



MONTHLY TOURIST ARRIVALS REPORT:

A MONTHLY SNAPSHOT OF INTERNATIONAL ARRIVALS TO
SRI LANKA FROM IMMIGRATION STATISTICS

MAY 2025

Introduction

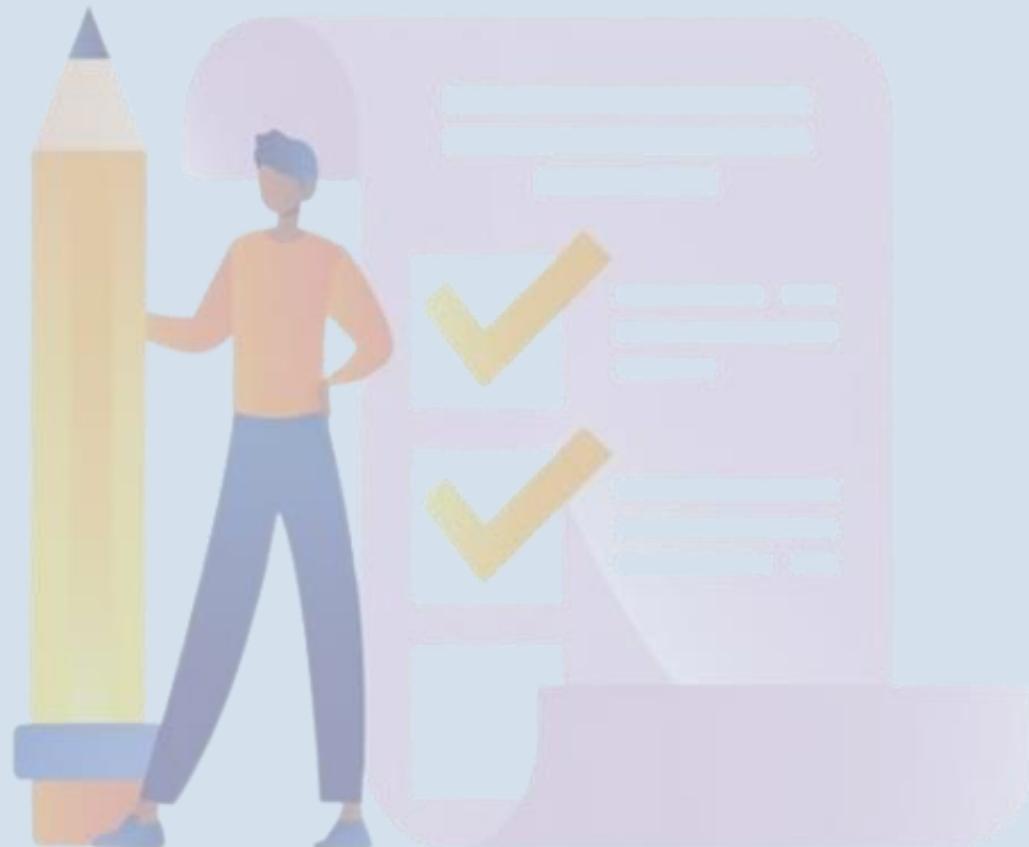
The following document provides a synthesis of the most recent May 2025 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st May 2025, and subject to change. The data provides an overview of month-on-month and annual changes in visitor arrivals to Sri Lanka from international source markets. The data is meant to provide an overview of how travel and tourism is performing to Sri Lanka.

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



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Summary

Sri Lanka's tourism sector is demonstrating strong momentum in early 2025, with January to May figures indicating substantial year-on-year growth. In January 2025, arrivals rose to 252,761, marking a robust 21.4% increase from January 2024 (208,253). February saw 240,217 arrivals, up 10.0% from the previous year (218,350), while March recorded 229,298 arrivals, a 9.62% rise compared to March 2024 (209,181). Continuing this positive trajectory, April 2025 arrivals reached 174,608, representing a notable 17.3% increase over April 2024 (148,867).

May 2025 maintained this strong performance with 132,919 arrivals, an impressive 18.5% increase from May 2024 (112,128).

Cumulatively, for the period of January to May 2025, Sri Lanka has welcomed 1,029,803 tourists, showcasing a significant overall growth compared to the 896,779 tourists recorded in the corresponding period of 2024. This consistent double-digit growth across reported months underscores a robust recovery and expanding appeal of Sri Lanka as a tourist destination.

Major source markets, including India, the United Kingdom, China, Bangladesh, and Germany, have played a pivotal role in invigorating Sri Lanka's tourism sector during May. Their significant contributions have been instrumental in driving the surge in visitor arrivals and supporting the overall growth of the industry throughout this period.

Month	2024	2025	% Change 2025/24
January	208,253	252,761	21.4
February	218,350	240,217	10.0
March	209,181	229,298	9.62
April	148,867	174,608	17.3
May	112,128	132,919	18.5
June	113,470		
July	187,810		
August	164,609		
September	122,140		
October	135,907		
November	184,158		
December	248,592		
TOTAL	2,053,465	1,029,803	



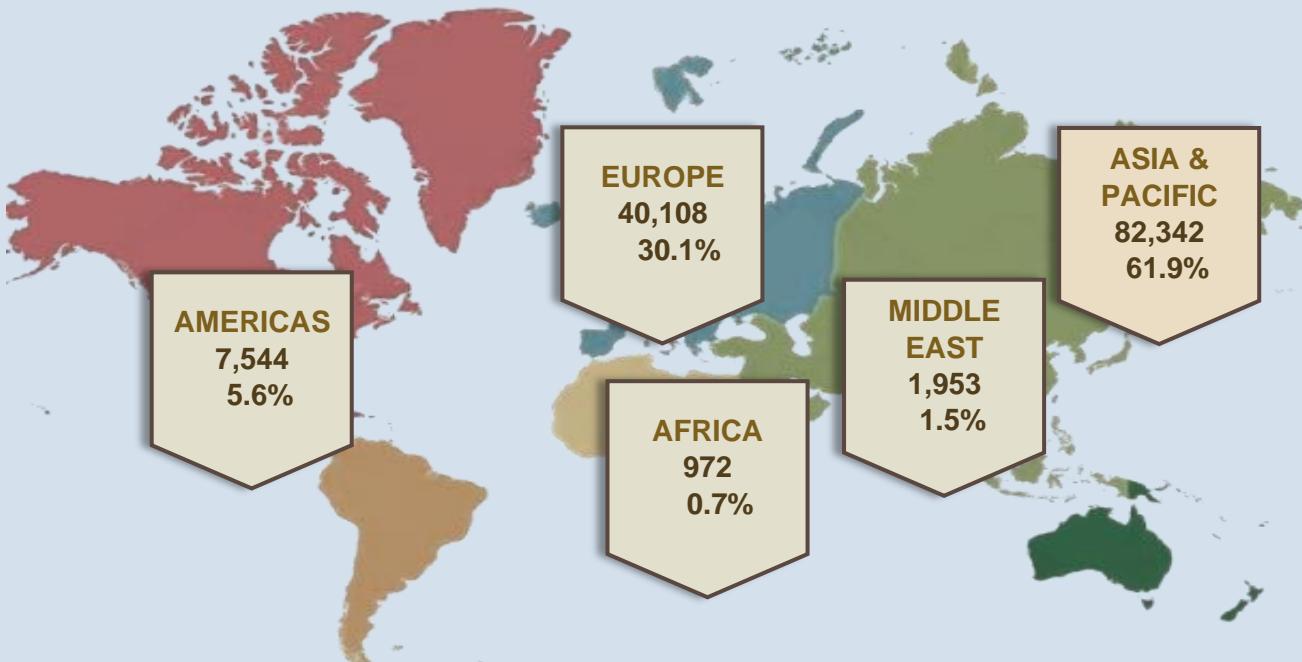
Tourist Arrivals | May 2025

132,919



Tourist arrivals by region and percentage share May 2025

Map 1. Tourist arrivals by region and percentage share



An analysis of tourist arrivals by region in May 2025 highlights the primary geographical sources of visitors to Sri Lanka. The Asia & Pacific region stands out as the largest contributor, accounting for 82,342 arrivals, which represents a significant 61.9% of the total. This dominance underscores the strong regional connectivity and perhaps shorter travel distances and cultural affinities that make Sri Lanka a highly accessible and attractive destination for travelers from this vast region.



Europe follows as the second-largest source region, contributing 40,108 arrivals, making up 30.1% of the total. Together, Asia & Pacific and Europe collectively represent the overwhelming majority of Sri Lanka's inbound tourists, emphasizing the country's strong appeal and established tourism infrastructure catering to both Western and regional travelers.

The Americas contributed 7,544 arrivals (5.6%), while the Middle East and Africa accounted for comparatively smaller shares, with 1,953 arrivals (1.5%) and 972 arrivals (0.7%) respectively. This regional distribution indicates that Sri Lanka's tourism sector is currently much less reliant on these latter regions for overall volume, suggesting substantial untapped potential for growth.

The consistently high numbers from Asia & Pacific and Europe can be attributed to a combination of factors, including established travel patterns, extensive flight connectivity, cultural interests, and favorable travel packages. Conversely, the relatively low figures from the Middle East and Africa may reflect limitations such as fewer direct flight options, less targeted marketing efforts, or a lower awareness of Sri Lanka as a leisure destination within these regions. This heavy reliance on Europe and Asia & Pacific implies that while marketing and connectivity are strongest in these areas, the industry remains somewhat vulnerable to economic or political shifts within these key markets. Diversifying source markets, particularly by increasing promotional activities and improving air links with the Americas, Middle East, and Africa, could significantly help stabilize and foster overall tourist arrivals. Tailored marketing campaigns, enhanced flight connectivity, and targeted travel incentives could be instrumental in attracting more visitors from these underrepresented regions.



Top primary markets and top potential markets

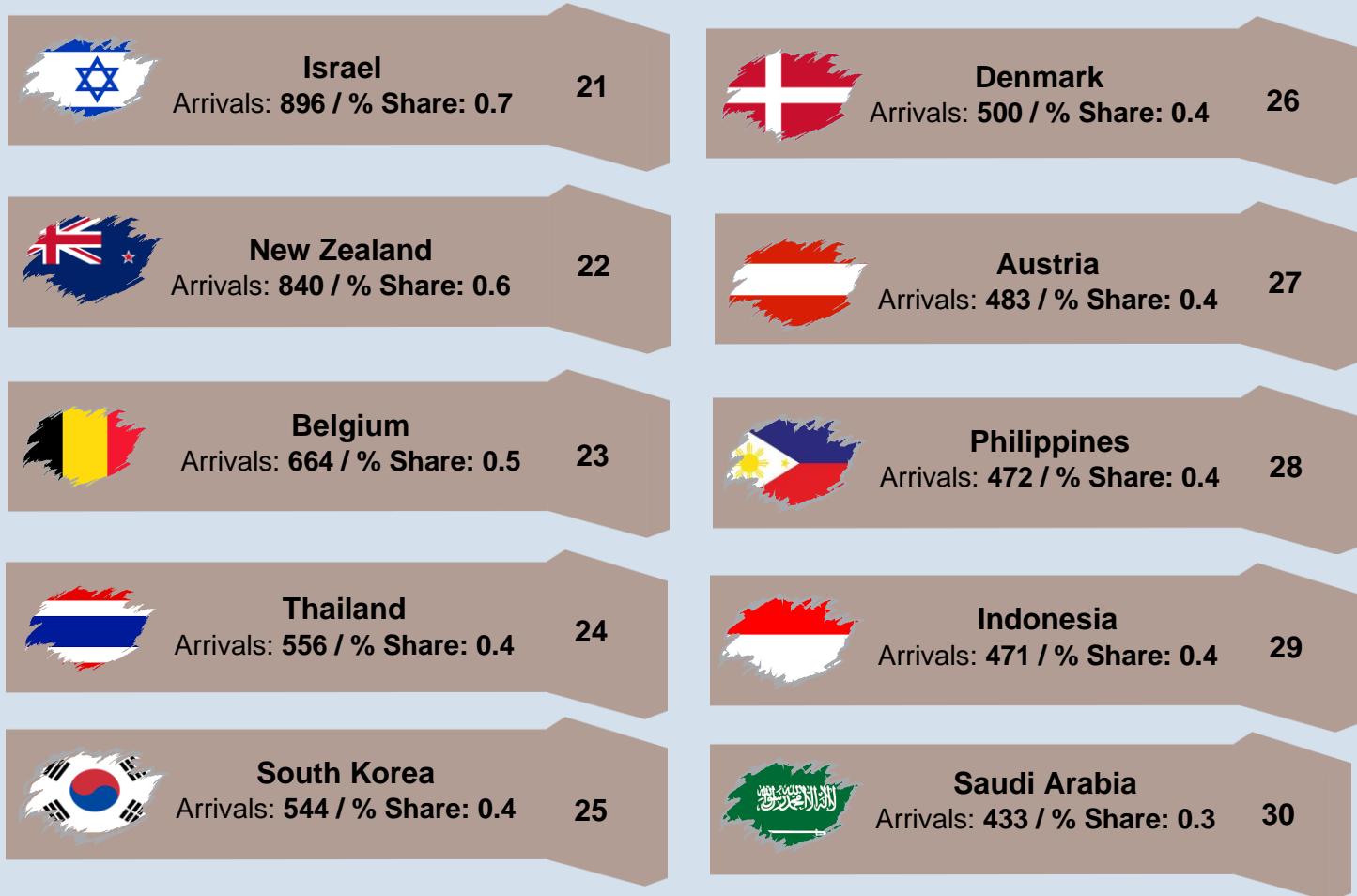
Top primary markets, May 2025

	India Arrivals: 47,001 / % Share: 35.4	01
	United Kingdom Arrivals: 9,221 / % Share: 6.9	02
	China Arrivals: 8,803 / % Share: 6.6	03
	Bangladesh Arrivals: 7,282 / % Share: 5.5	04
	Germany Arrivals: 7,223 / % Share: 5.4	05
	Australia Arrivals: 5,929 / % Share: 4.5	06
	France Arrivals: 5,470 / % Share: 4.1	07
	United States Arrivals: 3,607 / % Share: 2.7	08
	Canada Arrivals: 3,412 / % Share: 2.6	09
	Russia Arrivals: 3,328 / % Share: 2.5	10
	Maldives Arrivals: 3,006 / % Share: 2.3	11
	Netherlands Arrivals: 2,329 / % Share: 1.8	12
	Japan Arrivals: 2,126 / % Share: 1.6	13
	Malaysia Arrivals: 1,920 / % Share: 1.4	14
	Spain Arrivals: 1,593 / % Share: 1.2	15
	Switzerland Arrivals: 1,424 / % Share: 1.1	16
	Italy Arrivals: 1,333 / % Share: 1.0	17
	Poland Arrivals: 1,078 / % Share: 0.8	18
	Singapore Arrivals: 1,054 / % Share: 0.8	19
	Pakistan Arrivals: 946 / % Share: 0.7	20

Note: The top primary markets for Sri Lanka have been identified using visitor arrivals. The previous methodology used to identify the markets was altered due to the current arrival trends in the source markets and the socio-economic factors in Sri Lanka. The intention is to track these source markets on a go-forward basis to understand future performance of Sri Lanka's tourism economy, including during the projected international tourism recovery period, 2022-2025.



Top potential markets, May 2025



Note: The top potential markets for Sri Lanka have been identified using visitor arrivals data. The previous methodology used to identify the markets was altered due to the current arrival trends in the source markets and the socio-economic factors in Sri Lanka. The intention is to track these source markets on a go-forward basis to understand future performance of Sri Lanka's tourism economy, including during the projected international tourism recovery period, 2022-2025.





Top ten source markets

May 2025

An analysis of key source markets reveals that India stands as the undisputed leader, contributing a dominant 35.4% of total arrivals. This signifies an exceptionally strong and consistent inbound flow, likely driven by geographical proximity, cultural ties, and robust air connectivity. While this provides a strong foundation for Sri Lanka's tourism, such heavy reliance on a single market also presents a vulnerability; any significant negative shifts in Indian outbound travel could disproportionately impact overall arrivals.

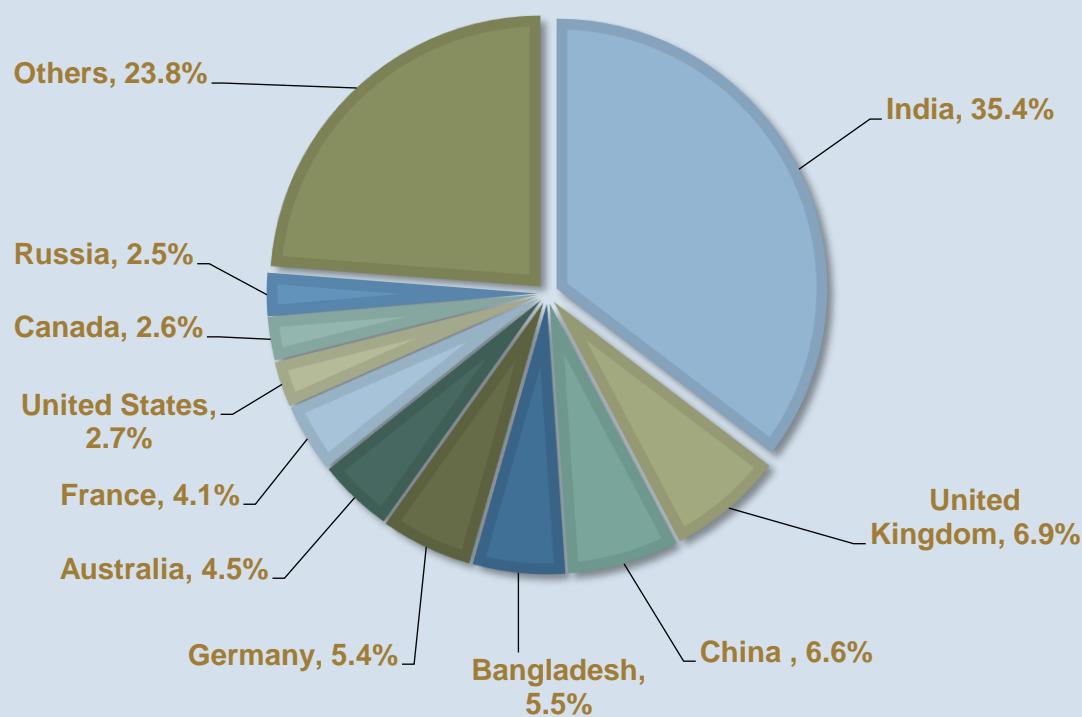
Following India, the market share distribution becomes more fragmented. The United Kingdom (6.9%) and China (6.6%) are the next significant contributors, collectively accounting for around 13.5% of arrivals.

Bangladesh (5.5%), Germany (5.4%), and Australia (4.5%) form a mid-tier group of contributors. The consistent presence of Germany indicates a mature European market, often associated with higher-spending tourists and specialized interests (as seen in the "Health/Ayurvedic" purpose). Bangladesh's strong showing points to robust regional connections and perhaps a growing outbound travel market. Australia, as a long-haul market, signifies successful efforts in attracting visitors especially for VFR purposes despite the greater distance.

Further down the list, France (4.1%), the United States (2.7%), Canada (2.6%), and Russia (2.5%) represent smaller, but still important, segments. The European markets (France, Germany) highlight continued interest from traditional Western sources, while the Americas (US, Canada) represent markets with significant untapped potential, often associated with higher average spending. Russia's presence, while smaller, indicates the success of specific initiatives or direct flight connections from this market.

Understanding the unique characteristics and travel behaviors of each of these markets, is paramount for developing effective, tailored tourism strategies.

Chart 1. Top ten source markets to Sri Lanka, May 2025



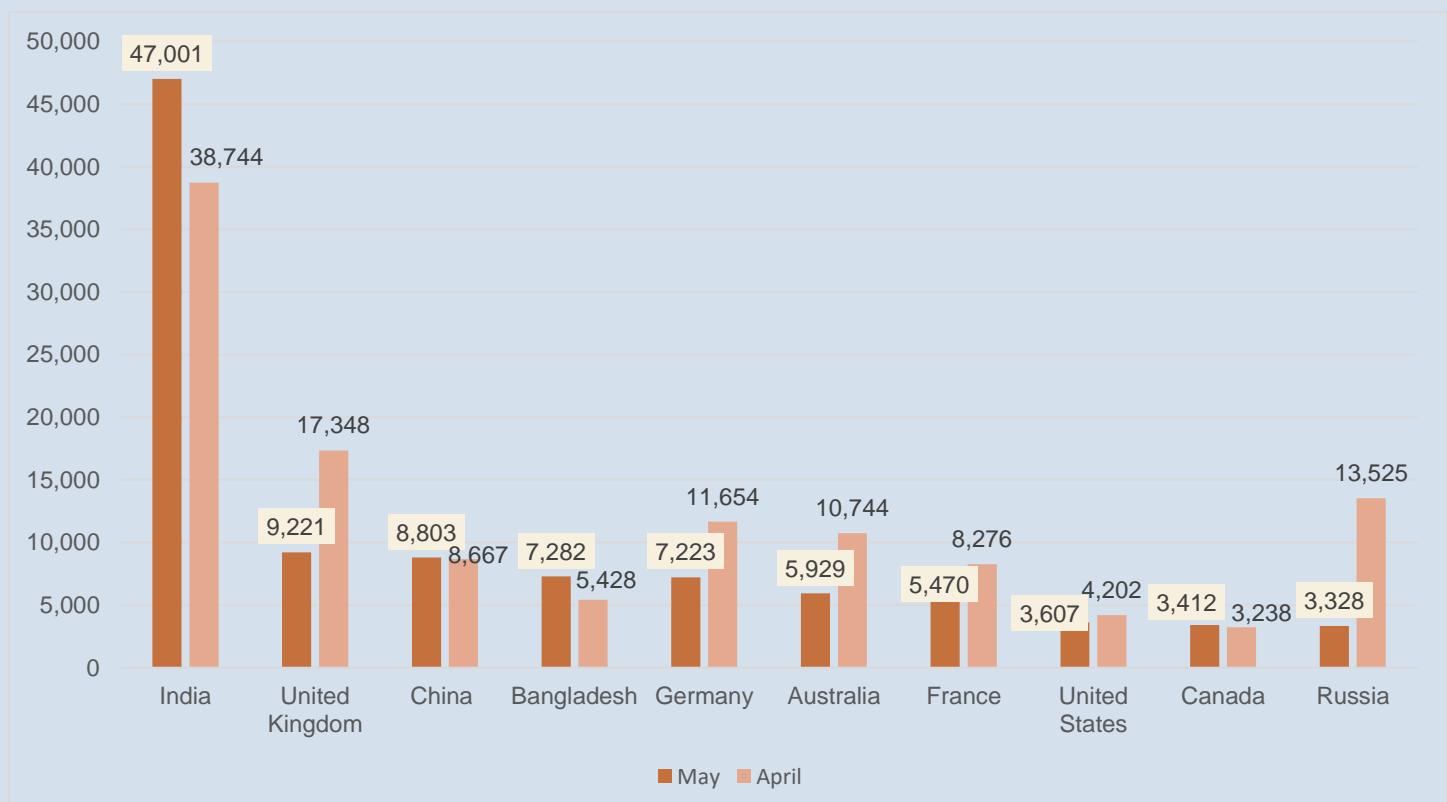


Monthly Tourist Arrivals Report May 2025

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

Rank	Country of Residence	Tourist Arrivals (May 2025)			Tourist Arrivals (May 2024)
		By Air	By Sea	Total	
1	India	46,272	729	47,001	32,254
2	United Kingdom	9,160	61	9,221	8,094
3	China	8,803	0	8,803	7,930
4	Bangladesh	7,282	0	7,282	2,878
5	Germany	5,343	1,880	7,223	7,495
6	Australia	5,896	33	5,929	5,465
7	France	5,465	05	5,470	4,064
8	United States	3,234	373	3,607	4,082
9	Canada	3,344	68	3,412	3,294
10	Russian Federation	3,322	06	3,328	4,384

Chart 2: Comparison of arrivals from top ten markets to Sri Lanka, April / May 2025





Top ten source markets

January to May 2025

Sri Lanka's tourism sector is demonstrating robust and diverse growth across its major source markets in the first five months of 2025, compared to the same period in 2024. India remains the clear leader, with 204,060 arrivals in Jan-May 2025, an impressive 30.94% year-over-year increase from 155,837 in the same period of 2024. This substantial growth is driven by geographic proximity, strong cultural ties, and improved connectivity.

The Russian Federation sustained its position as the second-largest source market, with 110,421 visitors in Jan-May 2025. However, this represents a slight decline of 0.24% from 110,692 in Jan-May 2024. This indicates a relatively stable, but not growing, demand, possibly influenced by consistent flight connections and established travel patterns.

European markets present a dynamic picture. The United Kingdom saw arrivals rise significantly from 80,086 in Jan-May 2024 to 96,274 in Jan-May 2025, a robust 20.21% growth. Germany also experienced an increase from 65,514 to 69,078, marking a 5.44% growth. France stands out with particularly strong growth, rising from 46,238 to 57,112 arrivals, a 23.52% increase. Similarly, Poland recorded a promising 9.15% increase, from 22,849 to 24,941 arrivals. These positive trends from European markets likely benefit from favorable economic conditions, targeted marketing, and enhanced air links.

Australia also posted a significant 27.87% increase, with arrivals reaching 44,026 in Jan-May 2025, up from 34,429 in Jan-May 2024, underscoring Sri Lanka's appeal to long-haul travelers including expatriates.

China, however, recorded a 4.30% decline in arrivals, falling from 59,542 in Jan-May 2024 to 56,983 in Jan-May 2025. This highlights ongoing recovery challenges and increased competition from other Asian destinations, signaling a need for renewed engagement and tailored strategies to regain momentum in this important market.

In contrast, the United States showed modest growth of 1.03%, with arrivals increasing from 28,694 to 28,991, signaling emerging opportunities in this market that could be further cultivated. A notable highlight is Bangladesh, which experienced an exceptional 142.59% surge in arrivals, growing from 11,258 in Jan-May 2024 to 27,311 in Jan-May 2025, indicating a rapidly emerging and significant market.

Overall, Sri Lanka's tourism sector benefits from strong performances in its traditional markets, particularly India and several European nations, while also seeing encouraging signs from emerging regions like Bangladesh and Australia. However, the decline from Russia and China signals the need for renewed engagement and tailored strategies to regain momentum and address specific challenges in those markets. Continued diversification of source markets, improved air links, and targeted promotions will be key to sustaining and accelerating overall tourist arrivals.

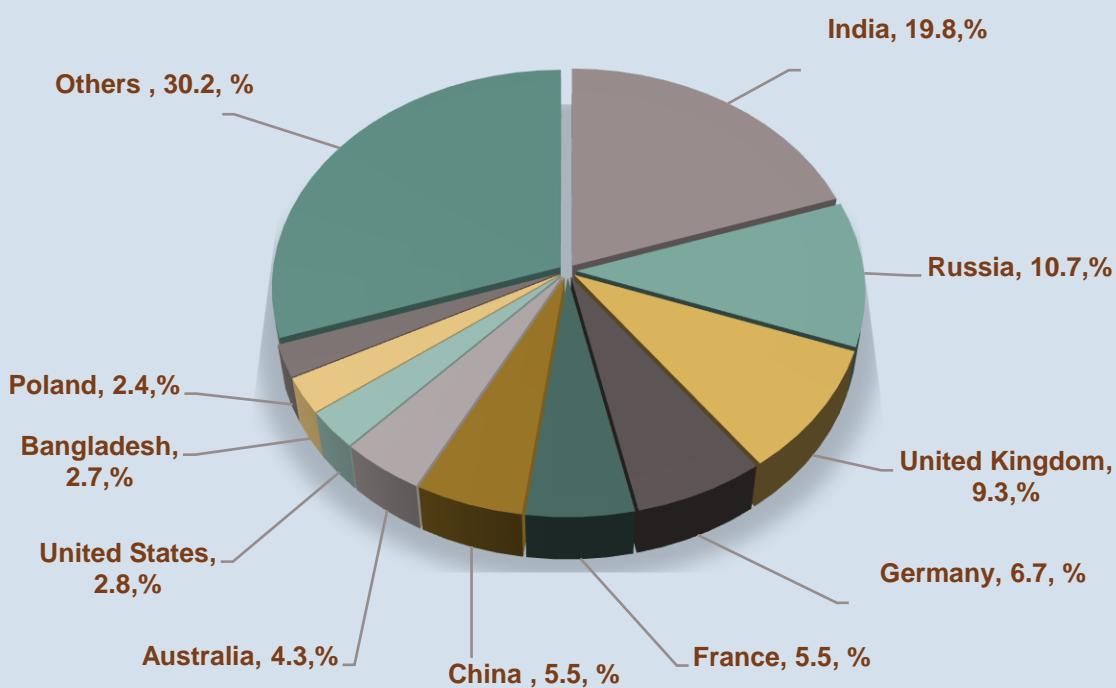


Monthly Tourist Arrivals Report May 2025

Table 3. Top ten markets to Sri Lanka, January to May 2025

Rank	Country of Residence	Tourist Arrivals (Jan ~ May.2025)	Tourist Arrivals Jan ~ May. 2024)
1	India	204,060	155,837
2	Russian Federation	110,421	110,692
3	United Kingdom	96,274	80,086
4	Germany	69,078	65,514
5	France	57,112	46,238
6	China	56,983	59,542
7	Australia	44,026	34,429
8	United States	28,991	28,694
9	Bangladesh	27,311	11,258
10	Poland	24,941	22,849
11	Others	310,606	281,660
Total		1,029,803	896,799

Chart 3. Top ten source markets to Sri Lanka, January to May 2025





Tourist arrivals by purpose of visit

May 2025

The analysis of tourist arrivals for May 2025 reveals that 'Pleasure/Vacation' continues to be the predominant purpose of visit, constituting a substantial majority of all inbound tourists (51%). This consistently high proportion reaffirms Sri Lanka's strong market positioning as a leisure destination. Complementing the leisure segment, 'Visiting Friends and Relatives' and 'MICE' (Meetings, Incentives, Conferences, and Exhibitions) represent key secondary purposes, contributing 8.35% and 6.15% respectively. These segments underscore the importance of diaspora engagement and the growing potential of business tourism. Smaller, yet strategically important, niche categories such as 'Business' (3%), 'Sports' (0.6%), and 'Health/Ayurvedic' (0.5%) also contribute to the visitor profile, indicating opportunities for focused development within specialized tourism sectors.

Chart 4: Purpose of visit

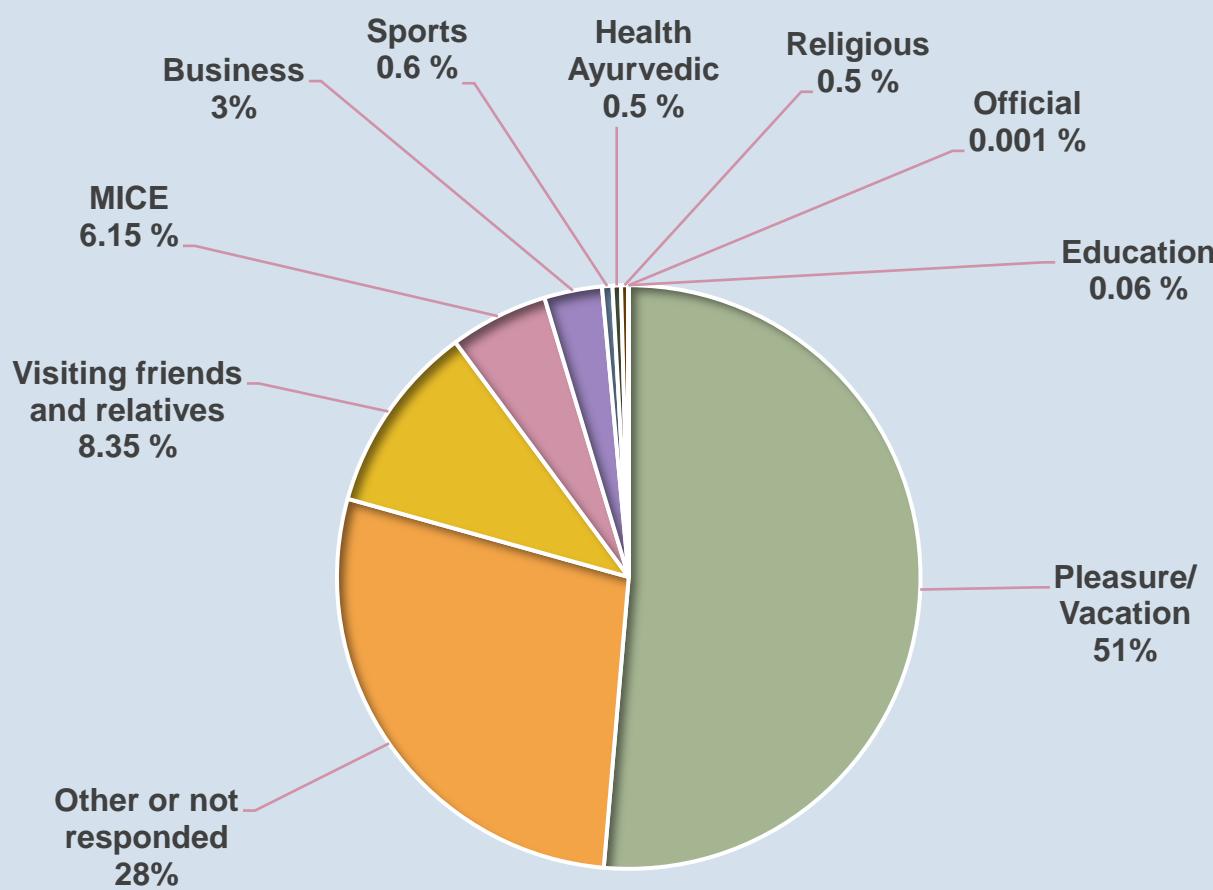
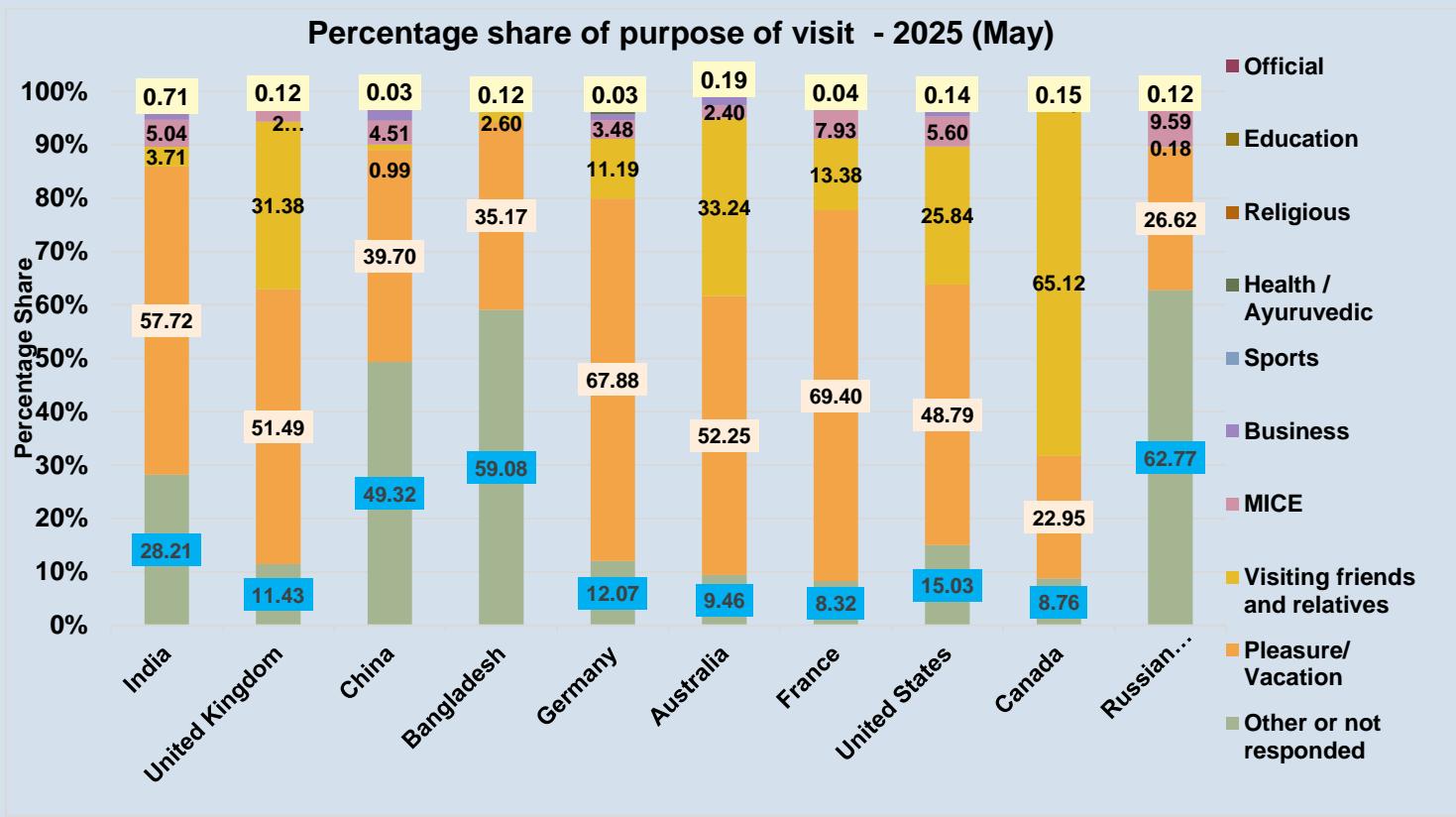




Chart 5: Purpose of visit vs main source markets



A deeper dive into the purpose of visit by top source markets for May 2025 reveals interesting market-specific dynamics. While 'Pleasure/Vacation' is generally dominant, its proportion varies significantly, ranging from a high of 69.40% for France to a low of 22.95% for Canada and 26.62% for the Russian Federation. This highlights diverse market preferences, with some nations strongly prioritizing leisure travel. Conversely, the 'Visiting Friends and Relatives' segment is exceptionally high for Canada (65.12%), and notably strong for the United Kingdom (31.38%) Australia (33.24%) and United States (25.84%) indicating robust community ties. The 'MICE' segment shows particular strength from the Russian Federation (9.59%) and France (7.93%), suggesting these markets are key for business-related travel and events. 'Health/Ayurvedic' purpose stands out for Germany (4.18%), indicating a specialized interest from this market. These market-specific trends emphasize the necessity of tailored marketing and product development strategies to effectively capture and serve the distinct motivations of tourists from each key source country.





International tourist arrivals by country of residence

	May 2025			Tourist arrivals May 2024	% change May (25/24)	Total tourist arrivals up to May 2025	Total tourist arrivals up to May 2024	% change up to May (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
AMERICAS	7,086	458	7,544	7,785	(3.1)	52,227	51,014	2.4					
North America	6,653	454	7,107	7,433	(4.4)	49,398	48,168	2.6					
Canada	3,344	68	3,412	3,294	3.6	19,877	18,960	4.8					
Mexico	75	13	88	57	54.4	530	514	3.1					
United States	3,234	373	3,607	4,082	(11.6)	28,991	28,694	1.0					
Caribbean & Central America	78	02	80	63	27.0	401	446	(10.1)					
Costa Rica	10	02	12	07	71.4	58	63	(7.9)					
Jamaica	03	0	03	07	(57.1)	15	41	(63.4)					
Others	65	0	65	49	32.7	328	342	(4.1)					
South America	355	02	357	289	23.5	2,428	2,400	1.2					
Argentina	60	0	60	44	36.4	466	486	(4.1)					
Brazil	131	01	132	106	24.5	934	952	(1.9)					
Chile	41	0	41	42	(2.4)	310	289	7.3					
Colombia	56	0	56	40	40.0	291	321	(9.3)					
Others	67	01	68	57	19.3	427	352	21.3					
AFRICA	972	0	972	700	38.9	6,112	5,287	15.6					
North Africa	266	0	266	213	24.9	1,265	1,200	5.4					
Morocco	108	0	108	59	83.1	452	390	15.9					
Sudan	66	0	66	69	(4.3)	316	250	26.4					
Others	92	0	92	85	8.2	497	560	(11.3)					
Sub-Saharan Africa	706	0	706	487	45.0	4,847	4,087	18.6					
Kenya	71	0	71	45	57.8	350	276	26.8					
Mauritius	56	0	56	25	124.0	354	228	55.3					
Nigeria	14	0	14	0	—	42	24	75.0					
South Africa	198	0	198	195	1.5	1,995	1,899	5.1					
Others	367	0	367	222	65.3	2,106	1,660	26.9					



	May 2025			Tourist arrivals May 2024	% change May (25/24)	Total tourist arrivals up to May 2025	Total tourist arrivals up to May 2024	% change up to May (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
ASIA & PACIFIC	81,561	781	82,342	64,773	27.1	411,429	334,464	23.0					
North East Asia	11,491	2	11,493	10,090	13.9	77,140	74,922	3.0					
China	8,803	0	8,803	7,930	11.0	56,983	59,542	(4.3)					
Japan	2,124	02	2,126	1,581	34.5	14,366	10,764	33.5					
South Korea	544	0	544	571	(4.7)	5,711	4,576	24.8					
Others	20	0	20	08	150.0	80	40	100.0					
South East Asia	4,981	9	4,990	3,792	31.6	26,575	21,804	21.9					
Cambodia	28	0	28	82	(65.9)	862	858	0.5					
Indonesia	471	0	471	218	116.1	2,025	1,267	59.8					
Malaysia	1,917	03	1,920	1,204	59.5	9,202	7,548	21.9					
Myanmar	203	0	203	83	144.6	642	525	22.3					
Philippines	468	04	472	395	19.5	2,427	2,070	17.2					
Singapore	1,054	0	1,054	914	15.3	5,375	4,604	16.7					
Thailand	554	02	556	583	(4.6)	4,023	3,566	12.8					
Vietnam	250	0	250	290	(13.8)	1,852	1,265	46.4					
Others	36	0	36	23	56.5	167	101	65.3					
Oceania	6,761	41	6,802	6,147	10.7	49,211	38,677	27.2					
Australia	5,896	33	5,929	5,465	8.5	44,026	34,429	27.9					
New Zealand	832	08	840	664	26.5	4,977	4,111	21.1					
Others	33	0	33	18	83.3	208	137	51.8					
South Asia	58,328	729	59,057	44,744	32.0	258,503	199,061	29.9					
Afghanistan	10	0	10	20	(50.0)	54	85	(36.5)					
Bangladesh	7,282	0	7,282	2,878	153.0	27,311	11,258	142.6					
Bhutan	55	0	55	52	5.8	280	346	(19.1)					
India	46,272	729	47,001	32,254	45.7	204,060	155,837	30.9					
Iran	354	0	354	280	26.4	5,782	5,902	(2.0)					
Maldives	3,006	0	3,006	8,040	(62.6)	13,296	18,694	(28.9)					
Nepal	403	0	403	282	42.9	2,300	2,008	14.5					
Pakistan	946	0	946	938	0.9	5,420	4,931	9.9					
EUROPE	37,991	2,116	40,108	37,357	7.4	549,244	496,219	10.7					
Northern Europe	10,989	67	11,056	9,657	14.5	124,016	104,239	19.0					
Denmark	498	02	500	410	22.0	8,650	7,431	16.4					
Finland	208	0	208	159	30.8	2,494	2,264	10.2					
Norway	355	0	355	379	(6.3)	5,258	4,515	16.5					
Sweden	285	01	286	278	2.9	6,467	5,970	8.3					
United Kingdom	9,160	61	9,221	8,094	13.9	96,274	80,086	20.2					
Others	483	03	486	337	44.2	4,873	3,973	22.7					



	May 2025			Tourist arrivals May 2024	% change May (25/24)	Total tourist arrivals up to May 2025	Total tourist arrivals up to May 2024	% change up to May (25/24)
	Tourist arrivals							
	By Air	By Sea	Total					
Western Europe	15,652	1,974	17,626	15,881	11.0	180,430	155,962	15.7
Austria	461	22	483	544	(11.2)	8,458	8,067	4.8
Belgium	656	08	664	549	20.9	7,629	5,918	28.9
France	5,465	05	5,470	4,064	34.6	57,112	46,238	23.5
Germany	5,343	1,880	7,223	7,495	(3.6)	69,078	65,514	5.4
Netherlands	2,311	18	2,329	1,845	26.2	23,716	17,531	35.3
Switzerland	1,385	39	1,424	1,345	5.9	13,993	12,263	14.1
Others	31	02	33	39	(15.4)	444	431	3.0
Central/Eastern Europe	6,447	40	6,487	6,957	(6.8)	189,886	192,053	(1.1)
Belarus	148	0	148	195	(24.1)	5,346	6,838	(21.8)
Czech Republic	347	07	354	314	12.7	9,971	11,917	(16.3)
Estonia	28	0	28	11	154.5	2,742	2,745	(0.1)
Hungary	128	05	133	78	70.5	3,726	3,755	(0.8)
Kazakhstan	207	0	207	65	218.5	7,614	8,515	(10.6)
Lithuania	101	01	102	69	47.8	4,536	4,305	5.4
Poland	1,068	10	1,078	1,002	7.6	24,941	22,849	9.2
Romania	188	02	190	147	29.3	3,188	3,233	(1.4)
Russia	3,322	06	3,328	4,384	(24.1)	110,421	110,692	(0.2)
Slovakia	208	04	212	173	22.5	3,997	3,822	4.6
Ukraine	232	02	234	203	15.3	5,023	4,225	18.9
Others	470	03	473	316	49.7	8,381	9,157	(8.5)
Southern/Mediterranean Europe	4,904	35	4,939	4,862	1.6	54,912	43,965	24.9
Greece	140	0	140	133	5.3	1,703	1,272	33.9
Italy	1,324	09	1,333	1,010	32.0	17,383	12,436	39.8
Portugal	306	06	312	314	(0.6)	3,439	2,655	29.5
Spain	1,575	18	1,593	1,369	16.4	12,509	10,281	21.7
Turkey	383	01	384	294	30.6	3,789	3,057	23.9
Israel	896	0	896	1,506	(40.5)	10,475	9,648	8.6
Others	280	01	281	236	19.1	5,614	4,616	21.6
MIDDLE EAST	1,953	0	1,953	1,513	29.1	10,791	9,795	10.2
Bahrain	54	0	54	68	(20.6)	391	385	1.6
Egypt	298	0	298	223	33.6	1,834	1,652	11.0
Iraq	65	0	65	101	(35.6)	457	308	48.4
Jordan	169	0	169	149	13.4	1,183	954	24.0
Kuwait	106	0	106	77	37.7	746	814	(8.4)
Lebanon	169	0	169	216	(21.8)	1,498	1,577	(5.0)
Oman	136	0	136	139	(2.2)	712	644	10.6
Qatar	47	0	47	39	20.5	272	240	13.3
Saudi Arabia	433	0	433	213	103.3	1,895	1,724	9.9
United Arab Emirates	400	0	400	229	74.7	1,429	1,125	27.0
Others	76	0	76	59	28.8	374	372	0.5
TOTAL	129,564	3,355	132,919	112,128	18.5	1,029,803	896,799	14.8



Main last departure airports and airlines to Sri Lanka, May 2025

The analysis of last departure airports for tourists arriving in Sri Lanka offers valuable insights into current travel patterns and global connectivity. Chennai leads the list, accounting for a significant 14.10% of total arrivals, followed closely by key Middle Eastern hubs: Dubai (8.25%), Abu Dhabi (7.04%), and Doha (6.79%). This clearly underscores the pivotal role of these Gulf cities as major transit points, leveraging their extensive global airline networks to connect travelers from diverse regions, including Europe, Africa, and the Americas, to Sri Lanka.

Indian cities collectively form a substantial portion of arrivals, with Mumbai (7.33%), Bangalore (6.00%), Delhi (5.22%), and Hyderabad (3.55%) joining Chennai to highlight robust air connectivity and strong bilateral travel ties between India and Sri Lanka. This strong showing from Indian airports directly correlates with India's position as one of Sri Lanka's top source markets.

Beyond these primary hubs, several other key Asian cities demonstrate Sri Lanka's integration into major regional air networks, including Singapore (4.04%), Kuala Lumpur (3.65%), Shanghai (2.49%), Bangkok (2.07%), and Hong Kong (1.29%). European connectivity is also evident with London (3.03%) and Istanbul (1.99%) appearing on the list, suggesting direct or convenient connecting flights from these major European gateways. Additionally, Moscow (0.94%) facilitates travel from Russia, while Dhaka (1.47%) and Sharjah (1.85%) contribute to arrivals from Bangladesh and other parts of the Middle East. Australian cities like Melbourne (1.38%) and Sydney (1.02%) reflect long-haul travel patterns. This detailed breakdown of last departure airports is crucial for optimizing flight routes, enhancing airline partnerships, and implementing geographically targeted marketing initiatives to bolster tourist arrivals.

An analysis of tourist arrivals to Sri Lanka by airlines/ cruise lines reveals a clear hierarchy of carriers facilitating inbound tourism. Sri Lankan Airlines, as the national carrier, naturally leads with a dominant 27% of arrivals, demonstrating its crucial role in connecting the country to global markets. This is followed by a strong presence from Indian carriers, with Indigo accounting for 19% and Air India for 9%, collectively highlighting the significant volume of Indian tourists arriving in Sri Lanka. This strong performance by Indian airlines is consistent with India being a top source market for Sri Lanka.

Middle Eastern airlines also play a substantial role, with Emirates (7%), Qatar Airways (7%), Etihad Airways (6%), and Fly Dubai (2%) collectively channeling a considerable number of travelers, leveraging their extensive international networks to connect passengers from various continents. China Eastern Airlines (3.31%) shows a notable contribution from the Chinese market, while Singapore Airlines (2.23%) and Turkish Airlines (1.99%) provide further connectivity from Southeast Asia and Europe/Middle East, respectively.

Smaller, but still significant, contributions come from Fly Emirates (1.93%), Air Arabia (1.85%), Aida Stella (1.52%), Air Asia (1.33%), Cathay Pacific (1.29%), Thai Air Asia (0.98%), Malaysia Airlines (0.98%), and Aeroflot (0.94%). This airline-specific data is invaluable for strategic engagement with carriers, identifying opportunities for route expansion, and coordinating marketing efforts to maximize passenger loads and facilitate seamless travel to Sri Lanka.



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Chart 6. Main last departure airports to Sri Lanka, May 2025

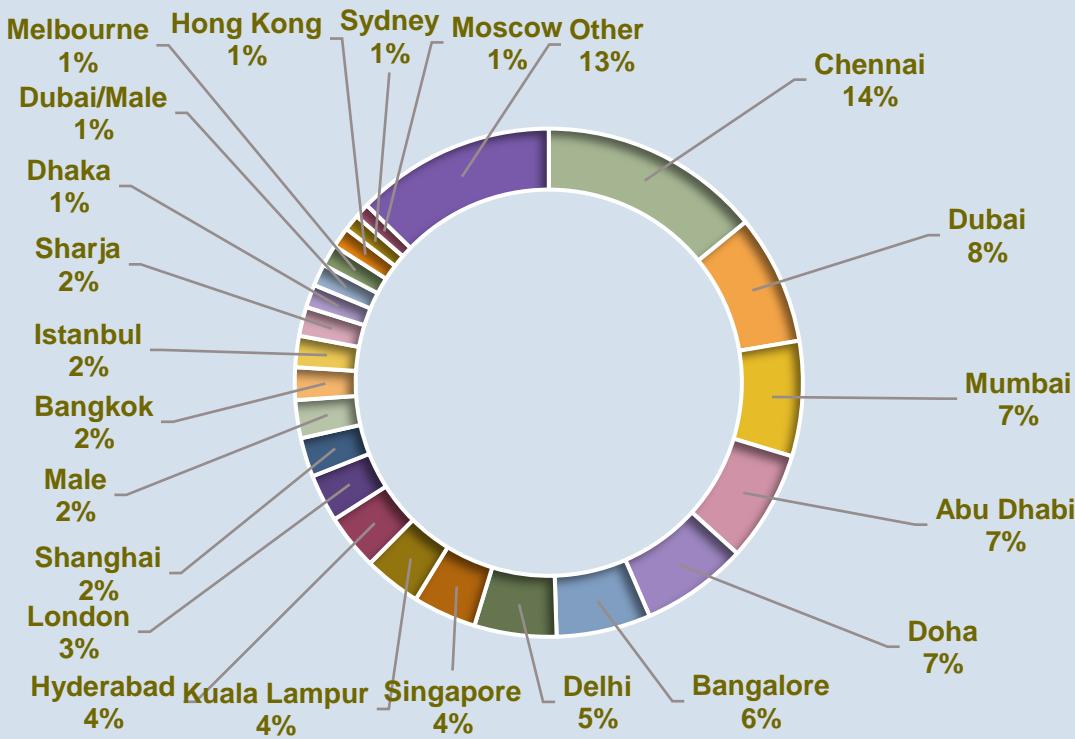
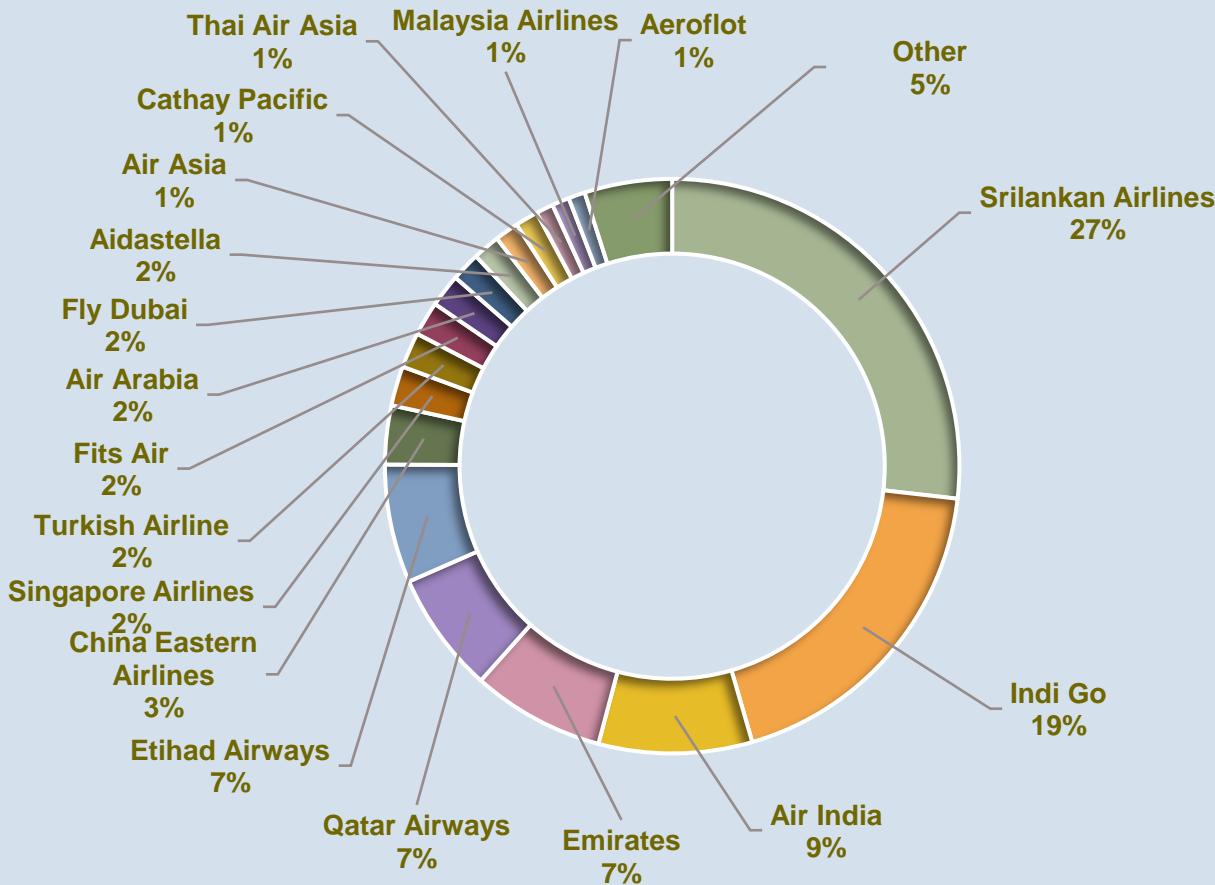


Chart 7. Main airlines to Sri Lanka, May 2025



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

May 2025

An examination of the last departure airports for tourists from Sri Lanka's top source markets provides granular detail on specific travel corridors. Indian tourists, as expected from a dominant source market, primarily depart from major Indian cities, with Chennai leading significantly (16,016 arrivals), followed by Mumbai (8,266), Bangalore (7,417), Delhi (3,728), and Hyderabad (4,111). This pattern underscores the robust direct and frequent flight options available from various parts of India.

For tourists from the United Kingdom, London serves as the primary departure point (3,124 arrivals), indicating strong direct flight connections. However, a significant reliance on Middle Eastern hubs is also evident, with Dubai (1,001), Doha (1,768), and Abu Dhabi (1,016) featuring prominently as connecting flight origins. Similarly, German tourists also show a strong preference for Middle Eastern hubs as primary departure points, with Abu Dhabi (1,257), Dubai (1,237) and Doha (1,012) being key. London (103) and Istanbul (371) also contribute to their itineraries, indicating multi-stop journeys. French tourists predominantly depart from Dubai (1,839), Doha (1,016), and Istanbul (568), further solidifying the role of these connecting hubs for European travelers.

Chinese tourists primarily depart from Shanghai (2,645 arrivals), but a substantial number also originate from regional hubs such as Kuala Lumpur (454), Singapore (358), and Bangkok (306), indicating a mixed reliance on direct flights and connections through Southeast Asian gateways. For Bangladesh, Dhaka is a significant departure point (1,709), as anticipated, but Chennai (1,474) and Delhi (1,533) also play roles, reflecting a combination of direct flights and regional connections.

Long-haul markets also exhibit distinct patterns. Australian visitors primarily use Singapore (1,859) and Melbourne (1507) as their last departure airports, indicating a strong reliance on Southeast Asian and Middle Eastern transit hubs. Tourists from the United States frequently utilize Doha (692), Dubai (288), and Abu Dhabi (458) as key transit points, alongside Singapore (222), underscoring multi-leg journeys often involving Middle Eastern and Asian hubs. Canadian tourists similarly rely on Middle Eastern transit through Dubai (874) and Doha (316), serving as a significant connecting hub. Finally, for the Russian Federation, Moscow (1,247) serves as a primary departure point, complemented by Sharjah (681) as a direct or connecting hub, reflecting direct flights or connections through the UAE.

Overall, this detailed breakdown by source market and last departure airport is crucial for understanding the specific travel dynamics of each market. It enables targeted route development strategies, collaborative marketing with airlines operating key connections, and optimizing connectivity to better serve the diverse geographic origins of Sri Lanka's tourist base.





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

Country	Chennai	Dubai	Mumbai	Abu Dhabi	Doha	Bangalore	Delhi	Singapore	Kuala Lumpur	Hyderabad	London	Shanghai	Male	Bangkok	Istanbul	Sharia	Dhaka	Dubai/Male	Melbourne	Others	Total
India	16,016	735	8,266	390	143	7,417	3,728	346	324	4,111	18	10	251	403	7	199	15	49	107	4,466	47,001
United Kingdom	254	1,001	107	1,016	1,768	60	244	216	294	24	3,124	28	64	152	129	48	39	62	34	557	9,221
China	44	129	13	75	30	14	32	358	454	3	1	2,645	190	306	7	13	64	28	1	4,396	8,803
Bangladesh	1,474	93	783	28	35	21	1,533	8	75	428	1	7	964	41	3	25	1,709	3	51	7,282	
Germany	49	1,237	113	1,257	1,012	31	94	117	141	5	103	10	39	83	371	31	5	30	5	2,490	7,223
Australia	59	87	24	44	44	25	279	1,859	515	17	18	10	24	97	8	11	6	25	1,507	1,270	5,929
France	62	1,839	39	710	1,016	22	82	81	124	10	58	6	30	68	568	19	9	12	715	5,470	
United States	187	284	88	458	692	146	100	222	78	66	140	20	48	81	162	18	24	19	4	770	3,607
Canada	131	874	29	612	316	18	67	77	47	8	282	11	19	52	24	8	2	10	8	817	3,412
Russian Federation	19	270	16	556	63	7	45	23	76	7	4	65	75	36	21	681	8	43	1,313	3,328	

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

Country	Srilankan Airlines	Indi Go	Air India	Emirates	Qatar Airways	Ethihad Airways	China Eastern Airlines	Singapore Airlines	Turkish Airline	Fits Air	Air Arabia	Fly Dubai	Air Asia	Cathay Pacific	Thai Air Asia	Malaysia Airlines	Aeroflot	Air China	Other	Total
India	32.89	45.19	16.69	0.72	0.24	0.74	0.03	0.14	0.01	0.16	0.42	0.52	0.09	0.03	0.06	0.05	0.00	0.01	1.98	100.00
United Kingdom	40.88	3.12	2.49	10.29	19.44	10.83	0.34	0.78	1.40	0.60	0.52	1.01	2.03	0.43	1.96	0.49	0.00	0.01	3.36	100.00
China	12.42	0.41	0.55	0.91	0.28	0.74	41.85	2.69	0.08	1.70	0.15	0.48	2.47	11.60	1.45	1.50	0.00	12.46	8.27	100.00
Bangladesh	18.17	30.05	28.12	0.25	0.47	0.37	0.10	0.01	0.04	21.13	0.34	0.11	0.08	0.01	0.05	0.07	0.01	0.01	0.59	100.00
Germany	10.83	1.00	1.72	15.69	14.16	17.35	0.15	0.47	5.14	0.60	0.43	1.44	1.41	0.08	0.98	0.18	0.00	0.00	28.38	100.00
Australia	56.81	0.83	2.21	1.57	0.74	0.67	0.19	21.15	0.13	0.13	0.19	0.35	1.79	2.31	0.83	5.70	0.00	0.00	4.40	100.00
France	13.86	1.32	1.57	32.45	19.03	12.82	0.20	0.18	10.38	0.49	0.35	1.13	1.43	0.26	1.83	0.60	0.00	0.00	2.10	100.00
United States	17.33	8.34	3.91	6.10	19.10	12.53	0.64	4.88	4.49	0.67	0.50	1.50	1.03	3.66	0.86	0.44	0.00	0.00	14.03	100.00
Canada	34.11	3.25	2.08	21.66	8.53	17.88	0.38	0.82	0.70	0.44	0.23	1.17	0.79	3.60	1.03	0.06	0.00	0.12	3.14	100.00
Russian Federation	3.37	0.99	1.20	4.63	1.83	10.79	2.01	0.06	0.63	2.04	20.46	4.09	1.56	0.03	1.86	0.21	36.42	0.03	7.78	100.00





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An analysis of last departure airport among key source markets reveals distinct patterns. For India, Sri Lankan Airlines carries a significant share (32.89%), but is closely rivaled by Indian budget carrier Indigo (45.19%), and Air India (16.69%), collectively highlighting the dominant role of both national and Indian airlines in facilitating travel from this key market. United Kingdom tourists show a strong preference for Sri Lankan Airlines (40.88%), followed by Qatar Airways (19.44%), with Etihad Airways (10.83%) also having a notable presence. This indicates a reliance on a mix of direct flights and connecting services through Middle Eastern hubs.

For China, China Eastern Airlines is the primary carrier (41.85%), showcasing direct routes. Sri Lankan Airlines (12.42%) and Air China (12.46%) also contribute. Bangladesh travelers heavily rely on IndiGo (30.05%) and Air India (28.12%) indicating strong regional connectivity with India, which then likely connects to Sri Lanka. Germany demonstrates a clear preference for Middle Eastern airlines, with Emirates (15.69%), Etihad Airways (17.35%), and Qatar Airways (14.16%) being prominent. Sri Lankan Airlines (10.83%) and Turkish Airline (5.14%) also play roles, reflecting diverse connecting options. For Australia, Sri Lankan Airlines (56.81%) is the dominant carrier, suggesting strong direct or well-connected services. Singapore Airlines (21.15%) and Cathay Pacific (2.31%) also contribute significantly, highlighting reliance on Southeast Asian and Middle Eastern hubs.

France presents an interesting dynamic, with Emirates (32.45%) and Qatar Airways (19.03%) being the leading airlines, underscoring the strong role of Middle Eastern carriers as connecting points from Europe. Sri Lankan Airlines (13.86%) also holds a notable share. United States tourists predominantly use Middle Eastern carriers for their journey, with Qatar Airways (19.10%), and Etihad Airways (12.53%) being key. Sri Lankan Airlines (17.33%) also contributes, likely facilitating connections. Similarly, Canada also relies heavily on Middle Eastern airlines, with Emirates (21.66%) and Etihad Airways (17.88%) as major carriers, alongside Sri Lankan Airlines (34.11%). Finally, for the Russian Federation, Aeroflot (36.42%) is the primary airline, indicating a direct or preferred route. Air Arabia (20.46%) also plays a significant role, suggesting connections through Sharjah.

This airline-specific market breakdown is invaluable for understanding the competitive landscape of air travel to Sri Lanka. It allows for targeted collaboration with leading airlines from each source market, identification of potential new route opportunities, and the development of joint marketing initiatives to enhance tourist flow and accessibility."





Research & International Relations Division

011 2426800 Ext. 151/155

research@srilanka.travel

www.sltda.gov.lk