

Introduction

The following document provides a synthesis of the most recent June 2025 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 30th June 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

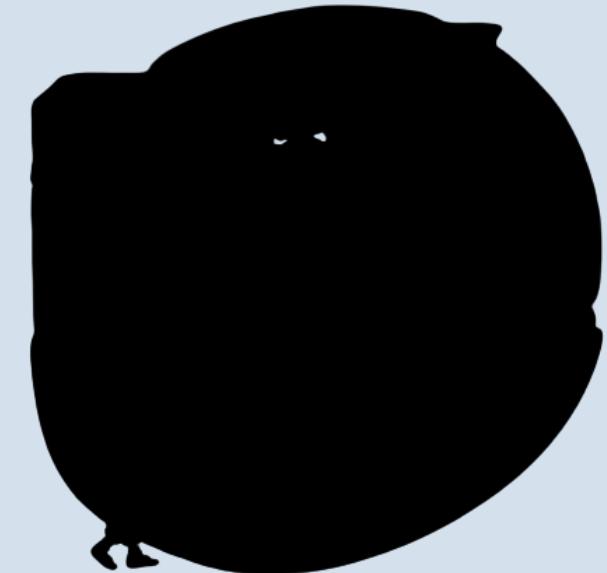
Monthly tourist arrivals to Sri Lanka for 2024 and 2025 reveals a significant increase in arrivals during the first half of 2025, with a total of 1,168,044 tourists from January to June, compared to 1,010,249 during the same period in 2024 reflecting a growth of approximately 15.6%. All six months in 2025 recorded positive growth, with June (21.8%), January (21.4%), and May (18.5%) showing the highest percentage increases. Notably, January 2025 saw the highest number of monthly arrivals at 252,761, highlighting strong seasonal demand. The consistent growth in traditionally off-peak months such as April, May, and June indicate a potential shift toward a more balanced year-round tourism pattern. This positive trend may

suggests the effectiveness of factors such as improved airline connectivity, and streamlined visa processes. With this momentum, Sri Lanka is well-positioned to exceed the total arrivals recorded in 2024 (2,053,465) by the end of 2025, marking a strong recovery and continued growth for the tourism sector.

Key source markets such as India, the United Kingdom, China, Australia, and Pakistan have played a crucial role in revitalizing Sri Lanka's tourism sector during the month of June. Their strong contributions have been vital in boosting tourist arrivals and sustaining the overall growth of the industry during this period.

Table 1. Monthly tourist arrivals, June 2025

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	138,241	21.8
July	187,810		
August	164,609		
September	122,140		
October	135,907		
November	184,158		
December	248,592		
TOTAL	2,053,465	1,168,044	

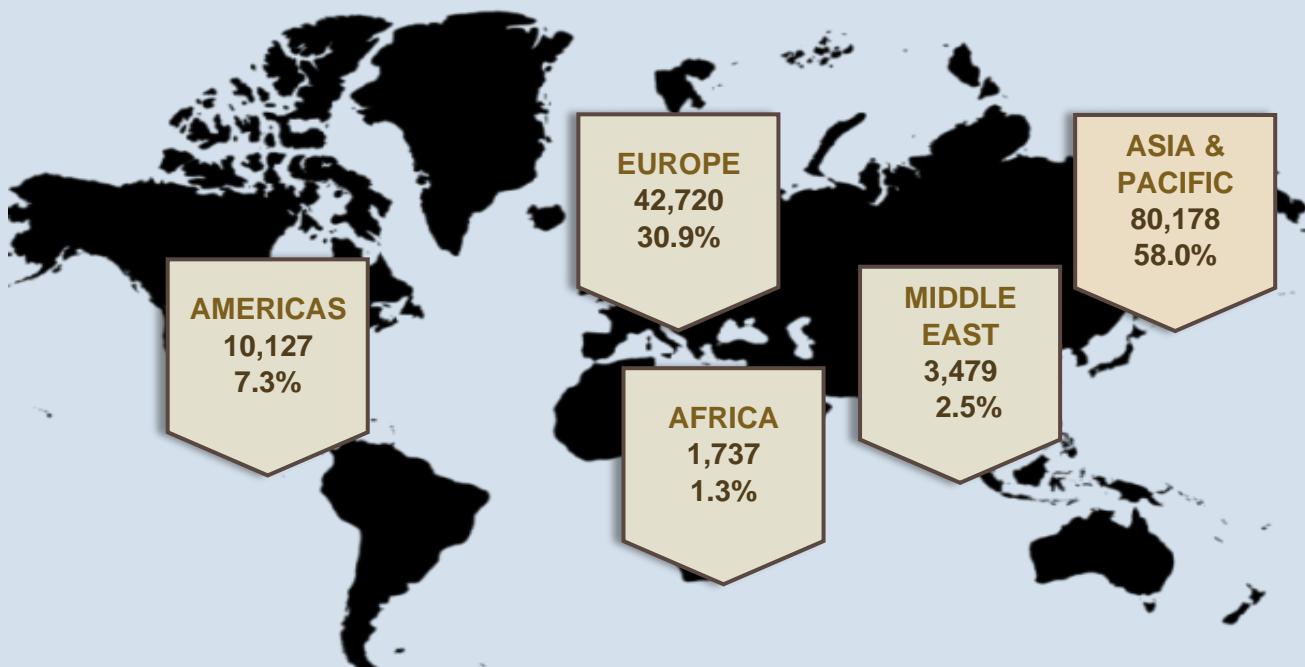


Tourist Arrivals | June 2025

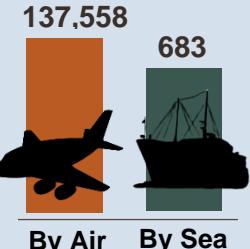
138,241

Tourist arrivals by region and percentage share June 2025

Map 1. Tourist arrivals by region and percentage share



An analysis of tourist arrivals by region in June 2025 highlights the Asia & Pacific region as the primary source of inbound tourism to Sri Lanka, contributing 80,178 arrivals—or a notable 58% of the total. This strong performance can be attributed to close regional connections, proximity, and cultural affinity, which collectively make Sri Lanka a convenient and attractive destination for travelers from this part of the world.



Europe emerged as the second-largest source region, contributing 42,720 visitors and representing 30.9% of total arrivals. Together, Asia & Pacific and Europe made up the overwhelming majority of tourists, underscoring Sri Lanka's strong tourism infrastructure and its broad appeal to both regional travelers and those from Western markets.

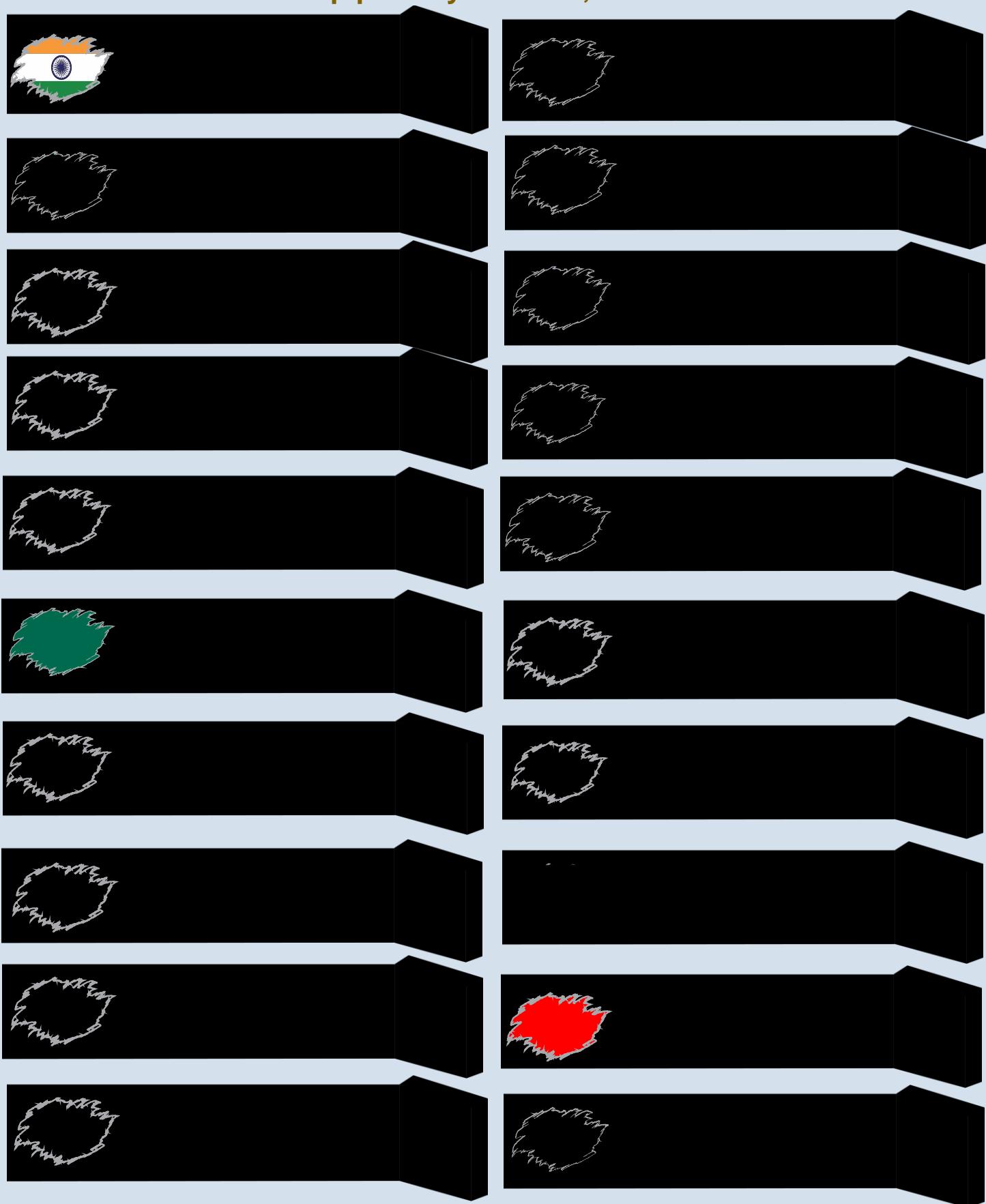
In comparison, the Americas accounted for 10,127 visitors (7.3%), while arrivals from the Middle East and Africa were more modest, totaling 3,479 (2.5%) and 1,737 (1.3%) respectively. This distribution highlights Sri Lanka's current reliance on a limited number of key regions, with relatively low engagement from others. Nonetheless, it also signals a promising opportunity to expand into underrepresented markets.

The sustained high arrival numbers from Asia & Pacific and Europe can be attributed to steady travel demand, robust air connectivity, cultural appeal, and attractive travel packages. In contrast, the lower figures from the Middle East and Africa may stem from limited direct flight options, reduced marketing outreach, or lower awareness of Sri Lanka as a travel destination. This regional concentration reveals a level of vulnerability, especially if disruptions impact the dominant source markets.

To address this and support long-term, sustainable growth, Sri Lanka would benefit from diversifying its tourism base. Initiatives such as expanding flight connectivity, launching targeted marketing campaigns, and providing tailored travel incentives could enhance visibility and interest in less-tapped regions like the Americas, the Middle East, and Africa—fostering a more balanced and resilient tourism industry.

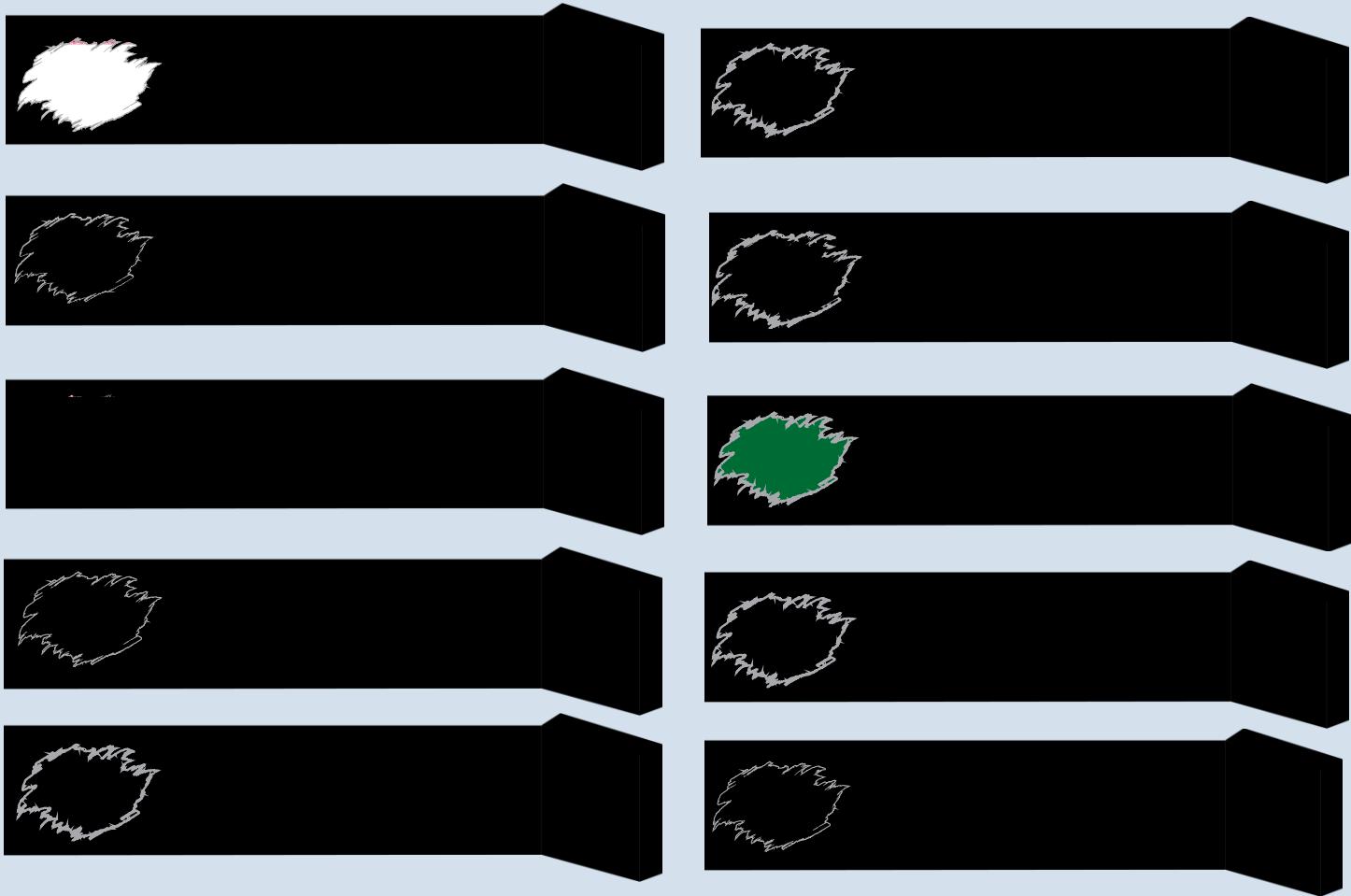
Top primary markets and top potential markets

Top primary markets, June 2025



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, June 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

June 2025

An analysis of the top ten source markets for Sri Lanka in June 2025 reveals a strong overall upward trend in tourist arrivals. India continues to dominate as the leading source market, with 37,934 arrivals—up from 28,631 in June 2024—marking a robust 32.4% increase. This growth is bolstered by both air and sea arrivals, underscoring India's geographic proximity, cultural links, and increasing travel interest. The United Kingdom holds the second position with 11,628 visitors, showing a 25.6% year-on-year growth, reflecting the steady recovery of long-haul travel from Western Europe. China, despite being the third-largest market, showed a slight decline in arrivals from 9,222 to 8,804 (a 4.5% drop), possibly due to outbound travel restrictions or reduced destination visibility.

Australia, ranked fourth, posted a healthy 15.5% increase, rising from 6,317 to 7,299 arrivals. Notably, Pakistan showed the most dramatic surge, with arrivals skyrocketing from 1,399 in 2024 to 6,833 in 2025—an increase of nearly 389%. This could be attributed to ongoing religious convention and conference in Sri Lanka and improved bilateral ties. Bangladesh also performed well, with arrivals rising 33.2% to reach 5,826. European markets such as Germany and France showed solid growth at 20.7% and 40.1% respectively, indicating strong interest from Western Europe. Similarly, arrivals from the United States increased by 34.8%, and Canada recorded a 29.9% rise, signaling a resurgence of North American travel interest in Sri Lanka.

Across all markets, air travel remains the predominant mode of entry, with minimal sea arrivals—except from India, which recorded 641 arrivals by sea, pointing to emerging maritime travel potential. Overall, this distribution highlights Sri Lanka's growing appeal across both regional and long-haul markets. However, the decline from China and continued dependence on a few key regions also signals the need for diversification. Strategic focus on underrepresented but growing markets like Pakistan, Bangladesh, and North America could help build a more balanced and resilient tourism sector.

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

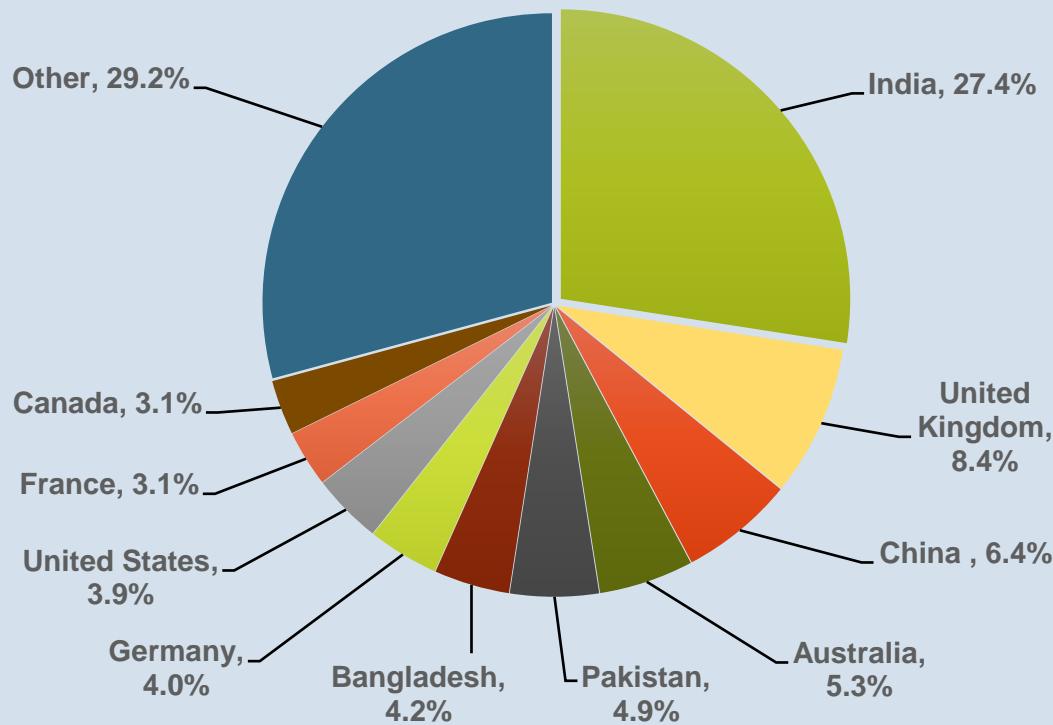
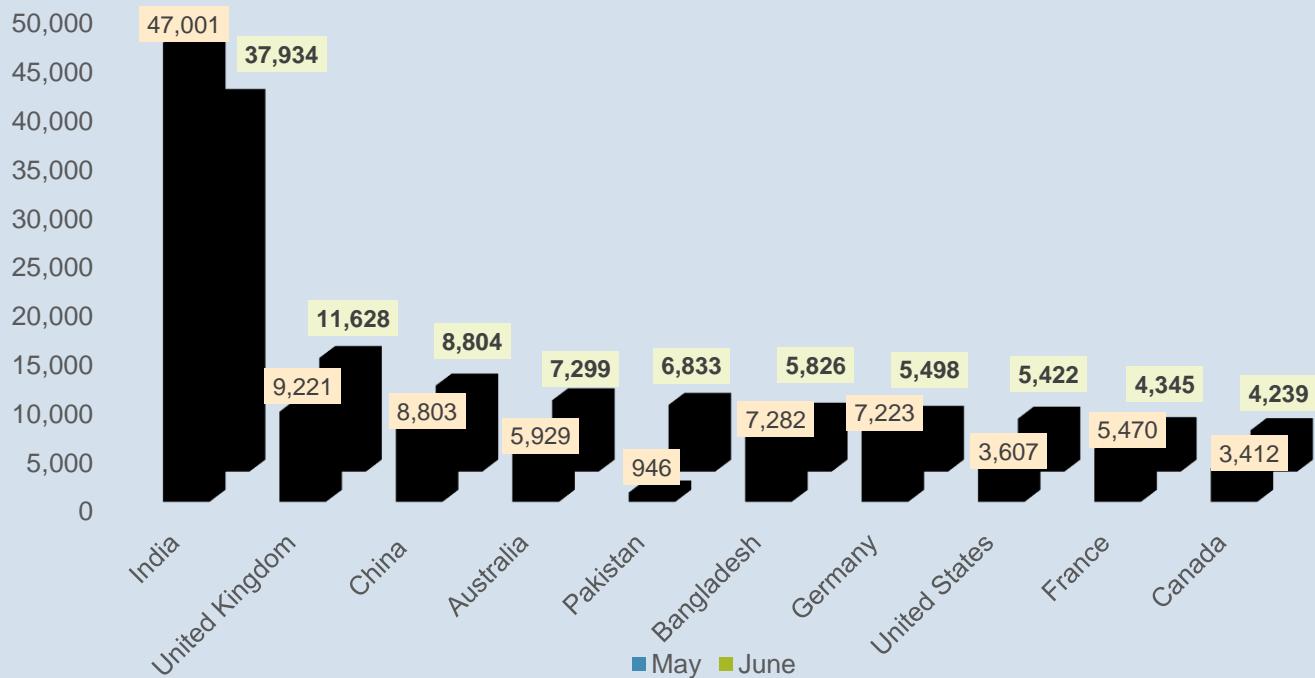


Table 2. Top ten source markets to Sri Lanka, June

Rank	Country of Residence	Tourist Arrivals (June 2025)			Tourist Arrivals (June 2024)
		By Air	By Sea	Total	
1	India	37,293	641	37,934	28,631
2	United Kingdom	11,622	6	11,628	9,266
3	China	8,804	0	8,804	9,222
4	Australia	7,297	2	7,299	6,317
5	Pakistan	6,833	0	6,833	1,399
6	Bangladesh	5,826	0	5,826	4,374
7	Germany	5,493	5	5,498	4,556
8	United States	5,413	9	5,422	4,023
9	France	4,339	6	4,345	3,102
10	Canada	4,235	4	4,239	3,263

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

Top ten source markets

January to June 2025

India maintained its position as the leading source market, with 241,994 arrivals, showing significant growth from 184,468 in 2024 a remarkable increase of over 31%. This performance underscores India's strong regional connection, accessibility, and continued travel interest in Sri Lanka. The Russian Federation, despite a slight decline from 114,104 to 112,312, retained its position as the second-largest contributor, suggesting continued outbound demand despite potential geopolitical or economic factors.

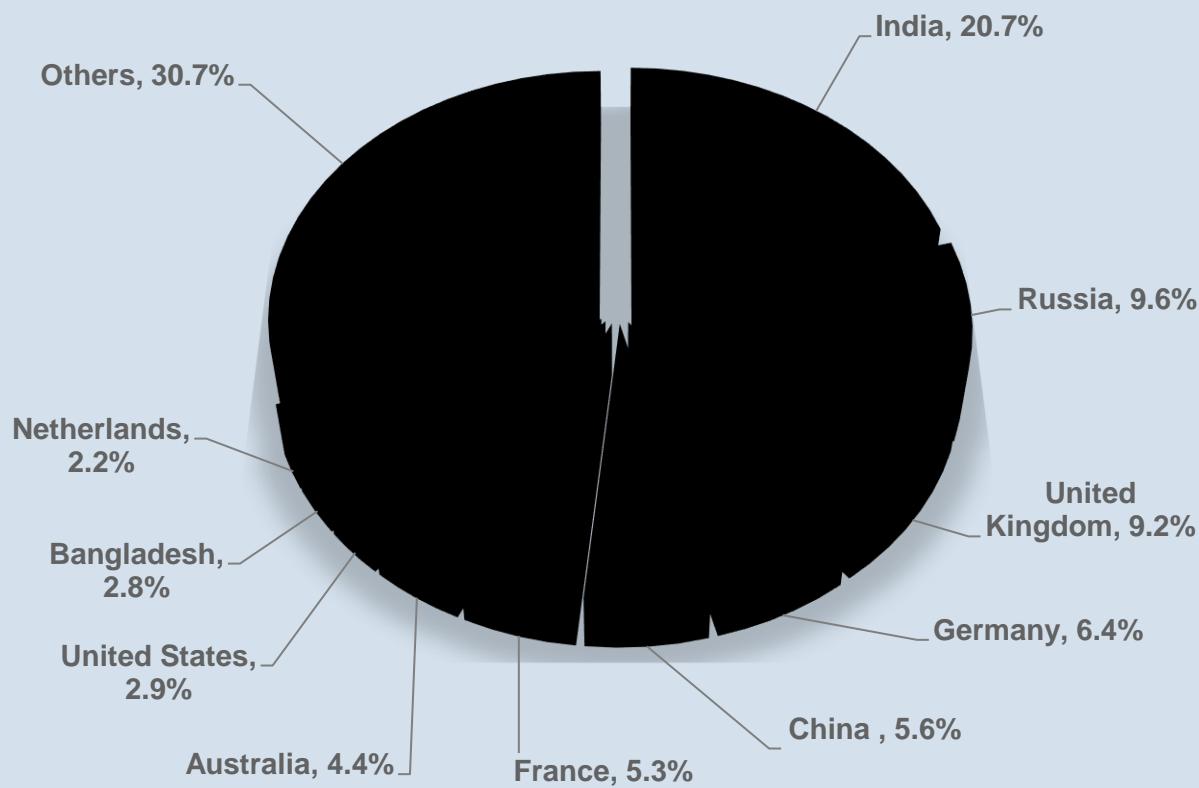
The United Kingdom showed robust growth, rising from 89,352 to 107,902 arrivals an increase of nearly 21%, reflecting the strength of Western European markets. Similarly, Germany also grew steadily, reaching 74,576 arrivals compared to 70,070 last year. China, though traditionally a strong market, saw a modest decline from 68,764 to 65,787, potentially indicating lingering travel constraints or shifting outbound preferences. Meanwhile, France showed impressive growth at over 24%, with arrivals increasing from 49,340 to 61,457.

Notably, Australia recorded a sharp increase from 40,746 to 51,325, and Bangladesh more than doubled its arrivals from 15,632 to 33,137, indicating successful regional outreach and emerging potential. The United States continued to perform consistently with a small but steady rise, while the Netherlands also grew from 19,466 to 26,139, reflecting increasing interest from smaller European markets.

Overall, the data signals a strong and diversified recovery in Sri Lanka's tourism sector for the first half of 2025, with particularly promising growth from South Asia, Europe, and the Asia-Pacific. However, small declines from markets like Russia and China suggest the importance of targeted re-engagement strategies to maintain momentum across all regions. This balanced performance also highlights the importance of sustained promotion, improved connectivity, and strategic market diversification to ensure long-term resilience and sustainable growth in the tourism industry.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ June .2025)	Tourist Arrivals Jan ~ June. 2024)
1	India	241,994	184,468
2	Russian Federation	112,312	114,104
3	United Kingdom	107,902	89,352
4	Germany	74,576	70,070
5	China	65,787	68,764
6	France	61,457	49,340
7	Australia	51,325	40,746
8	United States	34,413	32,717
9	Bangladesh	33,137	15,632
10	Netherlands	26,139	19,466
11	Others	359,002	325,590
Total		1,168,044	1,010,249

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

Tourist arrivals by purpose of visit

June 2025

The analysis of tourist arrivals to Sri Lanka in June, reveal a tourism landscape dominated by leisure activities while showcasing diverse motivational drivers across different visitor segments. Pleasure and vacation tourism emerges as the primary purpose, accounting for nearly half of all arrivals at 49.77% (68,809 tourists), demonstrating Sri Lanka's strong positioning as a premier holiday destination with its rich combination of pristine beaches, ancient cultural heritage sites, and stunning natural attractions. Social connections play a substantial role in driving tourism, with 13.41% (18,543 tourists) visiting friends and relatives, reflecting the importance of Sri Lanka's global diaspora and established family networks in sustaining inbound travel flows. The business and professional travel segment, while smaller, demonstrates considerable significance with MICE (Meetings, Incentives, Conferences, Exhibitions) activities contributing 5.81% (8,038 tourists) and general business travel accounting for 3.21% (4,433 tourists), collectively representing nearly 9% of total arrivals and positioning Sri Lanka as an emerging regional hub for corporate events and professional gatherings. Religious tourism contributes 3.78% (5,223 tourists), highlighting the country's spiritual significance and Buddhist heritage as a draw for pilgrims and spiritual seekers. The remaining segments sports (0.32%), health and Ayurvedic tourism (0.24%), education (0.11%), and official visits (0.001%) represent niche markets that, while currently small, offer potential growth opportunities, particularly in health and wellness tourism given Sri Lanka's traditional Ayurvedic practices. This comprehensive analysis of 138,241 total tourist arrivals underscores the critical importance of leisure tourism to Sri Lanka's economy while revealing the multifaceted nature of travel motivations and identifying potential areas for strategic tourism development.

Chart 4: Purpose of visit

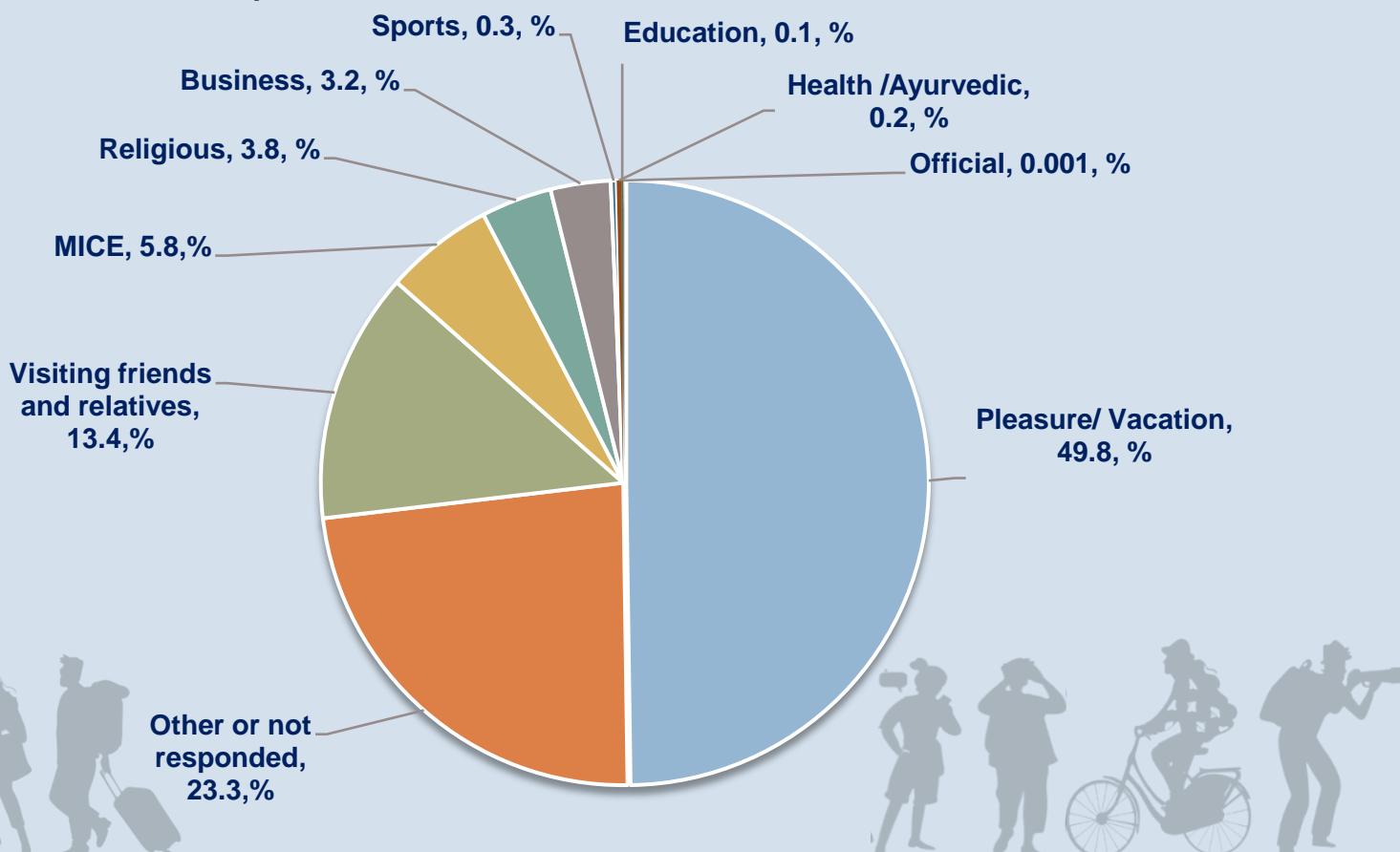
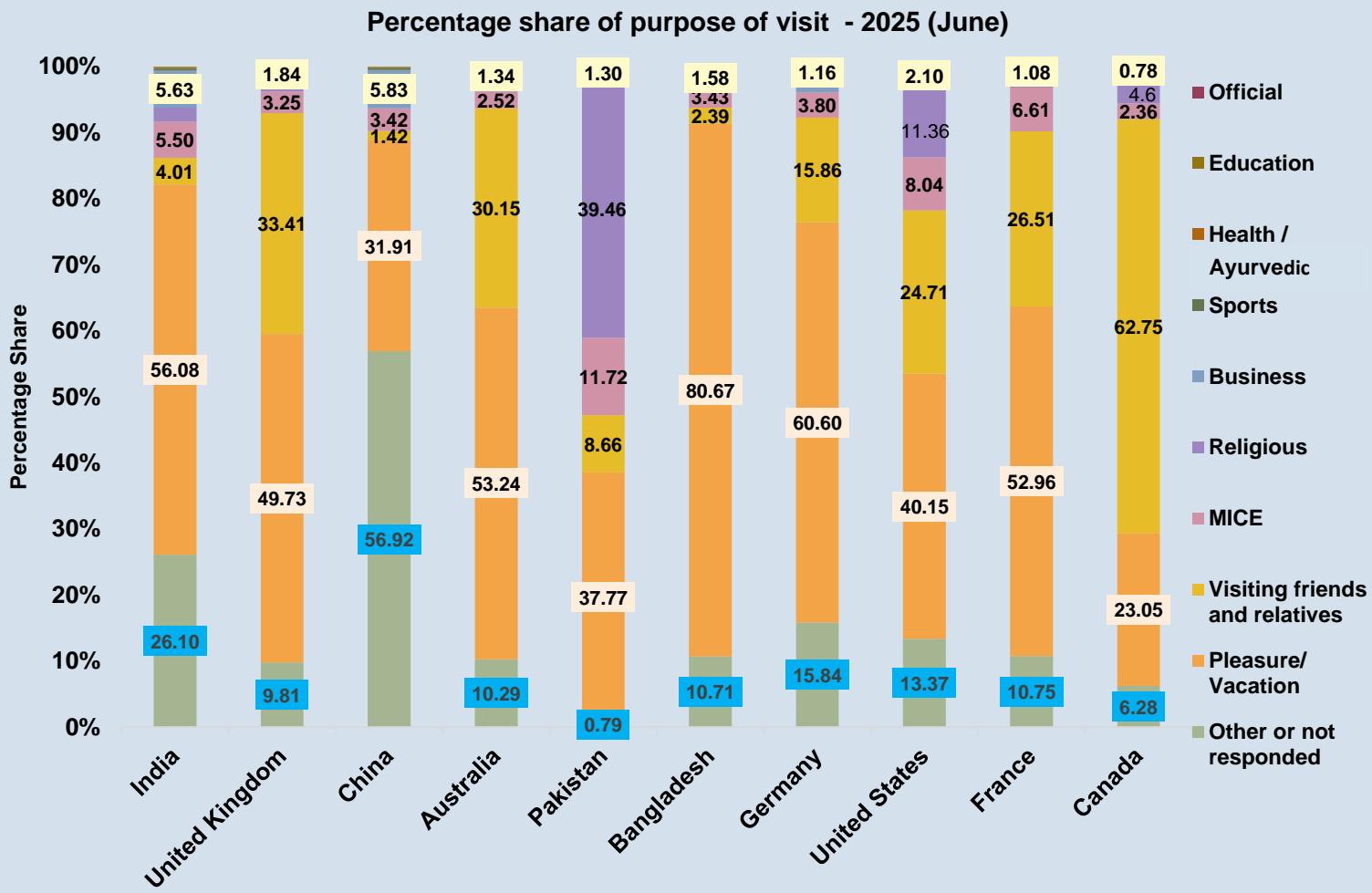


Chart 5: Purpose of visit vs main source markets



An analysis of tourist arrival data from Sri Lanka's top source markets, reveal distinct regional and cultural preferences that reflect the diverse motivations and relationships different countries have with Sri Lanka as a destination. Bangladesh emerges as the most leisure-focused market with an exceptional 80.67% of visitors coming for pleasure and vacation purposes, followed by Germany (60.60%) and India (56.08%), indicating these markets view Sri Lanka primarily as a holiday destination with strong appeal for its beaches, cultural heritage, and natural attractions. Visiting friends and relatives dominates the Canadian market with a remarkable 62.75% of visitors, followed by the United Kingdom (33.41%) and Australia (30.15%), reflecting the strong Sri Lankan diaspora communities in these countries and the importance of family and social connections in driving tourism from Commonwealth nations. Religious tourism shows striking variations, with Pakistan leading at 39.46% due to the Bohra conference that is being held in Sri Lanka, followed by the United States (11.36%) and Canada (4.60%), while most European markets show minimal religious travel motivations. Business travel

patterns indicate China's commercial significance with 5.83% business travelers and India's strong business ties at 5.63%, while MICE activities are notably prominent from Pakistan (11.72%) and the United States (8.04%), suggesting Sri Lanka's growing role as a regional conference and events destination for these markets. Health and Ayurvedic tourism, though generally small, shows interesting concentration from Germany (2.64%), reflecting European interest in wellness and alternative medicine, while sports tourism remains minimal across all markets, indicating an underdeveloped niche despite Sri Lanka's sporting heritage. This analysis reveals that Sri Lanka's tourism appeal varies significantly across source markets, with South Asian neighbors prioritizing religious and business connections, Commonwealth countries driven by diaspora relationships, European markets focusing on leisure and wellness, and China presenting unique patterns that warrant further investigation to fully understand visitor motivations and optimize targeted marketing strategies.





Diversifying Source Markets for a Resilient Tourism Future

As global travel patterns evolve in the post-pandemic era, Sri Lanka's tourism sector is showing signs of steady recovery and renewed momentum. Tourist arrivals for the first half of 2025 reached 1,168,044, up from 1,010,249 in the same period of 2024 a growth of over 15.6%. However, behind this positive trajectory lies an important strategic challenge: the concentration of arrivals from a few dominant markets, which may expose the industry to external shocks. A diversified source market portfolio is essential to build a resilient and sustainable tourism economy, a concept supported by several tourism and economic theories including Butler's Tourism Area Life Cycle (TALC) model and Portfolio Theory.

Current Market Composition: Strengths and Risks

Table 4: Top source markets, January to June 2024 & 2025

	Source market	Tourist Arrivals in 2025	Percentage share %	Tourist arrivals in 2024	Percentage share %
1	India	241,994	20.7	184,468	18.3
2	Russia	112,312	9.6	114,104	11.3
3	United Kingdom	107,902	9.2	89,352	8.8
4	Germany	74,576	6.4	70,070	6.9
5	China	65,787	5.6	68,764	6.8
6	France	61,457	5.3	49,340	4.9
7	Australia	51,325	4.4	40,746	4.0
8	United States	34,413	2.9	32,717	3.2
9	Bangladesh	33,137	2.8	15,632	1.5
10	Netherlands	26,139	2.2	19,466	1.9
	Others	359,002	30.7	325,590	32.2
		1,168,044		1,010,249	

An analysis of source markets shows that India remains the undisputed leader, contributing 241,994 arrivals, which accounts for 20.7% of the total in 2025. This reflects strong geographic proximity, cultural familiarity, and improved connectivity. The United Kingdom and Russia follow as major contributors, together accounting for nearly 19% of total arrivals. While these traditional markets have proven reliable, they also represent a form of concentration risk. Portfolio Theory, which in tourism suggests diversifying markets to mitigate volatility, warns against overreliance on a few regions.

For instance, despite Russia's overall stability in tourist numbers, its share dropped from 11.3% in 2024 to 9.6% in 2025, highlighting the sensitivity of outbound travel from politically or economically unstable countries.

Emerging Markets: New Growth Frontiers

Encouragingly, 2025 data reveals strong growth from emerging and underutilized markets. Bangladesh, for example, more than doubled its arrivals from 15,632 to 33,137, increasing its share from 1.5% to 2.8%. This is a significant shift that underscores the value of strengthening regional travel corridors and tapping into rising middle-class travel demand in South Asia. Similarly, France and the Netherlands both increased their absolute arrivals and market shares, suggesting that Western Europe continues to hold untapped potential. According to Plog's Psychographic Theory, different markets align with varying traveler types—allocentricks (adventure-seeking), mid-centrics, and psychocentricks (comfort-seeking). Countries like France and the Netherlands may comprise more allocentric travelers, especially drawn to Sri Lanka's nature, heritage, and authenticity.

Regional Imbalance and Tourism Lifecycle Implications

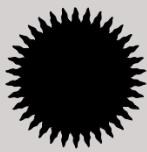
A closer look at the distribution shows that the top three markets (India, Russia, UK) account for 39.5% of all arrivals. While the "Others" category (which includes a wide range of minor markets) accounts for 30.7%, this is a slight decline from 32.2% in 2024, indicating narrowing market diversity. According to Butler's TALC model, destinations that fail to refresh their market base may stagnate. To avoid this, Sri Lanka must remain in the "growth" phase of the lifecycle by continually attracting new source markets and adjusting its offerings.

Strategic Imperatives for Diversification

- ✓ To ensure long-term resilience, Sri Lanka must adopt a multi-pronged strategy for market diversification:
- ✓ Expand regional aviation routes: Enhance direct connectivity to secondary cities in South Asia, East Asia, and Eastern Europe.
- ✓ Target niche segments: Use market segmentation (e.g., wellness, surfing, pilgrimage, wildlife) to attract mid- to high-value travelers from underrepresented markets.
- ✓ Leverage digital marketing: Platforms like social media and influencer networks can create awareness in newer markets like the Middle East, Latin America, and Africa.
- ✓ Build bilateral tourism agreements: These can facilitate group travel, marketing cooperation, and streamlined visa processes.

Conclusion: Toward a Balanced Tourism Future

The first half of 2025 has demonstrated Sri Lanka's continued appeal among traditional markets and growing interest from emerging ones. However, the current market concentration exposes the country to external risks such as economic downturns, travel restrictions, or geopolitical shifts. Guided by principles from Portfolio Theory, Plog's model, and Butler's TALC, Sri Lanka must now focus on diversifying its tourism source markets. A well-balanced portfolio of regions will not only enhance resilience and reduce volatility but also contribute to a more inclusive, sustainable, and prosperous tourism future.



International tourist arrivals by country of residence

	June 2025			Tourist arrivals June 2024	% change June (25/24)	Total tourist arrivals up to June 2025	Total tourist arrivals up to June 2024	% change up to June (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
AMERICAS	10,114	13	10,127	7,680	31.9	62,354	58,694	6.2					
North America	9,709	13	9,722	7,324	32.7	59,120	55,492	6.5					
Canada	4,235	04	4,239	3,263	29.9	24,116	22,223	8.5					
Mexico	61	0	61	38	60.5	591	552	7.1					
United States	5,413	09	5,422	4,023	34.8	34,413	32,717	5.2					
Caribbean & Central America	103	0	103	84	22.6	504	530	(4.9)					
Costa Rica	04	0	04	03	33.3	64	66	(71.2)					
Jamaica	06	0	06	12	(50.0)	19	53	20.8					
Others	93	0	93	69	34.8	421	411	2.4					
South America	302	0	302	272	11.0	2,730	2,672	2.2					
Argentina	56	0	56	51	9.8	522	537	(2.8)					
Brazil	119	0	119	111	7.2	1,053	1,063	(0.9)					
Chile	23	0	23	32	(28.1)	333	321	3.7					
Colombia	43	0	43	44	(2.3)	334	365	(8.5)					
Others	61	0	61	34	79.4	488	386	26.4					
AFRICA	1,737	0	1,737	1,064	63.3	7,849	6,351	23.6					
North Africa	306	0	306	303	1.0	1,571	1,503	4.5					
Morocco	84	0	84	80	5.0	536	470	14.0					
Sudan	114	0	114	116	(1.7)	430	366	17.5					
Others	108	0	108	107	0.9	605	667	(9.3)					
Sub-Saharan Africa	1,431	0	1,431	761	88.0	6,278	4,848	29.5					
Kenya	308	0	308	29	-	658	305	115.7					
Mauritius	37	0	37	25	48.0	391	253	54.5					
Nigeria	12	0	12	01	-	54	25	116.0					
South Africa	344	0	344	349	(1.4)	2,339	2,248	4.0					
Others	730	0	730	357	104.5	2,836	2,017	40.6					

Monthly Tourist Arrivals Report June 2025

	June 2025			Tourist arrivals June 2024	% change June (25/24)	Total tourist arrivals up to June 2025	Total tourist arrivals up to June 2024	% change up to June (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
ASIA & PACIFIC	79,532	646	80,178	63,058	27.1	491,607	397,522	23.7					
North East Asia	11,566	02	11,568	11,489	0.7	88,708	86,411	2.7					
China	8,804	0	8,804	9,222	(4.5)	65,787	68,764	(4.3)					
Japan	2,091	02	2,093	1,666	25.6	16,459	12,430	32.4					
South Korea	660	0	660	579	14.0	6,371	5,155	23.6					
Others	11	0	11	22	(50.0)	91	62	46.8					
South East Asia	5,856	01	5,857	4,288	36.6	32,432	26,092	24.3					
Cambodia	63	0	63	50	26.0	925	908	1.9					
Indonesia	376	0	376	272	38.2	2,401	1,539	56.0					
Malaysia	1,829	01	1,830	1,384	32.2	11,032	8,932	23.5					
Myanmar	131	0	131	117	12.0	773	642	20.4					
Philippines	745	0	745	544	36.9	3,172	2,614	21.3					
Singapore	1,830	0	1,830	1,284	42.5	7,205	5,888	22.4					
Thailand	597	0	597	364	64.0	4,620	3,930	17.6					
Vietnam	255	0	255	237	7.6	2,107	1,502	40.3					
Others	30	0	30	36	(16.7)	197	137	43.8					
Oceania	8,402	02	8,404	7,215	16.5	57,615	45,892	25.5					
Australia	7,297	02	7,299	6,317	15.5	51,325	40,746	26.0					
New Zealand	1,084	0	1,084	853	27.1	6,061	4,964	22.1					
Others	21	0	21	45	(53.3)	229	182	25.8					
South Asia	53,708	641	54,349	40,066	35.6	312,852	239,127	30.8					
Afghanistan	02	0	02	02	0.0	56	87	(35.6)					
Bangladesh	5,826	0	5,826	4,374	33.2	33,137	15,632	112.0					
Bhutan	49	0	49	33	48.5	329	379	(13.2)					
India	37,293	641	37,934	28,631	32.5	241,994	184,468	31.2					
Iran	196	0	196	318	(38.4)	5,978	6,220	(3.9)					
Maldives	3,157	0	3,157	5,109	(38.2)	16,453	23,803	(30.9)					
Nepal	352	0	352	200	76.0	2,652	2,208	20.1					
Pakistan	6,833	0	6,833	1,399	388.4	12,253	6,330	93.6					
EUROPE	42,696	24	42,720	37,989	12.5	591,964	534,208	10.8					
Norther Europe	15,411	07	15,418	12,890	19.6	139,434	117,048	19.1					
Denmark	815	01	816	714	14.3	9,466	8,145	16.2					
Finland	145	0	145	130	11.5	2,639	2,394	10.2					
Norway	1,473	0	1,473	1,452	1.4	6,731	5,967	12.8					
Sweden	628	0	628	568	10.6	7,095	6,538	8.5					
United Kingdom	11,622	06	11,628	9,266	25.5	107,902	89,352	20.8					
Others	728	0	728	679	7.2	5,601	4,652	20.4					

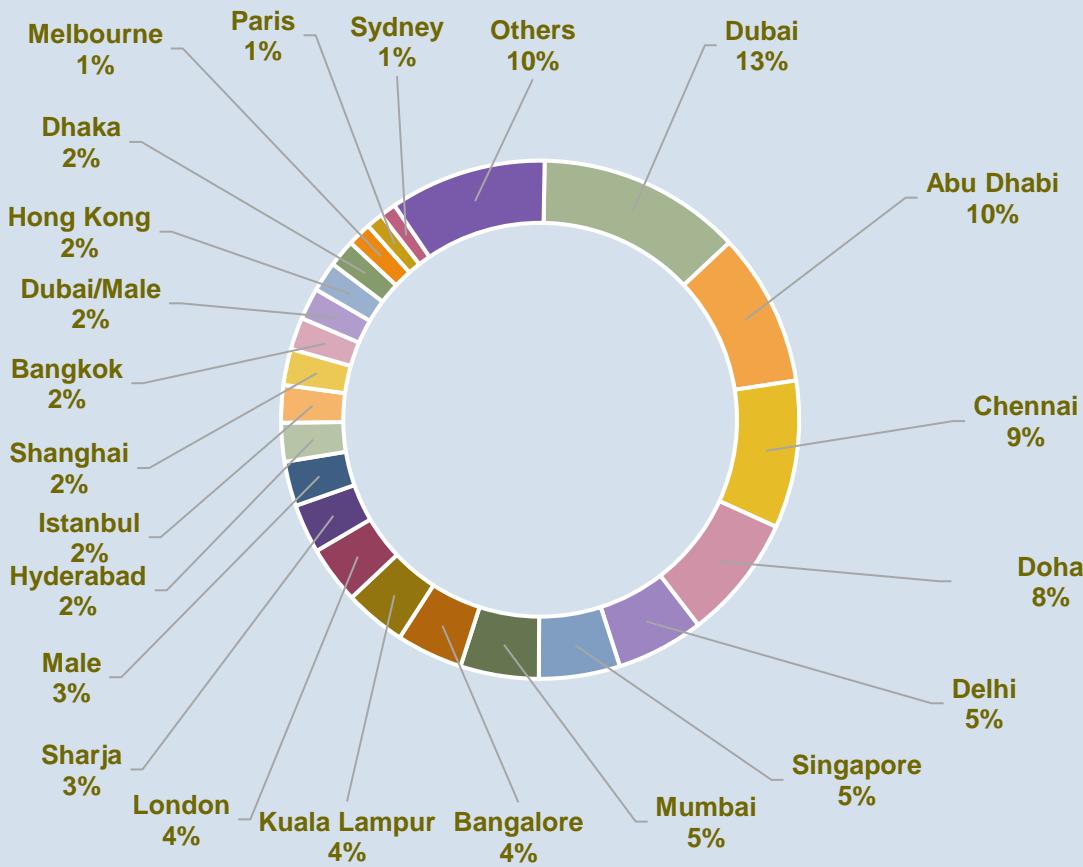
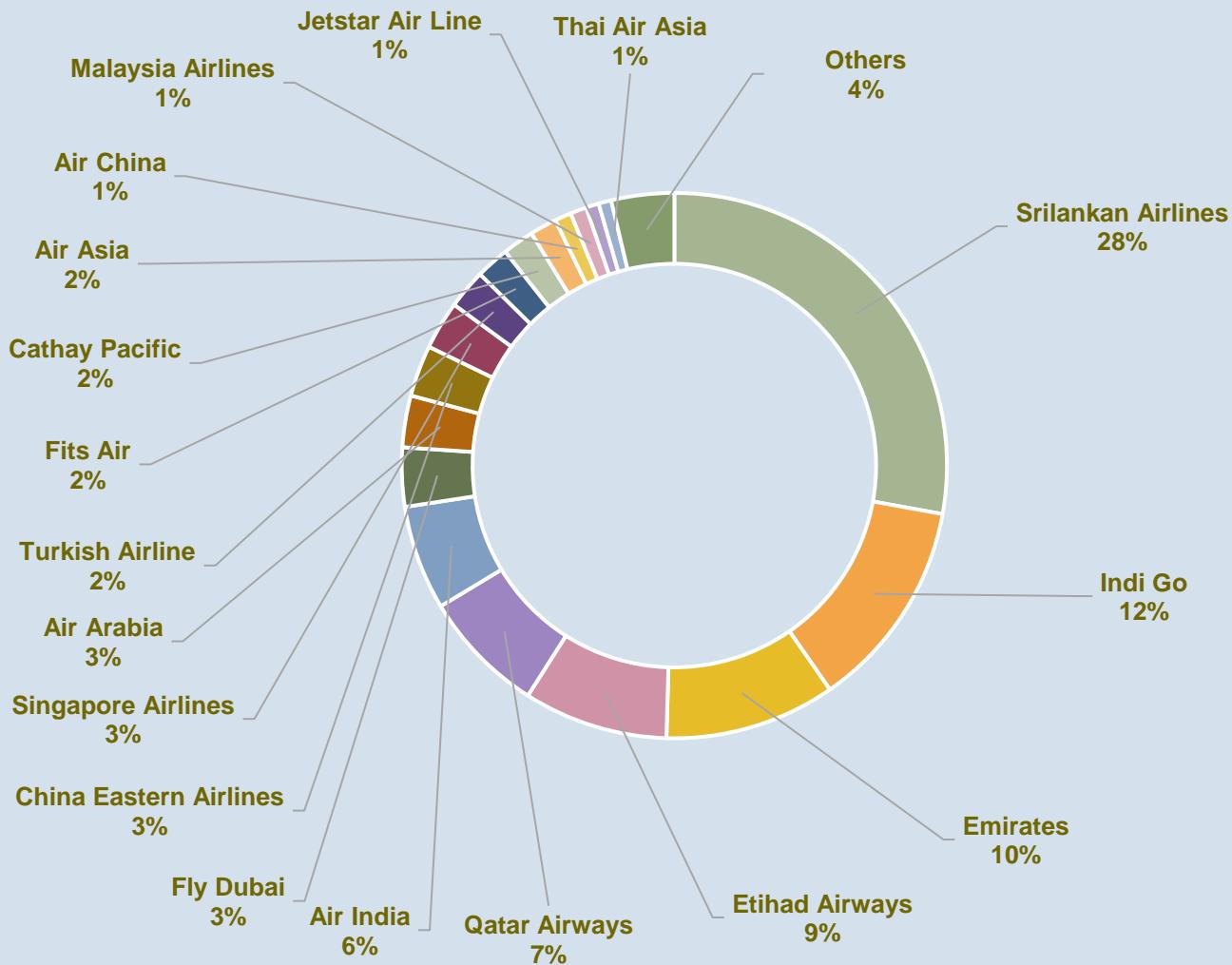
	June 2025			Tourist arrivals June 2024	% change June (25/24)	Total tourist arrivals up to June 2025	Total tourist arrivals up to June 2024	% change up to June (25/24)
	Tourist arrivals							
	By Air	By Sea	Total					
Western Europe	15,488	14	15,502	12,156	27.5	195,932	168,118	16.5
Austria	487	0	487	384	26.8	8,945	8,451	5.8
Belgium	1,135	0	1,135	872	30.2	8,764	6,790	29.1
France	4,339	06	4,345	3,102	40.1	61,457	49,340	24.6
Germany	5,493	05	5,498	4,556	20.7	74,576	70,070	6.4
Netherlands	2,421	02	2,423	1,935	25.2	26,139	19,466	34.3
Switzerland	1,588	01	1,589	1,291	23.1	15,582	13,554	15.0
Others	25	0	25	16	56.3	469	447	4.9
Central/Eastern Europe	5,016	0	5,016	6,398	(21.6)	194,902	198,451	(1.8)
Belarus	86	0	86	175	(50.9)	5,432	7,013	(22.5)
Czech Republic	625	0	625	526	18.8	10,596	12,443	(14.8)
Estonia	19	0	19	30	(36.7)	2,761	2,775	(0.5)
Hungary	126	0	126	160	(21.3)	3,852	3,915	(1.6)
Kazakhstan	96	0	96	96	0.0	7,710	8,611	(10.5)
Lithuania	126	0	126	73	72.6	4,662	4,378	6.5
Poland	1,138	0	1,138	1,047	8.7	26,079	23,896	9.1
Romania	219	0	219	192	14.1	3,407	3,425	(0.5)
Russia	1,891	0	1,891	3,412	(44.6)	112,312	114,104	(1.6)
Slovakia	133	0	133	163	(18.4)	4,130	3,985	3.6
Ukraine	214	0	214	206	3.9	5,237	4,431	18.2
Others	343	0	343	318	7.9	8,724	9,475	(7.9)
Southern/ Mediterranean Europe	6,781	03	6,784	6,626	2.4	61,696	50,591	22.0
Greece	106	0	106	82	29.3	1,809	1,354	33.6
Italy	2,173	01	2,174	1,792	21.3	19,557	14,228	37.5
Portugal	644	0	644	281	129.2	4,083	2,936	39.1
Spain	2,329	02	2,331	2,081	12.0	14,840	12,362	20.0
Turkey	607	0	607	572	6.1	4,396	3,629	21.1
Israel	573	0	573	1,515	(62.2)	11,048	11,163	(1.0)
Others	349	0	349	303	15.2	5,963	4,919	21.2
MIDDLE EAST	3,479	0	3,479	3,679	(5.4)	14,270	13,474	5.9
Bahrain	230	0	230	197	16.8	621	582	6.7
Egypt	425	0	425	365	16.4	2,259	2,017	12.0
Iraq	188	0	188	93	102.2	645	401	60.8
Jordan	286	0	286	373	(23.3)	1,469	1,327	10.7
Kuwait	190	0	190	231	(17.7)	936	1,045	(10.4)
Lebanon	263	0	263	308	(14.6)	1,761	1,885	(6.6)
Oman	286	0	286	322	(11.2)	998	966	3.3
Qatar	109	0	109	80	36.3	381	320	19.1
Saudi Arabia	660	0	660	990	(33.3)	2,555	2,714	(5.9)
United Arab Emirates	720	0	720	591	21.8	2,149	1,716	25.2
Others	122	0	122	129	(5.4)	496	501	(1.0)
TOTAL	137,558	683	138,241	113,470	21.8	1,168,044	1,010,249	15.6

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

Tourist arrivals to Sri Lanka based on their last port of departure, reveals key transit hubs to Sri Lanka and regional travel patterns. Dubai ranks as the top last port of departure, contributing 12.74% (17,615 arrivals), followed by Abu Dhabi (9.55%) and Chennai (9.21%), highlighting the significant role of the UAE and South India as primary gateways. Other major contributors include Doha (7.77%), Delhi (5.47%), and Singapore (5.06%), indicating that a considerable portion of travelers are arriving via Middle Eastern and South/Southeast Asian hubs. The data shows that over 50% of arrivals come through just the top seven ports, reflecting concentrated connectivity through major regional and international aviation and transit centers. This distribution suggests strong air travel links from the Middle East and South Asia, and likely due to available flight connections, diaspora movements, and regional tourism ties.

A breakdown of tourist arrivals to Sri Lanka by airline, offers insight into market share and connectivity trends. Sri Lankan Airlines emerges as the dominant carrier, accounting for 27.85% of total arrivals (38,495 passengers), indicating its central role in facilitating inbound travel, likely due to its extensive regional network and national carrier advantage. Indigo follows with 12.49%, reflecting the strong air connectivity and traveler flow between India and Sri Lanka. Major Gulf carriers such as Emirates (10.13%), Etihad Airways (8.56%), and Qatar Airways (7.35%) also play a significant role, highlighting the importance of the Middle Eastern hubs as key transit points for long-haul travelers. Other notable contributors include Air India (6.20%), Fly Dubai (3.50%), and Air Arabia (3.06%), further reinforcing the prominence of Indian and Gulf-based carriers. The presence of Chinese and Southeast Asian airlines like China Eastern, Singapore Airlines, and Malaysia Airlines, although smaller in share, suggests emerging or niche travel corridors. The wide spread across 20+ airlines, including budget carriers like Air Asia and Thai Air Asia, indicates a diversified aviation landscape and a mix of travel purposes — from business and leisure to visiting friends and relatives (VFR). This analysis suggests that maintaining strong bilateral air agreements and route expansions, particularly with India, the Middle East, and East Asia, will be crucial for sustaining and growing tourist arrivals to Sri Lanka.



Chart 6. Main last departure airports to Sri Lanka, June 2025**Chart 7. Main airlines to Sri Lanka, June 2025**

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

June 2025

A detailed breakdown of tourist arrivals to Sri Lanka from the top ten source markets by last port of departure, offers a layered understanding of travel patterns, transit hubs, and regional connectivity.

Unsurprisingly, India dominates the chart with a total of 37,934 arrivals, heavily concentrated through Chennai (10,386), Delhi (5,649), Mumbai (5,699), and Bangalore (5,158), demonstrating a strong reliance on direct regional gateways and short-haul travel. This indicates that Indian tourists tend to travel directly via major Indian cities, supported by proximity, frequency of flights, and possibly VFR and business ties.

The United Kingdom (11,628) shows a significant concentration via London (3,643) and Middle Eastern hubs like Abu Dhabi (1,739) and Dubai (1,563), which are commonly used transit points for long-haul European travelers. This suggests that connecting flights through the Gulf play a critical role in facilitating arrivals from Western countries.

China (8,804) shows an interesting pattern with a relatively low volume through Indian or Gulf ports, but very high numbers via Shanghai (2,358) and Hong Kong (1,361), emphasizing the significance of direct East Asian hubs, though some dispersal through Kuala Lumpur and Singapore is evident.

Australia (7,299) mainly routes through Singapore (2,502) and Kuala Lumpur (771), indicating strong reliance on Southeast Asian aviation hubs for connectivity to Sri Lanka, consistent with standard airline routing in the Asia Pacific region.

Notably, Pakistan (6,833) shows a very high dependence on Dubai (2,911) and Abu Dhabi (1,045), reaffirming the role of UAE as a bridge between South Asia and Sri Lanka. Likewise, Bangladesh (5,826) has strong routing through Dhaka (2,115) and Male (1,648), revealing a more regionally networked route via South Asia.

For Germany (5,498), arrivals are mainly split between Abu Dhabi (1,397) and Dubai (1,371), confirming again the Middle East as a vital corridor for European markets.

In the case of the United States (5,422), multiple entry points are utilized, but there is a notable number through Doha (1,077), Dubai (728) which aligns with typical transit routes via the Gulf.

France (4,345) and Canada (4,293) also show strong reliance on Gulf hubs such as Dubai, Abu Dhabi, and Doha, while Canada also sees notable movement via Abu Dhabi (965) and Dubai (730).

This data highlights the central role of Middle Eastern hubs like Dubai, Abu Dhabi, and Doha as critical transit points for Western and South Asian tourists, while regional connectivity through Indian cities dominates travel from neighboring South Asian countries. East and Southeast Asian hubs like Singapore, Kuala Lumpur, Shanghai, and Hong Kong are especially significant for travelers from China and Australia. These insights are crucial in planning route development, marketing strategies, and bilateral tourism partnerships.

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

Rank	Market	Airport	Arrivals (June)
1	India	Chennai	120,000
2	United Kingdom	Gatwick	80,000
3	Maldives	Male	70,000
4	United States	JFK	60,000
5	Thailand	Bangkok	50,000
6	China	Shanghai	40,000
7	Japan	Narita	35,000
8	Germany	Frankfurt	30,000
9	Australia	Sydney	25,000
10	Canada	Toronto	20,000

Table 6. Top ten markets vs. main airlines to Sri Lanka, June

Rank	Airline	Arrivals (June)
1	Qatar Airways	15,000
2	Emirates	12,000
3	Etihad Airways	10,000
4	Srilankan Airlines	8,000
5	Maldivian	7,000
6	IndiGo	6,000
7	Qatar Executive	5,000
8	Emirates SkyCargo	4,000
9	Etihad Cargo	3,000
10	Srilankan Cargo	2,000



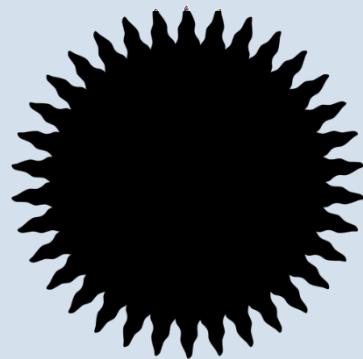
An overview of the airline preferences among the top source markets traveling to Sri Lanka reveals significant variations in airline market share based on the travelers' country of origin. For instance, Sri Lankan Airlines dominates several markets, holding the highest share in Australia (48.32%), Bangladesh (43.92%), the United Kingdom (38.46%), and Canada (38.08%). Indigo, an Indian low-cost carrier, is the leading choice for travelers from India (38.08%), reflecting the strong connectivity and frequency of flights between the two countries.

Emirates and Etihad Airways are particularly prominent among travelers from Pakistan with Emirates capturing 24.41% and Etihad Airways securing 10.61%.

Notably, China Eastern Airlines commands a significant share (38.38%) of the Chinese market, and Singapore Airlines is a major player for Australian travelers (23.91%). The data also highlights the diversity of airline choices in markets like Germany and the United States, where no single carrier dominates, indicating a competitive landscape and a wide range of available options.

Overall, the table underscores the importance of national carriers and regional connectivity, with travelers often favouring airlines based in their home country or region. It also points to the strategic role of Middle Eastern and Southeast Asian carriers in connecting distant markets to Sri Lanka, reflecting broader trends in global aviation and travel preferences.





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