YEAR IN REVIEW 2024

Sri Lanka Tourism Development Authority

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HIGHLIGHTS

Tourist arrivals

Tourist arrivals

2,053,465

Tourism revenue

Tourism revenue

3,168.601 * USD Mn
3.2 * billion USD
957.297.7* RS Mn

Average duration of stay

Average duration of stay

8. 42* 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

Chart 01: Tourist arrivals by month, 2023 & 2024

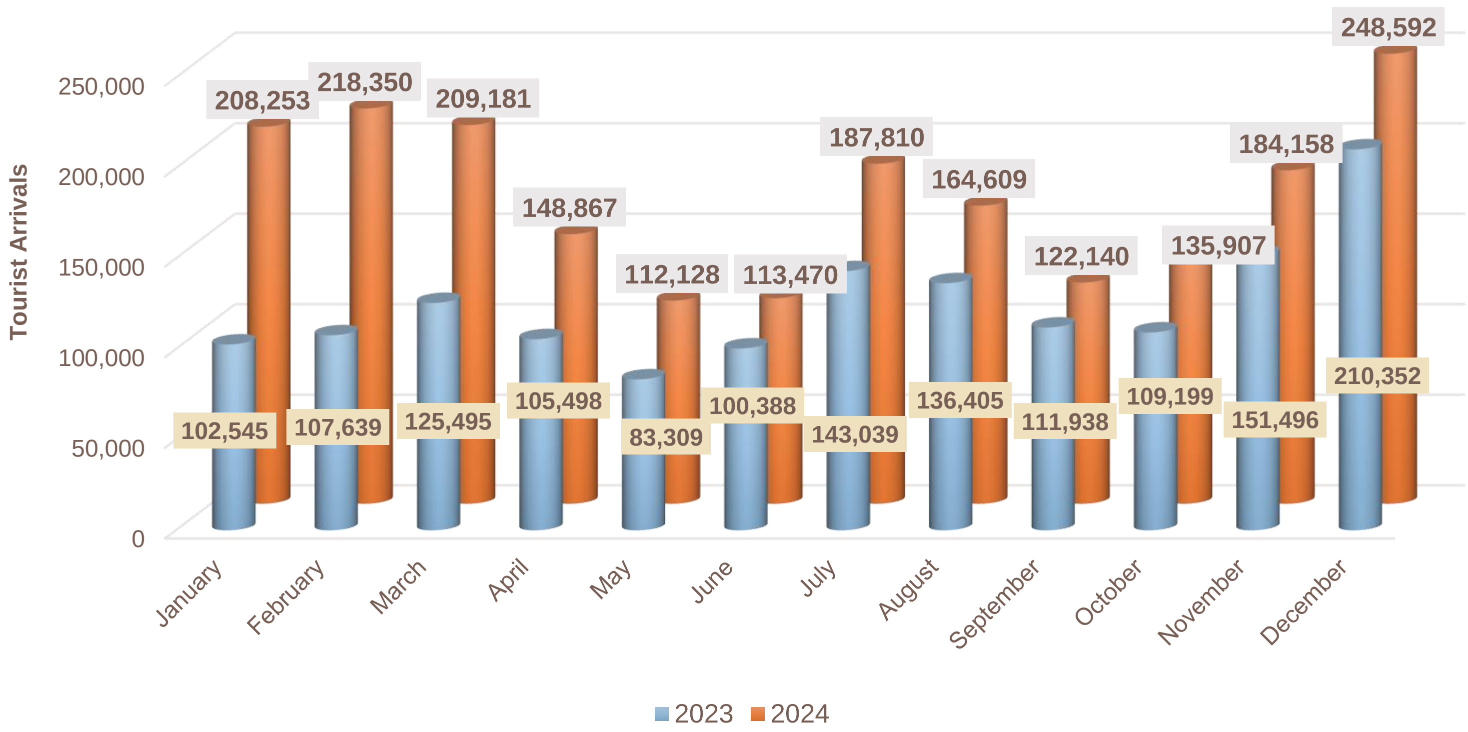


Table 01: Tourist arrivals by month & percentage change, 2023 & 2024

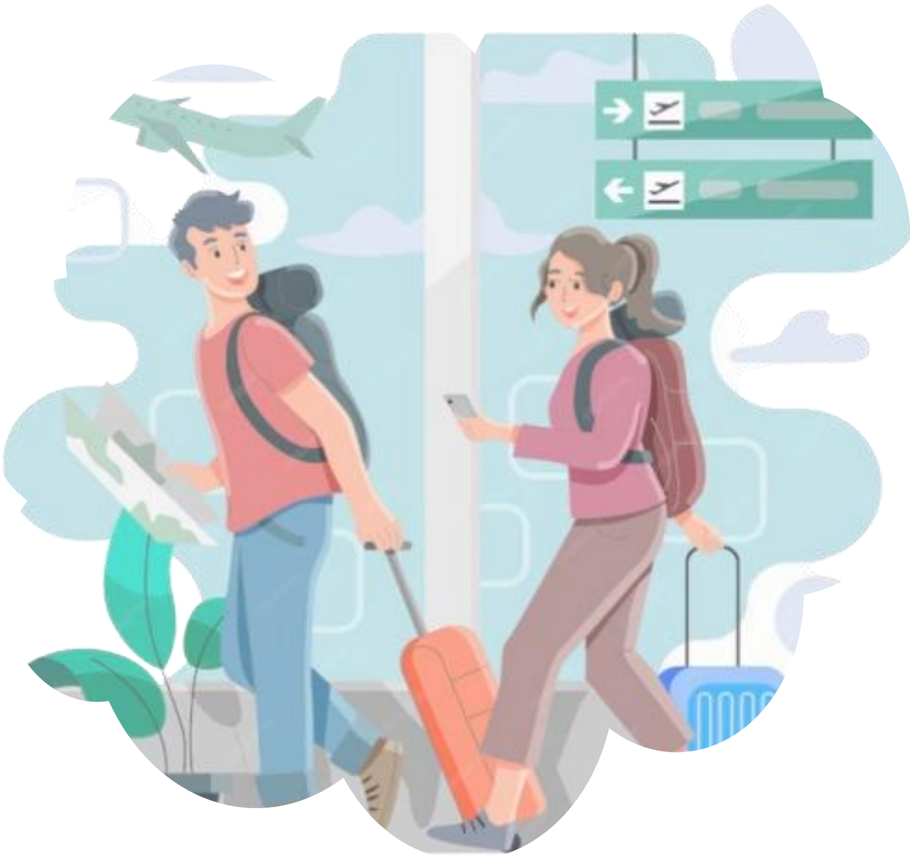
Month	2023	2024	% Cha. 2024/23
January	102,545	208,253	103.08
February	107,639	218,350	102.9
March	125,495	209,181	66.68
April	105,498	148,867	41.1
May	83,309	112,128	34.6
June	100,388	113,470	13.0
July	143,039	187,810	31.3
August	136,405	164,609	20.7
September	111,938	122,140	9.11
October	109,199	135,907	24.5
November	151,496	184,158	21.6
December	210,352	248,592	18.18
Total	**1,487,303**	**2,053,465**	**38.07**

Sri Lanka saw a significant 38.07% increase in tourist arrivals in 2024, welcoming 2,053,465 visitors compared to 2023. This substantial growth suggests a robust recovery for the tourism industry, potentially attributed to factors such as easing global travel restrictions, robust performance from large source markets globally, and growing confidence among travelers in choosing Sri Lanka as their destination.

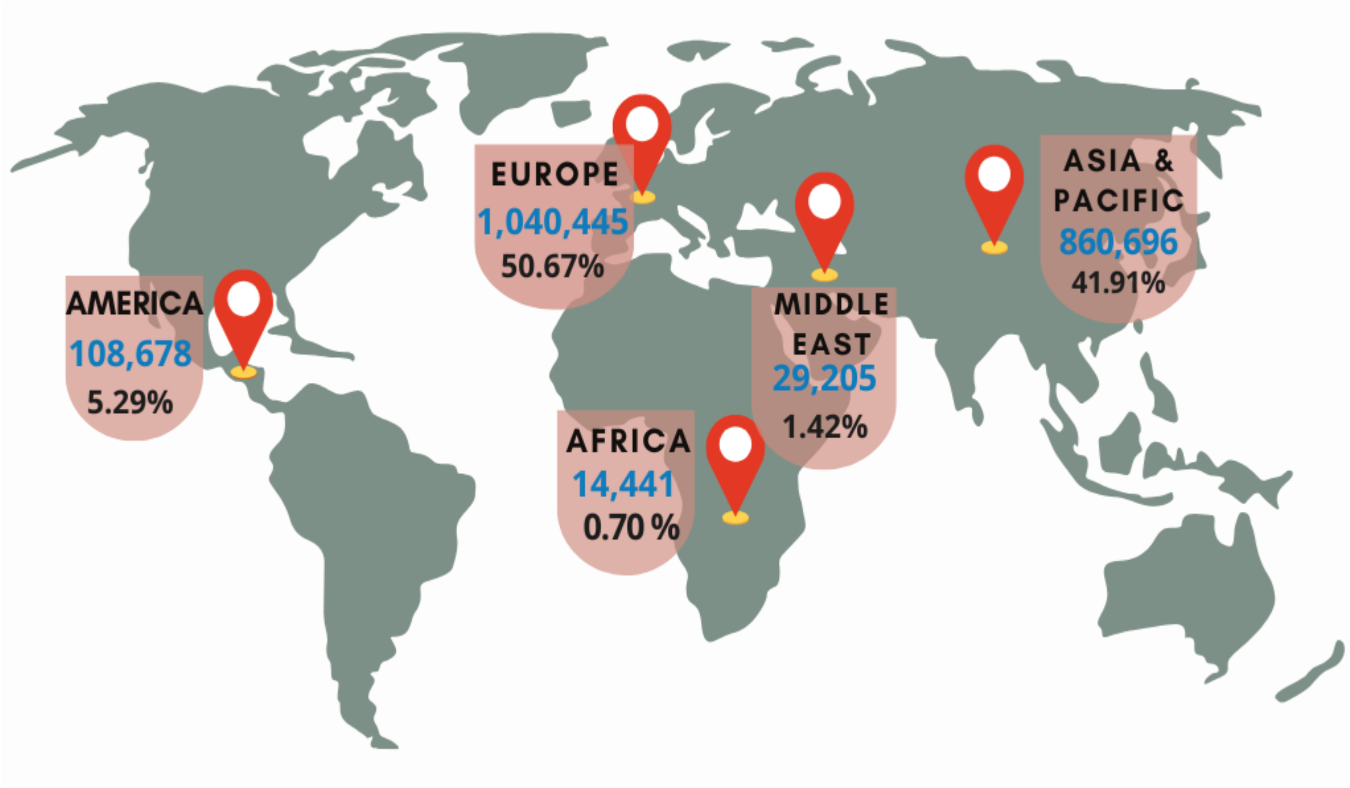
Notably, January witnessed the most substantial growth rate, soaring by 103.08% from the previous year. This surge could be attributed to various factors, including favorable weather conditions and holiday seasons in key source markets. September recorded the lowest growth rate indicating 9.11%, suggesting a slowdown in momentum as the off-peak season set in.

December marked the peak tourist season with the highest number of arrivals, totaling 248,592 visitors. This underscores December's popularity, likely influenced by winter vacations and other advantageous conditions. Conversely, May recorded the lowest tourist arrivals, with 112,128 visitors. This decline may be due to less favorable weather conditions or fewer incentives for travel 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



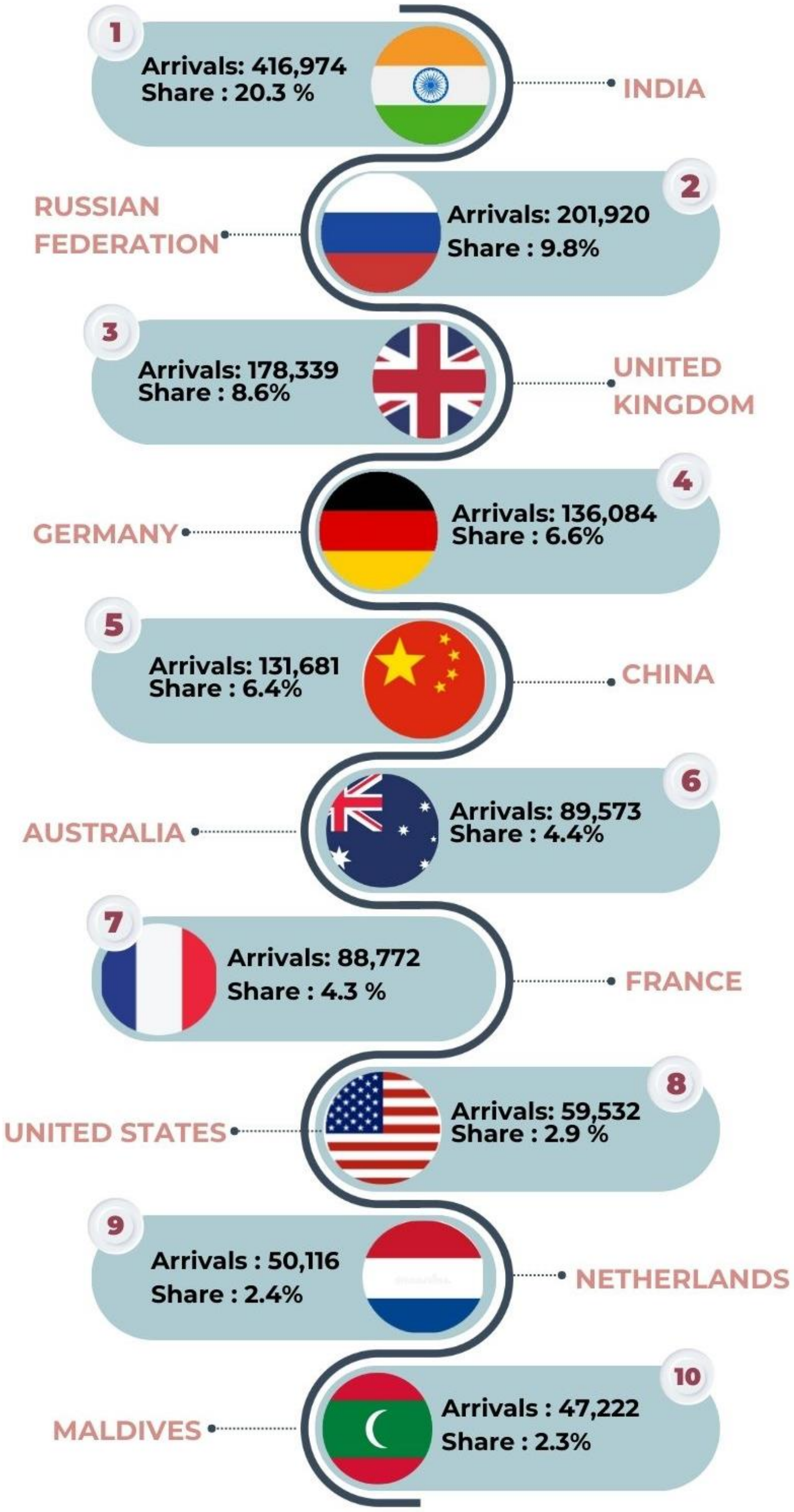
An analysis of tourist arrivals by region shows that Europe remains the leading source of tourists to Sri Lanka, accounting for 50.67% of total arrivals. This dominant share underscores Europe's strong affinity for Sri Lanka as a preferred travel destination, likely driven by cultural ties, effective marketing strategies, and well-established travel routes.

The Asia and Pacific region emerged as the second-largest source market, contributing 41.91% 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 5.29% 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 1.42% and 0.7%, 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 source markets to Sri Lanka, 2024



In the year 2024, the top source markets for Sri Lanka were led by India, contributing 20.3% 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 9.8% 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 (8.6%), Germany (6.6%), and China (6.4%) 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 (4.4%), France (4.3%), and the United States (2.9%) 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 Netherland and Maldives respectively contributed 2.4 and 2.3%, highlighting their emerging roles in the tourism landscape, possibly due to enhanced travel links and niche tourism segments.

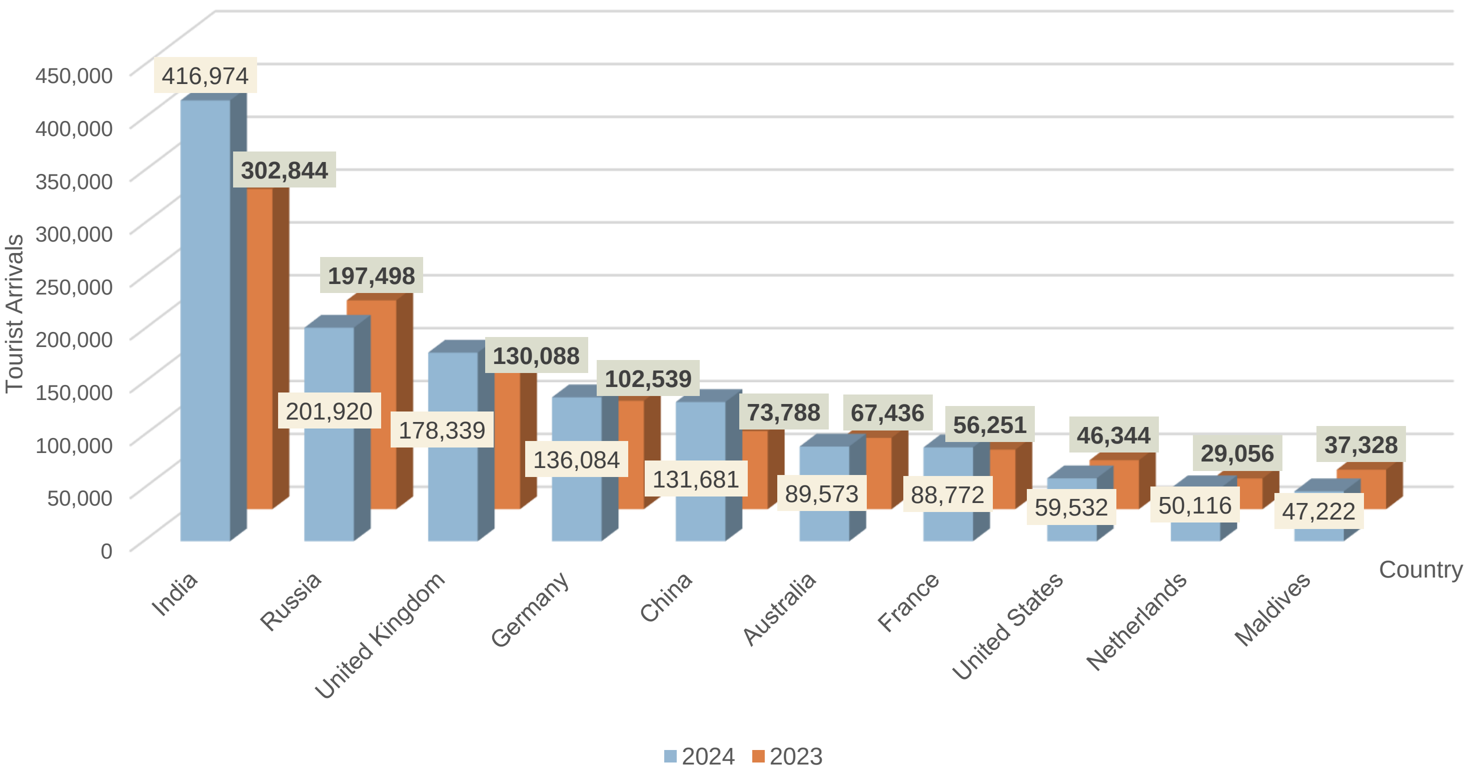
This diverse mix of source markets reflects the global appeal of Sri Lanka but also emphasizes the need to maintain a broad reach in marketing efforts to sustain growth and reduce dependency on any single market.

Table 02: Top ten markets to Sri Lanka, 2024 & 2023

Country of Residence	2024	2023
India	416,974	302,844
Russian Federation	201,920	197,498
United Kingdom	178,339	130,088
Germany	136,084	102,539
China	131,681	73,788
Australia	89,573	67,436
France	88,772	56,251
United States	59,532	46,344
Netherlands	50,116	29,056
Maldives	47,222	37,328
Others	653,252	444,131
Total	**2,053,465**	**1,487,303**

Comparison of top Ten Markets

Chart 2: Comparison of top Ten Markets

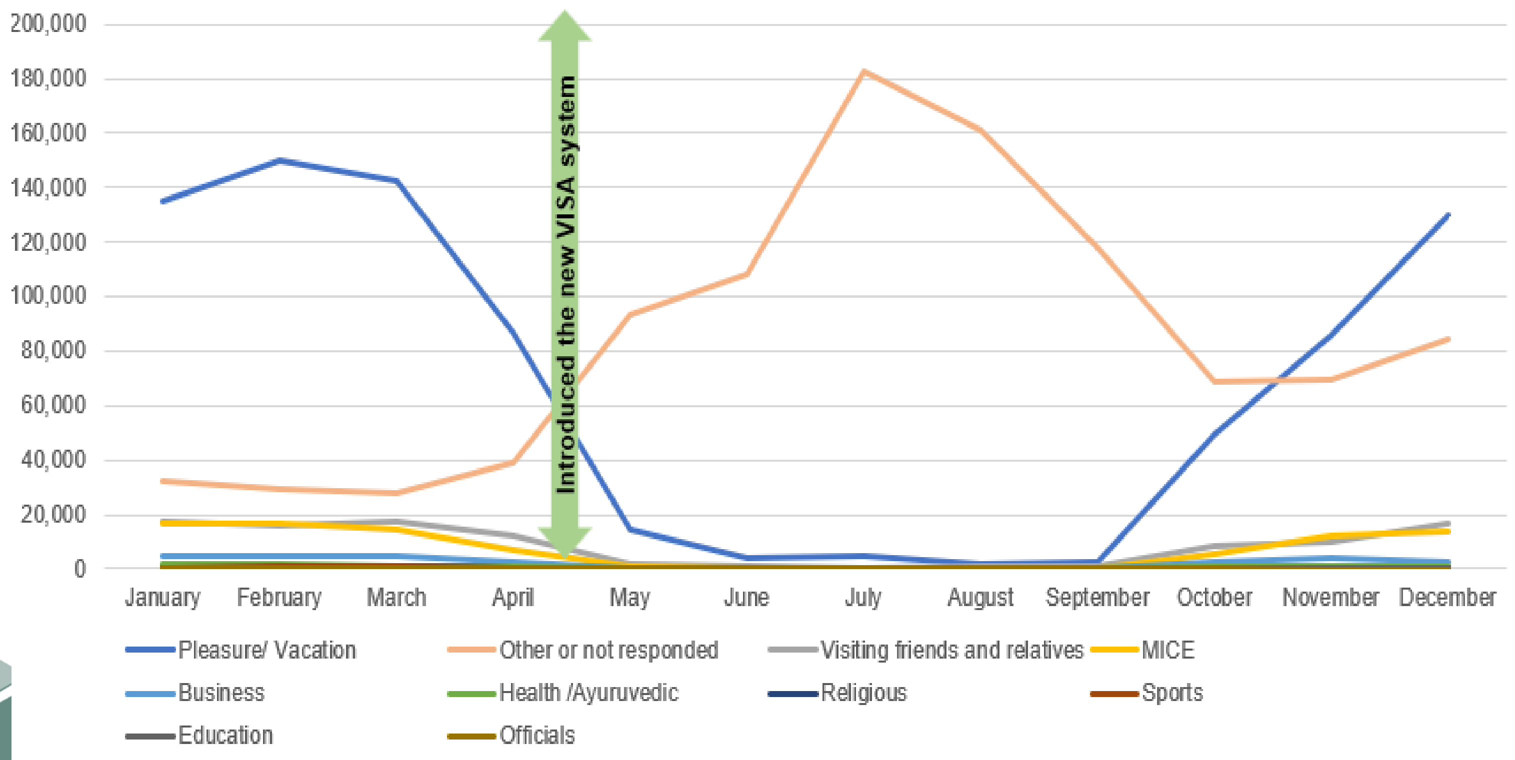


Analysis of Purpose of Visit

Table 03: Analysis of purpose of visit

Country	Pleasure/ Vacation	Visiting friends and relatives	MICE	Business	Health /Ayurveda	Sports	Religious	Education	Official	Other or not responded (or VFS related online Visa)	Grand Total
India	141,538	13,694	16,431	12,703	33	594	1,020	339	13	230,609	**416,974**
Russian Federation	83,866	971	18,657	60	147	61	22	26	02	98,108	**201,920**
United Kingdom	78,981	19,443	2,398	1,466	161	545	63	22	03	75,257	**178,339**
Germany	69,179	5,539	3,843	535	4,702	73	15	15	0	52,183	**136,084**
China	49,861	1,595	2,007	2,010	10	36	93	12	01	76,056	**131,681**
Australia	30,881	17,776	949	621	49	253	75	09	01	38,959	**89,573**
France	45,681	4,208	5,019	376	169	58	09	25	01	33,229	**88,775**
United States	26,078	7,024	1,609	968	90	130	150	78	01	23,404	**59,532**
Netherlands	19,117	1,485	1,138	303	81	15	06	08	02	27,961	**50,116**
Maldives	78	63	16	31	09	0	0	0	0	47,025	**47,222**

Chart 3: Tourist arrivals by purpose of visit – 2024



An analysis of tourist arrivals to Sri Lanka reveals that leisure and vacation are the predominant reasons for visits across major source markets. Notably, a significant proportion of tourists from various countries cite pleasure and vacation as their primary purpose.33.9% of Indian tourists,41.5% of Russian tourists, 44.3% of tourists from United Kingdom, 50.8% of German tourists and 37.9% of Chinese tourists had visited Sri Lanka for this purpose underscore Sri Lanka's appeal as a leisure destination.

In addition to leisure, visiting friends and relatives (VFR) is a notable motive among certain nationalities. For instance, 19.8% of Australian tourists, 11.8% of American tourists, and 10.9% of British tourists traveled to Sri Lanka for this purpose. This trend suggests strong diaspora connections and cultural ties influencing travel decisions.

The Meetings, Incentives, Conferences, and Exhibitions (MICE) sector also contributes to Sri Lanka's tourism, with 9.2% of Russian tourists and 5.7% of French tourists visiting for business-related events. Additionally, 3% of Indian tourists arrived for business purposes, likely due to geographical proximity and robust bilateral relations between India and Sri Lanka.

Wellness tourism is another emerging segment, particularly among German visitors, with 3.45% traveling to Sri Lanka for wellness purposes. This indicates a growing interest in the country's wellness offerings, such as Ayurveda and spa retreats.

Overall, these insights highlight the diverse motivations of tourists visiting Sri Lanka, with leisure and vacation leading, followed by VFR, business, and wellness pursuits.

Tourist arrivals by age category

Table 04: Tourist arrivals by age category

Age	Number of passengers	% Share
60 or 60 +	352,440	17.2
51-60	311,217	15.2
41-50	363,485	17.7
31-40	461,826	22.5
20-30	337,509	16.4
below 10	226,988	11.1
Total	**2,053,465**	**100.0**

The 31-40 age group represented the largest segment of tourist arrivals to Sri Lanka, comprising 22.5% of total visitors. This indicates that individuals in their 30s, who typically have established careers and a greater interest in varied travel experiences, are a crucial demographic for the tourism industry.

Tourists aged 60 and above made up a notable 17.2% of total arrivals, suggesting a strong attraction for older travelers. Sri Lanka's cultural heritage, diverse landscapes, and wellness tourism offerings are likely key factors driving this interest.

The 41-50 age group represented 17.7% of visitors, reflecting a strong presence of middle-aged tourists, possibly attracted by family-friendly and adventure-oriented experiences.

Tourists in the 51-60 age bracket made up 15.2% of arrivals, highlighting the appeal of Sri Lanka as a destination for mature travelers looking for relaxation and exploration.

Meanwhile, the 20-30 age group constituted 16.4% of arrivals, indicating a substantial interest from younger travelers, who are likely attracted to adventure activities, budget-friendly options, and vibrant social scenes. These findings emphasize the diverse age range of tourists visiting Sri Lanka and highlight the need to cater to a wide array of interests across different age groups to maintain tourism growth.

Chart 4: Tourist arrivals by age 2024

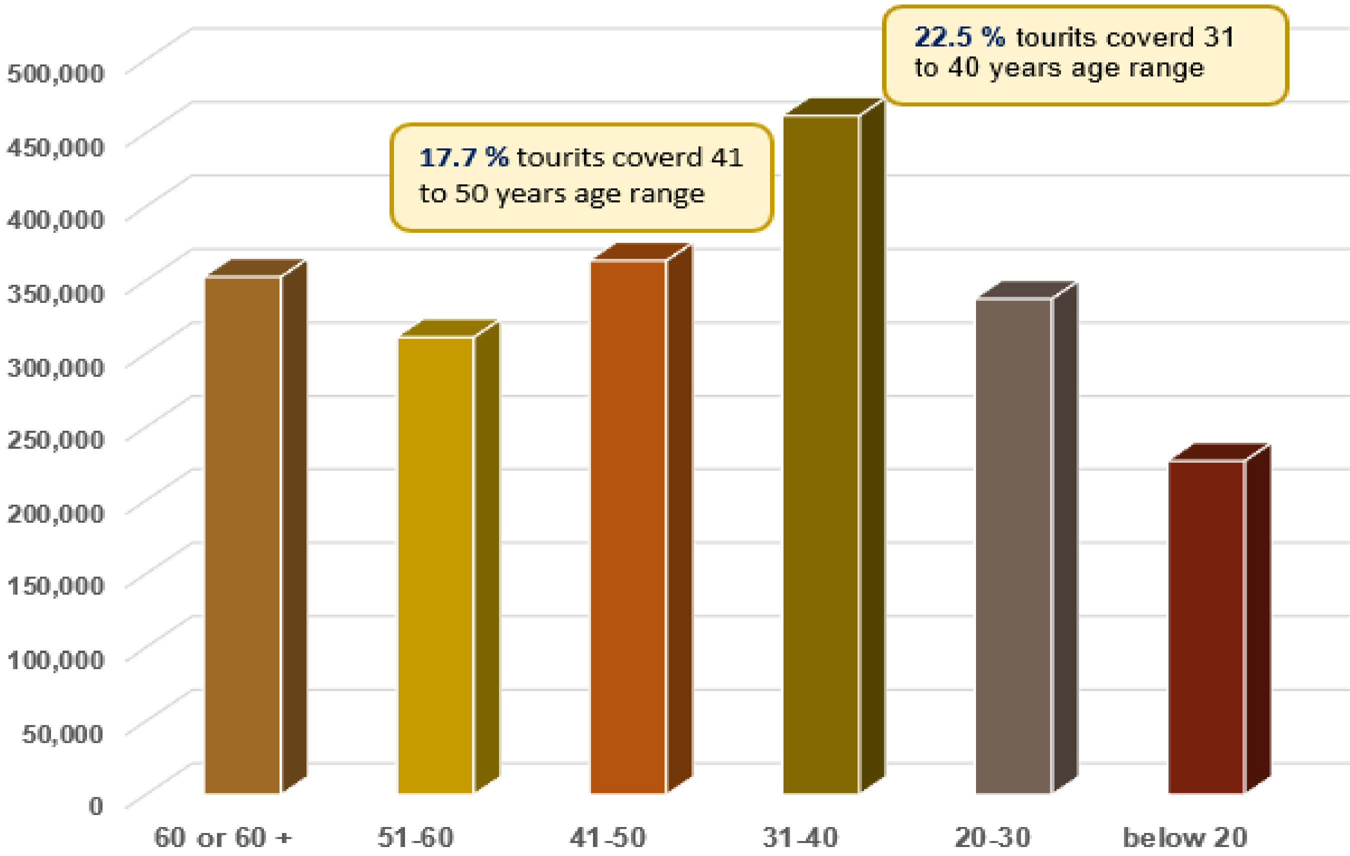
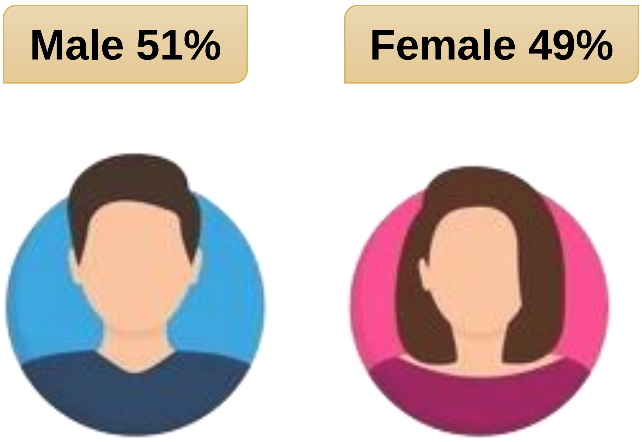


Chart 5: Tourist arrivals by gender -2024



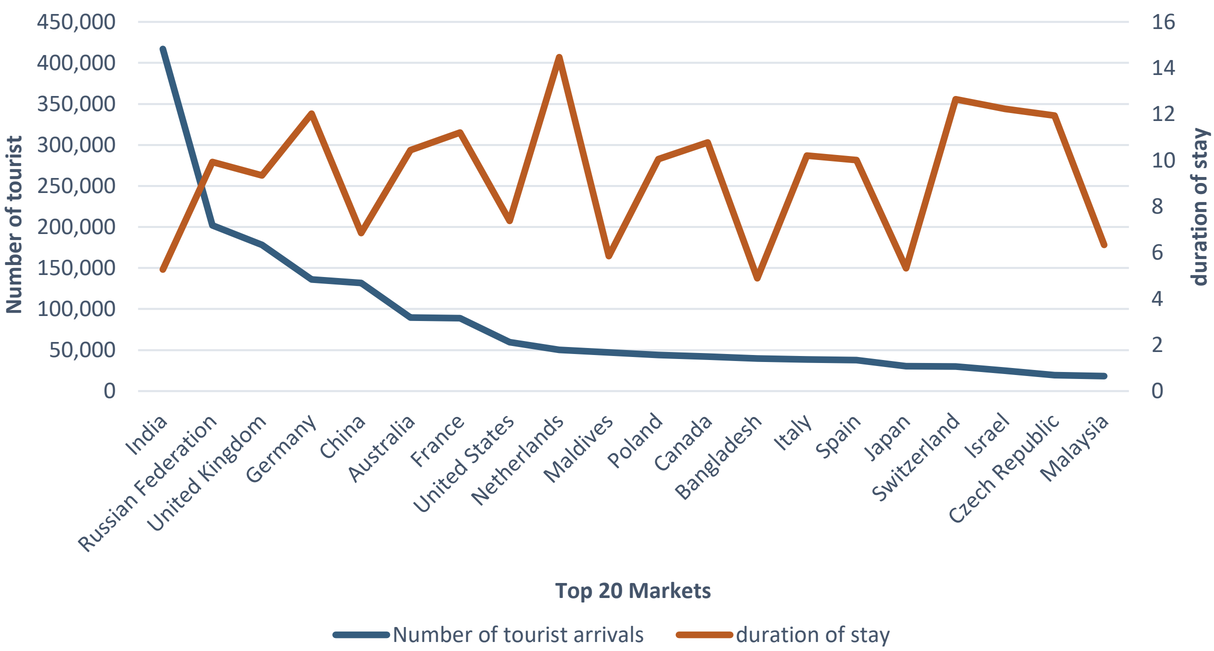
Sri Lanka attracts a nearly equal proportion of male and female tourists, with 51% and 49% respectively. This balanced gender split suggests that the destination provides a diverse range of attractions and activities appealing to all, including adventure, cultural experiences, relaxation, and wellness. This gender parity underscores the broad and inclusive nature of Sri Lanka's tourism offerings, catering effectively to a wide array of traveler preferences.

Average duration of stay by source markets

Table 05: Average duration of stay by source markets

Rank	Country	Number of tourists	Duration of stay
1	India	416,974	5.27
2	Russian Federation	201,920	9.93
3	United Kingdom	178,339	9.35
4	Germany	136,084	12.02
5	China	131,681	6.85
6	Australia	89,573	10.44
7	France	88,775	11.21
8	United States	59,532	7.38
9	Netherlands	50,116	14.47
10	Maldives	47,222	5.85
11	Poland	44,165	10.05
12	Canada	42,212	10.78
13	Bangladesh	39,555	4.89
14	Italy	38,709	10.2
15	Spain	37,928	10.01
16	Japan	30,429	5.32
17	Switzerland	29,829	12.64
18	Israel	24,845	12.23
19	Czech Republic	19,279	11.94
20	Malaysia	18,259	6.33

Chart 6: Tourist arrivals vs duration of stay



An analysis of tourist stay durations in Sri Lanka reveals notable variations across different nationalities. Visitors from the Netherlands exhibit the longest average stay, approximately 14.47 nights, followed by tourists from Switzerland and Israel. In contrast, Bangladeshi tourists have the shortest average stay, around 4.89 nights, with Indian tourists, who constitute a significant portion of Sri Lanka's tourist market, averaging 5.27 nights. Russian tourists tend to stay longer, with an average of 9.93 nights. These disparities in stay durations can be attributed to several factors, including travel motivations, economic considerations, and cultural influences.

Travel Motivations and Interests

Tourists from countries like the Netherlands, Switzerland, and Israel often seek immersive experiences that allow them to explore Sri Lanka's diverse landscapes, cultural heritage, and recreational activities. Their interest in niche tourism sectors, such as eco-tourism, adventure tourism, and cultural tourism, encourages longer stays to fully engage with the destination's offerings. In contrast, tourists from neighboring countries like Bangladesh and India may visit for shorter durations due to different travel objectives, such as business trips, religious pilgrimages, or brief leisure visits, which do not necessitate extended stays.

Economic Factors and Travel Costs

Economic considerations play a significant role in determining the length of stay. Tourists from Western countries, with generally higher disposable incomes, can afford longer vacations, allowing them to spend more time exploring Sri Lanka. Conversely, travelers from countries with lower income levels may have budget constraints that limit the duration of their trips. Additionally, the cost of travel, including airfare and accommodation, can influence stay lengths. For instance, long-haul travelers might opt for extended stays to maximize the value of their travel expenses, while short-haul visitors might prefer brief visits due to lower travel costs.

Cultural Influences and Travel Patterns

Cultural factors and travel habits also impact stay durations. In some cultures, shorter, more frequent vacations are customary, while in others, extended holidays are preferred. For example, European tourists often plan longer holidays to distant destinations like Sri Lanka, aligning with their cultural practices of taking extended vacations. In contrast, tourists from neighboring Asian countries might have cultural or occupational norms that favour shorter trips. Moreover, familiarity with the destination, repeat visits, and the presence of diaspora communities can influence travel patterns and stay durations.

Policy Implications and Tourism Development

Understanding these variations is crucial for Sri Lanka's tourism stakeholders to tailor marketing strategies and develop products that cater to the diverse needs of different tourist segments. By recognizing the distinct preferences and constraints of various nationalities, the tourism industry can enhance visitor satisfaction and promote longer stays, thereby boosting economic benefits. For instance, creating specialized packages that offer immersive experiences for long-haul travelers or providing affordable short-stay options for regional visitors can help accommodate the varying preferences and budgets of tourists.

The differences in average stay durations among tourists in Sri Lanka are influenced by a complex interplay of travel motivations, economic factors, and cultural influences. By acknowledging and addressing these factors, Sri Lanka can enhance its appeal to a broad spectrum of international visitors, encouraging longer stays and fostering a more robust tourism industry.

TOURISM INCOME

Table 06 : 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**
July	187,810	181.15**	9.65	**328.310**
August	164,609	181.15**	9.46	**282.087**
September	122,140	181.15**	8.18	**180.988**
October	135,907	181.15**	7.54	**185.631**
November	184,158	181.15**	8.18	**272.887**
December	248,592	181.15**	8.04	**362.061**
Total	**2,053,465**			**3,168.601**

Average Expenditure per day 2024 – Jan ~ Dec ** **- 181.15 USD**

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

TOURISM ACCOMMODATION

TOURISM ACCOMMODATION AND OTHER SERVICES

Table 07: SLTDA registered accommodation establishments, 2023 & 2024

Category	2024		2023	
	Number of establishments	Number of rooms	Number of establishments	Number of rooms
Boutique Hotel	39	877	41	865
Boutique Villa	49	344	51	356
Bungalow	1, 111	4,691	984	4,078
Classified Tourist Hotel	**169**	**17,182**	**168**	**16,686**
1 Star	41	1,852	41	1,852
2 Star	40	2,431	41	2,499
3 Star	26	2,462	26	2,462
4 Star	31	3,834	30	3,590
5 Star	31	6,603	30	6,283
Guest House	1,687	19,104	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	1,122	3,322	1,080	3,231
Hostels	16	155	12	143
Rented Apartment	82	325	86	328
Rented Home	17	47	14	41
Themed Accommodation & Value-added Activities	1	11	1	11
Camping Site	15	150	-	-
Tourist Apartment hotel	1	25	-	-
Tourist Hotel	201	8,869	221	8,515
Total	**4,519**	**55,455**	**4,346**	**53,229**

As at 02/01/2025

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

In 2024, the Sri Lanka Tourism Development Authority (SLTDA) registered 4,519 accommodation establishments, marking a 4% increase from the previous year. Of these, 169 were classified as tourist hotels, with 31 designated as five-star establishments. The accommodation sector was predominantly driven by small and medium enterprises (SMEs), with guest houses, homestays, and bungalows comprising 1,687, 1,122, and 1,111 establishments respectively. Guest houses accounted for 37.3% of the total, followed by homestays at 24.8% and bungalows at 24.5%, while classified tourist hotels represented only 3.7%. The total room capacity for 2024 was 55,455, with guest houses contributing the largest share of 19,104 rooms, underscoring the critical role of SMEs in the accommodation sector. This growth in establishments and room capacity 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

The distribution of tourist accommodations in Sri Lanka is notably uneven across its provinces. The Western, Southern, and Central Provinces collectively account for a significant portion of the country's total room capacity, with the Western Province alone comprising 36.0% of all rooms, followed by the Southern Province at 25.5%, and the Central Province at 16.2%. In stark contrast, the Northern Province holds a mere 2.0% of the total accommodations, underscoring a pronounced regional disparity. Additionally, the Uva Province contributes 5.1% to the overall room inventory.

This concentration of accommodations in specific provinces can be attributed to several factors. The Western Province, encompassing Colombo, serves as the nation's commercial and administrative hub, naturally attracting a higher influx of business and leisure travelers. The Southern Province boasts renowned coastal destinations like Galle and Hikkaduwa, which are popular among tourists for their pristine beaches and cultural heritage. The Central Province, home to Kandy and the scenic hill country, offers rich cultural experiences and natural beauty, making it a favoured destination for visitors.

Conversely, the Northern Province's limited share of accommodations reflects its historical context. The region was significantly affected by prolonged civil conflict, which impeded tourism development and infrastructure expansion. Although the conflict has ended, the area is still in the process of rebuilding and developing its tourism sector to attract more visitors.

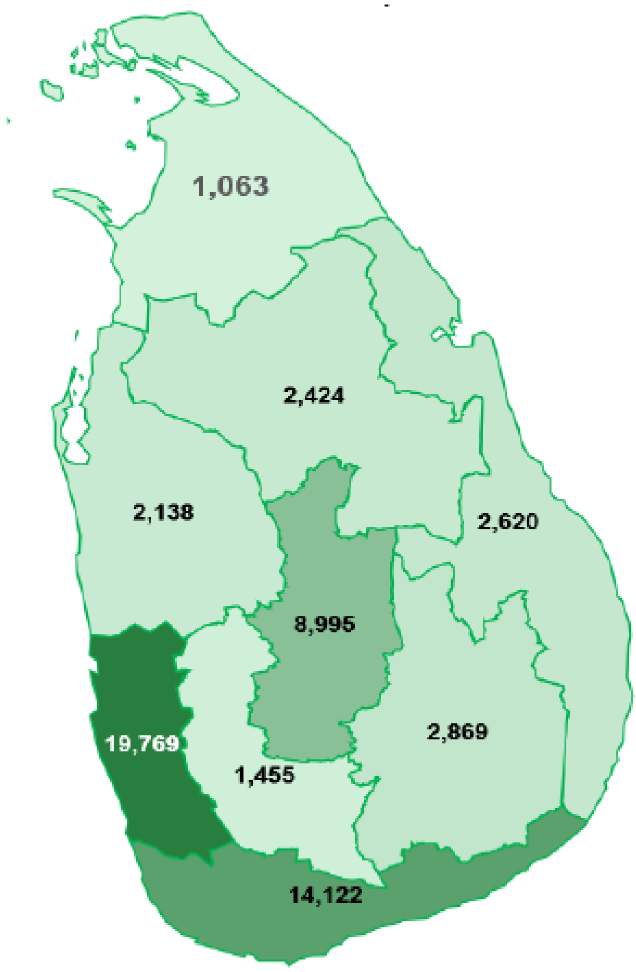


Table 08: Total rooms by provinces

Province	Total rooms	Percentage
Eastern Province	2,620	4.7
North Central Province	2,424	4.3
Uva Province	2,869	5.1
Western Province	19,769	36.0
Southern Province	14,122	25.5
Northern Province	1,063	2.0
Central province	8,995	16.2
Sabaragamuwa Province	1,455	2.6
North Western Province	2,138	3.9
Total	**55,455**	

Rooms by Districts

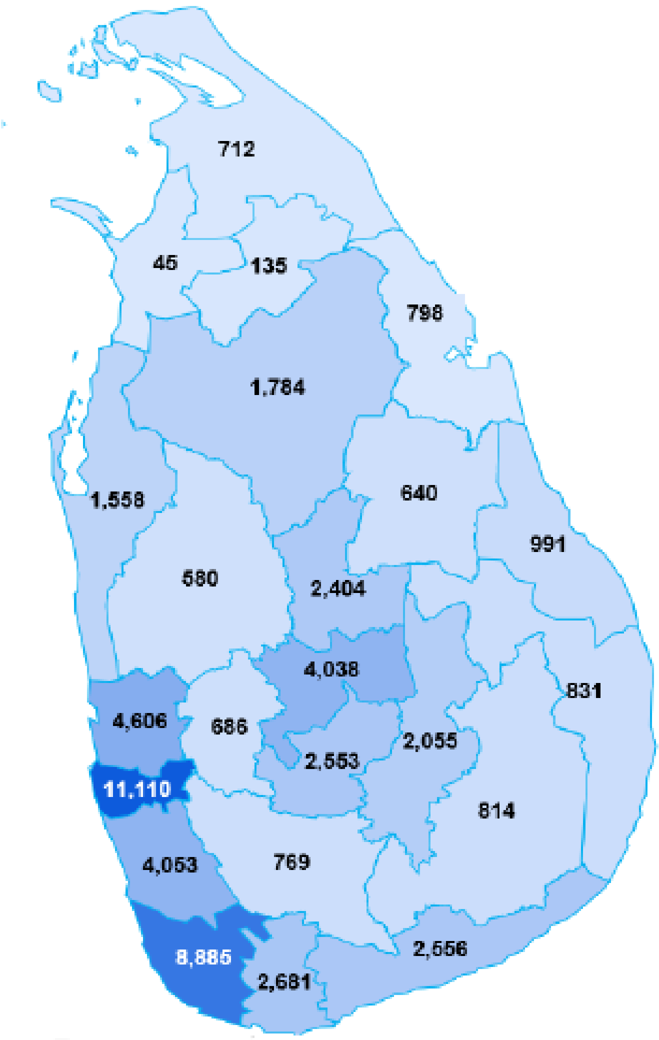


Table 09: Total rooms by districts

District	Rooms	Percentage
Ampara	831	1.4
Anuradhapura	1,784	3.2
Badulla	2,055	3.7
Batticaloa	991	1.8
Colombo	11,110	20.0
Galle	8,885	16.0
Gampaha	4,606	8.3
Hambantota	2,556	4.6
Jaffna	712	1.3
Kalutara	4,053	7.3
Kandy	4,038	7.3
Kegalle	686	1.2
Kilinochchi	108	0.1
Kurunegala	580	1.0
Mannar	45	0.08
Matale	2,404	4.3
Matara	2,681	4.8
Monaragala	814	1.5
Mullaitivu	63	0.1
Nuwara Eliya	2,553	4.6
Polonnaruwa	640	1.2
Puttalam	1,558	2.8
Rathnapura	769	1.4
Trincomalee	798	1.4
Vavuniya	135	0.2
Total	**55,455**	

The distribution of accommodation facilities across Sri Lanka's districts reflects the varying degrees of tourism development and visitor interest in each region. Districts such as Colombo, Galle, Gampaha, Kalutara, and Kandy have a high concentration of rooms, driven by their prominence as tourist destinations and commercial centers. In contrast, districts like Mullaitivu and Mannar have fewer accommodations, highlighting the potential for tourism development in these underutilized areas. Strategic efforts to enhance tourism in underrepresented districts can lead to a more balanced and inclusive tourism industry nationwide.

Table 10: Number of rooms by star category - 2024

Star category	Number of establishments	Number of rooms
One	41	1,852
Two	40	2,431
Three	26	2,462
Four	31	3,834
Five	31	6,603
Total	**169**	**17,182**

In Sri Lanka's formal accommodation sector, classified hotel rooms constitute 31.0% of the total inventory. Within this segment, five-star hotels lead with 38.4% of the rooms, reflecting the significant demand for luxury accommodations. Four-star hotels account for 22.3%, catering to guests desiring high-quality services at slightly lower prices. Three-star and two-star hotels represent 14.3% and 14.1% of the rooms, respectively, offering a balance between affordability and comfort. One-star hotels comprise 10.8% of the classified rooms, appealing primarily to budget-conscious travelers, which explains their smaller market share.

Distribution of rooms of classified hotels

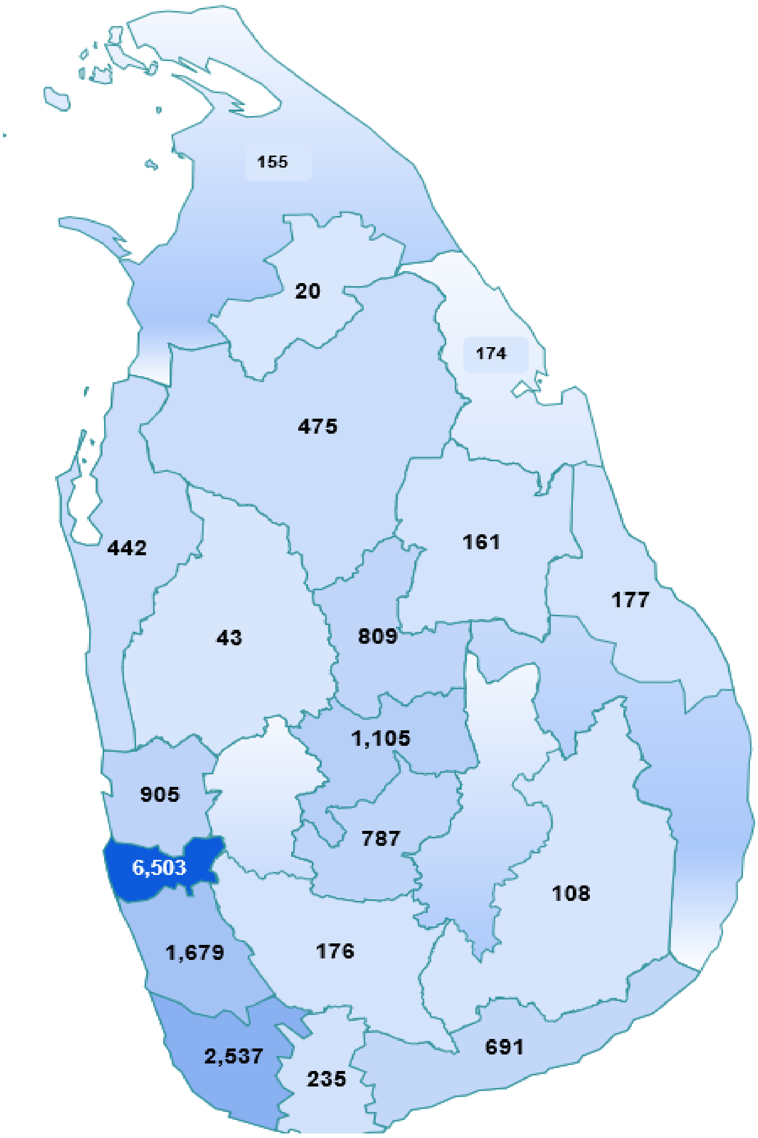


Table 11: Distribution of rooms of classified hotels ,2024

District	Number of rooms
Anuradhapura	475
Batticaloa	177
Colombo	6,503
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	**17,182**

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 all accommodation establishments

Table :12 Distribution of rooms of all accommodation establishments

District	Boutique Hotel	Boutique Vilas	Classified Hotels	Tourist Hotels	Bungalows	Camping Site	Eco Lodge	Guest Houses	Heritage Bungalows	Heritage Hotels	Heritage Home Stays	Hostels	Home Stay Units	Rented Apartments	Rented Homes	Tourist Apartment	Themed Accommodation	Grand Total
Ampara	–	10	–	85	48	–	–	527	–	–	–	10	147	–	4	–	–	**831**
Anuradhapura	21	10	475	142	201	24	–	770	–	–	–	–	141	–	–	–	–	**1,784**
Badulla	14	–		241	301	3	–	751	–	–	–	–	742	3	–	–	–	**2,055**
Batticaloa	57	–	177	417	77	–	–	237	–	–	–	–	26	–	–	–	–	**991**
Colombo	10	6	6,503	1,641	330	–	–	1,892	–	158	1	80	282	193	14	–	–	**11,110**
Galle	292	135	2,537	1,343	1,118	–	–	2,905	–	–	–	19	459	41	11	25	–	**8,885**
Gampaha	17	7	905	947	229	–	–	2,242	–	–	1	–	220	31	7	–	–	**4,606**
Hambantota	163	27	691	508	228	11	–	831	–	–	–	–	97	–	–	–	–	**2,556**
Jaffna	–	–	155	49	63	–	–	435	–	–	–	–	8	–	2	–	–	**712**
Kalutara	47	14	1,679	1,082	302	6	–	834	–	–	–	–	89	–	–	–	–	**4,053**
Kandy	10	43	1,105	684	498	10		1,175	9	–	–	8	470	20	6	–	–	**4,038**
Kegalle	–	7	–	13	81	5	–	531	–	–	–	–	49	–	–	–	–	**686**
Kilinochchi	–	–	–	–	18	–	–	90	–	–	–	–		–	–	–	–	**108**
Kurunegala	–	–	43	14	27	–	–	474	–	–	–	–	11	–	–	–	11	**580**
Mannar	–	–	–	–	–	–	–	42	–	–	–	–	3		–	–	–	**45**
Matale	95	23	809	574	146	–	–	551	–	–	–	–	198	8	–	–	–	**2,404**
Matara	62	7	235	227	372	–	20	1,505	–	–	–	38	193	19	3	–	–	**2,681**
Moneragala	–	–	108	166	48	77		395	–	–	–	–	20	–	–	–	–	**814**
Mullaitivu	–	–	–	–	2	–	–	58	–	–	–	–	3	–	–	–	–	**63**
Nuwara Eliya	52	44	787	174	302	–	–	966	4	154	–	–	67	3	–	–	–	**2,553**
Polonnaruwa	10	□	161	156	37	–	–	239	–	–	–	–	37	–	–	–	–	**640**
Puttalam	27	11	442	241	144	6		653	6	–	–	–	25	3	–	–	–	**1,558**
Rathnapura	–	–	176	20	70	8	–	460	–	–	–	–	35	–	–	–	–	**769**
Trincomalee	–	–	174	145	42	–	–	433	–	–	–	–	–	4	–	–	–	**798**
Vavuniya	–	–	20	–	7	–	–	108	–	–	–	–	–		–	–	–	**135**
Grand Total	**877**	**344**	**17,182**	**8,869**	**4,691**	**150**	**20**	**19,104**	**19**	**312**	**2**	**155**	**3,322**	**325**	**47**	**25**	**11**	**55,455**

The distribution of rooms across various accommodation types registered with the Sri Lanka Tourism Development Authority (SLTDA) reveals significant patterns aligned with regional appeal and traveler inclinations. Guesthouses are prevalent across all districts, notably in Galle, Gampaha, and Colombo. This widespread presence underscores the vital role of small and medium-sized enterprises (SMEs) in Sri Lanka's hospitality sector.Catering to luxury travelers, boutique hotels are predominantly situated in Galle and Hambantota. These areas offer a unique combination of historical significance and picturesque landscapes, appealing to upscale tourists.Boutique villas are especially common in Galle, Nuwara Eliya, and Kandy. These regions, celebrated for their coastal beauty and highland attractions, provide guests with exclusive and serene retreats. Bungalows are primarily located in Galle and Kandy, both rich in cultural heritage. Notably, there are no SLTDA-registered bungalows in the Mannar District. Homestays are most prevalent in Badulla and Kandy, reflecting a blend of rural allure and urban lodging preferences. These accommodations are absent in the districts of Kilinochchi, Trincomalee, and Vavuniya. SLTDA-registered eco lodges are exclusively found in the Matara district, indicating a focused approach to eco-tourism in this area. Themed accommodations are solely located in the Kurunegala district, suggesting a niche market catering to specific traveler interests. Tourist apartments are available only in the Galle district, offering alternatives for travelers seeking self-catering options. The highest concentration of rooms in tourist hotels is observed in Colombo, Galle, and Kalutara districts. These areas serve both leisure and business travelers, highlighting their strategic importance as central hubs for tourism. On a district level, Colombo, Galle, and Gampaha boast the largest room inventories, while Mannar district records the smallest. This distribution reflects the diverse tourism landscape of Sri Lanka, where different regions cater to varying traveler preferences and market demands.

AIR CONNECTIVITY

AIR CONNECTIVITY

Direct 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 31.05% 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 13: Main final departure airports to Sri Lanka

Rank	Final Port by Air	Number of tourists	% Share	Rank	Final port by Air	Number of tourists	% Share
1	Dubai	235,415	11.46	21	Zhukovsky	19,123	0.93
2	Doha Qatar	226,020	11.01	22	Paris	16,376	0.80
3	Chennai	176,180	8.58	23	Don Mueang	15,445	0.75
4	Abu Dhabi	125,949	6.13	24	Dhaka	15,118	0.74
5	Mumbai	83,214	4.05	25	Hong Kong	14,561	0.71
6	Delhi	79,150	3.85	26	Narita	14,172	0.69
7	Bangalore	78,163	3.81	27	Kunming	13,882	0.68
8	Kuala Lumpur	72,036	3.51	28	Sydney	13,414	0.65
9	Moscow.	69,929	3.41	29	Muscat	12,078	0.59
10	Singapore	69,597	3.39	30	Warsaw	11,446	0.56
11	London	65,965	3.21	31	Tolmachevo Novosibirsk	10,988	0.54
12	Sharjah	58,258	2.84	32	Frankfurt	10,400	0.51
13	Shanghai	51,706	2.52	33	Almaty	9,766	0.48
14	Dubai/Male	51,179	2.49	34	Kuwait	9,369	0.46
15	Hyderabad	49,850	2.43	35	Moscow/Vnukovo	8,939	0.44
16	Istanbul	49,473	2.41	36	Kochi	8,923	0.43
17	Male	47,979	2.34	37	Bahrain/Male	8,200	0.40
18	Bangkok	34,491	1.68	38	Guangzhou	8,051	0.39
19	Melbourne	22,874	1.11	39	Tiruchchirappalli	7,403	0.36
20	Chengdu	21,097	1.03	40	Kazan, Russia	7,178	0.35
				41	Others	150,108	7.31
					Total	**2,053,465**	**100.00**

Contribution of Airlines on tourist arrivals to Sri Lanka

No.	Airline	Number of passengers	Percentage Share
01	SriLankan Airlines	514,623	25.1%
02	Qatar Airways	222,911	10.9 %
03	Emirates	184,345	9.0%
04	IndiGo	173,858	8.5%
05	Etihad Airways	111,323	5.4%
06	flydubai	86,574	4.2%
07	Air India	78,088	3.8%
08	China Eastern	65,571	3.2%
09	Red Wings Airlines	56,805	2.8%
10	AirArabia	56,617	2.8%
11	Turkish Airlines	49,515	2.4%
12	Singapore Airlines	47,668	2.3%
13	airasia	38,541	1.9%
14	azurair	30,204	1.5%
15	Rossiya Russian Airlines	30,169	1.5 %
16	Vistara	28,947	1.4 %
17	Aeroflot Russian Airlines	27,451	1.3 %
18	FirstAir Fly the Arctic	24,405	1.2 %
19	AirAsia Thailand	21,945	1.06 %
20	OTHERS	203,905	9.9 %

An analysis of tourist arrivals by airline reveals that Sri Lankan Airlines holds the largest share with 25.1% of the total. Qatar Airways follows with 10.9%, and Emirates with 9.0%. IndiGo and Etihad contribute 8.5% and 5.4% respectively. This data highlights the importance of Sri Lankan Airlines, but also emphasizes the significant contribution of Middle Eastern and South Asian carriers in connecting Sri Lanka to a global market.

VISITORS TO MAJOR TOURIST ATTRACTIONS

VISITORS TO MAJOR TOURIST ATTRACTIONS, 2024

Table:14 Visitors to major national parks, 2024

Parks	Local tickets		Foreign tickets		Vehicle income (Rs)	Boat income (Rs)	Total number of visitors	Total revenue (including the vehicle and boat income)
	Local visitors	Local income (Rs)	Foreign Visitors	Foreign income (Rs)				
Yala	293,058	44,990,039.00	353,646	2,718,936,703.32	39,322,350.00	0.00	646,704	2,803,249,092.32
Horton Plains	296,515	42,651,390.00	52,883	394,197,197.00	14,058,200.00	0.00	349,398	450,906,787.00
Udawalawa	136,509	17,324,600.00	128,183	905,924,835.48	15,224,500.00	0.00	264,692	938,473,935.48
Wasgomuwa	12,538	721,750.00	2,733	9,690,191.14	812,300.00	0.00	15,271	11,224,241.14
Minneriya	78,397	8,480,300.00	76,086	385,523,618.45	8,992,350.00	0.00	154,483	402,996,268.45
Bundala	7,469	442,140.00	7,194	26,033,899.60	788,350.00	0.00	14,663	27,264,389.60
Horagolla	11,573	452,980.00	45	64,787.04	0.00	0.00	11,618	517,767.04
Kaudulla	22,334	3,346,510.00	21,582	158,348,221.33	2,558,400.00	0.00	43,916	164,253,131.33
Galoya	7,256	427,770.00	6,734	23,726,710.00	264,400.00	9,508,000.00	13,990	33,926,880.00
Kumana	24,614	1,551,890.00	10,980	39,484,171.00	1,819,300.00	0.00	35,594	42,855,361.00
Angammedilla	637	32,800.00	05	18,310.32	25,300.00	0.00	642	76,410.32
Galways Land	15,105	734,150.00	674	2,252,146.00	0.00	0.00	15,779	2,986,296.00
Wilpattu	75,903	10,905,450.00	54,216	392,679,478.04	8,145,350.00	0.00	130,119	411,730,278.04
Maduruoya	1,877	108,130.00	342	1,206,205.62	112,900.00	0.00	2,219	1,427,235.62
Lahugala	646	37,650.00	41	139,849.20	59,500.00	0.00	687	236,999.20
Pigeon Island	57,957	8,436,250.00	12,535	90,992,485.00	0.00	1,850,250.00	70,492	101,278,985.00
Hikkaduwa	36,421	1,394,160.00	1,492	2,063,637.00	0.00	1,030,250.00	37,913	4,488,047.00
Eth Athurusewana	122,816	7,902,866.00	89,157	102,832,902.00	0.00	0.00	211,973	110,735,768.00
Kalawewa	527	3,340.00	17	0.00	26,100.00	0.00	544	29,440.00
Bareef - Kalpitiya	10,139	214,410.00	3,146	7,438,774.00	0.00	2,400.00	13,285	7,655,584.00
Mirissa	31,417	2,797,850.00	88,201	159,795,180.00	0.00	45,303,291.01	119,618	207,896,321.01
Girithale	9,092	305,140.00	75	48,586.00	0.00	0.00	9,167	353,726.00
TOTAL	**1,252,800**	**153,261,565.00**	**909,967**	**5,421,397,887.54**	**92,209,300.00**	**57,694,191.01**	**2,162,767**	**5,724,562,943.55**

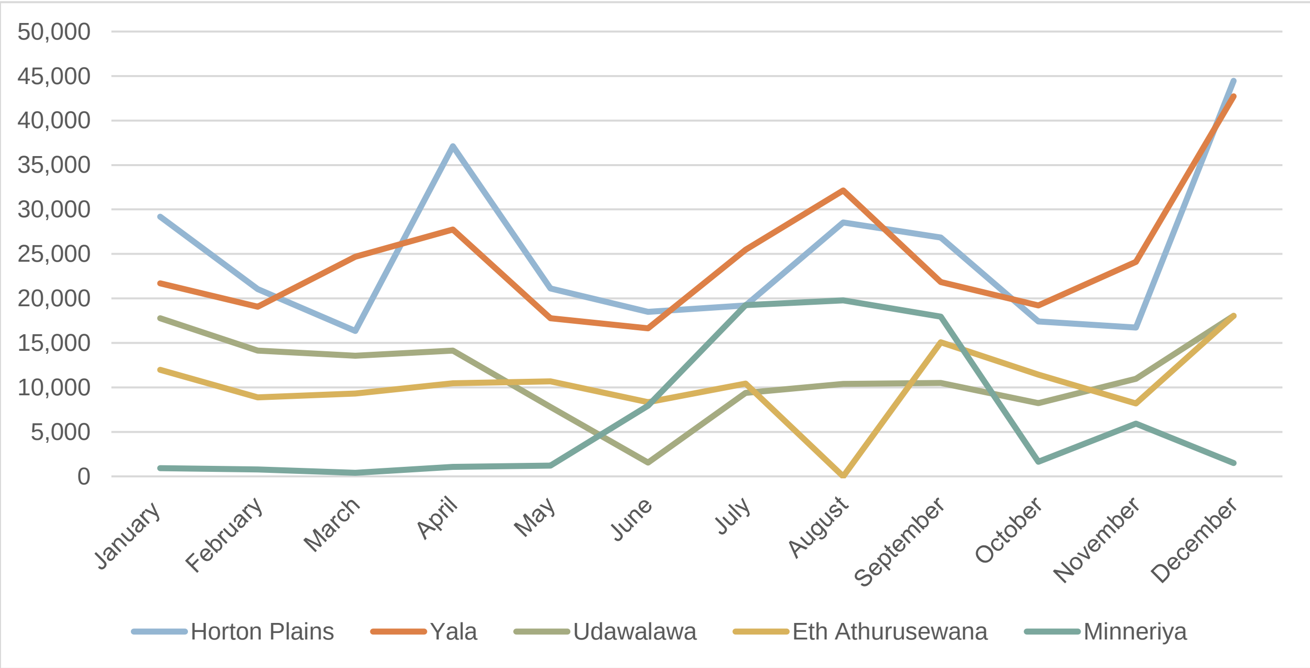
Source: Department of Wildlife Conservation

An analysis of visitor statistics for Sri Lanka's wildlife parks indicates that Yala, Horton Plains, Udawalawa, Eth Athuru Sewana, and Minneriya are the most frequented destinations. In terms of revenue, Yala, Udawalawa, Horton Plains, Wilpattu, and Minneriya lead the rankings. Domestic visitors constitute approximately 57.9% of the total park attendance, while foreign tourists make up 42.07%. Notably, foreign ticket sales are the primary revenue source, accounting for 94.7% of total earnings, whereas domestic sales contribute only 2.6%. This underscores the critical importance of maintaining high park standards to continue attracting international visitors.

For domestic tourists, the top attractions are Horton Plains, Yala, Udawalawa, Eth Athuru Sewana, and Minneriya. In contrast, foreign visitors show a preference for Yala, Udawalawa, Eth Athuru Sewana, Mirissa (dolphin and whale watching), and Minneriya. The significant overlap in popular sites among both local and international tourists, particularly Yala, Eth Athuru Sewana, and Udawalawa, has led to concerns about overcrowding. To mitigate this, it is advisable to promote lesser-known parks such as Kaudulla and Wasgamuwa. Introducing innovative activities in these underutilized areas can effectively redistribute tourist traffic and alleviate pressure on the more popular parks.

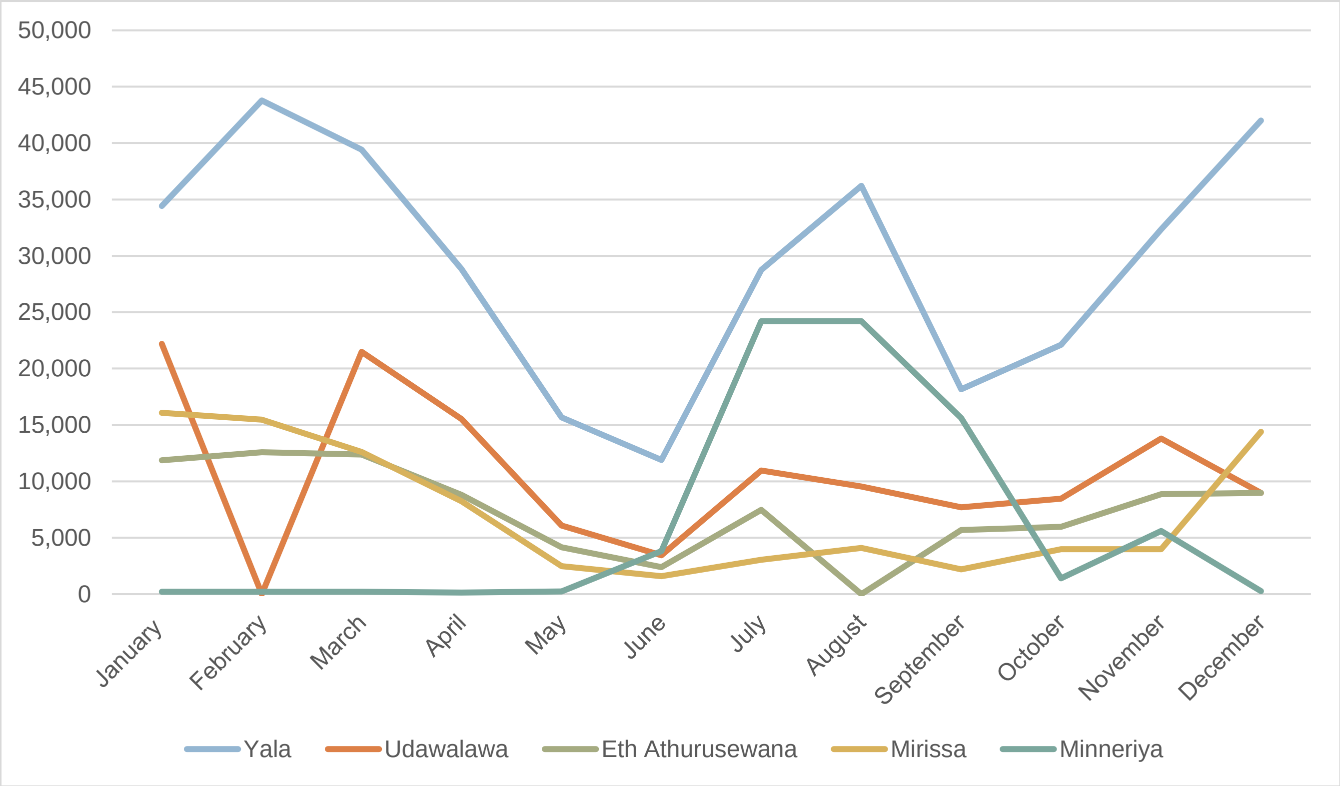
In 2024, Sri Lanka's wildlife parks attracted 44% of the total tourist arrivals.

Chart 07: Visitation of domestic tourists to top wildlife parks



The peak months for domestic tourists visiting wildlife parks are typically April and December coinciding with school holidays during these periods. For Yala April, August and December are the peak months

Chart 08: Visitation of foreign tourists to top wildlife parks



Foreign tourist visits to major wildlife parks tend to peak during January, February, March, August and December .This pattern could be attributed to favorable weather conditions and arrival season to Sri Lanka, 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

Table: 15 Visitors to conservation forests ,2024

Name of the forest	Number of visitors			Income without VAT		
	Domestic tourists	Foreign tourists	Total	Domestic tourists	Foreign tourists	Total
Makandawa Conservation Forest	2,085	896	2,981	130,802.09	667,944.66	798,746.75
Kurulukele	1,705	0	1,705	88,342.58	13,878.36	102,220.94
Nuwaragala (Ampara)	1,315	0	1,315	139,247.40	0.00	139,247.40
Ek Gal Oya	480	0	480	396,000.00	0.00	396,000.00
Kottawa Conservation Forest	982	233	1,215	58,969.89	180,407.79	239,377.68
Kanneliya Conservation Forest	40,762	2,781	43,543	3,474,203.96	1,962,660.44	5,436,864.40
Adahalena Ella (Galle)	3,952	1637	5,589	351,042.50	880,911.81	1,231,954.31
Hurulu Eco Park	68,561	176,266	244,827	35,025,805.10	279,367,491.50	314,393,296.60
Gal Oya	171	404	575	17,961.87	317,237.30	335,199.17
Sinharaja Conservation Forest	48,865	21216	70,081	4,681,943.06	20,665,336.59	25,347,279.65
Kunckles Conservation	241,881	6390	248,271	13,001,071.24	3,456,308.75	16,457,379.99
Udawattakele Conservation Forest / Kandy	20,577	9,036	29,613	1,450,145.66	6,861,438.05	8,311,583.71
Rathna Ella (Kandy)	3,647	961	4,608	354,346.95	813,480.62	1,167,827.57
Yahangala	0	0	0	0.00	0.00	0.00
Geradigala	0	0	0	292,815.43	2,065,328.95	2,358,144.38
Piduruthalagala (Nuwaraeliya)	11,718	159	11,877	542,055.66	122,975.28	665,030.94
Mandaramnuwara (Kolapathanaella) (Nuwaraeliya)	23,168	8	23,176	1,419,846.80	6,305.12	1,426,151.92
Badagamuwa Ecological Zone (Kurunegala)	5,791	16	5,807	320,923.62	11,822.00	332,745.62
Galwila Eco Park (Puttlam)	135	33	168	33,631.30	8,704.30	42,335.60
Dolukanda (Kurunegala)	190	7	197	12,363.06	4,652.22	17,015.28
Badulla (Elle Gala)	11,441	19,876	31,317	645,833.04	16,152,669.13	16,798,502.17
Kande Ela Nuwara Eliya	1,856	2	1,858	69,386.96	1,576.28	70,963.24
Total	**489,282**	**239,921**	**729,203**	**62,506,738.17**	**333,561,129.15**	**396,067,867.32**

Source: Department of forest conservation, In 2024, Sri Lanka's conservation forests attracted a diverse group of visitors, with domestic tourists comprising 67% and foreign tourists accounting for 33% of the total. Despite the higher number of local visitors, revenue contributions were disproportionately higher from international tourists, who contributed 84% of the income, while domestic tourists accounted for 16%. Additionally, 12% of all tourists to Sri Lanka in 2024 included visits to conservation forests in their itineraries.

Sri Lanka's forests have experienced a diverse influx of visitors, both domestic and foreign, each contributing uniquely to the country's tourism sector. Among these natural sanctuaries, the Knuckles Conservation Forest has emerged as a prominent attraction, drawing a substantial number of 241,881 domestic visitors and 6,390 foreign visitors in 2024. Its appeal likely lies in its pristine beauty and rich biodiversity, making it a must-visit destination for nature enthusiasts. According to statistics, Hurulu Eco Park stands out as the top destination among foreign tourists, with Knuckles Sinharaja and Badulla, Ella Gala following closely behind.

Hurulu Eco Park, despite ranking second in total visitor numbers, distinguishes itself through its remarkable natural diversity, solidifying its status as a premier eco-tourism destination. This Park significantly contributes to Sri Lanka's sustainable tourism landscape and holds potential for further development, which could help redirect tourists from overcrowded parks that are struggling with capacity issues.

Tourism is prevalent across many forested areas in Sri Lanka, highlighting the country's rich natural heritage on a global scale. However, certain locations such as Nuwaragala (Ampara), Kurulukele, Kottawa Conservation Forest, Yahangla, and Geradigala present untapped opportunities for attracting foreign tourists. The top revenue-generating forest reserves include Hurulu Eco Park, Sinharaja, Badulla, Ella Gala and Knuckles, likely due to their pristine biodiversity that attracts visitors. Particularly, Hurulu Eco Park benefits from its proximity to popular tourist sites like Sigiriya, enhancing its overall appeal.

Chart 09: Visitation of domestic tourists conservation forests

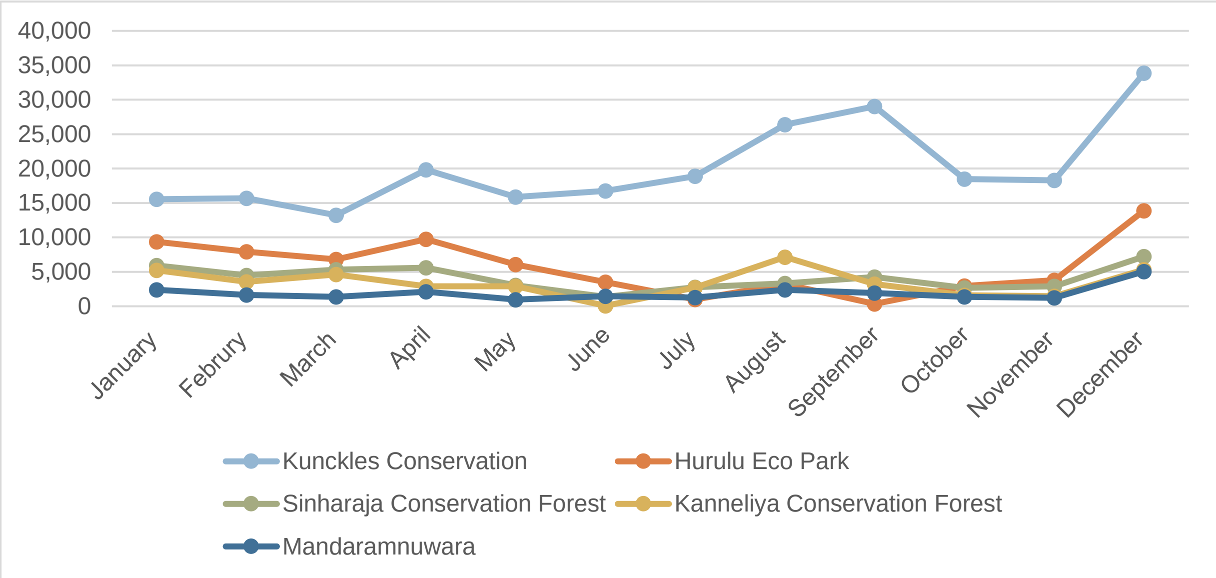
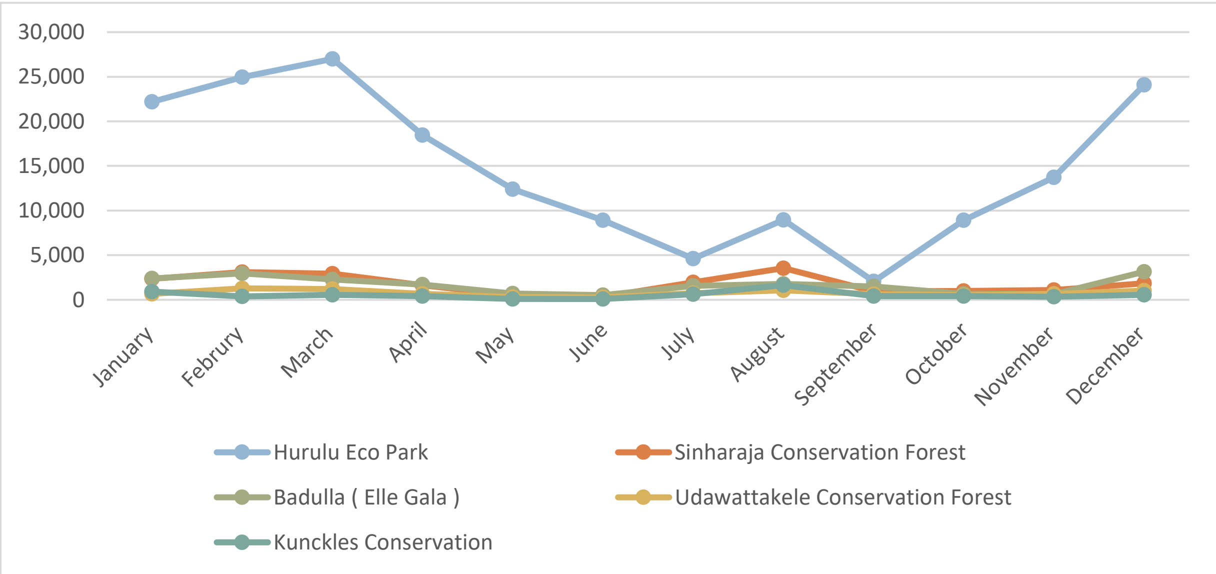


Chart 10: Visitation of foreign tourists conservation forests



Domestic tourist visits to Sri Lanka's conservation forests exhibit notable fluctuations throughout the year, with peaks typically occurring in April, July, August, September and December These patterns are influenced by several factors, including national holidays, school vacation periods, and prevailing weather conditions. The surge in domestic tourism during April aligns with significant national celebrations and school holidays. In April, the Sinhala and Tamil New Year is celebrated, often accompanied by school vacations, making it a popular time for family travel. Similarly, December encompasses Christmas and the year-end school holidays, contributing to increased travel during this period. Conversely, months like March, May, October and November do not feature major holidays or extended school breaks, leading to reduced domestic travel as students are in school and adults are engaged in regular work schedules.

Foreign tourist visits to Sri Lanka's conservation parks typically reach their highest levels during the months of January, February, March, November and December.

Visitors to tourist attractions administered by Central Cultural Fund

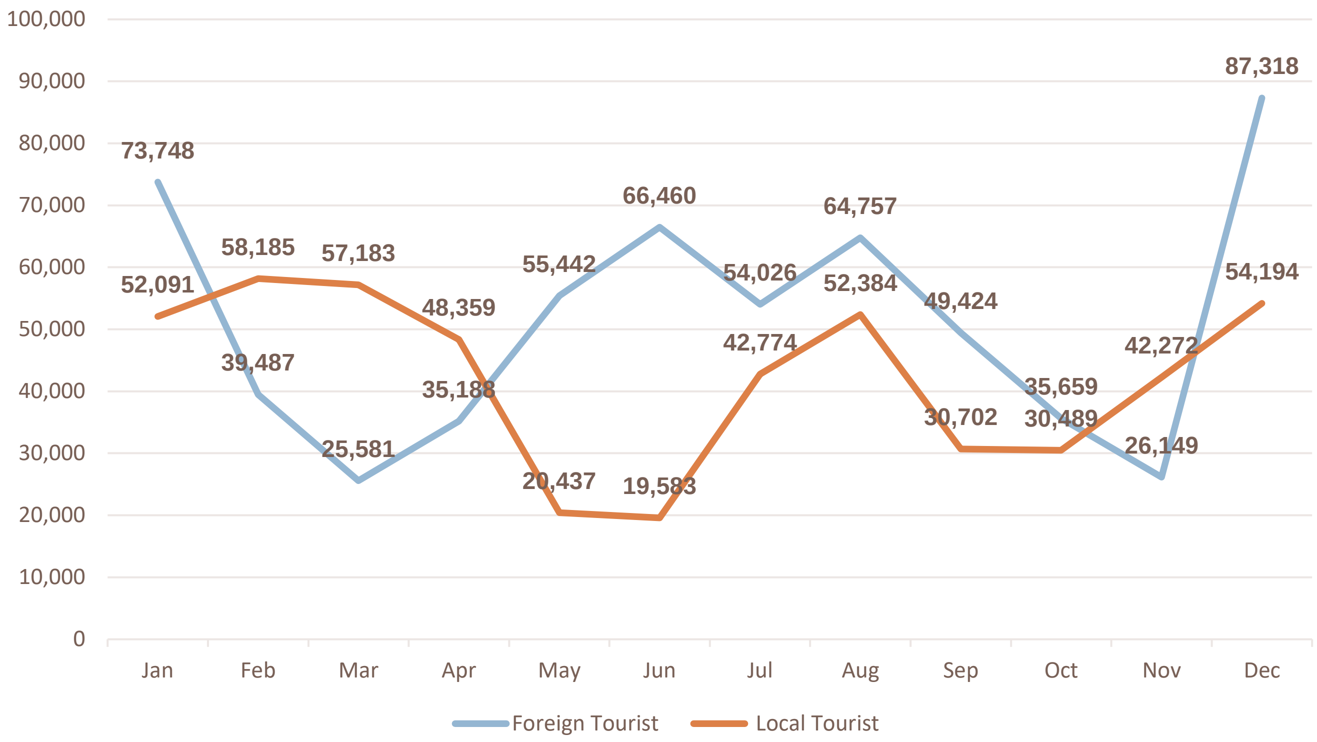
Table 16: Visitors to tourist attractions administered by Central Cultural Fund

Locations	Number of foreign visitors	Number of local visitors	Total numbers of visitors	Local Visitor income	Foreign visitor income	Total visitor income
Abhayagiriya	1,675	17,561	19,236	2,158,598.84	14,186,791.77	16,345,390.61
Jethawanaya	72,855	12,992	85,847	1,498,436.13	443,063,894.11	444,562,330.24
Sigiriya (Museum and Sigiriya Rock	508,653	613,239	1,121,892	68,693,151.00	3,928,377,976.56	3,997,071,127.56
Polonnaruwa (Alahana, Gal Viharaya, Museum & Kingdom	204,834	32,529	237,363	3,416,432.00	1,339,611,020.57	1,343,027,452.57
Kandy Museum	191	9,711	9,902	520,962.27	87,051.31	608,013.58
Galle Museum	14,118	50,100	64,218	5,369,533.00	23,039,800.66	28,409,333.66
Ramba Viharaya	104	393	497	39,840.00	95,780.19	135,620.19
Jaffna Fort	10,722	225,731	236,453	12,538,257.10	15,249,435.07	27,787,692.17
Trincomalee	3,348	23,582	26,930	2,708,242.00	5,728,868.01	8,437,110.01
Katharagama Museum	73	5,034	5,107	550,085.13	126,390.47	676,475.60
Ampara Lahugala	209	0	209	0.00	187,790.83	187,790.83
Buduruwagala (Monaragala)	39,730	0	39,730	0.00	35,541,867.25	35,541,867.25
Dambulla Museum	419	615	1,034	67,630.00	376,222.21	443,852.21
Ritigala forest Monastery	9,261	29,557	38,818	1,675,810.65	16,568,513.41	18,244,324.06
Ibbankatuwa Ancient Bural Ground	952	21,821	22,773	2,444,004.51	771,581.00	3,215,585.51
Namal Uyana	1,279	38,998	40,277	2,094,419.40	2,182,710.57	4,277,129.97
Rathugala	405	0	405	0.00	348,343.00	348,343.00
Seethawaka (Royal Palace)	03	6,043	6,046	85,200.00	0.00	85,200.00
Total	**868,831**	**1087906**	**1,956,737**	**103,860,602.03**	**5,825,544,036.98**	**5,929,404,639.01**
Head Office (advance payments for tickets Sigiriya, Polonnaruwa, Anuradhapura)	–	–	–	–	**1,776,104,509.00**	**1,776,104,509.00**
Total	**868,831**	**1087906**	**1,956,737**	**103,860,602.03**	**7,601,648,545.99**	**7,705,509,148.02**

Source: Central Cultural Fund, Sri Lanka

In 2024, Sri Lanka's cultural heritage sites managed by the Central Cultural Fund (CCF) experienced significant visitor engagement, with 868,831 foreign tourists, accounting for approximately 42% of the nation's total tourist arrivals, exploring these historic locations. Among international visitors, the most frequented sites were Sigiriya Museum and Sigiriya Rock, Polonnaruwa's Gal Viharaya, Museum & Kingdom, Jethawanaya, Buduruwagala, and Galle Museum. Domestic tourists predominantly visited Sigiriya Museum and Sigiriya Rock, Jaffna Fort, Galle Museum, Namal Uyana, and Polonnaruwa. Overall, Sigiriya Museum and Sigiriya Rock, Jaffna Fort, and Polonnaruwa's Gal Viharaya, Museum & Kingdom recorded the highest visitor numbers. In terms of revenue, leading sites included Sigiriya Museum and Sigiriya Rock, Polonnaruwa's Gal Viharaya, Museum & Kingdom, Jethawanaya, Buduruwagala, and Galle Museum.

Chart 11: Visitation of domestic and foreign tourists to Sigiriya



The popularity and revenue generation of Sigiriya among both foreign and domestic visitors highlight the importance of effective visitor management to ensure its long-term sustainability. Strategic initiatives, including extending operating hours and implementing sustainable visitor management practices, are essential to enhance the appeal and preserve the integrity of these historic locations.

The peak season for foreign tourists occurs in January, June, August and December which coincides with the off-peak season for domestic travelers. In contrast, foreign tourist numbers drop significantly in March and November. This decline could be due to the off-peak travel season. For domestic tourists, May and June tends to see lower visitation, potentially because of school exams and work schedules during this time.

TOURISM INVESTMENT

TOURISM INVESTMENT

Table 17: Investment projects received during 2024

	District	Total Projects	Rooms	Investment value (USD Mn)
1	Ampara	1	8	0.52
2	Anuradpura	0	0	0
3	Badulla	10	275	42.633
4	Batticaloa	1	7	0.51
5	Colombo	0	0	0
6	Galle	9	118	13.817
7	Gampaha	3	38	4.04
8	Hambantota	14	213	16.858
9	Jaffna	3	54	1.996
10	Kaluthara	1	5	0.27
11	Kegalle	2	30	5.5
12	Kurunegala	0	0	0
13	Kandy	7	129	22.46
14	Kilinochchi	0	0	0
15	Mannar	0	0	0
16	Monaragala	0	0	0
17	Matara	9	115	5.653
18	Matale	6	222	24.232
19	Mulative	1	11	0.74
20	Nuwara Eliya	2	37	7.677
21	Polonnaruwa	1	50	2.88
22	Puttalam	2	17	0.83
23	Rathnapura	2	13	0.643
24	Trincomalee	2	42	9.47
25	Vavuniya	0	0	0
	Total	**76**	**1,384**	**160.729**

In 2024, Hambantota, Badulla, Matara, and Galle attracted the highest number of investment projects, with the Southern Province becoming a hub for tourism accommodation. Badulla, Matale, and Hambantota are expected to add the most to room capacity, while Badulla, Matale, and Kandy lead in investment value. By the end of 2024, 76 projects totaling USD 160.729 million had been submitted.

Number of investment projects received and approved

Table: 18 Investment projects received and approved

Year	Received projects			Approved projects		
	Number of projects received	Number of rooms	Investment /USD Mn.	Number of projects approved	Number of 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	76	1384	160.729	30	586	41.723
Total	**1,197**	**49,584**	**8681.893**	**545**	**24,684**	**4157.937**

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