
Introduction

The following document provides a synthesis of the most recent October 2025 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st October 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

The tourist arrival data indicates a robust and positive recovery for Sri Lanka's tourism sector. Comparing the first ten months of 2025 to the same period in 2024, arrivals have surged by 269,972 visitors, a significant 16.7% increase. This overall growth is driven by strong performance across nearly all months, with no month recording a decline. The standout insight is the changing seasonality and emergence of new peaks. While traditional high season months like January and August contributed substantially to absolute growth, the most remarkable performer is September, which saw an increase of 30.2%. This suggests a successful expansion of the tourist season beyond traditional windows. Furthermore, the consistent high-growth rates (exceeding 20%) in the shoulder months of June and October point to a more resilient, year-round tourism flow. The growth narrative is not uniform. July's relatively muted growth (6.6%) stands out as an anomaly in an otherwise strong year. This could indicate capacity constraints during the peak European summer holiday period or increased competition from other destinations. The top-line growth story is

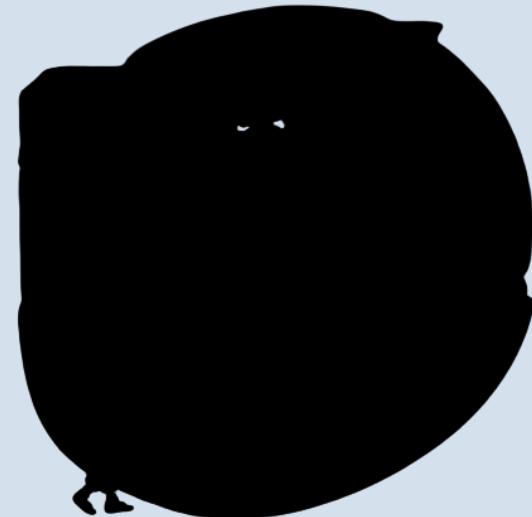
Table 1. Monthly tourist arrivals, October 2025

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	9.6
April	148,867	174,608	17.3
May	112,128	132,919	18.5
June	113,470	138,241	21.8
July	187,810	200,244	6.6
August	164,609	198,235	20.4
September	122,140	158,971	30.2
October	135,907	165,193	21.5
November	184,158		
December	248,592		
TOTAL	2,053,465	1,890,687	

compelling, but the underlying monthly shifts reveal a dynamic market.

The impressive 21.5% increase in tourist arrivals in October, compared to the same month in 2024, was largely fueled by strong performances from key source markets such as India, the United Kingdom, Russia, China, and Germany. Their significant contributions reflect a renewed confidence in travel to Sri Lanka and highlight the country's strengthening appeal as a preferred destination.

Despite the growth in tourist arrivals to Sri Lanka, the Panel of Tourism Experts and the UN Tourism Confidence Index highlight several challenges affecting the sector's performance. The main concerns for the year include elevated transport and accommodation costs, along with other adverse economic factors that could constrain further growth. While arrivals have shown a positive trajectory, these rising costs may impact travel affordability and slow down the momentum.

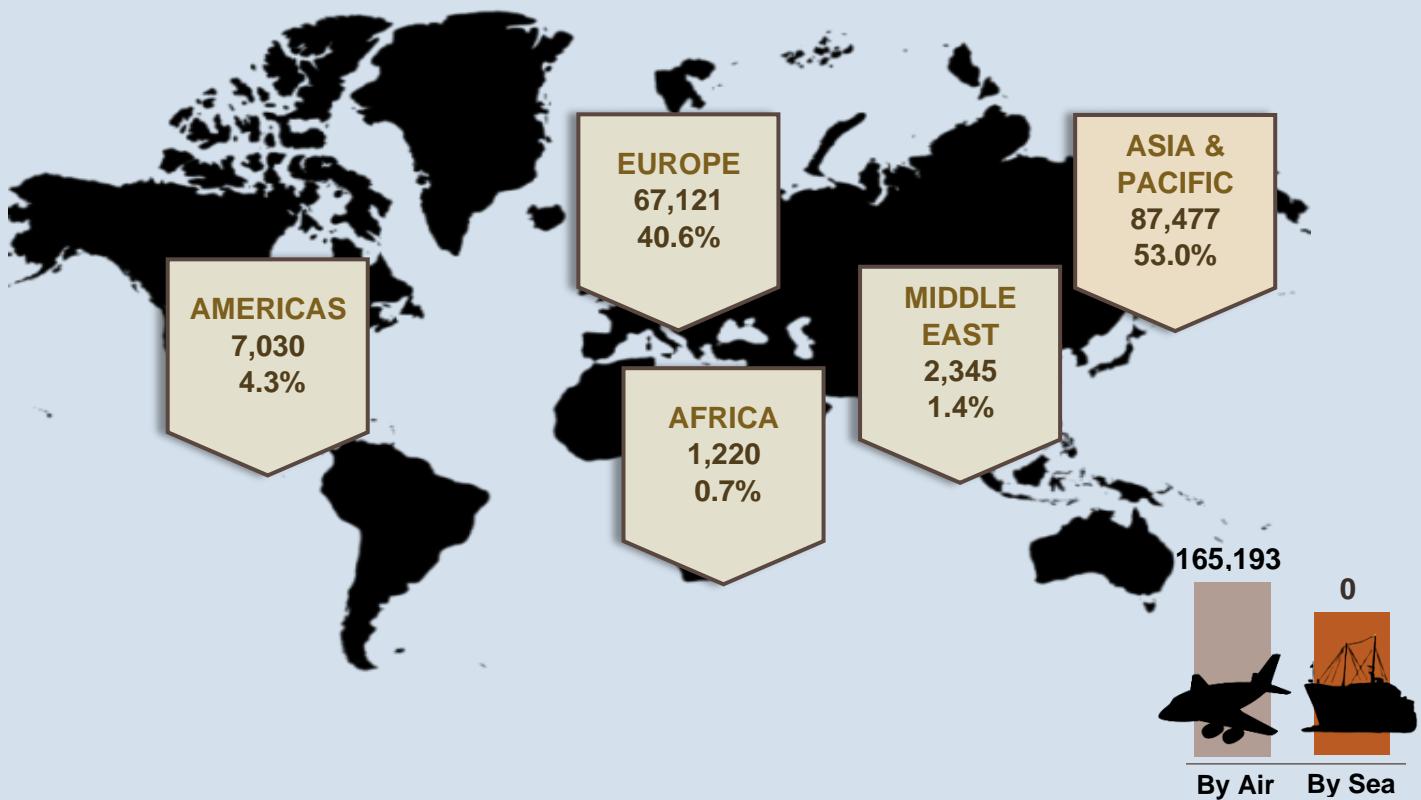


Tourist Arrivals | October 2025

165,193

Tourist arrivals by region and percentage share October 2025

Map 1. Tourist arrivals by region and percentage share



The regional distribution of tourist arrivals to Sri Lanka in October reveals a market heavily concentrated in two key areas. With a total of 165,193 visitors, the landscape is dominated by the Asia & Pacific region, which contributed 87,477 arrivals, accounting for a commanding 53% of all tourists. This is closely followed by Europe, which served as the second pillar of inbound travel with 67,121 arrivals, making up 40.6% of the total. Together, these two regions were responsible for over 93% of all visitors, underlining their critical importance to the nation's tourism sector.

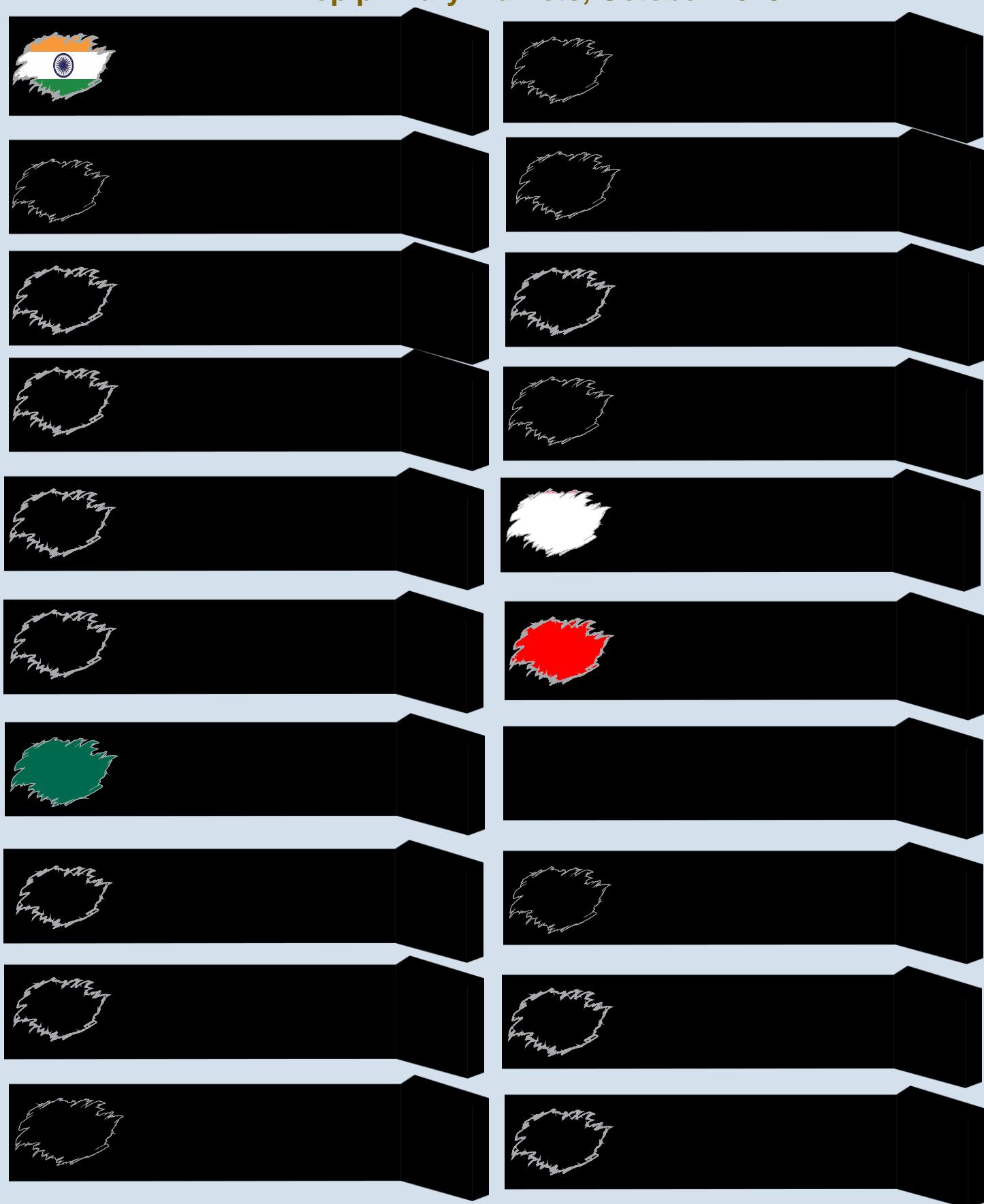
This data highlights both a strategic strength and a potential vulnerability. The strong performance from Asia & Pacific and Europe provides a stable and substantial revenue base. However, such a high degree of reliance means that any economic or political instability in these regions could significantly impact Sri Lanka's tourism economy. Meanwhile, other regions represent largely untapped potential. The Americas, Middle East, and Africa collectively contributed less than 7% of arrivals, indicating substantial opportunities for future market diversification. In summary, the current strategy should focus on consolidating the core markets while actively pursuing growth in the underrepresented regions to build a more resilient and balanced tourism portfolio.





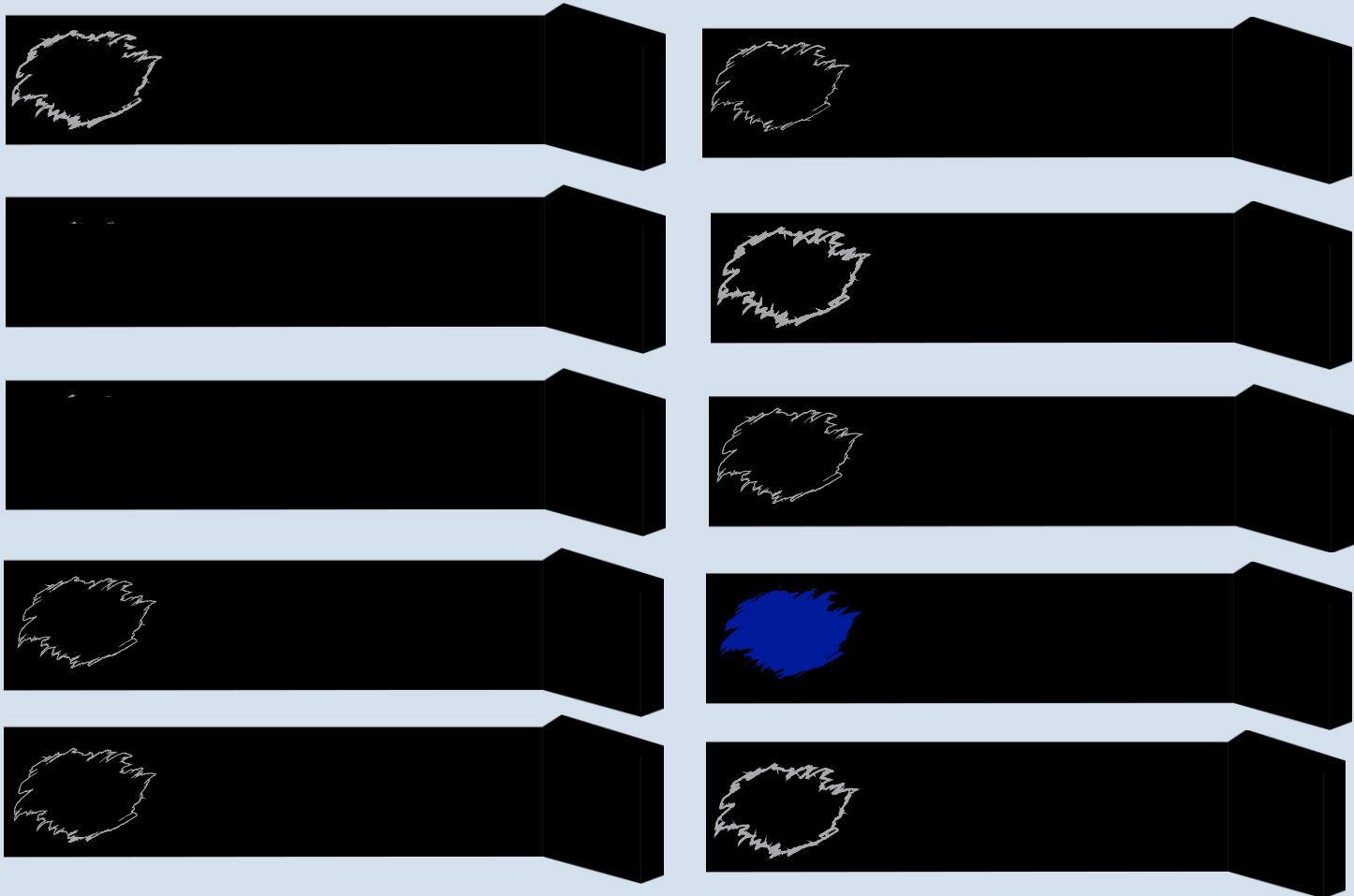
Top primary markets and top potential markets

Top primary markets, October 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, October 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

October 2025

Sri Lanka's tourism sector demonstrates robust and broad-based growth, with all top ten source markets showing a positive year-on-year increase. The overall arrivals from these key countries surged by approximately 26%, significantly outpacing the overall monthly growth and highlighting their collective role as the primary engine of tourism recovery.

The market is overwhelmingly dominated by India, which is not only the top source country but also the single most powerful growth driver. With 48,113 arrivals, India alone contributed nearly a third of the total volume from the top ten markets. Its remarkable 32% growth from October 2024 underscores its critical and expanding importance to Sri Lanka's tourism economy. Beyond India, the market structure reveals a strong and stable performance from traditional European sources. The United Kingdom, Germany, France, and Spain all registered steady growth, confirming Europe's role as a reliable, high-value market. Meanwhile, Russia and China continue to be vital contributors, with both markets showing solid growth, indicating a successful recapture of these key segments. A notable highlight is the exceptional performance of Bangladesh, which, despite a smaller base, registered a striking 48% growth, the highest among the top ten, suggesting it is an emerging market with substantial potential.

Moving forward, the strategic focus should be on strengthening India's leading position, safeguarding steady arrivals from Europe, and proactively developing high-potential emerging markets to create a more diversified and resilient tourism portfolio that supports sustained growth.

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

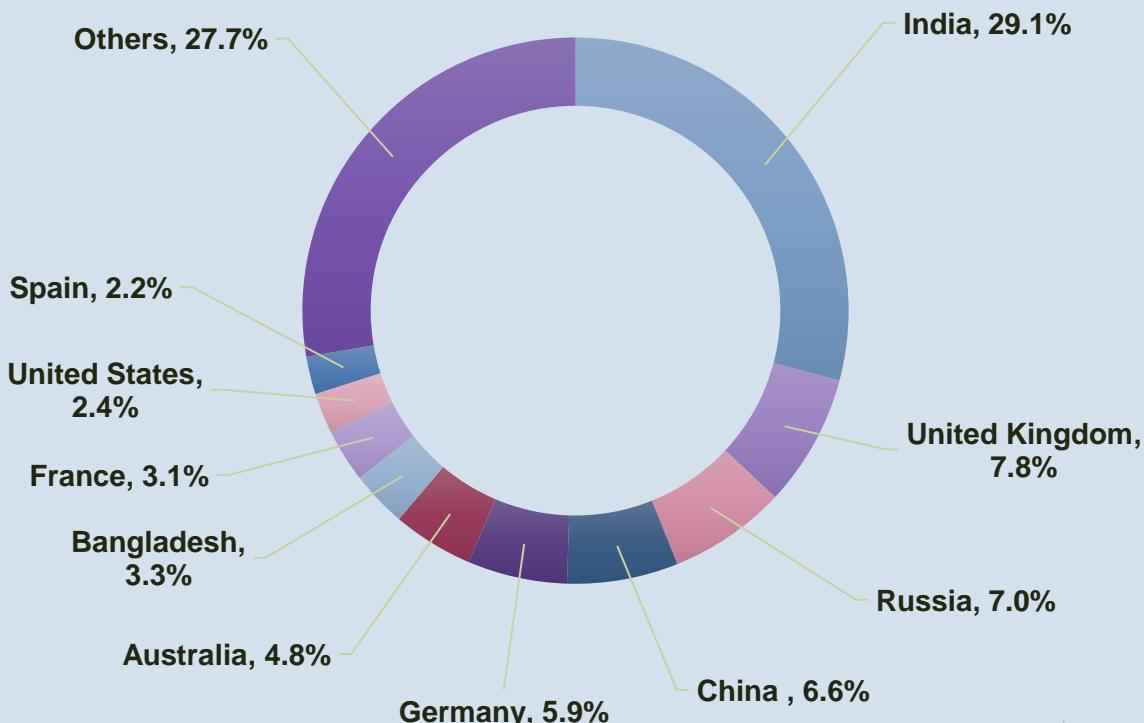
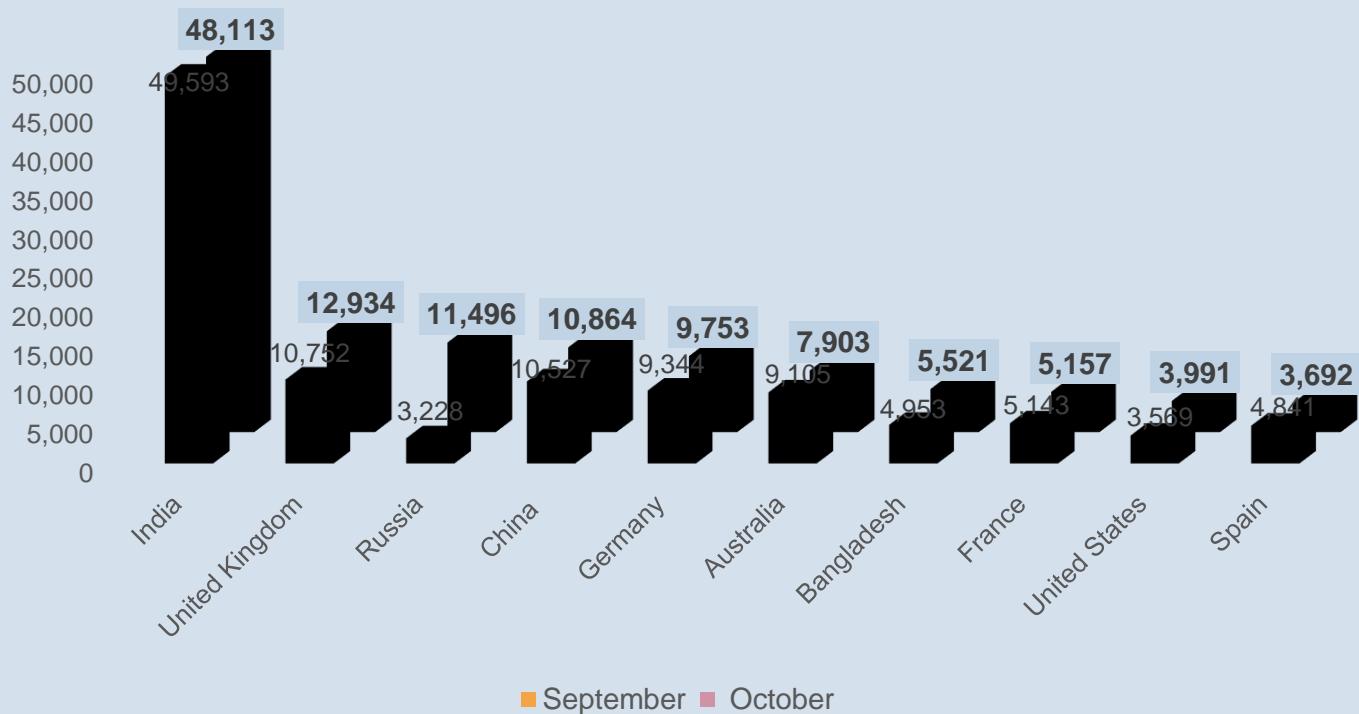


Table 2. Top ten source markets to Sri Lanka, October 2025

Rank	Country of Residence	Tourist arrivals (October 2025)			Tourist arrivals (October 2024)
		By Air	By Sea	Total	(October 2024)
1	India	48,113	0	48,113	36,417
2	United Kingdom	12,934	0	12,934	10,206
3	Russia	11,496	0	11,496	10,367
4	China	10,864	0	10,864	9,164
5	Germany	9,753	0	9,753	9,217
6	Australia	7,903	0	7,903	6,523
7	Bangladesh	5,521	0	5,521	3,732
8	France	5,157	0	5,157	4,688
9	United States	3,991	0	3,991	3,170
10	Spain	3,692	0	3,692	3,458

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

Top ten source markets

January to October 2025

A deeper look into the top source markets up to October reveals a clear hierarchy of growth drivers, a notable success story, and specific markets that require strategic attention.

The most compelling insight is the overwhelming dominance of India as the engine of Sri Lanka's tourism growth. India is not only the top source market but the primary contributor to the sector's expansion. With an increase of 100,432 arrivals, India alone accounts for 31.1% growth. Alongside India, the performance of Western markets is exceptionally strong. The United Kingdom, Germany, France, Australia, the Netherlands, and the United States all show robust, double digit growth. France (+23.1%) and the Netherlands (+29.9%) stand out as particularly dynamic markets, indicating successful outreach in these regions.

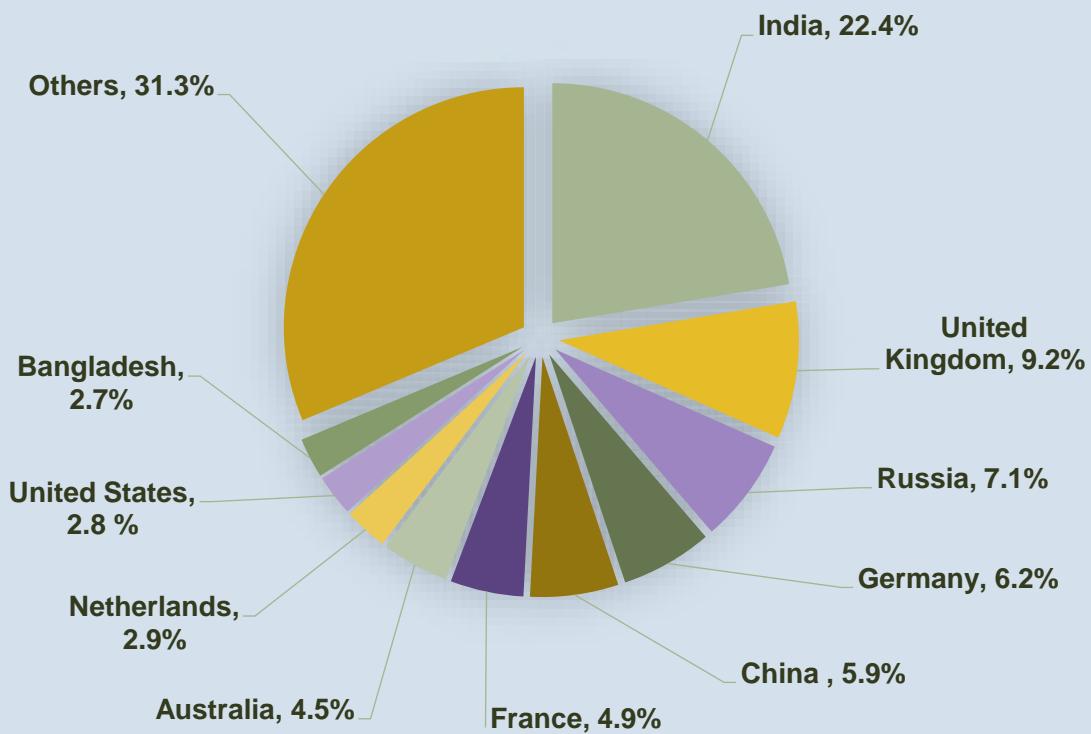
With a staggering 59.2% increase, Bangladesh is the fastest-growing market among the top ten. This explosive growth transforms its profile from a minor market to a significant and emerging source of tourism that demands further nurturing. In stark contrast, the data highlights a concerning stagnation in two key markets: Russia and China. Arrivals from the Russian Federation saw a slight decline (-2.9%), while Chinese arrivals remained virtually flat (-0.8%). Given their large population bases and historical importance, their failure to participate in the broader recovery represents a major strategic challenge and a significant opportunity loss.

The insights point to a tourism economy powered by a primary anchor (India), a strong supporting cast of Western markets, and a new, high-potential player (Bangladesh). The strategic imperative is clear: to ensure sustainable growth, efforts must focus on consolidating the Indian market, capitalizing on the momentum in Western Europe, and developing targeted strategies to revive the underperforming Russian and Chinese markets. The growth is impressive, but its concentrated nature also underscores a vulnerability that must be managed through strategic diversification.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ October 2025)	Tourist Arrivals Jan ~ October 2024)
1	India	423,405	322,973
2	United Kingdom	174,827	146,670
3	Russian Federation	133,640	137,599
4	Germany	116,741	108,788
5	China	112,454	113,386
6	France	93,312	75,778
7	Australia	85,283	68,527
8	Netherlands	55,651	42,836
9	United States	52,165	46,848
10	Bangladesh	50,959	32,026
11	Others	592,250	525,284
Total		1,890,687	1,620,715

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



Tourist arrivals by purpose of visit

October 2025

The distribution of tourist arrivals for October 2025 reveals a tourism economy highly concentrated in the leisure and vacation segment. A plausible hypothesis for this dominance is Sri Lanka's well established reputation as a tropical holiday destination, combined with October falling within the favourable inter monsoonal period on the west coast, which is a key selling point for beach tourism.

The combined share of Business (3.1%) and MICE (7.4%) travel indicates a viable but secondary commercial tourism stream. The MICE segment's larger share suggests that Sri Lanka may be successfully attracting small to mid scale corporate events, which could be a strategic focus area for growth. The respectable VFR share points to a stable diaspora and expatriate network, which provides a resilient tourist base less sensitive to seasonal fluctuations.

Conversely, the minimal shares for Religious, Sports, and Education tourism suggest that these are underdeveloped niche markets. This could be an inference based on Sri Lanka's rich cultural heritage and potential for eco adventure sports not being fully leveraged in marketing campaigns or product development.

This concentration has clear implications. Operationally, it creates seasonal peaks and troughs aligned with holiday periods in key source markets, straining airport, transport, and hotel capacity in resort areas while potentially underutilizing them elsewhere. From a policy perspective, such heavy reliance on a single segment makes the national tourism industry vulnerable to external shocks that disproportionately affect discretionary leisure travel, such as global economic downturns or travel advisories. Marketing efforts are likely already disproportionately focused on promoting beach and cultural leisure, potentially at the expense of diversifying the tourist base.

Chart 4: Purpose of visit, October 2025

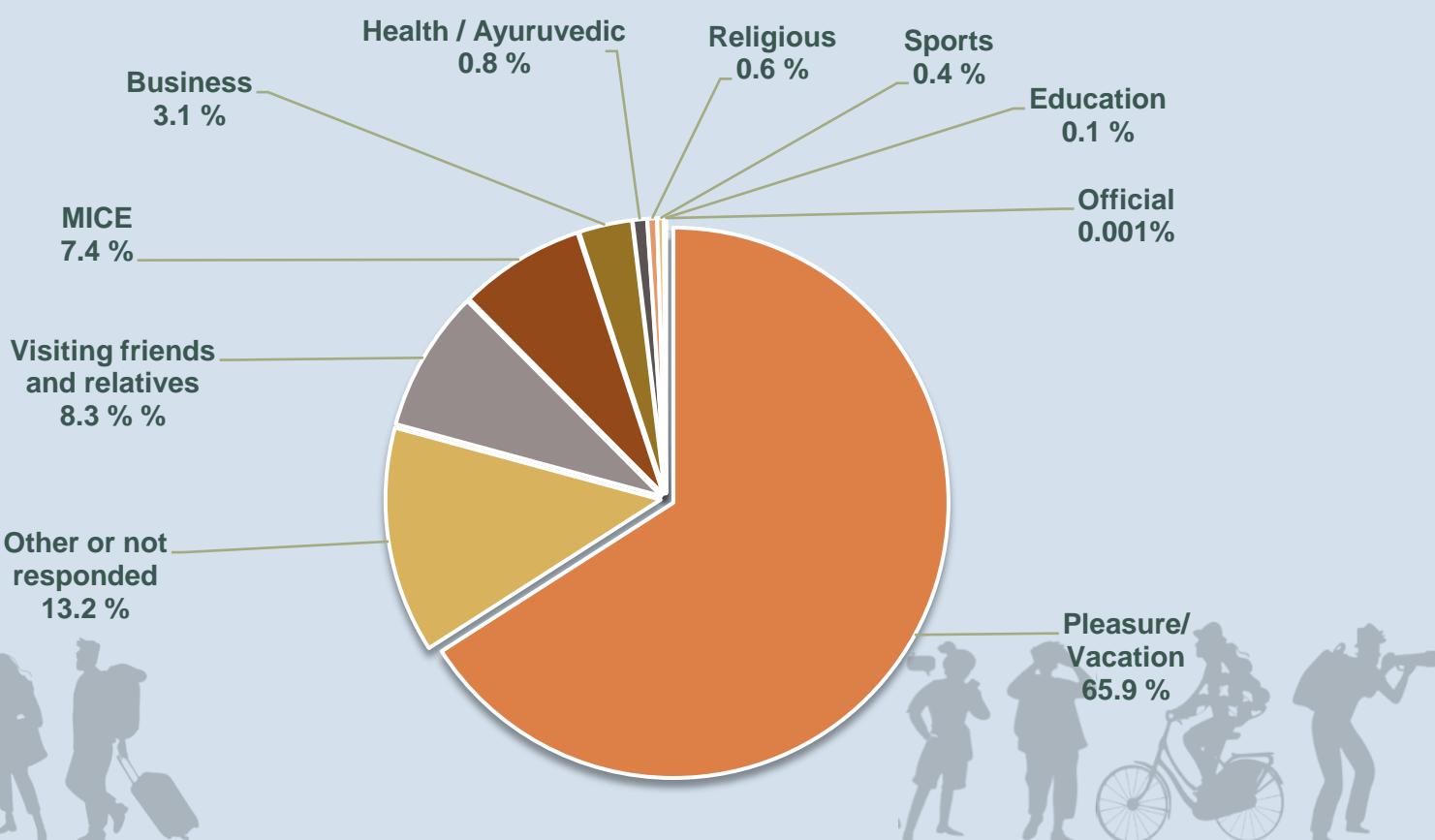
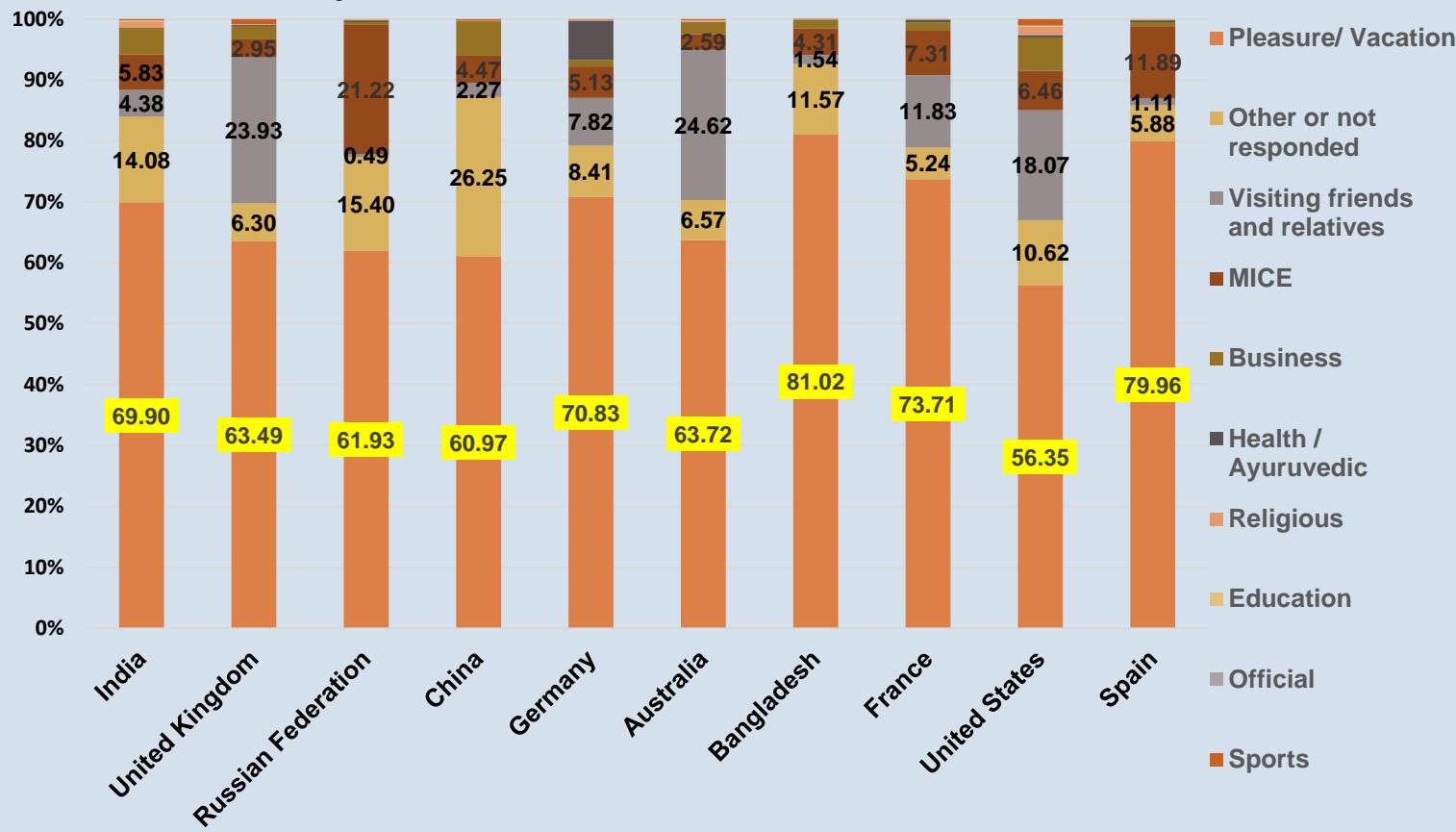




Chart 5: Purpose of visit vs main source markets



Sri Lanka's tourism landscape in October presents a tale of two realities: a universal dominance of leisure travel underpinned by significant, market-specific nuances that demand tailored strategies. While the "Pleasure/Vacation" segment is the undisputed leader across all top ten source markets, accounting for between 56.4% (United States) and 81.0% (Bangladesh) of arrivals, this surface level uniformity masks critical diversification beneath. A deeper analysis reveals distinct tourist profiles that carry profound implications for marketing, product development, and economic resilience.

The first key insight is the strength of Visiting Friends and Relatives (VFR) travel from traditional diaspora markets. The United Kingdom (23.9%) and Australia (24.6%) demonstrate VFR shares that are several times higher than those of other Western markets. This indicates deep-seated socio-cultural ties and a stable, resilient travel corridor that is less susceptible to seasonal fluctuations or competitive destination marketing. The operational implication is that airlines and tourism authorities can rely on a consistent baseline demand from these markets. Furthermore, this segment offers potential for cross-promotion, as VFR travelers can be introduced to experiential tourism products during their stays.

A second, more surprising insight is the emergence of Sri Lanka as a competitive destination for the MICE (Meetings, Incentives, Conferences, Exhibitions) sector, particularly from the Russian Federation (21.2%) and Spain (11.9%). This segment is highly valuable, as it typically involves higher spending per visitor and occupancy during weekdays and off-peak seasons. The strategic implication is a clear opportunity to double down on MICE marketing in these regions and invest in purpose-built infrastructure to capture a larger share of this high yield market.

The analysis uncovers a niche opportunity. Conversely, Germany's notable share for "Health/Ayurvedic" travel (6.5%) stands out as a clear signal. It identifies Germany as a prime and under-served market for wellness tourism, suggesting that targeted product development and promotional partnerships with wellness influencers and clinics could yield significant returns. Moving beyond a generic "sun and sand" marketing approach to leverage these distinct market profiles is essential for sustainable growth.

The AI Revolution in Tourism: Transforming Travel Experiences

In an era defined by rapid technological advancement, artificial intelligence has emerged as a transformative force across industries worldwide. Perhaps nowhere is this revolution more evident than in the tourism sector, where AI is fundamentally reshaping how travellers plan, experience, and remember their journeys. From the moment a potential tourist begins dreaming of their next destination to the final moments of their trip, AI-powered technologies are enhancing every touchpoint of the travel experience.

From Humble Beginnings to Industry Revolution

The journey of artificial intelligence began formally in 1956 at the Dartmouth Conference, where visionary researchers first coined the term that would come to define a technological revolution. The decades that followed saw alternating periods of enthusiasm and disappointment, cycles often referred to as "AI winters," when progress seemed to stall and funding dried up. However, the last decade has witnessed unprecedented advancement in AI capabilities, driven primarily by breakthroughs in machine learning and deep learning, coupled with the availability of massive datasets and increasingly powerful computing resources.

Today's tourism industry stands at the confluence of this technological maturity and an ever-growing demand for personalized, seamless travel experiences. The sector, known for its dynamic nature and unwavering customer focus, has embraced AI not merely as a tool for operational efficiency but as a catalyst for reimagining the entire travel ecosystem.

The Technological Backbone of AI in Tourism

Machine Learning and Deep Learning: The Foundation

At the heart of AI's tourism revolution lies machine learning, particularly its more sophisticated subset, deep learning. These technologies enable systems to learn from vast amounts of data and continuously improve their performance without explicit programming. The applications are both diverse and impactful.

Personalized recommendation engines powered by deep learning analyze user preferences, historical behavior, and current trends to provide tailored travel suggestions that feel remarkably intuitive. Gone are the days of generic travel packages; today's AI systems understand that each traveller is unique, with distinct preferences for accommodation style, activity levels, dining choices, and cultural experiences.

Demand forecasting has been revolutionized through machine learning algorithms that predict travel patterns with remarkable accuracy, enabling tourism operators to optimize pricing strategies dynamically. This benefits both businesses, which can maximize revenue during peak periods, and consumers, who can find better deals during off-peak times.

Image recognition capabilities powered by deep learning have transformed how travelers discover and plan their journeys. These systems can analyze and categorize millions of travel images, enabling visual search capabilities that allow users to find destinations simply by uploading a photograph that captures their desired aesthetic.

Natural Language Processing: Breaking Down Communication Barriers

Natural Language Processing has become indispensable in creating more natural, intuitive interactions between AI systems and travelers. NLP powers the chatbots and virtual assistants that have become ubiquitous across booking platforms and hotel websites, capable of understanding and responding to customer queries in multiple languages, 24 hours a day.

Beyond simple customer service, NLP techniques enable sophisticated sentiment analysis, parsing through countless customer reviews and social media posts to gauge public opinion and identify emerging trends. This allows tourism businesses to respond proactively to concerns and capitalize on positive momentum.

Perhaps most significantly for international travel, advanced NLP models enable real-time translation services that are breaking down language barriers that have historically limited where and how people travel. Modern travelers can navigate foreign cities with confidence, knowing that their smartphone can instantly translate signs, menus, and conversations.

Computer Vision: Seeing the World Differently

Computer vision technology allows AI systems to interpret and analyze visual information in ways that enhance both security and experience. Facial recognition systems are streamlining check-in processes at hotels and airports, reducing wait times while enhancing security measures. When implemented with proper privacy safeguards, these systems create a more seamless travel experience.

Augmented reality applications, powered by computer vision, are creating interactive and immersive tourist experiences. Visitors can point their smartphones at historical sites and see them reconstructed in their original glory, or overlay information about architecture, history, and cultural significance onto their real-world view.

Visual search capabilities enable travelers to search for destinations, accommodations, or attractions simply by uploading images, making the trip planning process more intuitive and inspiring. If you see a photograph of a stunning beach or charming village, you can now discover where it is and plan your visit accordingly.

Internet of Things: The Connected Travel Experience

The Internet of Things has brought unprecedented levels of automation and personalization to the physical spaces of tourism. Smart hotels equipped with IoT devices can adjust room temperatures, lighting, and entertainment systems based on guest preferences, often learning and adapting to individual habits during their stay.

IoT sensors deployed throughout tourist destinations collect data on visitor flows, helping destination managers make informed decisions about crowd management and tourism carrying capacity. This ensures that popular attractions remain enjoyable and sustainable, benefiting both visitors and local communities.

For travelers, IoT-enabled luggage tags provide real time information about baggage location, dramatically reducing the anxiety associated with checked luggage and helping airlines quickly reunite travelers with misplaced bags.



Generative AI: Creating Personalized Content at Scale

The recent explosion of generative AI technologies, exemplified by large language models like ChatGPT, is opening entirely new frontiers in tourism. These systems can produce personalized travel itineraries that account for individual interests, time constraints, and budget considerations, creating custom experiences that would have required hours of research and planning.

Content creation for marketing and communication has been transformed, with generative AI producing compelling copy, social media posts, and even assisting restaurants in creating innovative menus that appeal to diverse palates.

Looking to the future, AI-generated content promises to create immersive virtual travel experiences, allowing potential visitors to explore destinations before committing to a trip, or enabling those unable to travel to experience the world from their homes. Personalized storytelling capabilities mean that AI can create customized travel stories or guides based on a traveler's specific interests and past experiences, enhancing engagement and inspiring future adventures.

Edge AI: Processing at the Point of Need

Edge AI represents the next evolution in deployment strategy, bringing artificial intelligence directly to local devices rather than relying on cloud processing. This approach offers faster processing speeds and enhanced privacy protection, both increasingly important to modern travelers.

Real-time translation devices powered by edge AI can operate without constant internet connectivity, making them invaluable in remote destinations or areas with limited infrastructure. Smart cameras equipped with edge AI can provide real-time information about attractions and crowd levels without transmitting data to the cloud, addressing privacy concerns while reducing data transmission costs.

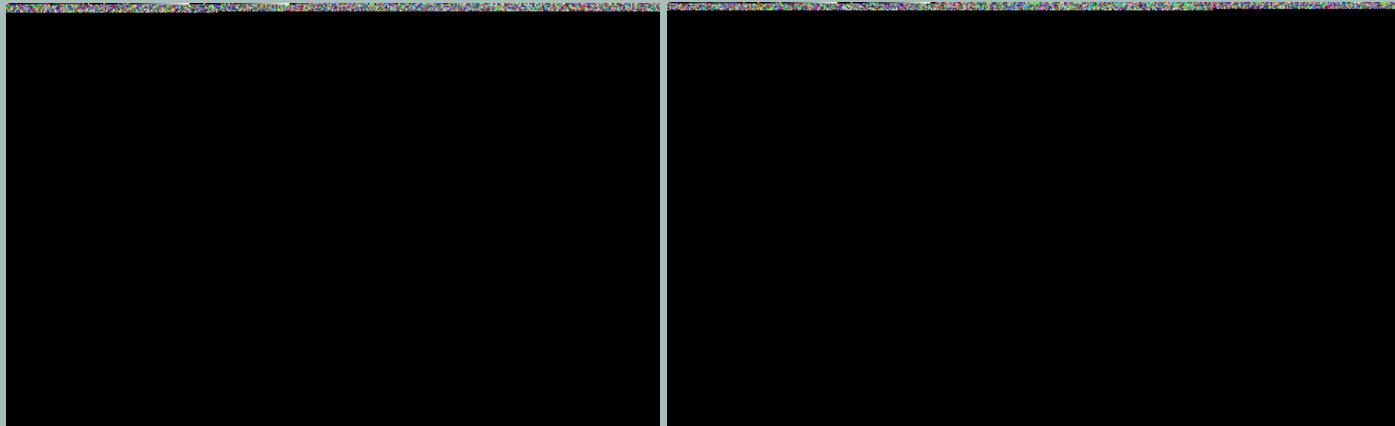
Perhaps most intriguingly, edge AI could enable sophisticated autonomous tour guides robots capable of interacting with visitors and providing information in real time, adapting their presentations based on audience engagement and questions.

Real-World Innovation: Vienna's Un Artificial Art Campaign

The theoretical potential of AI in tourism comes alive in campaigns like Vienna Tourist Board's innovative "UnArtificial Art" initiative. This campaign exemplifies how forward-thinking destination marketing organizations are leveraging AI technologies to create engaging, conversation-starting content that bridges past and future.

The campaign featured AI-generated works inspired by famous painters whose works fill Vienna's museums including the world's largest collection of pieces by Klimt, Schiele, and Bruegel. The iconic human figures in these masterpieces were replaced with cats, creating whimsical reimaging's that captured attention across digital and physical media.

This initiative demonstrates Vienna's understanding that engaging modern travelers particularly younger generations requires meeting them in the digital spaces they inhabit while maintaining deep respect for cultural heritage. These progressive approaches show how Vienna remains connected to its rich artistic past while confidently embracing its digital future.



The Path Forward

The adoption of artificial intelligence in tourism represents far more than a technological upgrade. It signifies a fundamental reimagining of how we experience travel and cultural exchange. As AI technologies continue to evolve, becoming more sophisticated, accessible, and intuitive, they promise to make travel more personalized, efficient, and enriching.

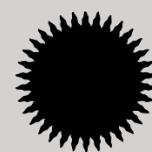
The most successful tourism organizations will be those that view AI not as a replacement for human hospitality and cultural authenticity, but as a powerful tool that amplifies these essential elements. By handling routine tasks, providing instant information, and personalizing experiences at scale, AI frees human workers to focus on creating the memorable moments and genuine connections that make travel truly transformative.

As we stand at this intersection of tradition and innovation, the tourism industry has an unprecedented opportunity to harness artificial intelligence in ways that enhance rather than diminish the human experience of discovery, connection, and wonder that lies at the heart of every journey. The future of travel is not just smart, it's intelligently human.

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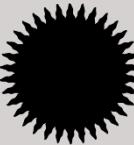
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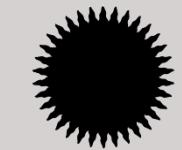


International tourist arrivals by country of residence

	October 2025			Tourist arrivals Oct 2024	% change Oct (25/24)	Total tourist arrivals up to Oct 2025	Total tourist arrivals up to Oct 2024	% change up to Oct (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
AMERICAS	7,030	0	7,030	6,098	15.3	97,051	87,816	10.5					
North America	6,529	0	6,529	5,599	16.6	91,911	83,038	10.7					
Canada	2,444	0	2,444	2,339	4.5	38,868	35,346	10.0					
Mexico	94	0	94	90	4.4	878	844	4.0					
United States	3,991	0	3,991	3,170	25.9	52,165	46,848	11.3					
Caribbean & Central America	99	0	99	109	(9.2)	880	828	6.3					
Costa Rica	11	0	11	05	120.0	94	78	20.5					
Jamaica	05	0	05	09	(44.4)	41	86	(52.3)					
Others	83	0	83	95	(12.6)	745	664	12.2					
South America	402	0	287	390	(26.4)	4,260	3,950	7.8					
Argentina	70	0	70	91	(23.1)	774	766	1.0					
Brazil	156	0	156	125	24.8	1,590	1,551	2.5					
Chile	54	0	54	40	35.0	543	471	15.3					
Colombia	67	0	67	62	8.1	588	555	5.9					
Others	55	0	55	72	(23.6)	765	607	26.0					
AFRICA	1,220	0	1,220	1,035	17.9	13,403	10,810	24.0					
North Africa	287	0	287	406	(29.3)	2,986	2,754	8.4					
Morocco	82	0	82	100	(18.0)	930	847	9.8					
Sudan	90	0	90	115	(21.7)	1,011	743	36.1					
Others	115	0	115	191	(39.8)	1,045	1,164	(10.2)					
Sub-Saharan Africa	933	0	933	629	48.3	10,417	8,056	29.3					
Kenya	88	0	88	42	109.5	991	608	63.0					
Mauritius	69	0	69	21	228.6	648	384	68.8					
Nigeria	39	0	39	07	-	145	64	126.6					
South Africa	437	0	437	259	68.7	4,064	3,463	17.4					
Others	300	0	300	300	0.0	4,569	3,537	29.2					


 Monthly Tourist Arrivals Report October 2025

	October 2025			Tourist arrivals Oct 2024	% change Oct (25/24)	Total tourist arrivals up to Oct 2025	Total tourist arrivals up to Oct 2024	% change up to Oct (25/24)		
	Tourist arrivals					Total tourist arrivals up to Oct 2025	Total tourist arrivals up to Oct 2024	% change up to Oct (25/24)		
	By Air	By Sea	Total							
ASIA & PACIFIC	87,477	0	87,477	68,486	27.7	841,627	683,637	23.1		
North East Asia	14,241	0	14,241	12,434	14.5	153,466	146,479	4.8		
China	10,864	0	10,864	9,164	18.6	112,454	113,386	(0.8)		
Japan	2,253	0	2,253	2,392	(5.8)	31,052	24,652	26.0		
South Korea	1,105	0	1,105	876	26.1	9,783	8,346	17.2		
Others	19	0	19	02	-	177	95	86.3		
South East Asia	4,980	0	4,980	3,362	48.1	54,327	42,718	27.2		
Cambodia	29	0	29	59	(50.8)	1,062	1,071	(0.8)		
Indonesia	356	0	356	297	19.9	3,983	2,833	40.6		
Malaysia	1,810	0	1,810	1,013	78.7	19,281	15,066	28.0		
Myanmar	172	0	172	82	109.8	2,030	1,368	48.4		
Philippines	588	0	588	407	44.5	5,689	4,384	29.8		
Singapore	1,011	0	1,011	717	41.0	11,828	9,383	26.1		
Thailand	724	0	724	581	24.6	6,981	5,976	16.8		
Vietnam	273	0	273	202	35.1	3,170	2,459	28.9		
Others	17	0	17	04	325.0	303	178	70.2		
Oceania	9,023	0	9,023	7,330	23.1	96,143	77,625	23.9		
Australia	7,903	0	7,903	6,523	21.2	85,283	68,527	24.5		
New Zealand	1,069	0	1,069	780	37.1	10,480	8,805	19.0		
Others	51	0	51	27	88.9	380	293	29.7		
South Asia	59,233	0	59,233	45,360	30.6	537,691	416,815	29.0		
Afghanistan	04	0	04	07	(42.9)	69	132	(47.7)		
Bangladesh	5,521	0	5,521	3,732	47.9	50,959	32,026	59.1		
Bhutan	51	0	51	41	24.4	538	545	(1.3)		
India	48,113	0	48,113	36,417	32.1	423,405	322,973	31.1		
Iran	632	0	632	591	6.9	8,092	9,260	(12.6)		
Maldives	2,780	0	2,780	2,880	(3.5)	30,921	37,337	(17.2)		
Nepal	455	0	455	552	(17.6)	4,727	3,628	30.3		
Pakistan	1,677	0	1,677	1,140	47.1	18,980	10,914	73.9		
EUROPE	67,121	0	67,121	58,577	14.6	911,991	814,392	12.0		
Northern Europe	16,565	0	16,565	13,044	27.0	220,992	186,759	18.3		
Denmark	969	0	969	739	31.1	14,284	12,203	17.1		
Finland	450	0	450	215	109.3	3,545	2,968	19.4		
Norway	574	0	574	442	29.9	10,316	9,138	12.9		
Sweden	861	0	861	716	20.3	9,387	8,605	9.1		
United Kingdom	12,934	0	12,934	10,206	26.7	174,827	146,670	19.2		
Others	777	0	777	726	7.0	8,633	7,175	20.3		



	October 2025			Tourist arrivals Oct 2024	% change Oct (25/24)	Total tourist arrivals up to Oct 2025	Total tourist arrivals up to Oct 2024	% change up to Oct (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
Western Europe	22,208	0	22,208	20,383	9.0	325,122	279,695	16.2					
Austria	878	0	878	917	(4.3)	13,802	12,997	6.2					
Belgium	877	0	877	847	3.5	17,931	14,492	23.7					
France	5,157	0	5,157	4,688	10.0	93,312	75,778	23.1					
Germany	9,753	0	9,753	9,217	5.8	116,741	108,788	7.3					
Netherlands	3,441	0	3,441	2,859	20.4	55,651	42,836	29.9					
Switzerland	2,079	0	2,079	1,816	14.5	26,911	24,093	11.7					
Others	23	0	23	39	(41.0)	774	711	8.9					
Central/Eastern Europe	18,755	0	18,755	16,973	10.5	242,031	243,355	(0.5)					
Belarus	719	0	719	504	42.7	6,677	8,096	(17.5)					
Czech Republic	875	0	875	729	20.0	14,353	15,623	(8.1)					
Estonia	176	0	176	131	34.4	3,013	2,990	0.8					
Hungary	434	0	434	431	0.7	4,926	4,954	(0.6)					
Kazakhstan	246	0	246	213	15.5	8,212	9,162	(10.4)					
Lithuania	271	0	271	285	(4.9)	5,338	5,040	5.9					
Poland	2,182	0	2,182	2,132	2.3	37,788	32,768	15.3					
Romania	352	0	352	354	(0.6)	4,585	4,633	(1.0)					
Russia	11,496	0	11,496	10,367	10.9	133,640	137,599	(2.9)					
Slovakia	385	0	385	439	(12.3)	5,516	5,261	4.8					
Ukraine	529	0	529	350	51.1	6,620	5,389	22.8					
Others	1,090	0	1,090	1,038	5.0	11,363	11,840	(4.0)					
Southern/Mediterranean Europe	9,593	0	9,593	8,177	17.3	123,846	104,583	18.4					
Greece	269	0	269	142	89.4	3,304	2,060	60.4					
Italy	1,913	0	1,913	1,431	33.7	40,943	30,777	33.0					
Portugal	492	0	492	633	(22.3)	6,260	4,997	25.3					
Spain	3,692	0	3,692	3,458	6.8	38,128	31,472	21.1					
Turkey	583	0	583	409	42.5	6,668	5,250	27.0					
Israel	1,929	0	1,929	1,398	38.0	19,482	21,913	(11.1)					
Others	715	0	715	706	1.3	9,061	8,114	11.7					
MIDDLE EAST	2,345	0	2,345	1,711	37.1	26,615	24,060	10.6					
Bahrain	61	0	61	64	(4.7)	1,124	1,002	12.2					
Egypt	305	0	305	282	8.2	3,427	3,122	9.8					
Iraq	194	0	194	64	203.1	1,459	837	74.3					
Jordan	254	0	254	315	(19.4)	2,353	2,241	5.0					
Kuwait	111	0	111	70	58.6	1,640	1,639	0.1					
Lebanon	242	0	242	110	120.0	2,752	2,685	2.5					
Oman	200	0	200	155	29.0	2,303	2,464	(6.5)					
Qatar	38	0	38	33	15.2	771	630	22.4					
Saudi Arabia	321	0	321	251	27.9	4,960	4,890	1.4					
United Arab Emirates	532	0	532	304	75.0	4,827	3,688	30.9					
Others	87	0	87	63	38.1	999	862	15.9					
TOTAL	165,193	0	165,193	135,907	21.5	1,890,687	1,620,715	16.7					

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

The analysis of last departure ports for the 165,193 tourists who arrived in Sri Lanka in October 2025 reveals a distinct geographic profile heavily influenced by regional proximity and global aviation networks. The data underscores a significant concentration of arrivals, with the top three ports, Chennai (16,436 arrivals, 9.95%), Doha (16,030, 9.70%), and Dubai (14,664, 8.88%) collectively accounting for over 28% of all traffic. This highlights a dual-stream arrival pattern: robust direct travel from key Indian metropolitan centers and substantial transit traffic funneled through the major Middle Eastern aviation hubs of Doha, Dubai, and Abu Dhabi. The prominence of these Gulf hubs is a critical insight, indicating that a large portion of Sri Lanka's long-haul tourism from Europe and other regions is dependent on the connectivity and capacity of a few key airlines and their hub airports.

Further examination of the data solidifies the Indian subcontinent as the single most important regional market, with five Indian cities Chennai, Mumbai, Bangalore, Delhi, and Hyderabad collectively contributing nearly 30% of all arrivals. This dominance is a direct function of geographic proximity, cultural ties, and high-frequency air links. Beyond this regional core, the presence of London (3.24%) and Moscow (2.38%) as the primary long-haul points of departure confirms established source markets.

The strategic implications of this port distribution are twofold. Firstly, it identifies a potential vulnerability; a disruption in flight operations or a geopolitical shift affecting these key hubs could have an immediate and material impact on Sri Lanka's tourist inflows. Secondly, it provides clear direction for resource allocation. Marketing and promotional efforts should be strategically tailored. This data underscores that Sri Lanka's tourism accessibility is not just about destination appeal, but is fundamentally linked to the strategic management of its air connectivity.

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

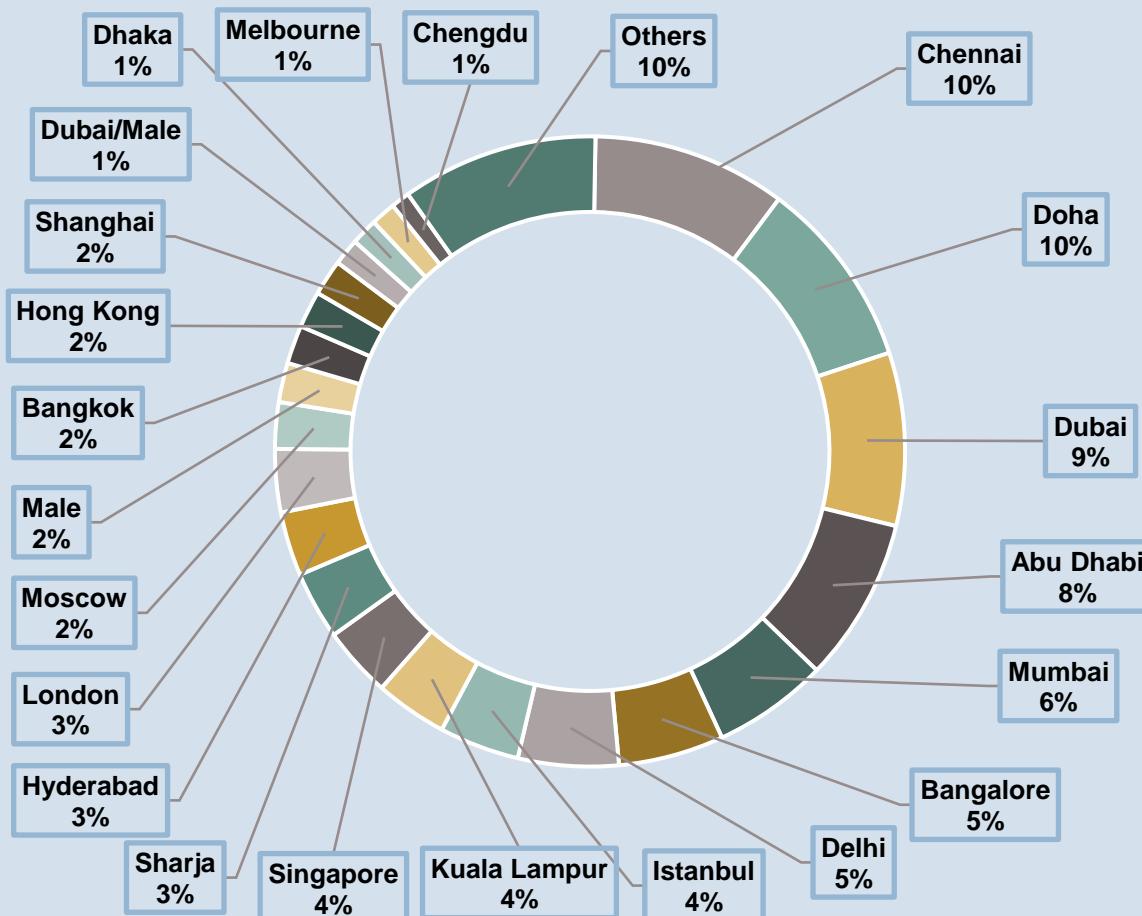
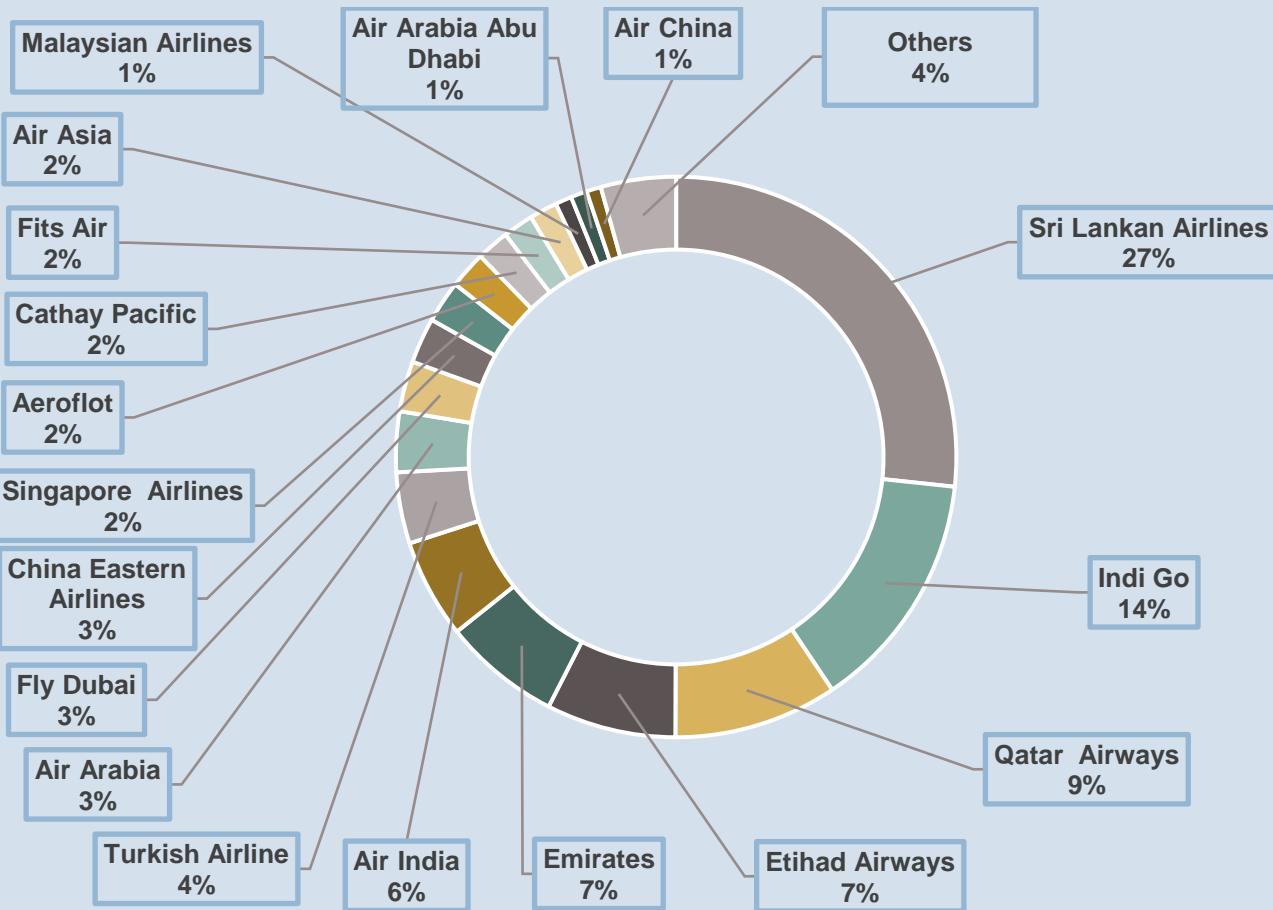


Chart 7. Main airlines to Sri Lanka, October 2025

The analysis of airlines utilized by tourists arriving in Sri Lanka in October 2025 reveals a market heavily influenced by a few key carriers, reflecting the nation's strategic position in global aviation networks. The data indicates that a significant portion of tourist traffic is channeled through major Middle Eastern carriers such as Qatar Airways, Emirates, and Etihad Airways which collectively account for a substantial share, leveraging their extensive global hubs to aggregate passengers from long-haul markets, particularly in Europe and the Americas. This is complemented by strong performance from Indian airlines like IndiGo and Air India, underscoring the critical importance of the high volume, short haul Indian market driven by geographic proximity and cultural ties.

The presence of Sri Lankan Airlines as a major player highlights its vital role in providing direct connectivity and serving as the national flag carrier, while the aggregated share of other airlines points to a diverse, though fragmented, long-tail of international connectivity. A key insight from this distribution is the inherent market access dependency on foreign mega-carriers, which presents both an opportunity for wide global reach and a strategic vulnerability to external airline network decisions. Consequently, this necessitates a proactive aviation policy that fosters competitive air access, explores opportunities for strategic partnerships with dominant carriers, and supports the national airline's role in serving both core and emerging routes to ensure a resilient and diversified tourist inflow.

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

October 2025

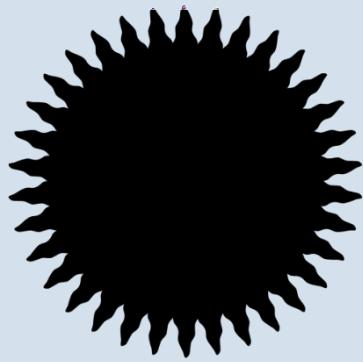
Table 5. Top ten markets vs. main last departure airports to Sri Lanka, October 2025

The analysis of last departure ports for Sri Lanka's top ten source markets in October 2025 reveals distinct geographic routing patterns and critical dependencies on specific international aviation hubs, providing a granular view of how tourists reach the country. The data clearly illustrates a regional bifurcation: tourists from India overwhelmingly utilize direct flights from their own metropolitan hubs, with Chennai, Mumbai, Bangalore, Delhi, and Hyderabad collectively accounting for the vast majority of the 48,113 Indian arrivals, highlighting the unparalleled importance of direct air connectivity for this dominant market. In stark contrast, long-haul markets like the United Kingdom, Germany, France, and Spain are profoundly reliant on Middle Eastern hubs, with Doha, Dubai, and Abu Dhabi serving as the primary gateways, underscoring the strategic role of carriers like Qatar Airways, Emirates, and Etihad in feeding Sri Lanka's tourism from Europe. Notable outliers provide further strategic insight; Russian arrivals show a unique dependence on Moscow, Abu Dhabi and Sharja, while Chinese tourists primarily transit through Shanghai, Hong Kong, and Southeast Asian hubs like Kuala Lumpur and Singapore. Similarly, Australian traffic is heavily funneled through Singapore. A key operational insight is the market-specific vulnerability this creates; for instance, any disruption with Gulf carriers would disproportionately affect European arrivals, while capacity changes on India-Sri Lanka routes would have an immediate and massive impact. Consequently, this necessitates a sophisticated, market-specific aviation and marketing strategy that secures capacity on direct routes for volume markets like India, while fostering deep partnerships with key transit hub airlines to safeguard and grow long haul tourist flows.

Table 6. Top ten markets vs. main airlines to Sri Lanka, October 2025

The analysis of airline utilization across Sri Lanka's top source markets for October 2025 reveals profound market-specific dependencies on particular carriers, illustrating a complex and fragmented aviation landscape critical for tourism access. The data underscores a clear regional divide: the national carrier, Sri Lankan Airlines, demonstrates strong dominance in nearby and diaspora-linked markets, holding a majority share with Australian tourists (51.25%) and commanding significant portions of arrivals from India (37.47%), the UK (42.55%), and Bangladesh (32.84%). Conversely, the Indian market is uniquely captured by low-cost carrier Indigo (42.54%), highlighting a volume driven, price sensitive segment. For long-haul European and North American travelers including those from Germany, France, Spain, and the United States the market is dominated by Middle Eastern giants Qatar Airways, Emirates, and Etihad Airways, which collectively account for the largest shares, underscoring Sri Lanka's reliance on these hub-and-spoke networks for global connectivity. Striking outliers reveal specialized routing; the Russian market is overwhelmingly dependent on its national carrier, Aeroflot (30.38%), and Chinese arrivals are channeled predominantly through China Eastern (35.33%) and Air China, pointing to the critical role of home-country airlines. A key strategic insight from this distribution is the inherent vulnerability and opportunity it presents; over-reliance on specific foreign carriers, like Indigo in India or Qatar Airways in Europe, creates significant market access risks should their commercial priorities shift. Therefore, a proactive and nuanced aviation strategy is imperative, one that secures the national carrier's role on core routes, deepens strategic code-share alliances with dominant foreign airlines, and incentivizes direct connectivity from key markets like China and Russia to build a more resilient and diversified air access framework.





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