
Introduction

The following document provides a synthesis of the most recent December 2025 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st December 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 experienced a strong growth in 2025 compared to 2024, with total arrivals increasing from 2,053,465 to 2,362,521, reflecting an impressive overall annual growth rate of 15.1%. This indicates continued recovery and strengthening of the sector, supported by growing traveler confidence, improved destination appeal, and likely supportive policies and marketing initiatives.

Monthly performance trends show particularly strong growth in the early part of the year. January recorded a remarkable 21.4% increase, followed by February at 10.0% and March at 9.6%, reflecting strong winter season demand from key tourist-generating markets. This suggests effective positioning of Sri Lanka during the global peak travel season and possibly improved air connectivity and branding efforts. Growth remains encouraging during the mid-year period as well. April (17.3%), May (18.5%), and June (21.8%) recorded notable increases, indicating strengthening of the shoulder season and improved seasonality management. This points towards diversification of tourism offerings

Table 1. Monthly tourist arrivals, December 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	212,906	15.6
December	248,592	258,928	4.2
TOTAL	2,053,465	2,362,521	15.1

and the ability to attract visitors beyond traditional peak periods.

Interestingly, July, typically a strong month, recorded comparatively modest growth of 6.6%, which may indicate potential constraints such as capacity limitations, pricing pressures, or heightened regional competition during this travel period. However, performance strengthens significantly again in the latter part of the year, particularly in August (20.4%), September (30.2%), October (21.5%), and November (15.6%). September shows the highest year-on-year growth (30.2%), highlighting a major upswing in off peak travel and signaling improved demand stability throughout the year. December continues to be a strong month in terms absolute arrivals, however growth remained modest at 4.2 % largely due to adverse impact of cyclone Ditwah.

The data indicates broad based, resilient tourism growth across most months, not limited only to traditional peak seasons. Strong off-peak and shoulder season performance suggests successful diversification, increased appeal to long-haul and repeat travelers, and likely improvements in connectivity, marketing, and tourism offerings.

However, comparatively lower growth in July and December also signals a need to examine issues such as pricing strategy, infrastructure capacity, and competitive positioning during peak periods. The findings emphasize the importance of capacity planning for high-demand months, continued promotion of off-season travel, strengthening service quality and visitor experience, and sustaining policy stability, connectivity improvements, and destination safety.

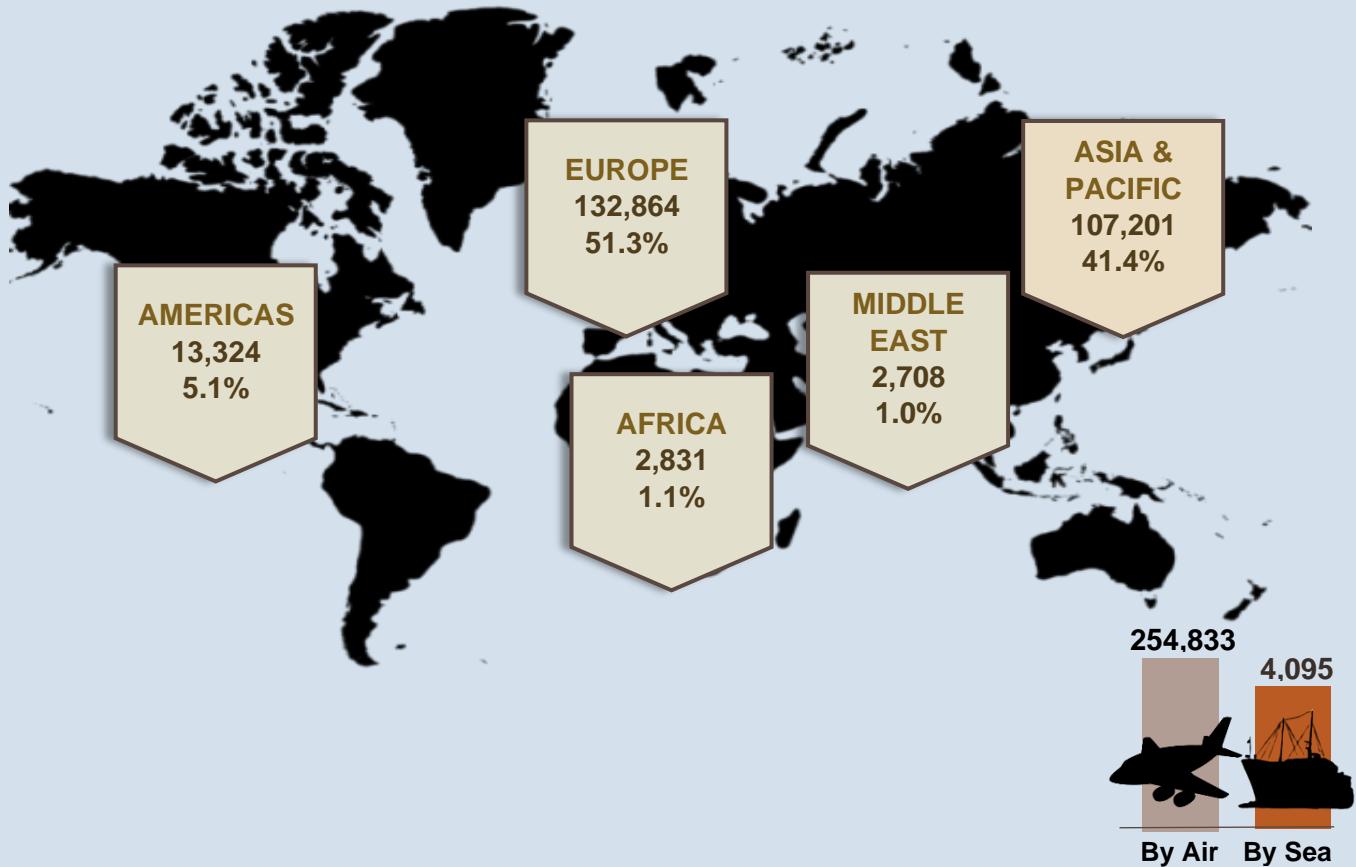
Tourist Arrivals | December 2025

258,928

Tourist arrivals by region and percentage share

December 2025

Map 1. Tourist arrivals by region and percentage share



Tourist arrivals to Sri Lanka in December reveal a clear and strong dependence on two key regions: Europe and Asia & Pacific. Together, these regions account for a dominant 92.7% of all arrivals, with Europe alone contributing 51.3% and Asia & Pacific 41.4%. This overwhelming share underscores Sri Lanka's established appeal as a major winter sun destination for these markets, likely driven by factors such as historical travel corridors, direct flight connectivity, and the country's well known blend of cultural, scenic, and beach attractions.

In contrast, the regions of the Americas, Africa, and the Middle East collectively represent a minimal 7.3% of total arrivals. This significant underperformance highlights substantial untapped potential. Barriers such as limited direct air connectivity, higher perceived travel distances and costs, or less focused promotional efforts in these regions may be limiting growth. The small but notable presence from Africa and the Middle East, however, suggests emerging niche segments, such as travelers from Gulf countries seeking alternative winter getaways, which could be nurtured further.

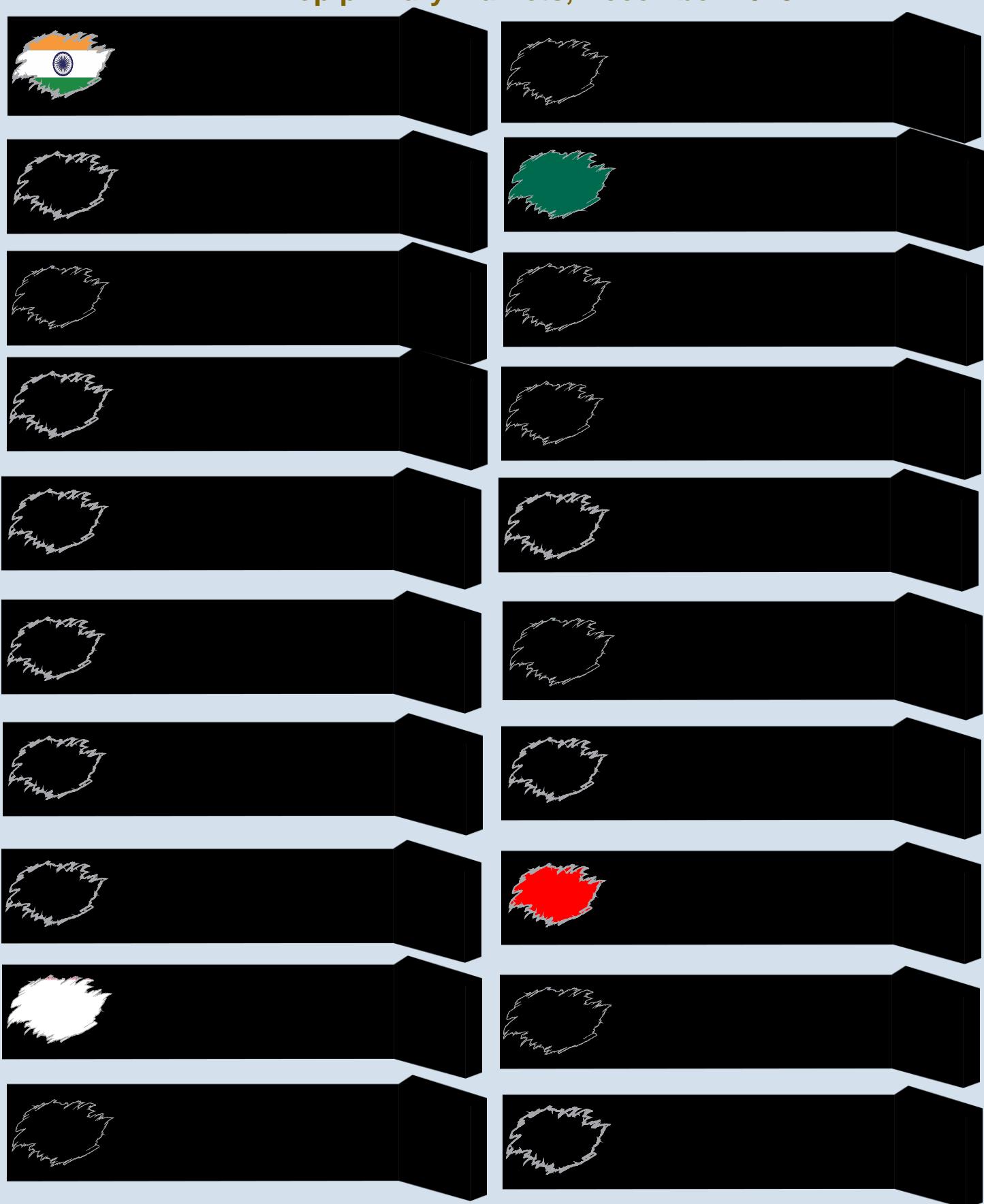
The current distribution suggests a need for a balanced approach. While it is prudent to continue strengthening core markets in Europe and Asia, diversifying the visitor base is crucial for long term resilience and growth. This could involve targeted initiatives to improve air access from underrepresented regions and developing tailored tourism products such as adventure, luxury, or wellness packages that specifically appeal to American, African, and Middle Eastern travelers. Furthermore, capitalizing on the peak December season by enhancing festive and event based tourism could help solidify Sri Lanka's position as a premier year end destination.

Sri Lanka's December tourism performance demonstrates robust health in its primary source markets but also reveals a clear opportunity for geographical diversification. By implementing region specific strategies to enhance accessibility and appeal, Sri Lanka can reduce its reliance on two major regions and build a more stable and growing tourism economy for the future.



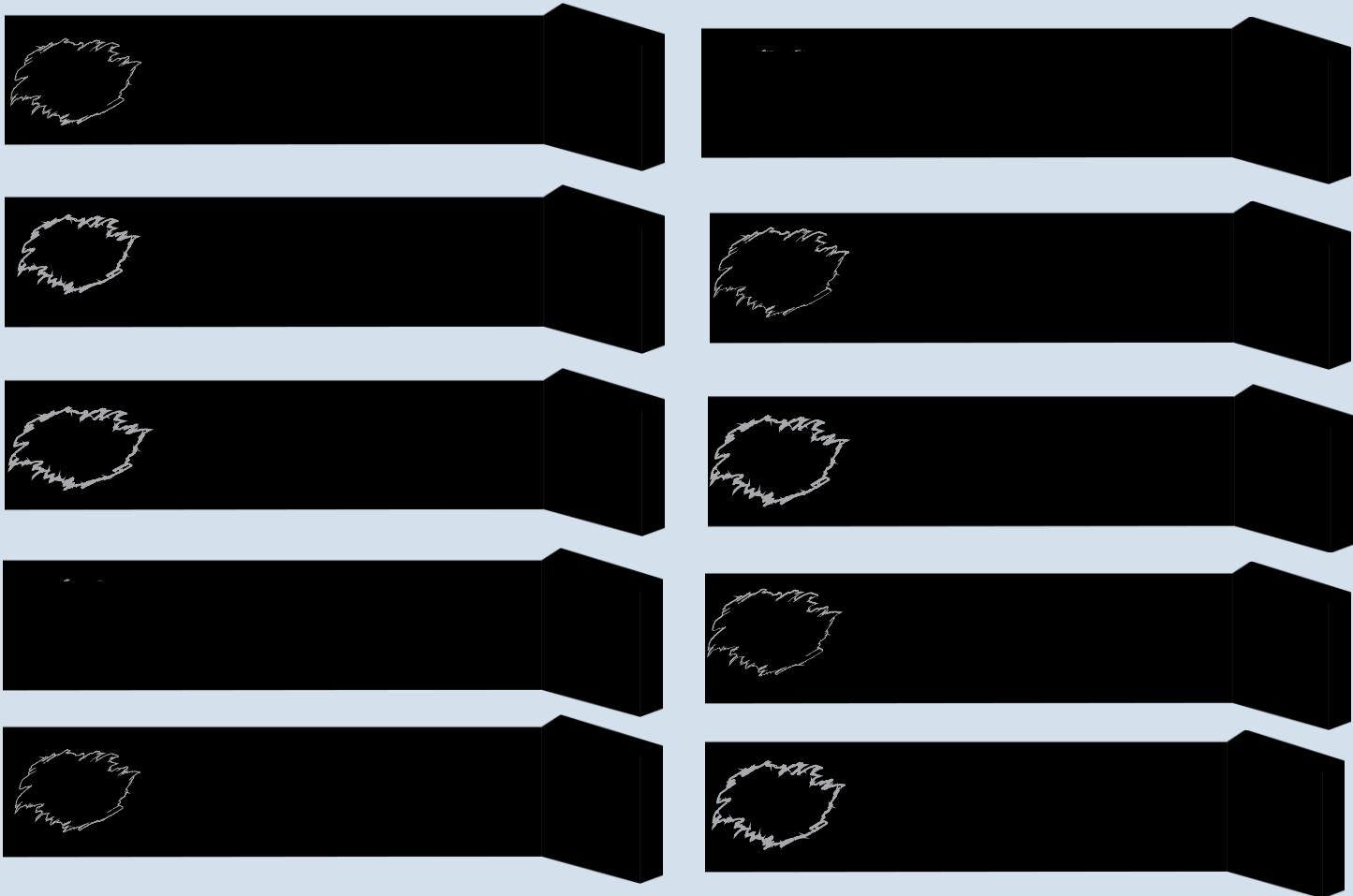
Top primary markets and top potential markets

Top primary markets, December 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, December 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

December 2025

The data on the top ten source markets for Sri Lanka in December 2025 reveals a clear hierarchy and significant trends in visitor arrivals. India stands as the dominant source market by a considerable margin, with 56,715 arrivals, significantly ahead of second place Russia (27,987). This underscores the critical importance of the Indian market, driven by geographical proximity, cultural ties, and affordable travel options. The year on year growth from 52,881 in December 2024 further solidifies this trend.

A notable observation is the composition of arrivals by mode of transport. While air travel is the primary method for all markets, Germany exhibits a remarkable exception, with over 2,100 arrivals by sea far surpassing other countries. This suggests a strong presence of cruise tourism or specialized maritime travel from Germany, indicating a unique niche segment. The United Kingdom and the United States also show relatively higher sea arrivals, pointing to potential in developing cruise and yacht-based tourism for specific Western markets.

Year on year comparisons provide insights into market performance. Most top markets, including India, the UK, Germany, Australia, China, and several European nations like France, Poland, and Italy, show healthy growth. However, Russia shows a significant decline from 35,268 to 27,987 arrivals. This drop could be attributed to ongoing geopolitical factors, economic sanctions, or shifts in travel capacity and affordability, highlighting the market's volatility and external sensitivities.

From a strategic perspective, the list reflects a diversified yet concentrated portfolio. The top ten are dominated by Asian (India, China) and European nations, with single representatives from North America (USA) and the Asia-Pacific (Australia). This aligns with the broader regional analysis showing Europe and Asia & Pacific as the dominant contributors. The growth across most markets is positive, but the reliance on traditional source regions remains high. To build resilience, strategies could include deepening engagement with growing markets like Poland and Italy, stabilizing the Russian market where possible, and further exploring the unique sea arrival segment exemplified by Germany to diversify tourism products and attract high value visitors.

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

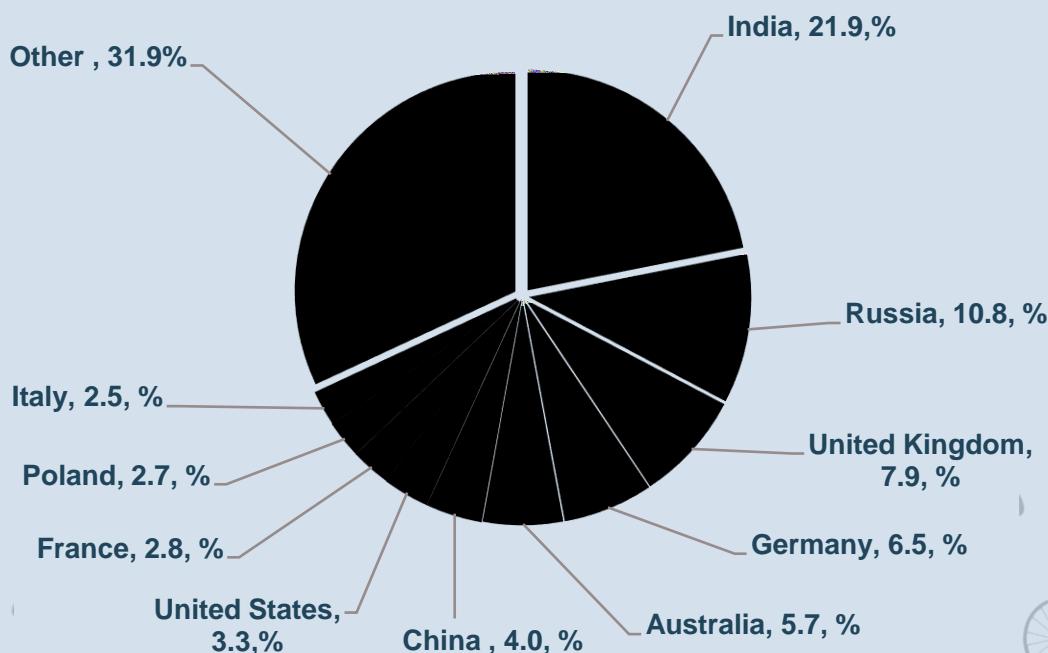
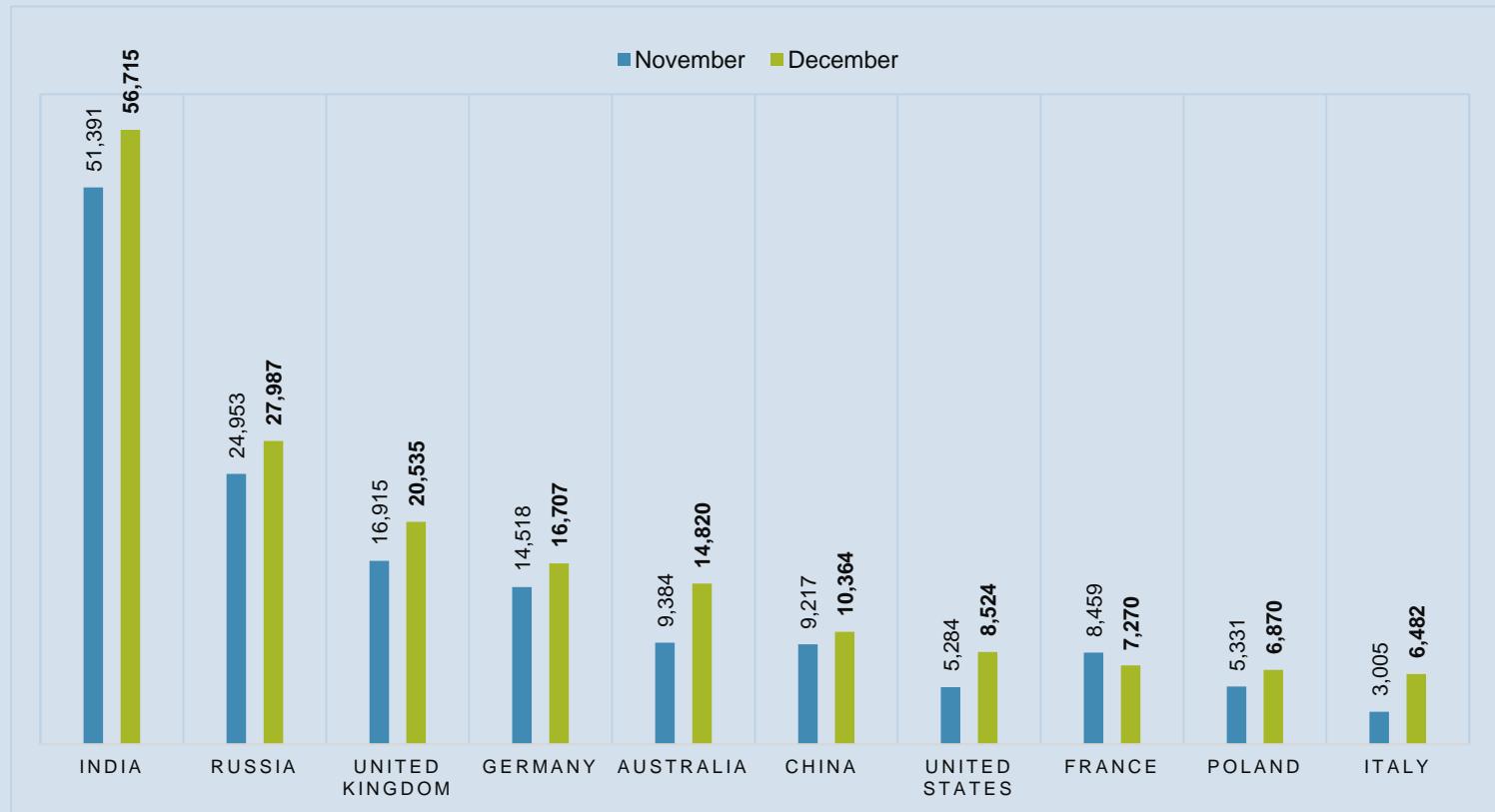


Table 2. Top ten source markets to Sri Lanka, December 2025

Rank	Country of Residence	Tourist arrivals (December 2025)			Tourist arrivals (December 2024)
		By Air	By Sea	Total	
1	India	56,712	03	56,715	52,881
2	Russia	27,956	31	27,987	35,268
3	United Kingdom	20,114	421	20,535	18,757
4	Germany	14,588	2,119	16,707	14,703
5	Australia	14,478	342	14,820	13,109
6	China	10,339	25	10,364	9,924
7	United States	8,028	496	8,524	8,212
8	France	7,259	11	7,270	6,332
9	Poland	6,858	12	6,870	6,233
10	Italy	6,467	15	6,482	5,695

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



Top ten source markets

January to December 2025

India remains the undisputed leading source market for the period from January to December 2025, contributing 531,511 arrivals more than double the next highest country. This reflects a remarkable year on year increase of over 114,000 visitors, highlighting the critical role of proximity, air connectivity, cultural affinity, and targeted marketing. The United Kingdom solidifies its position as the second largest market with 212,277 arrivals, showing steady growth. Notably, Russia has dropped to third place with 186,580 arrivals, experiencing a decline from 2024. This decrease suggests sustained challenges such as economic constraints and limited flight availability affecting this once top tier market.

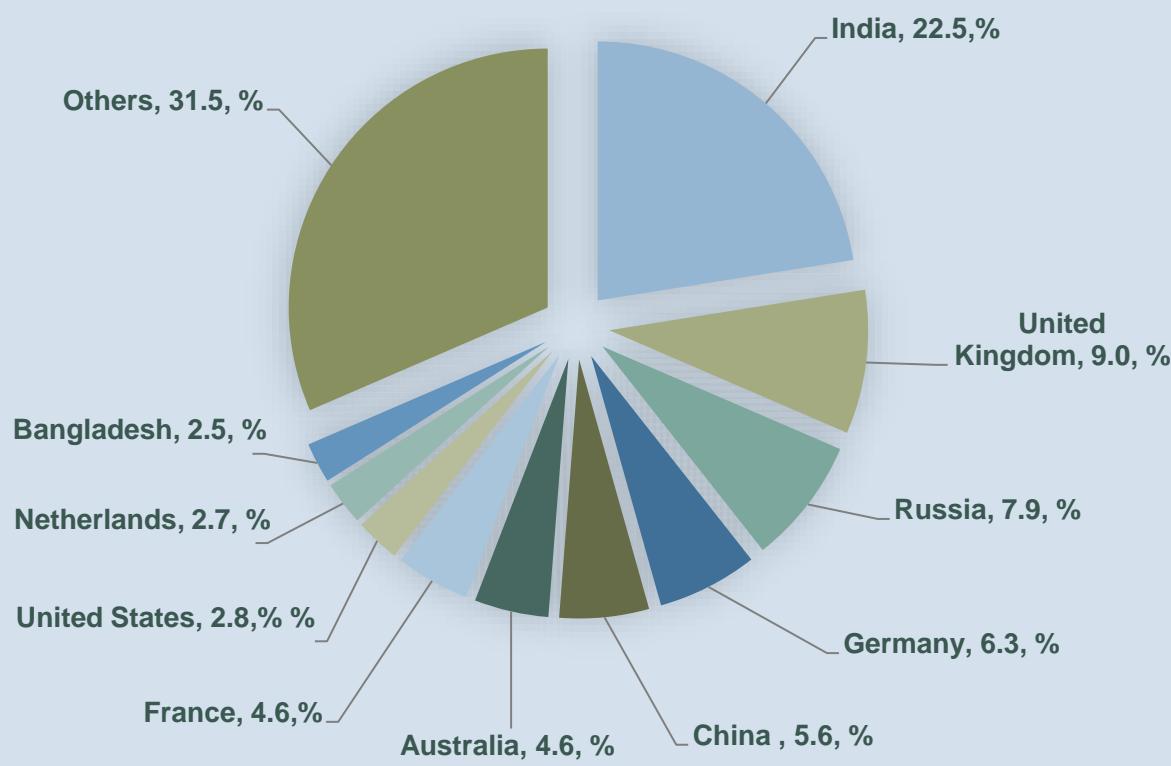
Beyond the top three, several markets demonstrate impressive growth trajectories. Australia and France both crossed the 100,000-arrival mark, with substantial year on year increases, indicating successful outreach and increasing appeal in these regions. Bangladesh enters the top ten for the first time, with arrivals surging to 59,563 from 39,555, underscoring an emerging and rapidly growing market, likely driven by affordable travel and regional tourism circuits. Similarly, the Netherlands shows strong growth, reinforcing the consistent performance of Western European markets. China's numbers remain stable with minimal growth, suggesting potential for more aggressive engagement to recover pre-pandemic arrival levels.

Top key source markets in 2025 is characterized by strong overall growth led by India and sustained European interest, alongside the emergence of new high-growth markets like Bangladesh. However, the decline in Russian arrivals and the plateauing of the Chinese market present areas for strategic review. To ensure sustainable growth, diversification efforts should continue, focusing on consolidating gains in growing Western markets, reigniting interest in China, and exploring further potential in neighboring Asian countries. The significant increase in total arrivals is a positive indicator of the sector's resilience and appeal.



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

Rank	Country of Residence	Tourist Arrivals (Jan ~ Dec 2025)	Tourist Arrivals Jan ~ Dec 2024)
1	India	531,511	416,974
2	United Kingdom	212,277	178,339
3	Russian Federation	186,580	201,920
4	Germany	147,966	136,084
5	China	132,035	131,681
6	Australia	109,487	89,573
7	France	109,041	88,775
8	United States	65,973	59,532
9	Netherlands	64,164	50,116
10	Bangladesh	59,563	39,555
11	Others	743,924	660,916
Total		2,362,521	2,053,465

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

Tourist arrivals by purpose of visit

December 2025

In December, Sri Lanka welcomed a total of 258,928 tourists, with leisure travel dominating overwhelmingly at 70.27%, or 181,945 visitors. This confirms the country's established appeal as a vacation destination.

Beyond leisure, the MICE (Meetings, Incentives, Conferences, Exhibitions) segment showed promising growth, accounting for 8.06% of arrivals, which underscores Sri Lanka's emerging potential as a business and events hub. The Visiting Friends and Relatives (VFR) category also represented 7.81%, reflecting strong diaspora and personal ties.

Specialized niches such as Business, Health/Ayurvedic, Sports, Education, and religious tourism collectively made up less than 2.5% of total arrivals. While these segments remain small, they highlight opportunities for diversification into high-value, experience-based tourism particularly in areas where Sri Lanka holds natural or cultural advantages, such as wellness and spiritual travel.

Overall, the data reinforces the importance of strengthening Sri Lanka's core leisure offerings while strategically developing high potential segments like MICE and niche tourism to build a more resilient and diversified tourism economy.

Chart 4: Purpose of visit, December 2025

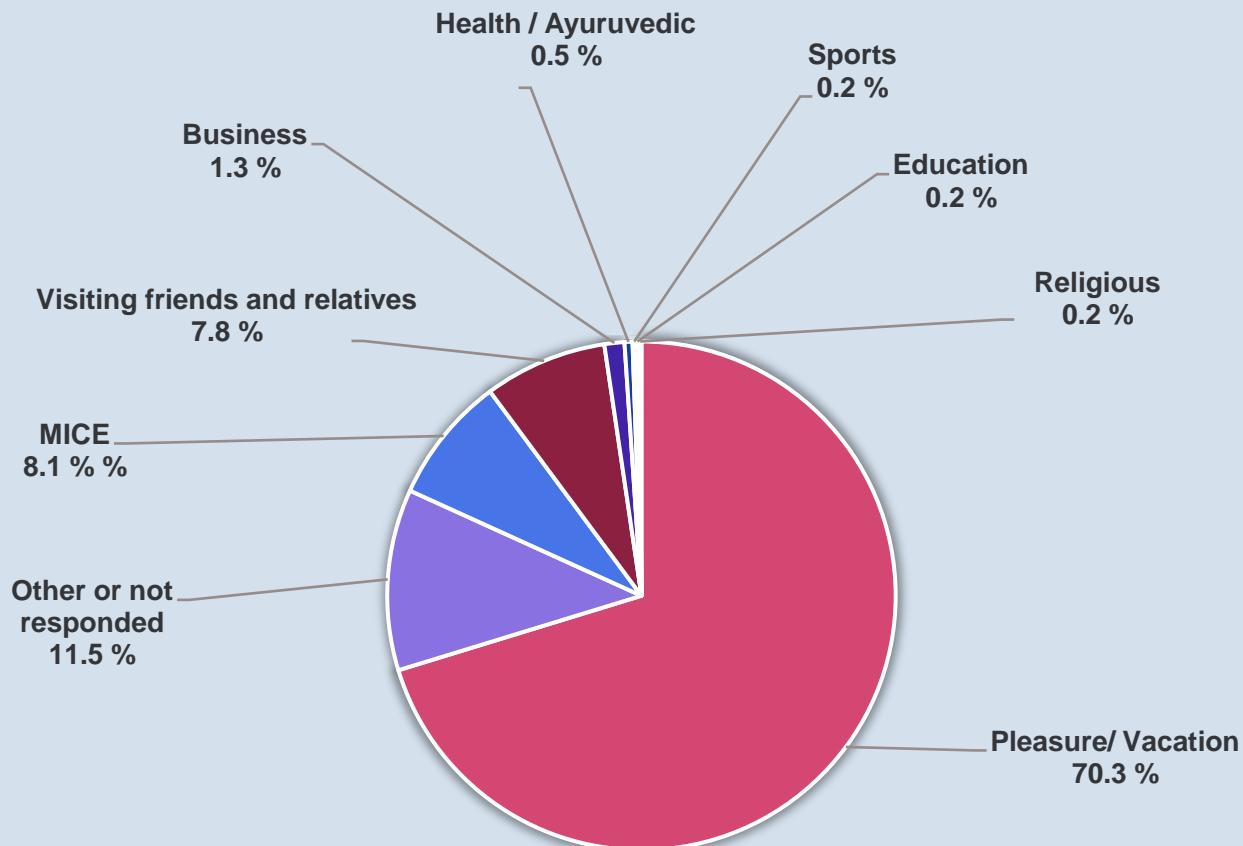
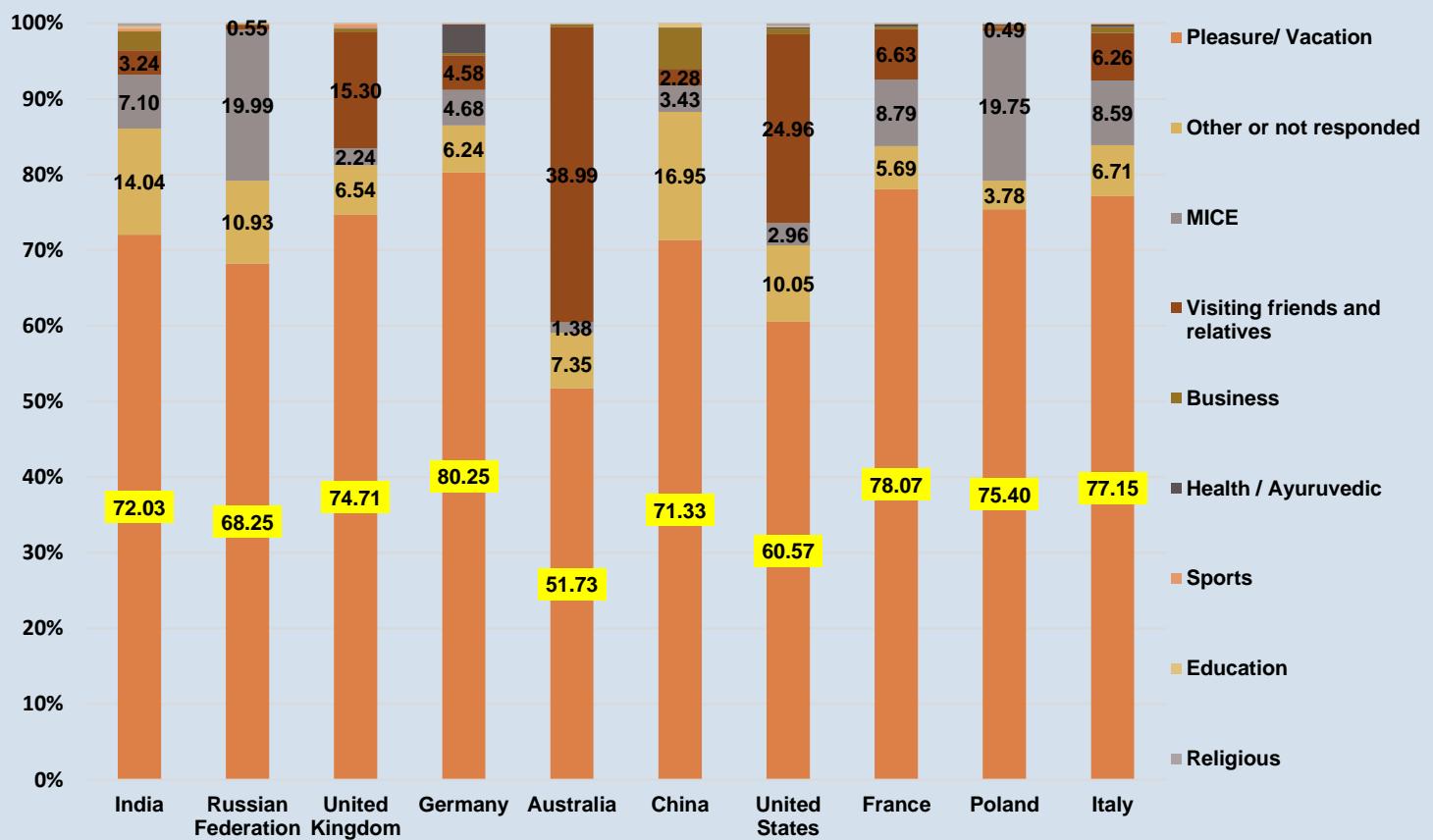


Chart 5: Purpose of visit vs main source markets



The tourists arrivals from key source markets analyzed by the purpose of visit clearly shows that leisure and vacation remain the dominant motivation for travel to Sri Lanka across almost all major source markets, consistently exceeding 70% for countries such as the United Kingdom (74.7%), Germany (80.25%), France (78.07%), Poland (75.40%), Italy (77.15%) and Russia (68.25%). Even in traditionally diversified markets like China (71.33%) and India (72.03%), holiday travel forms the core. This reinforces Sri Lanka's positioning as a leisure destination and highlights the continued strength of its core tourism assets such as culture, heritage, beaches, and nature-based attractions.

A key secondary motivation visible in the data is Visiting Friends and Relatives (VFR), which shows remarkable concentration in a few markets. Australia stands out significantly with 38.99% of arrivals coming for VFR purposes, indicating a strong Sri Lankan diaspora influence in this market. The United States also demonstrates a notable VFR share at 24.96%, followed by the United Kingdom at 15.30%. These insights suggest that diaspora-driven travel is a critical demand segment for long haul Western markets and can be leveraged through targeted campaigns, travel packages, and community engagement initiatives.

MICE tourism (Meetings, Incentives, Conferences, and Exhibitions) shows very strong importance particularly in Russia (19.99%) and Poland (19.75%), and to a lesser extent India (7.10%) and France (8.79%). This indicates emerging or strengthening business-event connectivity with Eastern European markets, while also pointing to opportunities to expand structured incentive and corporate travel programs. Meanwhile, Business travel remains relatively low overall, but China (5.42%) stands out as the highest in this category, suggesting commercial ties and investment-related travel influence.

Other specialized purposes such as health and Ayurvedic tourism, religious travel, sports, and education remain marginal in all markets, showing only occasional significance (for example Germany show slightly higher interest in health/wellness at around 3–4%). This indicates that

while Sri Lanka has potential for niche sectors, these remain underdeveloped compared to leisure and VFR-driven travel.

Overall, the data suggests that Sri Lanka's tourism demand profile is still highly leisure centric, supported strongly by diaspora led VFR travel in selected long-haul markets and meaningful MICE potential in certain regions. These patterns provide strategic direction: continue strengthening leisure offerings, enhance VFR engagement strategies, expand structured MICE promotion in identified markets, and selectively nurture emerging niches such as wellness to diversify the tourism portfolio further.

Turning Wanderlust into Wanderers: The Science of Travel Conversion

In the rapidly evolving global travel landscape, two key metrics increasingly shape how destinations understand **tourism demand**: *travel momentum* and *actual bookings*. While actual bookings reflect confirmed reservations for flights, hotels, and packages, travel momentum provides an early signal of consumer interest and intent captured through searches, inquiries, and planning behavior before any booking is finalized. Both indicators are crucial for destinations like Sri Lanka, where tourism remains a strategic engine for economic recovery and growth.

Understanding Travel Momentum vs Actual Bookings

Travel Momentum vs Actual Bookings

Travel momentum captures early signals of intent, such as flight searches, hotel availability checks, and itinerary explorations, long before travelers finalize bookings. These signals allow tourism operators and policymakers to anticipate demand, plan capacity, and implement targeted marketing campaigns.

Actual bookings, on the other hand, reflect confirmed travel decisions airline tickets purchased, hotel reservations made, and package tours finalized. Together, these two metrics provide a comprehensive view of tourism demand: momentum indicates interest, and bookings confirm realized travel.

Sri Lanka's Position in South Asia (Nov 2023–Oct 2025)

Amadeus Travel Insights provides a clear picture of Sri Lanka's performance among South Asian destinations over two consecutive periods: Nov 2023–Oct 2024 and Nov 2024–Oct 2025.

1. Top Searched Destinations

Nov 2023–Oct 2024: Sri Lanka ranked third among South Asian destinations in terms of search momentum, reflecting strong online interest and travel intent.

Nov 2024–Oct 2025: Sri Lanka moved to fourth place, signaling slight relative shifts in the competitive landscape but maintaining high search visibility.

2. Top Booked Destinations

Nov 2023–Oct 2024: Sri Lanka ranked fourth among South Asian destinations for actual bookings.

Nov 2024–Oct 2025: The ranking remained fourth, demonstrating consistency in converting interest into confirmed travel.

3. Destinations with Highest Growth

Search Momentum Growth (YOY): Between Nov 2024–Oct 2025 vs Nov 2023–Oct 2024, Sri Lanka ranked 7th, with a 26% year-on-year (YoY) growth in searches.

Booking Growth (YOY): In the same period, Sri Lanka ranked third among South Asian destinations, achieving a 6% YoY growth in confirmed bookings.



What These Insights Reveal

Sustained Visibility: Sri Lanka's top search rankings indicate that the destination remains highly visible and desirable among South Asian travelers, even as competition increases from other regional destinations like India, Maldives, and Nepal.

Conversion Potential: Maintaining a consistent booking rank demonstrates that early interest is being effectively converted into confirmed travel, a critical factor for revenue generation and tourism sustainability.

Rapid Interest Growth: A 26% YoY growth in searches highlights rising traveler curiosity, signaling opportunities to capture new market segments and encourage earlier bookings through promotions and tailored campaigns.

Healthy Booking Growth: The 6% YoY growth in bookings suggests steady recovery and resilience in the tourism sector, reflecting the effectiveness of marketing, visa facilitation, and service quality improvements.

Strategic Implications for Sri Lanka

Targeted Marketing Campaigns: Momentum data allows Sri Lankan Tourism Authorities and private operators to prioritize campaigns for markets showing high search growth, such as India, the UAE, and emerging European markets.

Capacity Planning and Infrastructure: Advanced insights into booking trends enable hotels, airlines, and transport operators to optimize capacity ahead of peak periods, reducing bottlenecks and enhancing the visitor experience.

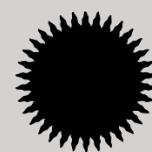
Diversification of Source Markets: The high search momentum from multiple markets suggests potential for diversification beyond traditional source countries, reducing dependency on any single market.

Policy Alignment and Investment: Data-driven insights can guide government policies on tourism incentives, sustainable development, and infrastructure investment, ensuring the sector grows in a resilient and competitive manner.

Sri Lanka's strong presence among top searched and booked destinations in South Asia, combined with notable year-on-year growth, demonstrates the country's sustained appeal and effective conversion of interest into travel. By leveraging travel momentum insights alongside confirmed bookings, tourism stakeholders can proactively plan marketing strategies, optimize infrastructure, and strengthen destination competitiveness.

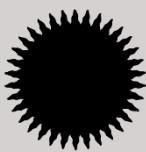
References

Amadeus and UN Tourism (2025). Travel Insights 2025 Focus on Asia & Pacific November 2024 - October 2025.



International tourist arrivals by country of residence

	December 2025			Tourist arrivals Dec 2024	% change Dec (25/24)	Total tourist arrivals up to Dec 2025	Total tourist arrivals up to Dec 2024	% change up to Dec (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
AMERICAS	12,644	680	13,324	12,718	4.8	119,830	108,678	10.3					
North America	11,959	655	12,614	12,130	4.0	113,289	102,812	10.2					
Canada	3,799	139	3,938	3,781	4.2	46,133	42,212	9.3					
Mexico	132	20	152	137	10.9	1,183	1,068	10.8					
United States	8,028	496	8,524	8,212	3.8	65,973	59,532	10.8					
Caribbean & Central America	111	0	111	118	(5.9)	1,108	1,044	6.1					
Costa Rica	10	0	10	04	150.0	111	95	16.8					
Jamaica	09	0	09	11	(18.2)	53	98	(45.9)					
Others	92	0	92	103	(10.7)	944	851	10.9					
South America	574	25	599	470	27.4	5,433	4,822	12.7					
Argentina	102	0	102	99	3.0	986	931	5.9					
Brazil	242	17	259	208	24.5	2,106	1,945	8.3					
Chile	75	01	76	47	61.7	689	552	24.8					
Colombia	74	04	78	59	32.2	739	666	11.0					
Others	81	03	84	57	47.4	913	728	25.4					
AFRICA	2,812	19	2,831	2,511	12.7	17,639	14,441	22.1					
North Africa	537	0	537	362	48.3	3,906	3,371	15.9					
Morocco	117	0	117	121	(3.3)	1,138	1,042	9.2					
Sudan	141	0	141	96	46.9	1,324	950	39.4					
Others	279	0	279	145	92.4	1,444	1,379	4.7					
Sub-Saharan Africa	2,275	19	2,294	2,149	6.7	13,733	11,070	24.1					
Kenya	149	0	149	137	8.8	1,201	807	48.8					
Mauritius	141	02	143	251	(43.0)	971	755	28.6					
Nigeria	05	0	05	13	(61.5)	160	96	66.7					
South Africa	1,193	17	1,210	1,089	11.1	5,670	4,872	16.4					
Others	787	0	787	659	19.4	5,731	4,540	26.2					



Monthly Tourist Arrivals Report December 2025

	December 2025			Tourist arrivals Dec 2024	% change Dec (25/24)	Total tourist arrivals up to Dec 2025	Total tourist arrivals up to Dec 2024	% change up to Dec (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
ASIA & PACIFIC	106,790	411	107,201	101,818	5.3	1,039,759	860,696	20.8					
North East Asia	16,110	31	16,141	14,808	9.0	182,599	173,039	5.5					
China	10,339	25	10,364	9,924	4.4	132,035	131,681	0.3					
Japan	4,393	04	4,397	3,599	22.2	38,153	30,429	25.4					
South Korea	1,342	02	1,344	1,266	6.2	12,169	10,800	12.7					
Others	36	0	36	19	89.5	242	129	87.6					
South East Asia	6,470	16	6,486	5,573	16.4	67,021	52,987	26.5					
Cambodia	60	0	60	59	1.7	1,181	1,183	(0.2)					
Indonesia	456	01	457	379	20.6	5,056	3,744	35.0					
Malaysia	2,246	02	2,248	1,726	30.2	23,684	18,259	29.7					
Myanmar	153	0	153	82	86.6	2,563	1,515	69.2					
Philippines	511	01	512	485	5.6	6,781	5,267	28.7					
Singapore	1,974	07	1,981	2,011	(1.5)	15,086	12,591	19.8					
Thailand	778	05	783	648	20.8	8,595	7,246	18.6					
Vietnam	267	0	267	158	69.0	3,729	2,963	25.9					
Others	25	0	25	25	0.0	346	219	58.0					
Oceania	16,363	361	16,724	14,716	13.6	123,411	101,234	21.9					
Australia	14,478	342	14,820	13,109	13.1	109,487	89,573	22.2					
New Zealand	1,831	19	1,850	1,562	18.4	13,456	11,282	19.3					
Others	54	0	54	45	20.0	468	379	23.5					
South Asia	67,847	03	67,850	66,721	1.7	666,728	533,436	25.0					
Afghanistan	07	0	07	61	(88.5)	79	198	(60.1)					
Bangladesh	4,453	0	4,453	4,154	7.2	59,563	39,555	50.6					
Bhutan	16	0	16	90	(82.2)	612	715	(14.4)					
India	56,712	03	56,715	52,881	7.3	531,511	416,974	27.5					
Iran	643	0	643	794	(19.0)	9,786	10,858	(9.9)					
Maldives	3,887	0	3,887	6,903	(43.7)	37,165	47,222	(21.3)					
Nepal	534	0	534	449	18.9	5,716	4,463	28.1					
Pakistan	1,595	0	1,595	1,389	14.8	22,296	13,451	65.8					
EUROPE	129,885	2,979	132,864	128,912	3.1	1,152,955	1,040,445	10.8					
Northern Europe	30,322	467	30,789	27,532	11.8	273,825	231,449	18.3					
Denmark	1,944	04	1,948	1,713	13.7	17,378	14,952	16.2					
Finland	1,038	0	1,038	774	34.1	5,287	4,276	23.6					
Norway	1,733	15	1,748	1,478	18.3	13,032	11,399	14.3					
Sweden	4,179	14	4,193	3,676	14.1	14,863	13,413	10.8					
United Kingdom	20,114	421	20,535	18,757	9.5	212,277	178,339	19.0					
Others	1,314	13	1,327	1,134	17.0	10,988	9,070	21.1					

	December 2025			Tourist arrivals Dec 2024	% change Dec (25/24)	Total tourist arrivals up to Dec 2025	Total tourist arrivals up to Dec 2024	% change up to Dec (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
Western Europe	33,913	2,420	36,333	32,014	13.5	395,039	340,016	16.2					
Austria	2,523	97	2,620	2,401	9.1	18,188	17,103	6.3					
Belgium	1,537	16	1,553	1,337	16.2	21,056	17,219	22.3					
France	7,259	11	7,270	6,332	14.8	109,041	88,775	22.8					
Germany	14,588	2,119	16,707	14,703	13.6	147,966	136,084	8.7					
Netherlands	4,529	46	4,575	3,893	17.5	64,164	50,116	28.0					
Switzerland	3,355	126	3,481	3,246	7.2	33,624	29,829	12.7					
Others	122	05	127	102	24.5	1,000	890	12.4					
Central/Eastern Europe	48,636	51	48,687	55,129	(11.7)	330,568	340,883	(3.0)					
Belarus	2,029	05	2,034	1,408	44.5	10,531	10,933	(3.7)					
Czech Republic	2,715	0	2,715	2,299	18.1	19,082	19,279	(1.0)					
Estonia	864	0	864	576	50.0	4,309	3,800	13.4					
Hungary	953	0	953	978	(2.6)	6,408	6,580	(2.6)					
Kazakhstan	771	0	771	1,932	(60.1)	9,281	11,383	(18.5)					
Lithuania	661	0	661	867	(23.8)	6,506	6,395	1.7					
Poland	6,858	12	6,870	6,233	10.2	49,989	44,165	13.2					
Romania	1,366	01	1,367	1,243	10.0	6,403	6,407	(0.1)					
Russia	27,956	31	27,987	35,268	(20.6)	186,580	201,920	(7.6)					
Slovakia	975	01	976	713	36.9	7,322	6,710	9.1					
Ukraine	1,242	01	1,243	1,156	7.5	8,758	7,099	23.4					
Others	2,246	0	2,246	2,456	(8.6)	15,399	16,212	(5.0)					
Southern/Mediterranean Europe	17,014	41	17,055	14,237	19.8	153,523	128,097	19.8					
Greece	855	02	857	533	60.8	4,670	2,853	63.7					
Italy	6,467	15	6,482	5,695	13.8	50,430	38,709	30.3					
Portugal	702	02	704	636	10.7	7,985	6,489	23.1					
Spain	3,229	15	3,244	2,801	15.8	46,038	37,928	21.4					
Turkey	677	01	678	803	(15.6)	8,112	6,673	21.6					
Israel	3,515	0	3,515	2,054	71.1	24,591	24,845	(1.0)					
Others	1,569	06	1,575	1,715	(8.2)	11,697	10,600	10.3					
MIDDLE EAST	2,702	06	2,708	2,633	2.8	32,338	29,205	10.7					
Bahrain	81	0	81	81	0.0	1,310	1,169	12.1					
Egypt	485	0	485	491	(1.2)	4,362	4,069	7.2					
Iraq	109	0	109	96	13.5	1,669	1,012	64.9					
Jordan	369	0	369	358	3.1	3,073	2,823	8.9					
Kuwait	156	04	160	150	6.7	1,899	1,885	0.7					
Lebanon	452	0	452	421	7.4	3,537	3,438	2.9					
Oman	152	0	152	141	7.8	2,625	2,775	(5.4)					
Qatar	68	0	68	82	(17.1)	875	746	17.3					
Saudi Arabia	333	02	335	353	(5.1)	6,120	5,887	4.0					
United Arab Emirates	399	0	399	326	22.4	5,656	4,296	31.7					
Others	98	0	98	134	(26.9)	1,212	1,105	9.7					
TOTAL	254,833	4,095	258,928	248,592	4.2	2,362,521	2,053,465	15.1					

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

The last departure ports for tourists visiting Sri Lanka in December reveals a clear reliance on regional aviation hubs, with Dubai, Doha, and Chennai accounting for the top three sources, collectively representing 27.74% of arrivals. This underscores the strategic importance of transit hubs in the Middle East and South India as critical gateways for inbound tourism, particularly for visitors from Europe, the Gulf, and the wider Indian subcontinent. The strong presence of Indian cities Chennai, Mumbai, Bangalore, Delhi, and Hyderabad together contributing over 20% highlights India's role as a key source market for both direct and connecting travel. Similarly, Southeast Asian hubs such as Kuala Lumpur and Singapore reflect sustained connectivity and appeal within the ASEAN region and beyond.

From a market diversification perspective, the prominence of cities like London, Moscow, Istanbul, and Frankfurt indicates Sri Lanka's established air links with Europe and Eurasia, supporting leisure, business, and visiting friends and relatives (VFR) travel streams. This points to opportunities for targeted route development and marketing in secondary cities and untapped regions.

Sri Lanka's tourism inflow in December was heavily channeled through a mix of major regional hubs and key source market cities, reinforcing the need to maintain and expand air connectivity with these ports. To reduce over-reliance on specific hubs, tourism authorities could explore incentives for direct flights from emerging markets and strengthen promotional partnerships with airlines serving secondary departure points. This approach would help disperse arrival sources, enhance visitor volume stability, and support longer-term growth in tourist arrivals.

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

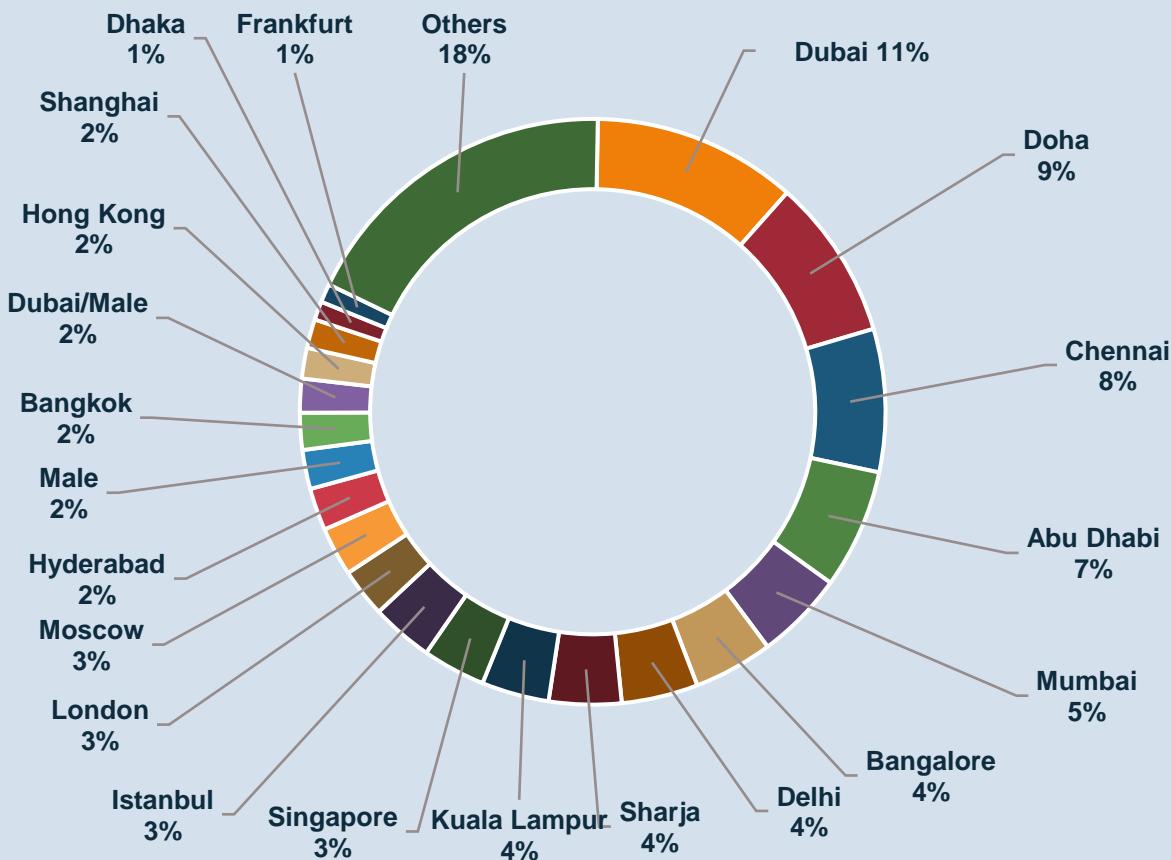
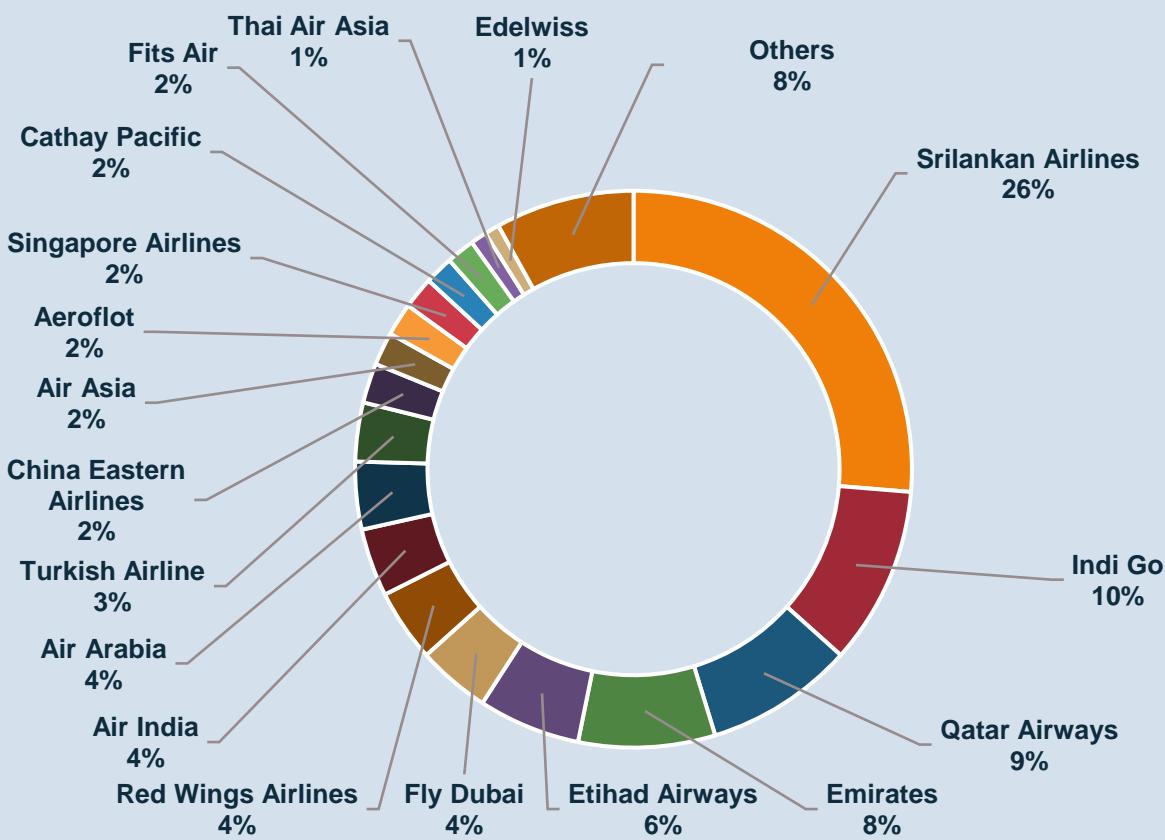


Chart 7. Main airlines to Sri Lanka, December 2025



The airline distribution for tourist arrivals in December highlights Sri Lankan Airlines' dominant role as the national carrier, accounting for 26.30% of all arrivals, or 68,107 passengers. This not only underscores the airline's significant contribution to inbound tourism but also points to its extensive network and frequency of flights connecting Sri Lanka to key markets. Following closely, IndiGo captured 10.34% of the market, reflecting strong demand from India, Sri Lanka's largest single source market and emphasizing the importance of affordable, high-frequency connections within the region.

Middle Eastern carriers collectively represented a substantial share, with Qatar Airways (8.62%), Emirates (7.94%), Etihad Airways (5.93%), Flydubai (4.23%), and Air Arabia (3.93%) together accounting for over 30% of arrivals. This indicates Sri Lanka's reliance on Gulf hubs particularly Doha, Dubai, and Abu Dhabi for connecting travelers from Europe, the Americas, Africa, and other regions. The presence of airlines like Red Wings Airlines (4.21%) and Aeroflot (1.90%) further points to sustained tourist inflows from Russia, a segment that has remained resilient despite broader geopolitical and economic shifts.

From a strategic perspective, the diversity of airlines spanning full-service, low cost, and hybrid carriers suggests a healthy competitive environment that benefits tourists through varied pricing and routing options. However, the concentration of traffic among a few key carriers also implies vulnerability to route cancellations or scheduling changes. Encouraging broader airline participation, especially from emerging markets in East Asia and Eastern Europe, could help diversify arrival sources and stabilize tourism inflows. Additionally, supporting the expansion of regional low cost carriers could stimulate price sensitive travel segments, particularly from neighboring countries and secondary cities. Overall, maintaining strong partnerships with both national and international airlines will be crucial for sustaining and growing Sri Lanka's tourism recovery in the coming seasons.

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

December 2025

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

The table provides a detailed view of how tourists from Sri Lanka's top ten source markets in December traveled to the country via various international departure hubs. A clear pattern emerges, showing strong regional and hub-based routing preferences that reflect both geographic proximity and airline network structures.

India, as the largest source market, shows a heavy reliance on direct connections from major Indian cities, with Chennai, Mumbai, Bangalore, and Delhi together accounting for over 43,000 arrivals. This underscores the importance of short-haul, point-to-point air connectivity within South Asia. In contrast, tourists from distant markets such as the United States, Germany, France, Poland and Italy predominantly used Middle Eastern hubs especially Dubai, Doha, and Abu Dhabi for transit, highlighting the role of Gulf carriers as vital connectors for long-haul travel into Sri Lanka. Russian tourists, for instance, relied significantly on Sharja and Dubai alongside direct services from Moscow, reflecting adapted travel routes amid changing air access.

The data also reveals interesting niche routing behaviors. Australian tourists frequently transited via Southeast Asian hubs such as Kuala Lumpur and Singapore, indicating the strength of connections through these regional gateways. Chinese tourists, while still fewer in number, showed notable use of Hong Kong, Shanghai, and Male as departure points, suggesting emerging or seasonal flight options. Meanwhile, travelers from the United States and Europe displayed diversified routing, combining Middle Eastern, Southeast Asian, and direct European hubs, which points to competitive airline options and flexible travel itineraries.

From a strategic perspective, this analysis reinforces the need for Sri Lanka to nurture relationships with key hub airports and airlines that channel significant tourist traffic. Enhancing direct flight options from secondary cities in core markets like India and Europe could help

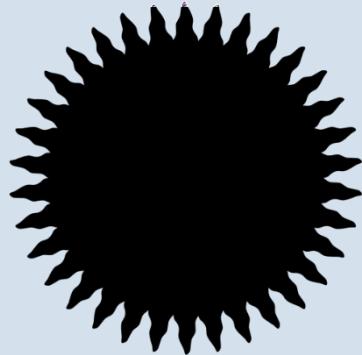
capture greater market share. Additionally, partnerships with transit hubs in the Gulf and Southeast Asia should be strengthened to ensure convenient and cost-effective connectivity for long haul travelers. Understanding these routing patterns allows tourism authorities and aviation planners to better align marketing efforts, negotiate new air services, and ultimately make Sri Lanka more accessible to a diverse and growing visitor base.

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

A percentage breakdown of airline preferences among tourists to Sri Lanka from top ten source markets in December, reveals clear patterns of loyalty, accessibility, and strategic routing. The dominance of Sri Lankan Airlines is particularly strong in near-region markets, carrying 44.74% of Indian tourists and 44.70% of Australian visitors, underscoring its role as the preferred carrier for both short-haul and long-haul travel from these regions, likely due to direct flight availability and competitive pricing.

For long-haul European markets such as the United Kingdom, Germany, France, and Italy, travel is more distributed across multiple full-service carriers, with significant reliance on Middle Eastern airlines like Qatar Airways, Emirates, and Etihad Airways. This reflects the importance of connectivity via the Gulf, offering travelers flexibility and frequent connections. Notably, Russian tourists show a distinct reliance on Red Wings Airlines (38.21%) and Aeroflot (17.30%), alongside Gulf-based carriers like Air Arabia, highlighting specialized and adapted air corridors amid broader aviation restrictions.

Niche and regional carriers also play important roles for specific markets. Chinese tourists heavily use China Eastern Airlines (39.91%) and Cathay Pacific (15.38%), pointing to the influence of home-country carriers and convenient regional hubs. Similarly, Australian tourists frequently travel via Singapore Airlines (17.85%) and AirAsia (8.37%) apart from Sri Lankan Airlines , emphasizing the role of Southeast Asian hubs in connecting Oceania to Sri Lanka. From a strategic perspective, these insights highlight opportunities for route development and airline partnerships. Strengthening Sri Lankan Airlines' presence in under-served European cities, fostering ties with low-cost carriers in price-sensitive markets, and improving connectivity with secondary Chinese and Australian airports could help diversify arrivals and reduce dependency on a few key airlines. This data ultimately underscores the need for tailored aviation and tourism strategy that aligns airline capacity with evolving source market demand.



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