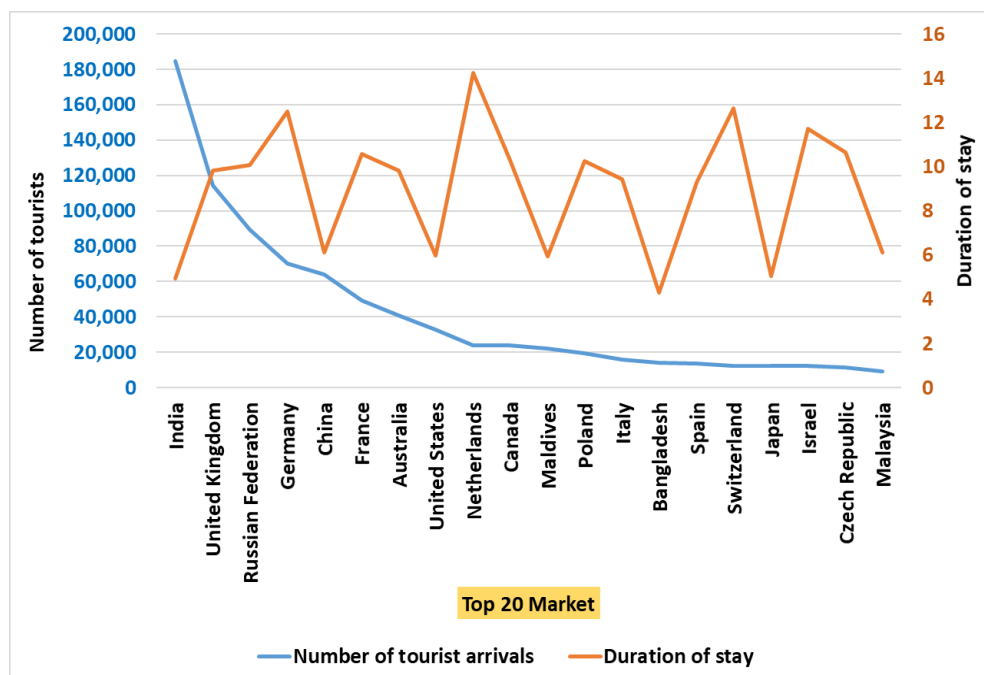
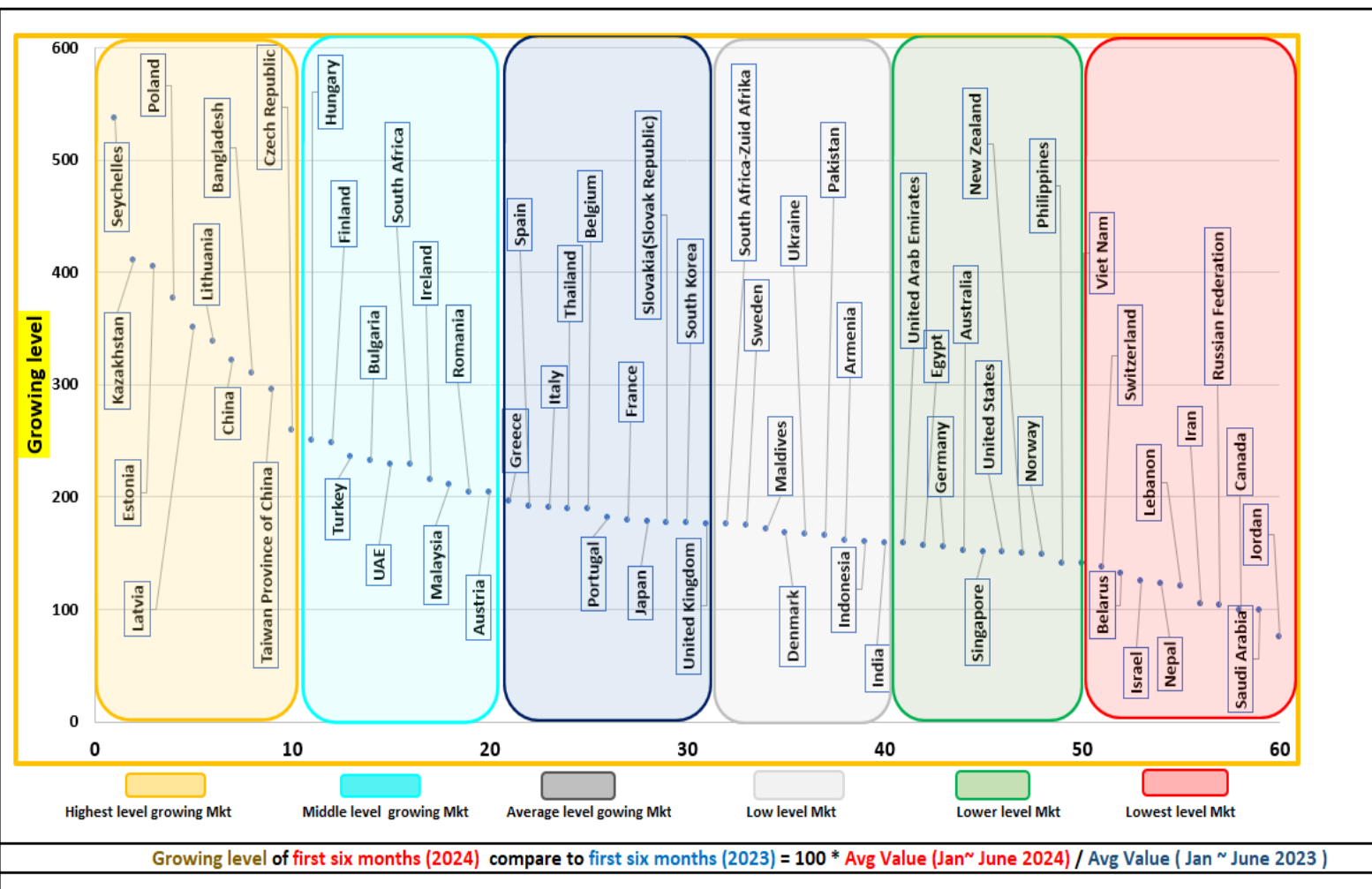




Chart 7: Levels of growth Sri Lanka's source markets during 2024



The comparison of tourist arrivals between January to June 2023 and the same period in 2024 shows significant differences in growth rates across various source markets. Countries like Latvia, Estonia, Kazakhstan, Seychelles, Poland, China, Lithuania, Bangladesh, Czech Republic, and Taiwan experienced the fastest growth. Meanwhile, notable increases were also observed in Turkey, UAE, Malaysia, Austria, Bulgaria, Romania, Ireland, Finland, South Africa, and Hungary.

Moderate growth was recorded from Portugal, Japan, the United Kingdom, Greece, Italy, France, Thailand, Spain, Belgium, Slovakia, and South Korea. In contrast, India, Denmark, Indonesia, Maldives, Sweden, Ukraine, and Pakistan showed slower growth rates. Russia and Canada, despite being key markets, saw the slowest recovery, likely due to changing preferences among Russian travelers and reduced visits from Canada for Visiting Friends and Relatives (VFR) purposes. Other markets like Belarus, Israel, Nepal, Saudi Arabia, Lebanon, Iran, Jordan, Switzerland, and Vietnam also experienced minimal growth compared to the previous year.

The slow recovery in some markets could be attributed to geopolitical factors, economic conditions, or changing traveler preferences.



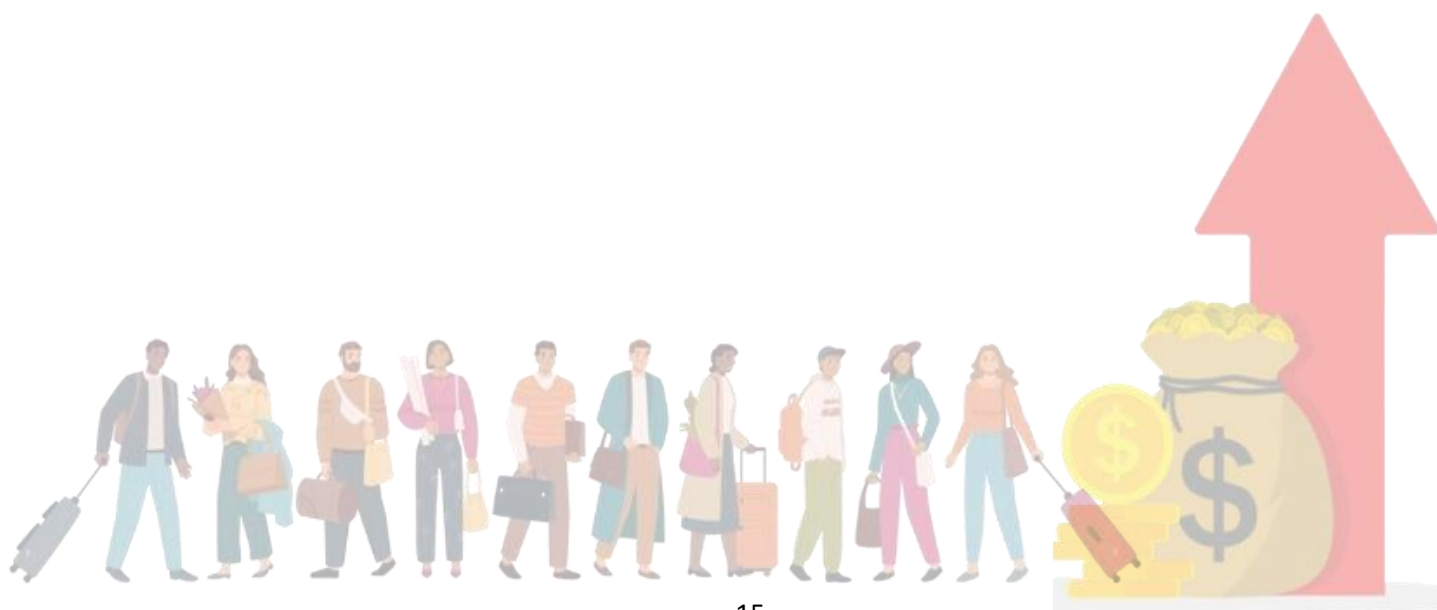
TOURISM INCOME

Table 7 : Tourism income

Month	Number of tourist arrivals	Average value of the month **	Average duration of the month**	Total value (USD Mn) **
January	208,253	181.15**	9.06	341.789
February	218,350	181.15**	8.74	345.702
March	209,181	181.15**	8.93	338.385
April	148,867	181.15**	8.37	225.716
May	112,128	181.15**	7.58	153.965
June	113,470	181.15**	7.35	151.080
Total	1,010,249			1,556.637

Average expenditure per day 2024 – Jan ~ June ** - 181.15 USD

Base value (Airport Survey 18 / 19 & TSA Calculations)



TOURISM ACCOMMODATION





TOURISM ACCOMMODATION AND OTHER SERVICES

Table 08: SLTDA registered accommodation establishments, 2023 & 2024 (up to June)

Category	2024 (Up to June)		2023	
	Number of establishments	Number of rooms	Number of establishments	Number of rooms
Boutique Hotel	38	835	41	865
Boutique Villa	49	345	51	356
Bungalow	1,052	4,390	984	4,078
Classified Tourist Hotel	167	16,808	168	16,686
1 Star	41	1,852	41	1,852
2 Star	40	2,431	41	2,499
3 Star	25	2,408	26	2,462
4 Star	31	3,834	30	3,590
5 Star	30	6,283	30	6,283
Guest House	1,647	18,445	1,679	18,622
Eco lodge	1	20	1	20
Heritage Bungalow	4	19	4	19
Heritage Home	2	2	2	2
Heritage Hotel	2	312	2	312
Home Stay Unit	1,112	3,308	1,080	3,231
Hostels	14	158	12	143
Rented Apartment	82	322	86	328
Rented Home	15	41	14	41
Themed Accommodation & Value-added Activities	1	11	1	11
Tourist Hotel	204	8,362	221	8,515
Total	4,390	53,378	4,346	53,229

* The registrations of Eco lodge and Heritage Hotels were started from 2023 onwards.



Up to June 2024, the SLTDA registered 4,390 accommodation establishments. Of these, 167 were categorized as classified tourist hotels, with 30 being five-star hotels. The sector was primarily driven by small and medium enterprises (SMEs), with guest houses, homestays, and bungalows making up the majority at 1,647, 1,112, and 1,052 establishments, respectively. Guest houses accounted for 37.5% of the total, followed by homestays at 25.3% and bungalows at 23.9%, while classified tourist hotels represented only 3.8%. The total room capacity for 2024 up to June was 53,378 with guest houses contributing the largest share of 18,445 rooms, highlighting the critical role of SMEs in the accommodation sector.

These variations in establishment numbers can be attributed to several factors, including new openings, changes in classification during renewals, SLTDA registration processes, and closures due to challenges posed by COVID-19 and economic conditions.





Distribution of rooms by provinces

In terms of provincial room distribution, most accommodations are concentrated in the Western, Southern, and Central Provinces, which together hold a significant portion of the country's total room capacity. The Western Province leads with 35.1% of all rooms, followed by the Southern Province at 25.7% and the Central Province at 16.4%. In contrast, the Northern Province has a much smaller share, accounting for just 2%, highlighting a regional imbalance in accommodation availability. Additionally, the Uva Province contributes 5.1% of the total rooms.

This distribution highlights a concentration of accommodations in certain regions, which may hinder equitable tourism development across the country. To promote more balanced growth and fully harness the tourism potential of all provinces, it is essential to expand tourism development efforts beyond the Western, Southern, and Central Provinces. Regions such as the Northern and Uva Provinces require greater focus and investment. By diversifying development initiatives, Sri Lanka can create a more inclusive and sustainable tourism landscape nationwide.

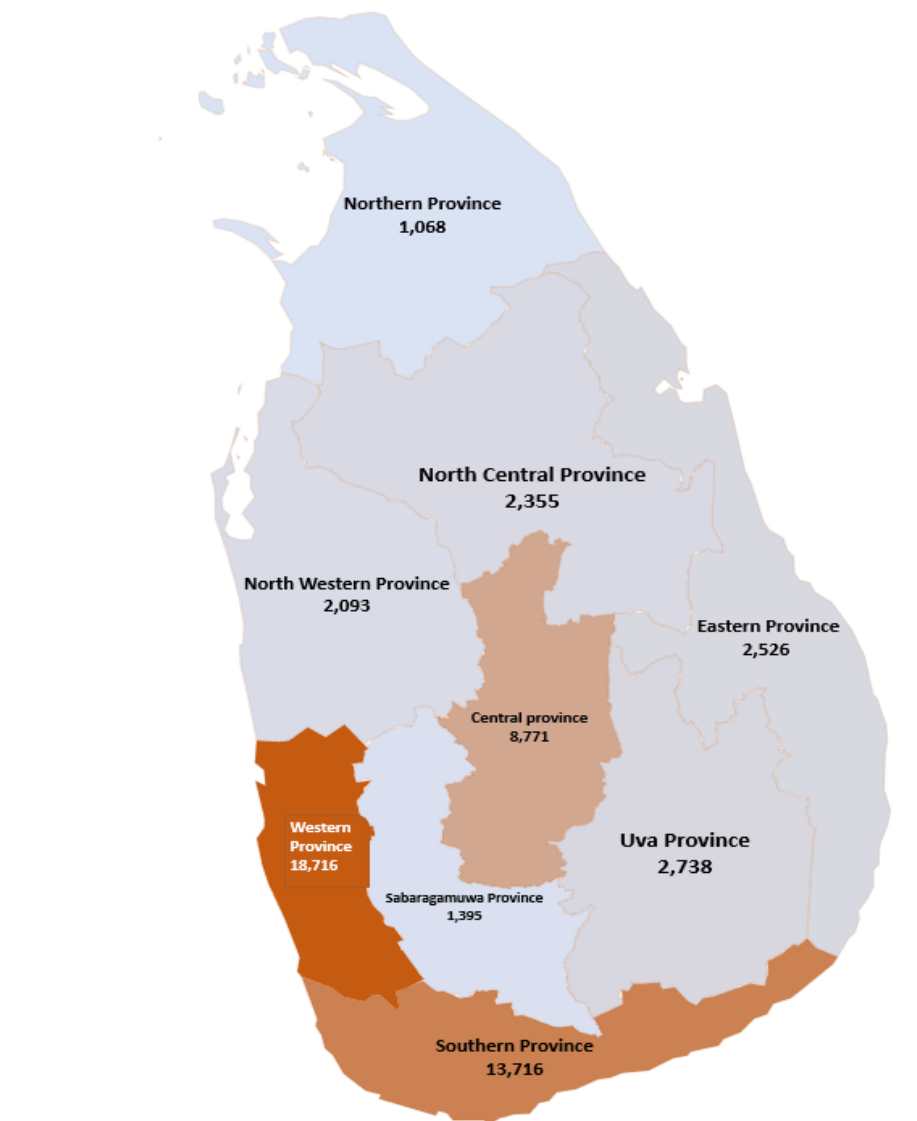


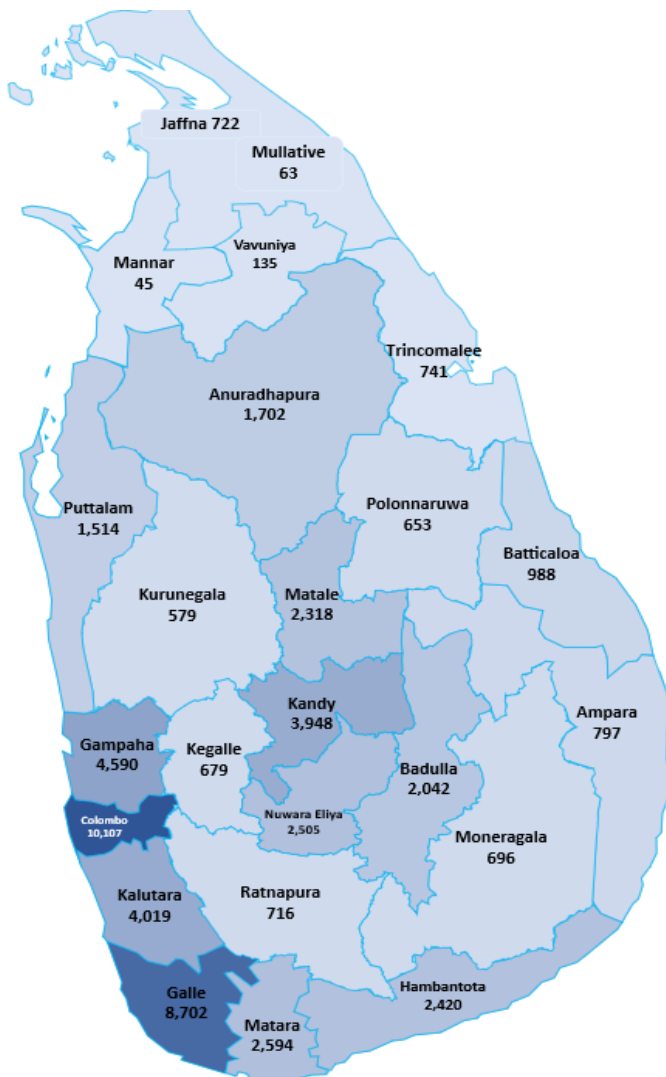


Table 09: Distribution of rooms by provinces

Province	Total rooms	Percentage
Eastern Province	2,526	4.7
North Central Province	2,355	4.4
Uva Province	2,738	5.1
Western Province	18,716	35.1
Southern Province	13,716	25.7
Northern Province	1,068	2.0
Central province	8,771	16.4
Sabaragamuwa Province	1,395	2.6
North Western Province	2,093	3.9
Total	53,378	

Distribution of rooms by districts

Table 10: Distribution of rooms by districts



District	Rooms	Percentage
Ampara	797	1.5
Anuradhapura	1,702	3.2
Badulla	2,042	3.8
Batticaloa	988	1.9
Colombo	10,107	18.9
Galle	8,702	16.3
Gampaha	4,590	8.6
Hambantota	2,420	4.5
Jaffna	722	1.4
Kalutara	4,019	7.5
Kandy	3,948	7.4
Kegalle	679	1.3
Kilinochchi	103	0.2
Kurunegala	579	1.1
Mannar	45	0.1
Matale	2,318	4.3
Matara	2,594	4.9
Monaragala	696	1.3
Mullaitivu	63	0.1
Nuwara Eliya	2,505	4.7
Polonnaruwa	653	1.2
Puttalam	1,514	2.8
Rathnapura	716	1.3
Trincomalee	741	1.4
Vavuniya	135	0.3
Total	53,378	



Colombo, Galle, Gampaha, Kalutara, and Kandy districts show a significant concentration of rooms in accommodation facilities, driven by their popularity as tourist hubs and commercial centers. As the capital, Colombo is a major hub for business and tourism, while Galle is famed for its historical landmarks. Gampaha, Kalutara, and Kandy also attract visitors with their cultural and natural attractions. In contrast, Mullaitivu and Mannar districts have fewer accommodations, indicating the need to promote tourism in these areas with untapped potential.

Table 11: Number of rooms by star category - 2024

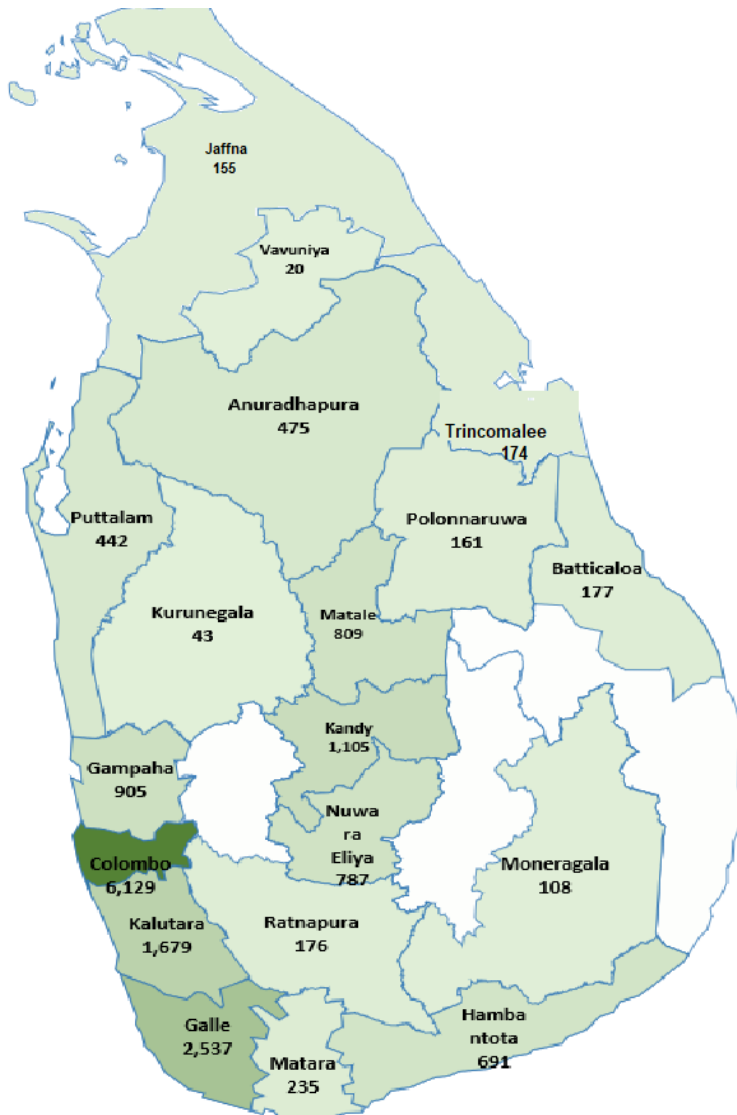
Star category	No of rooms
One	1,852
Two	2,431
Three	2,408
Four	3,834
Five	6,283
Total	16,808

Classified hotel rooms represent 31.5% of the total formal sector room inventory. Five-star hotels dominate this category, with 37.4% of the rooms, likely due to the high demand for luxury accommodations. Four-star hotels hold 22.8%, serving guests who seek quality services at slightly lower prices. Meanwhile, three-star and two-star hotels have 14.3% and 14.4% of rooms, respectively, offering a balance of affordability and comfort. One-star accommodations make up 11%, catering to budget-conscious travelers, which explains their smaller share.



Distribution of rooms of classified hotels – 2024

Table 12: Distribution of rooms of classified hotels ,2024



District	Number of rooms
Anuradhapura	475
Batticaloa	177
Colombo	6,129
Galle	2,537
Gampaha	905
Hambantota	691
Jaffna	155
Kalutara	1,679
Kandy	1,105
Kurunegala	43
Matale	809
Matara	235
Moneragala	108
Nuwara Eliya	787
Polonnaruwa	161
Puttalam	442
Rathnapura	176
Trincomalee	174
Vavuniya	20
Total	16,808

The distribution of classified hotel rooms shows that Colombo, Galle, and Kalutara have the highest room inventory, while Vavuniya district has the lowest. This variation is likely due to the higher tourist demand and developed infrastructure in coastal and urban areas like Colombo and Galle, which are popular destinations. In contrast, Vavuniya, being more rural and less frequented by international tourists, experiences lower demand for hotel accommodations, leading to fewer rooms being available.



Distribution of rooms of other tourism services by districts

Table :13 Distribution of other tourism services by districts

Distribution of rooms						
District	Guest House	Boutique Hotel	Boutique Villa	Bungalow	Homestay	Tourist Hotel
Ampara	485		10	48	169	85
Anuradhapura	735	21	10	183	141	142
Badulla	733	14		294	744	271
Batticaloa	246	57		67	26	415
Colombo	1,836	10	6	307	571	1,105
Galle	2,908	292	136	1,042	512	1,292
Gampaha	2,227	17	7	207	260	968
Hambantota	781	121	27	197	103	508
Jaffna	451			57	10	49
Kalutara	795	47	14	302	100	1,082
Kandy	1,118	10	43	478	504	681
Kegalle	538		7	74	47	13
Kilinochchi	85			18		
Kurunegala	471			31	9	14
Mannar	42				3	
Matale	468	95	23	144	205	574
Matara	1,438	62	7	349	262	227
Moneragala	374			30	18	166
Mullaitivu	58			2	3	
Nuwara Eliya	896	52	55	294	66	208
Polonnaruwa	255	10		37	34	156
Puttalam	637	27	11	132	24	241
Rathnapura	431			54	35	20
Trincomalee	376			42	4	145
Vavuniya	108			7		
Total	18,492	835	356	4,396	3,850	8,362

The distribution of rooms of different accommodation types in Sri Lanka highlights key trends based on regional popularity and traveler preferences. Guesthouses are most abundant in Galle, Gampaha, and Colombo, reflecting these regions' tourist appeal due to their coastal proximity and urban connectivity. Boutique hotels, which attract luxury travelers, have the highest room concentration in Galle and Hambantota, likely due to the blend of history, scenic views, and upscale tourism. Boutique villas are notably prominent in Galle and Nuwara Eliya, areas known for their coastal and hill country attractions, offering exclusive, tranquil experiences. Bungalows are largely found in Galle and Kandy, both regions rich in cultural heritage. Meanwhile, homestays are most popular in Badulla and Colombo, indicating both rural charm and city-based accommodation preferences. Finally, the highest number of rooms in tourist hotels are found in Galle and Colombo, areas that cater to both leisure and business travelers, demonstrating their strategic importance as tourism hubs.

AIR CONNECTIVITY



AIR CONNECTIVITY

Air connectivity to and from Sri Lanka to main destinations



Dubai, Doha, and Chennai are key departure points for tourists heading to Sri Lanka, accounting for 33.98% of total arrivals. This highlights the critical role these airports play in connecting international travelers to Sri Lanka. Their strategic locations, high connectivity, and frequent flights make them essential gateways, efficiently funneling a large number of tourists to the island. The prominence of these airports is likely due to their status as major hubs in the Middle East and South Asia, offering convenient travel options for visitors from a range of global destinations.

Table 14: Main final departure airports to Sri Lanka

Rank	Port	Number of passengers	% Share	Rank	Port	Number of passengers	% Share
1	Dubai	141,568	14.01	21	Chengdu	9,559	0.95
2	Doha	118,191	11.70	22	Frankfurt	8,716	0.86
3	Chennai	83,514	8.27	23	Muscat	8,607	0.85
4	Moscow	43,340	4.29	24	Don Mueang	8,547	0.85
5	Abu Dhabi	43,197	4.28	25	Almaty	8,117	0.80
6	Mumbai	37,572	3.72	26	Kunming	7,810	0.77
7	Kuala Lumpur	36,400	3.60	27	Dhaka	7,064	0.70
8	Delhi	36,125	3.58	28	Warsaw	6,806	0.67
9	Bangalore	34,742	3.44	29	Tolmachevo Novosibirsk	6,548	0.65
10	London	33,919	3.36	30	Hong Kong	6,516	0.64
11	Singapore	33,253	3.29	31	Narita	5,948	0.59
12	Sharja	28,243	2.80	32	Sydney	5,812	0.58
13	Shanghai	27,907	2.76	33	Bahrain	5,046	0.50
14	Hyderabad	22,883	2.27	34	Kazan, Russia	4,717	0.47
15	Male	20,991	2.08	35	Koltsovo, Russia	4,605	0.46
16	Istanbul	20,023	1.98	36	Kuwait	4,520	0.45
17	Zhukovsky	19,123	1.89	37	Guangzhou	4,049	0.40
18	Bangkok	16,609	1.64	38	Kochi	4,023	0.40
19	Paris	11,203	1.11	39	Tiruchchirappalli	3,617	0.36
20	Melbourne	10,560	1.05	40	Zurich	3,329	0.33



Contribution of Airlines on tourist arrivals to Sri Lanka

 <p>Number of passengers: 250,660 Percentage Share: 24.8%</p>	01	 <p>Number of passengers: 32,106 Percentage Share: 2.6%</p>	11
 <p>Number of passengers: 117,346 Percentage Share: 11.6 %</p>	02	 <p>Number of passengers: 23,668 Percentage Share: 2.3%</p>	12
 <p>Number of passengers: 95,026 Percentage Share: 9.1%</p>	03	 <p>Number of passengers: 20,034 Percentage Share: 1.9%</p>	13
 <p>Number of passengers: 76,264 Percentage Share: 7.5%</p>	04	 <p>Number of passengers: 18,469 Percentage Share: 2.6%</p>	14
 <p>Number of passengers: 39,027 Percentage Share: 3.9%</p>	05	 <p>Number of passengers: 17,866 Percentage Share: 1.7 %</p>	15
 <p>Number of passengers: 37,170 Percentage Share: 3.7%</p>	06	 <p>Number of passengers: 16,943 Percentage Share: 1.6 %</p>	16
 <p>Number of passengers: 34,472 Percentage Share: 3.4%</p>	07	 <p>Number of passengers: 13,143 Percentage Share: 1.3 %</p>	17
 <p>Number of passengers: 33,850 Percentage Share: 3.3%</p>	08	 <p>Number of passengers: 9,631 Percentage Share: 0.9 %</p>	18
 <p>Number of passengers: 27,072 Percentage Share: 2.7%</p>	09	 <p>Number of passengers: 9,448 Percentage Share: 0.9 %</p>	19
 <p>Number of passengers: 30,169 Percentage Share: 2.9%</p>	10	<p>OTHERS</p> <p>Number of passengers: 107,887 Percentage Share: 10.6 %</p>	20



A detailed analysis of tourist arrivals by airline carriers shows that Sri Lankan Airlines carried the largest share, contributing 24.8% of total arrivals. Following closely, Qatar Airways accounted for 11.62%, while Emirates contributed 9.1%. IndiGo was responsible for 7.55%, and Fly Dubai brought in 3.86% of the total tourist inflow to Sri Lanka. This distribution indicates that while Sri Lankan Airlines plays a pivotal role in inbound tourism, several other key international carriers, particularly from the Middle East and South Asia, significantly support the country's tourism sector by connecting diverse international markets to Sri Lanka.



VISITORS TO MAJOR TOURIST ATTRACTIONS





VISITORS TO WILDLIFE PARKS, 2024 (Jan to June)

Table:15 Visitors to wildlife parks, 2024 (Jan to June)

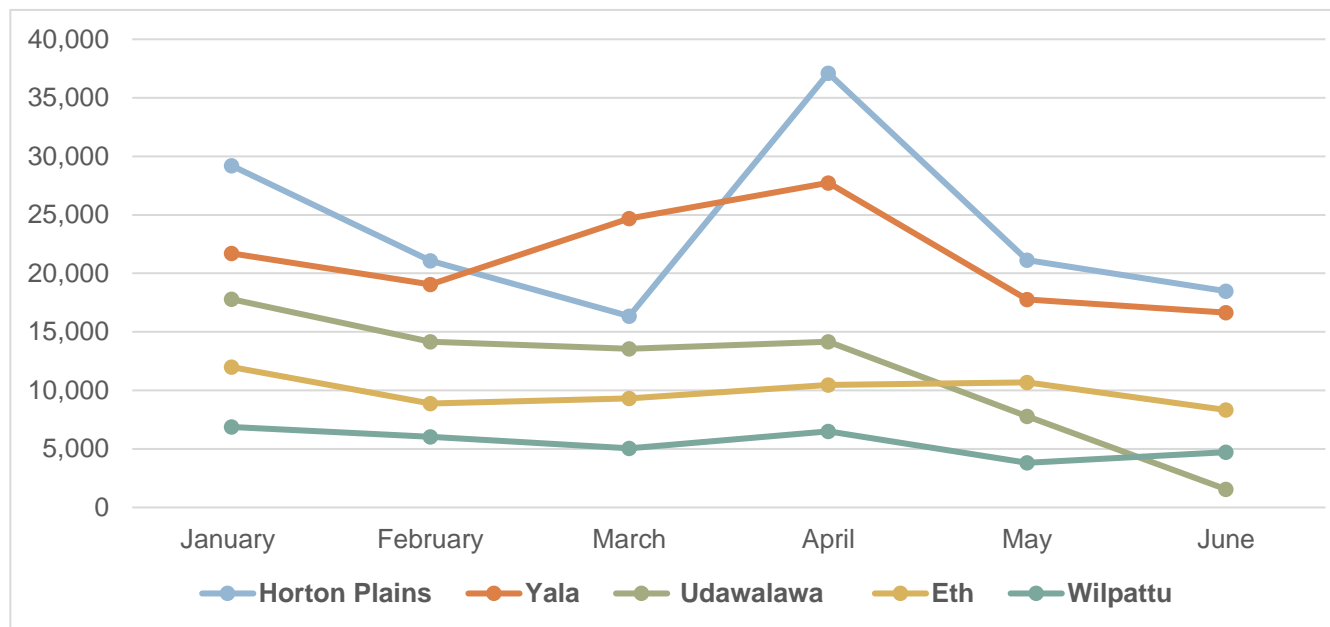
Parks	Local visitors		Foreign visitors		Total visitors	Total income
	Number of local visitors	Local income (Rs)	Number of foreign visitors	Foreign income (Rs)		
Yala	127,584	20,070,739.00	174,052	1,348,819,207.75	301,636	1,368,889,946.75
Horton Plains	143,329	20,713,150.00	26,158	466,047,542.85	169,487	486,760,692.85
Udawalawa	68,991	9,998,450.00	68,723	539,606,276.58	137,714	549,604,726.58
Wasgomuwa*	6,194	354,160.00	1,329	5,033,942.34	7,523	5,388,102.34
Minneriya	12,353	1,815,800.00	4,817	37,210,554.60	17,170	39,026,354.60
Bundala	4,188	248,670.00	4,393	16,485,824.19	8,581	16,734,494.19
Horagolla	6,370	248,980.00	17	273,914.36	6,387	522,894.36
Kaudulla*	58	8,650.00	6	55,043.00	64	63,693.00
Galoya*	3,526	208,290.00	2,651	9,817,580.00	6,177	10,025,870.00
Kumana	10,801	661,260.00	3,946	15,007,920.00	14,747	15,669,180.00
Angammedilla	363	16,780.00	5	38,990.32	368	55,770.32
Galways Land	7,513	415,810.00	416	1,893,086.00	7,929	2,308,896.00
Wilpattu	32,971	4,883,250.00	21,147	168,961,279.04	54,118	173,844,529.04
Maduruoya	807	45,910.00	149	555,906.40	956	601,816.40
Lahugala	398	22,980.00	15	74,580.00	413	97,560.00
Pigeon Island	32,867	4,770,150.00	2,515	27,055,585.00	35,382	31,825,735.00
Hikkaduwa	17,804	681,320.00	995	2,107,524.00	18,799	2,788,844.00
Eth	59,661	5,358,860.00	52,261	84,689,229.00	111,922	90,048,089.00
Kalawewa*	10	0.00	0	400.00	10	400.00
*Bareef - **Kalpitiya	6,569	131,850.00	2,173	5,397,378.00	8,742	5,529,228.00
Mirissa	16,960	1,375,000.00	56,494	99,269,193.00	73,454	100,644,193.00
Girithale	3,597	126,580.00	34	147,262.00	3,631	273,842.00
Total	562,914	72,156,639.00	422,296	2,828,548,218.43	985,210	2,900,704,857.43

Source: Department of wildlife conservation



An examination of wildlife park visitor numbers reveals that Yala, Horton Plains, Udawalawa, Eth Athuru Sewana, and Mirissa are the most frequented parks in Sri Lanka. Revenue-wise, Yala, Udawalawa, Horton Plains, and Wilpattu and Mirissa rank highest. Domestic visitors account for 57.1% of park visitors, while foreign travelers make up 42.8%. Foreign ticket sales contribute significantly to revenue, comprising 97.5%, compared to domestic sales at 2.5%. Given foreign visitors' substantial revenue contribution, maintaining park standards is crucial. Top destinations for domestic visitors include Horton Plains, Yala, Udawalawa, Eth Athuru Sevana, and Wilpattu. For foreign visitors, the preferred parks are Yala, Udawalawa, Mirissa (for dolphin and whale watching), Eth Athuru Sewanee and Horton Plain. Given the high visitation rates at Yala, Horton Plain and Udawalawa by both local and international tourists, it's evident that efforts should be made to redistribute visitors to other parks to alleviate overcrowding. Promoting lesser-known parks like Kaudulla, Kalawewa and offering innovative activities in these untapped areas can help redirect tourist traffic effectively. In first six months in year 2024, wildlife parks in Sri Lanka attracted 41.8 % of total tourist arrival.

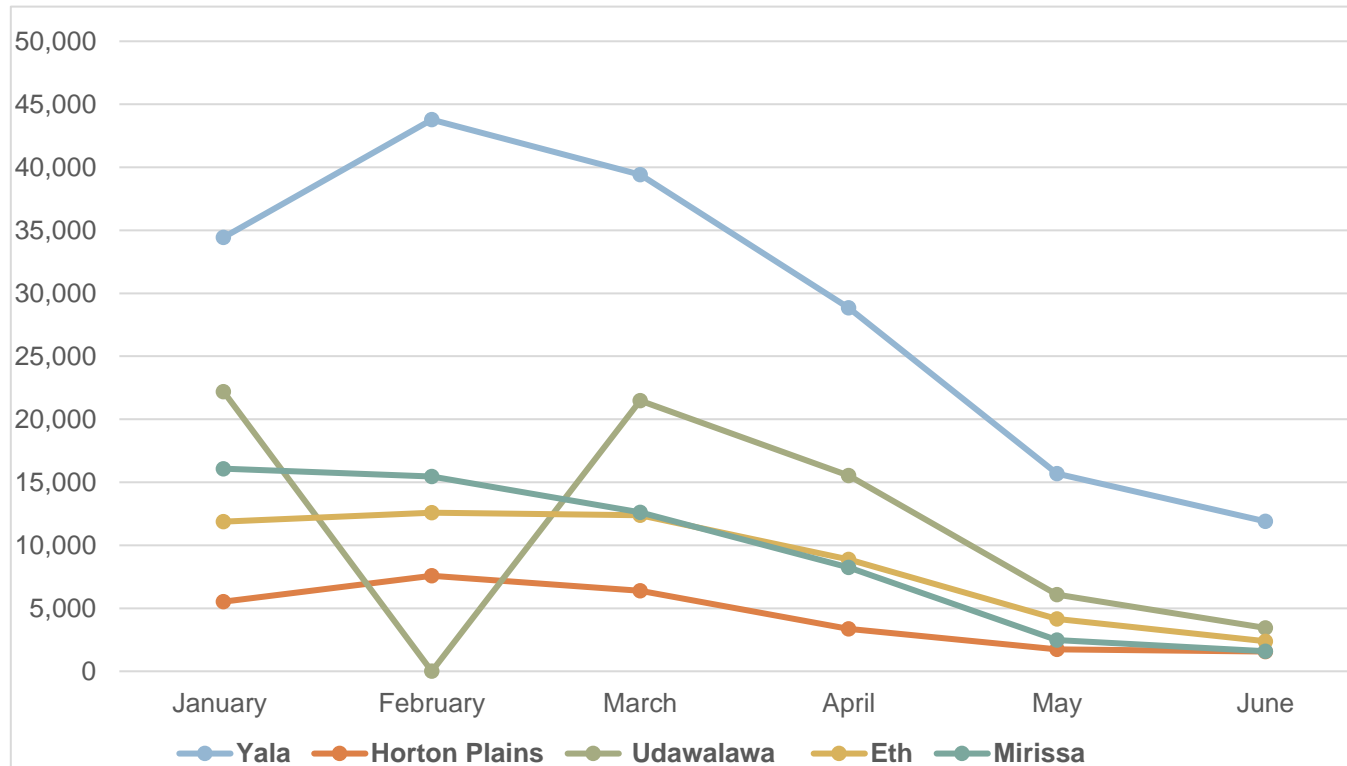
Chart 08: Visitation of domestic tourists to main wildlife parks



The peak months for domestic tourists visiting wildlife parks are typically January and April during first six months of 2024, coinciding with school holidays during these periods.



Chart 09: Visitation of foreign tourists to main wildlife park



Foreign tourist visits to major wildlife parks tend to peak during January, February, and March, after which a noticeable decline in arrivals is observed through June. This pattern could be attributed to favorable weather conditions early in the year, making these months more appealing for wildlife tourism. As the months progress, factors such as rising temperatures, increased humidity, or the onset of the rainy season may contribute to the decrease in visitor numbers. Additionally, global travel trends and holiday seasons might influence this variation, with fewer tourists traveling during off-peak periods.



Visitors to conservation forests ,2024 (Jan - June)

Table: 16 Visitors to conservation forests ,2024 (Jan - June)

Name of the forest	Number of visitors		Total	Income without VAT		Total
	Domestic tourists	Foreign tourists		Domestic tourists	Foreign tourists	
Makandawa Conservation Forest	1,075	421	1,496	67,873.34	304,129.01	372,002.35
Kuruluakele	917	228	1,145	55,219.62	13,878.36	69,097.98
Nuwaragala (Ampara)	698	0	698	73,888.59	0.00	73,888.59
Ek Gal Oya	340	0	340	288,000.00	0.00	288,000.00
Kottawa Conservation Forest	463	117	580	28,880.73	90,932.70	119,813.43
Kanneliya Conservation Forest	19,248	2,051	21,299	1,679,220.91	1,237,575.69	2,916,796.60
Adahalena Ella (Galle)	0	0	0	0.00	0.00	0.00
Hurulu Eco Park	43,380	113,926	157,306	7,524,347.47	195,943,542.36	203,467,889.83
Gal Oya	114	295	409	12,076.28	232,500.00	244,576.28
Sinharaja Conservation Forest	25,698	10,833	36,531	2,459,600.48	11,302,285.15	13,761,885.63
Knuckles Conservation Forest	96,919	2,406	99,325	6,209,203.87	1,477,242.45	7,686,446.32
Udawattakele Conservation Forest / Kandy	9,796	4,409	14,205	525,905.96	3,641,475.95	4,167,381.91
Rathna Ella (Kandy)	1,902	487	2,389	119,881.68	379,146.22	499,027.90
Yahangala	0	0	0	0.00	0.00	0.00
Geradigala	0	0	0	0.00	0.00	0.00
Piduruthalagala (Nuwaraeliya)	0	0	0	0.00	0.00	0.00
Mandaramnuwara (Kolapathanaella) (Nuwaraeliya)	9,922	0	9,922	619,994.38	0.00	619,994.38
Badagamuwa Ecological Zone (Kurunegala)	2,538	9	2,547	137,660.97	6,483.03	144,144.00
Galwila Eco Park (Puttalam)	104	21	125	30,350.30	6,863.40	37,213.70
Dolukanda (Kurunegala)	156	3	159	9,915.36	2,364.42	12,279.78
Badulla Haputhale	4,998	10,581	15,579	311,990.70	8,242,241.67	8,554,232.37
Kande Ela Nuwara Eliya	471	0	471	19,932.26	0.00	19,932.26
Total	218,739	145,787	364,526	20,173,942.90	222,880,660.41	243,054,603.31

Source: Forest department, Sri Lanka



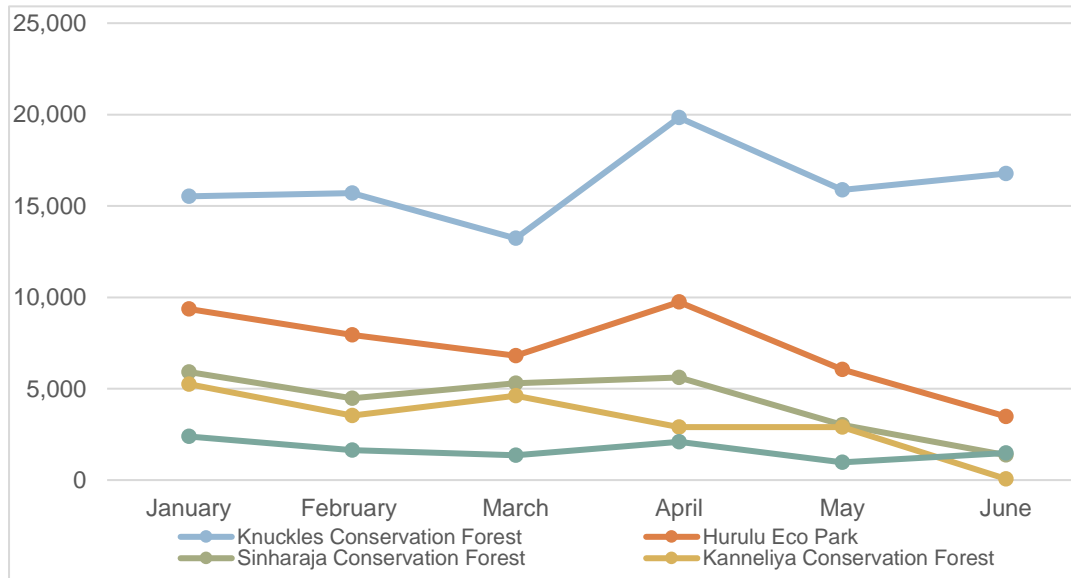
Of all visitors to conservation forests during first six months of the year 2024, 60% are domestic tourists, while 40% are foreign tourists. Regarding revenue, domestic tourists contribute 8.3%, whereas foreign tourists contribute 91.6%. Additionally, 14.4% of tourists, out of total tourists that visited Sri Lanka during first six months have visited the conservation forests.

In the first six months of the year 2024, Sri Lanka's forests witnessed a diverse influx of visitors, both domestic and foreign, each contributing to the country's tourism sector in unique ways. Among these natural sanctuaries, Hurulu eco park emerged as a beacon of attraction, drawing in a substantial number of 43, 380 domestic visitors and 113, 926 foreign visitors. Its appeal likely lies in its pristine beauty and rich biodiversity, making it a must-visit destination for nature enthusiasts. According to the statistics, Hurulu Eco Park stands out as the top destination among foreign tourists, with Badulla, Haputhale and Sinharaja forests following behind.

Despite ranking second in terms of total visitors, Knuckles conservation forest stood out with its exceptional natural diversity. By leveraging its unique selling points and addressing any shortcomings, Hurulu Eco Park can further solidify its position as a premier eco-tourism destination, contributing significantly to Sri Lanka's sustainable tourism landscape. Additionally, there is potential in it for further development to redirect tourists from overcrowded parks facing carrying capacity issues. Tourism predominates across most forests, showcasing the allure of Sri Lanka's natural heritage on an international scale. However, notable exceptions like Nuwaragala (Ampara), Kande Ela, Ekgal Oya, Adahalena ella, yahangala, Rathna ella, Geradigala, Piduruthalagala and Mandaramnuwara indicate untapped potential in attracting more foreign tourists . Hurulu Eco Park, Sinharaja, Badulla Haputhale and Knuckles emerge as the top revenue generating forest reserves. This likely stems from their pristine biodiversity, attracting visitors. Hurulu Eco Park, particularly, benefits from its proximity to tourist hotspots like Sigiriya, enhancing its appeal.

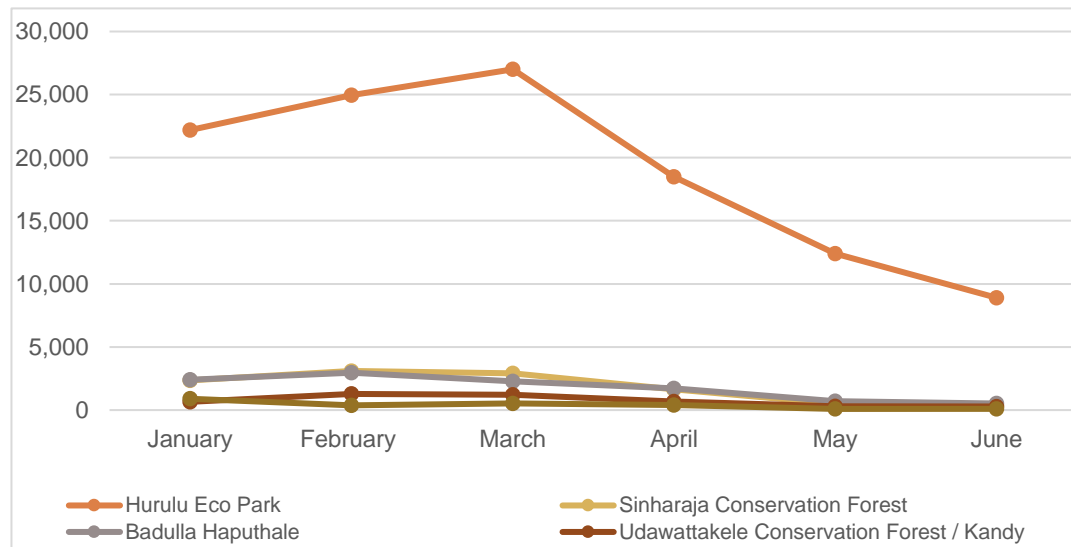


Chart 10: Visitation of domestic tourists to conservation forests



Domestic tourist visits to conservation forests tend to peak in January and April, while February, March, May, and June see fewer visitors. This fluctuation in visitation could be influenced by national holidays and vacation periods, such as the New Year and school holidays in April, driving up numbers during these months. The off-peak months may coincide with regular work schedules and less favorable weather conditions, leading to reduced travel.

Chart 11: Visitation of foreign tourists to conservation forests



Apart from Hurulu Eco Park, the visitation trends of foreign tourists to other conservation forests generally show consistent patterns. However, foreign tourist numbers significantly dip in May and June. This decrease could be attributed to unfavorable weather conditions during these months, as well as fewer international holidays, making it a less popular travel period.



Visitors to tourist attractions administered by Central Cultural Fund

Table 17: Visitors to tourist attractions administered by central cultural fund (January to June)

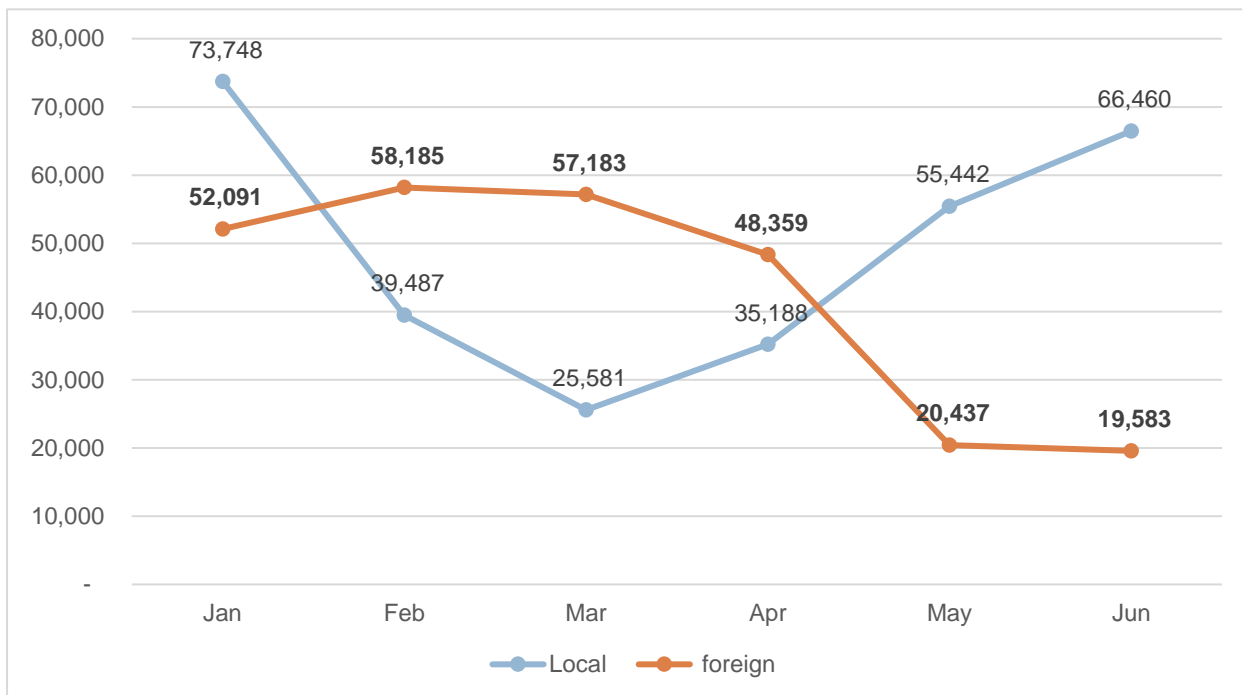
Locations	Number of foreign visitors	Number of local visitors	Total number of visitors	Local visitor income	Foreign visitor income	Total Visitor income
Abhayagiriya	702	8,565	9,267	943,149	6,218,700	7,161,849
Jethawanaya	34,601	6,770	41,371	782,036	212,086,717	212,868,753
Sigiriya Museum and Sigiriya Rock	255,838	295,906	551,744	33,959,751	1,955,626,240	1,989,585,991
Polonnaruwa Gal Viharaya, Museum & Kingdom	94,842	14,212	109,054	1,441,232	636,596,429	638,037,661
Kandy Museum	114	5,166	5,280	268,572	54,227	322,800
Galle Museum	7,808	24,884	32,692	2,599,702	13,295,016	15,894,718
Ramba Viharaya	66	0	66	54,348	8,228	62,576
Jaffna Fort	5,256	95,064	100,320	5,258,862	7,681,784	12,940,646
Trincomalee	1,099	11,414	12,513	1,317,142	1,909,515	3,226,657
Katharagama Museum	44	1,521	1,565	165,785	74,391	240,176
Ampara Lahugala	106	0	106	0	99,518	99,518
Rathugala	209	0	209	0	177,124	177,124
Buduruwagala	18,643	0	18,643	0	16,903,659	16,903,659
Dambulla Museum	202	271	473	33,310	185,265	218,575
Ritigala forest Monastery	4,529	14,030	18,559	807,421	8,261,968	9,069,389
Ibbankatuwa Ancient Bural Ground	461	9,520	9,981	1,100,305	388,264	1,488,569
Namal Uyana	644	20,446	21,090	1,093,282	1,291,739	2,385,022
Total	425,164	507,769	932,933	49,824,897	2,860,858,784	2,910,683,681

Source: Central cultural fund, Sri Lanka

Visitor and revenue data from sites overseen by the Central Cultural Fund during the first six months of year 2024 indicate that 425,164 foreign visitors, comprising 42% of Sri Lanka's total tourist arrivals, have visited these locations. Among foreign tourists, Sigiriya Museum and Sigiriya Rock, Polonnaruwa Gal Viharaya, Museum & Kingdom, and Jethawanaya are favored historical sites. For domestic tourists, top attractions include Sigiriya Museum and Sigiriya Rock, Jaffna Fort, and Galle Museum. Sigiriya Museum and Sigiriya Rock, Jaffna Fort, and Polonnaruwa Gal Viharaya, Museum & Kingdom record the highest visitor numbers overall. Regarding revenue, Sigiriya Museum and Sigiriya Rock, Polonnaruwa Gal Viharaya, Museum & Kingdom, and Jethawanaya are the leading revenue generating destinations. Extending the opening hours of Sigiriya to facilitate sunrise viewing from its summit could have enhanced its growing appeal to both domestic and international tourists. This underscores the significance of value addition of such destinations to enhance their allure. Sigiriya stands out for its popularity and revenue among both foreign and domestic visitors, emphasizing the need for effective visitor management to ensure its long-term sustainability.



Chart 12: Visitation of domestic and foreign tourists to Sigiriya



The peak season for foreign tourists occurs in February, March, and April, which coincides with the off-peak season for domestic travelers. In contrast, foreign tourist numbers drop significantly in May and June. This decline could be due to the onset of monsoon seasons or fewer international holidays. For domestic tourists, March tends to see lower visitation, potentially because of school exams and work schedules during this time.

TOURISM INVESTMENT





TOURISM INVESTMENT

Table 18: Investment projects received

	District	Total projects	Rooms	Investment value (USD Mn)
1	Ampara	31	439	15.427
2	Anuradpura	15	286	9.822
3	Badulla	33	818	76.71
4	Batticaloa	28	702	64.71
5	Colombo	86	9,530	2,874.65
6	Galle	166	5,352	547.598
7	Gampaha	50	3,182	305.423
8	Hambantota	79	2,846	720.33
9	Jaffna	48	1001	101.2714
10	Kaluthara	43	1,884	207.082
11	Kegalle	6	225	17.688
12	Kurunegala	3	87	5.64
13	Kandy	57	2,353	277.667
14	Kilinochchi	3	64	1.32
15	Mannar	9	137	3.19
16	Monaragala	4	57	1.84
17	Matara	89	2,090	239.733
18	Matale	58	2,012	169.926
19	Mulative	2	110	8.14
20	Nuwara Eliya	30	1,599	235.476
21	Polonnaruwa	5	179	7.092
22	Puttalam	29	1,317	112.515
23	Rathnapura	9	130	10.703
24	Trincomalee	46	1,435	142.511
25	Vavuniya	4	86	1.88
	Total	933	37,921	6,158.34

By June 2024, Galle, Matara, and Colombo had secured the highest number of investment projects, with 166, 89, and 86 projects, respectively. The Southern Province is increasingly recognized as a key area for tourism accommodation investments. Additionally, investments in Colombo, Galle, and Gampaha are expected to contribute the most to the available room capacity. In terms of investment value, Colombo, Hambantota, and Galle emerged as leading regions. By June 30, 2024, a total of 933 projects had been submitted, amounting to a significant investment value of USD 6,158.34 million.



Number of investment projects received and approved

Table: 19 Investment projects received and approved, 2010 - 2024

Year	Received projects			Approved projects		
	No. of projects received	No. rooms	Investment /USD Mn.	No. of projects approved	No. rooms	Investment /USD Mn.
2010	54	4437	938.87	3	262	17.17
2011	155	8951	1,187.63	44	2159	251.57
2012	72	3942	576.24	57	3695	313.22
2013	60	4098	1123.195	36	2327	370.64
2014	68	3764	957.79	42	2747	426.398
2015	59	3469	430.98	36	2256	889.945
2016	76	3916	588.96	41	1579	145.633
2017	95	2974	314.82	45	2391	379.77
2018	141	4051	935.06	44	1377	159.724
2019	132	2567	189.90	57	2027	755.73
2020	54	1699	837.85	24	690	95.47
2021	45	1328	133.73	30	922	103.985
2022	42	1054	68.437	22	393	36.833
2023	68	1950	237.702	34	1273	170.126
2024	26	506	33.312	15	224	16.929
Total	1,147	48,706	8554.465	530	24,322	4133.143



**Research & International Relations Division
Sri Lanka Tourism Development Authority
No .80, Galle Road
Colombo 03**

**Tel : 0112426800 /155
Email : research@srilanka.travel
web : www.sltda.gov.lk**