
Introduction

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

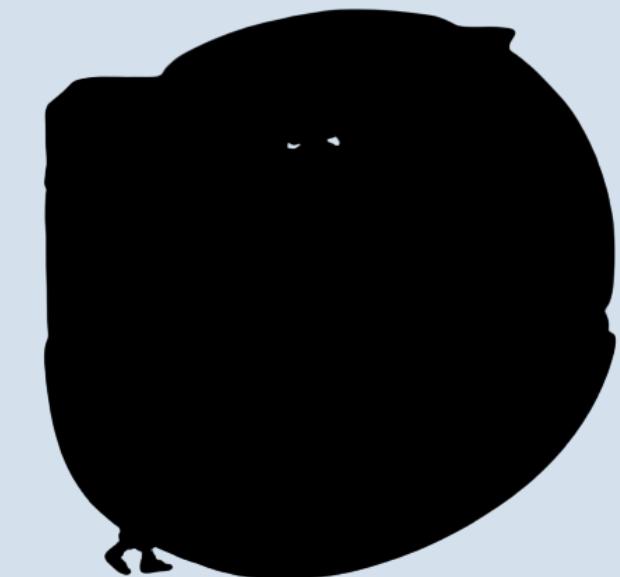
Sri Lanka's tourist arrivals for the first nine months of 2025 show a consistently positive trend compared to the same period in 2024, with each month recording a year-on-year increase. Growth was particularly strong in January, September, August, and June all of which saw increases exceeding 20%. The month of September stood out with arrivals reaching 158,971, marking the highest growth rate of 30.2% among all nine months. Sri Lanka welcomed a total of 1.73 million tourists in the first nine months of 2025, marking a 16.2% increase from the previous year's cumulative total for the same period.

The impressive 30.2% growth in tourist arrivals for September was significantly driven by strong performance in key source markets: India, the United Kingdom, China, Germany, and Australia. Their substantial contribution underscores the restored travel confidence.

UN Tourism reports that the first half of 2025 saw sustained international travel demand, even in the face of growing geopolitical and trade tensions. The main challenges for the year, as indicated by the Panel of Tourism Experts and the UN Tourism Confidence Index, are elevated costs for transport and accommodation, combined with other adverse economic factors.

Table 1. Monthly tourist arrivals, September 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		
November	184,158		
December	248,592		
TOTAL	2,053,465	1,725,494	

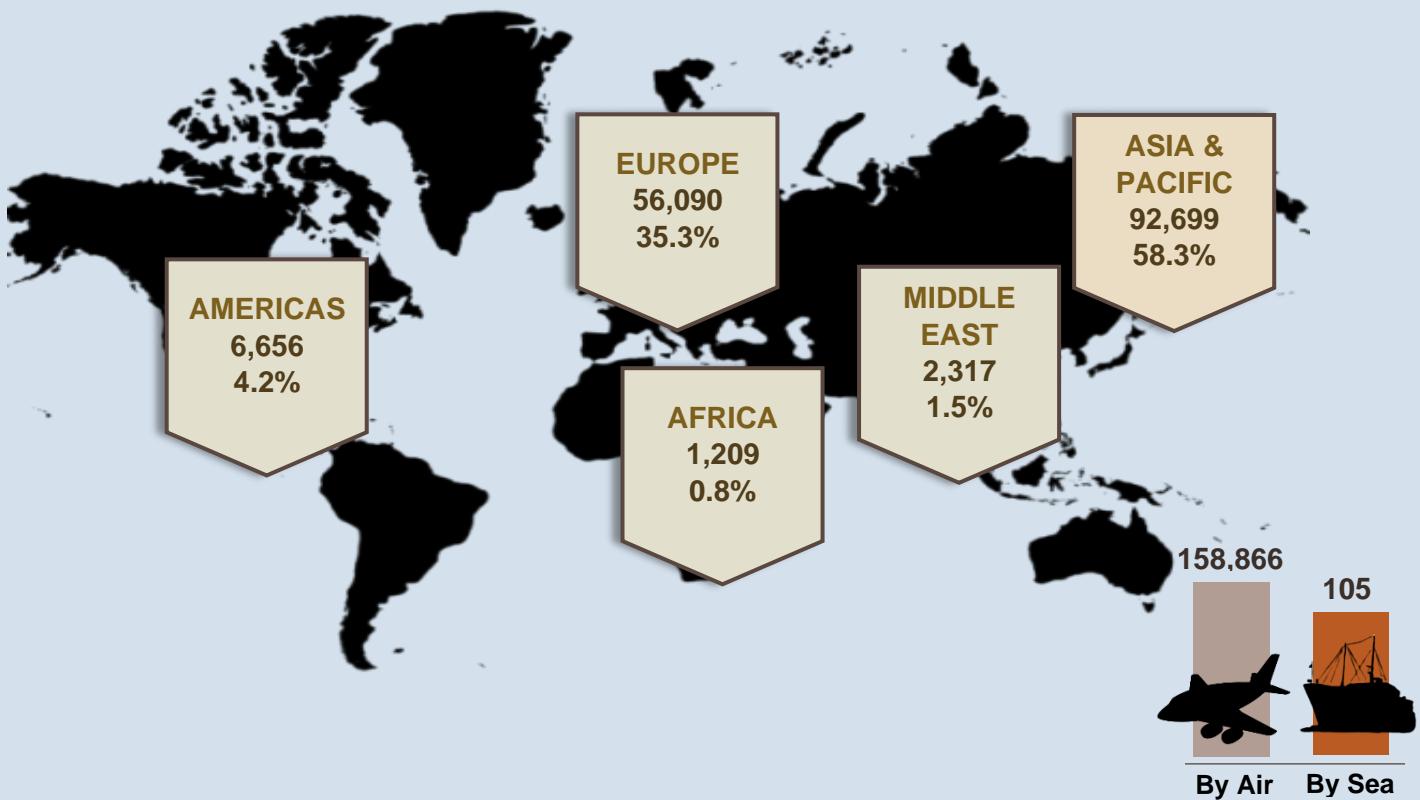


Tourist Arrivals | September 2025

158,971

Tourist arrivals by region and percentage share September 2025

Map 1. Tourist arrivals by region and percentage share



The regional distribution of tourist arrivals to Sri Lanka in the month of September reveals a clear and heavily skewed geographic dependency. The vast majority of visitors, accounting for 58.3% of the total, originate from the Asia & Pacific region, which contributed 92,699 arrivals. This establishes it as the dominant source market, underscoring the critical importance of regional proximity and travel links for Sri Lanka's tourism industry.

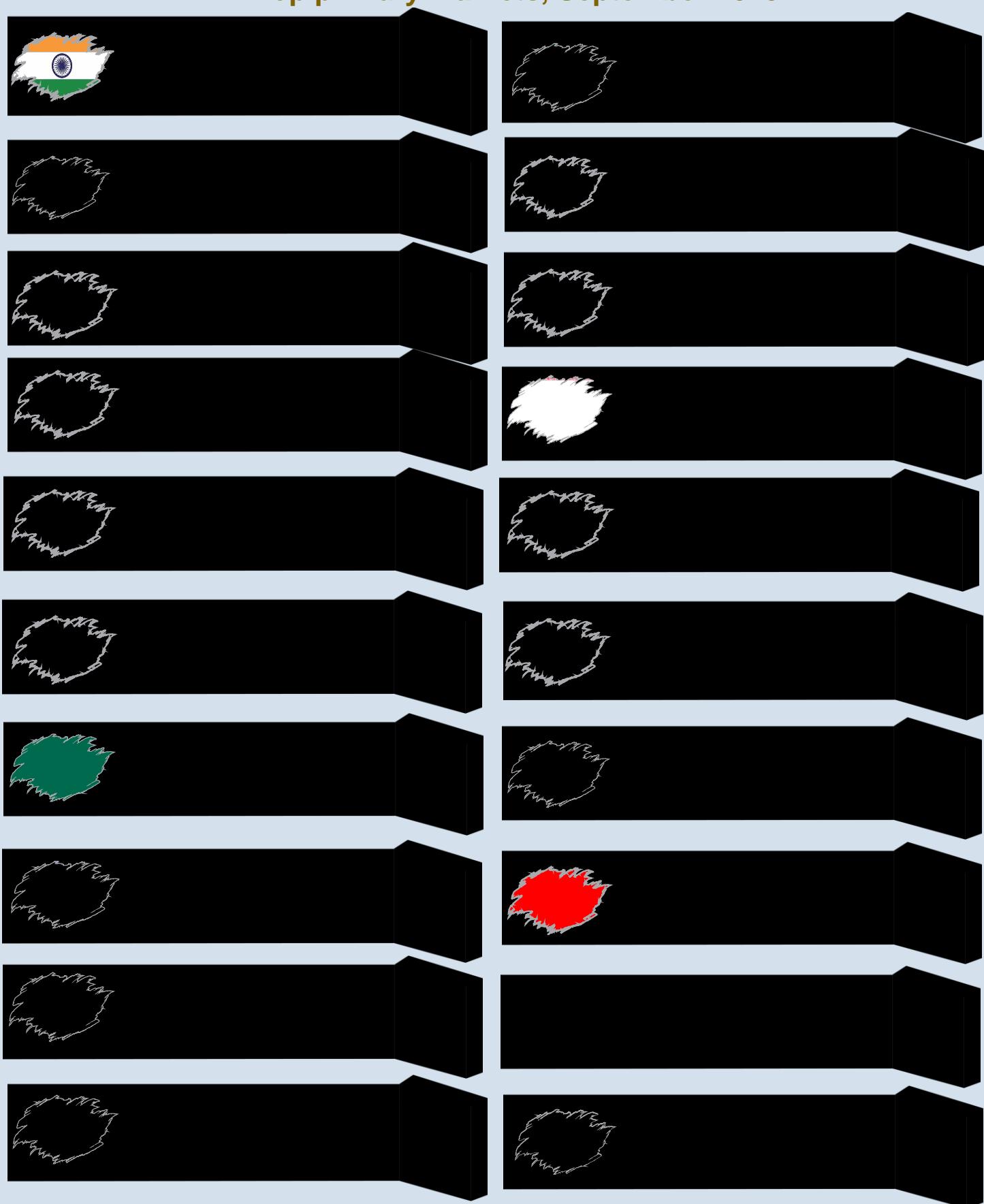
Europe stands as the second most significant contributor, providing 35.3% of total arrivals with 56,090 visitors. This indicates that Europe remains a vital and robust market for Sri Lankan tourism. All other regions play a comparatively minor role. The Americas (6,656 arrivals, 4.2%), the Middle East (2,317, 1.5%), and Africa (1,209, 0.8%) together constitute only a small fraction of the total tourist inflow, suggesting potential for future growth in these markets.





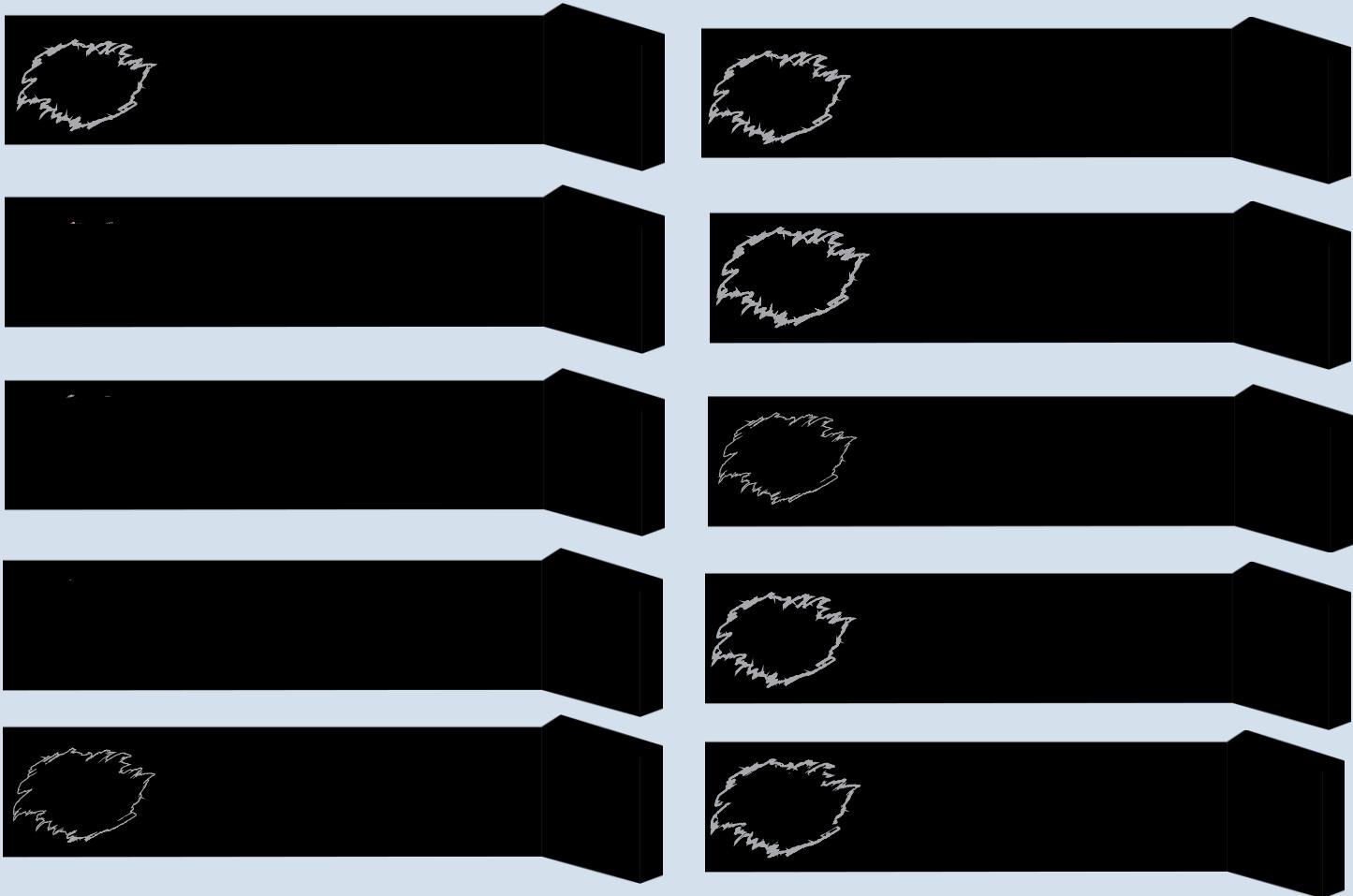
Top primary markets and top potential markets

Top primary markets, September 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, September 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

September 2025

The data on tourist arrivals from key source markets to Sri Lanka for September 2025, compared to the same month in 2024, indicates a period of robust and significant growth for the nation's tourism sector. This surge is likely driven by improved economic stability, restored air connectivity and other factors following recent global and domestic challenges.

A dominant narrative within this growth is the overwhelming performance of the Indian market. India is not merely the top source country but accounts for a staggering 31.3% of all arrivals from the top ten markets, with its numbers seeing a phenomenal 78.2% year-on-year increase. This volume is more than the combined total of the next four countries, highlighting Sri Lanka's profound success in capturing this key market. In contrast, traditional Western markets like the United Kingdom, Germany, Australia, and France also demonstrated strong, consistent double digit growth, confirming Sri Lanka's enduring appeal to long haul travelers. However, the performance across Asian markets was mixed. While Japan and Bangladesh saw healthy growth, China was a notable exception, recording only a 8.7% increase in arrivals. This slow growth amidst broad-based growth presents a critical area for further investigation.

The data also reveals an almost complete reliance on air travel, with arrivals by sea being statistically negligible for all markets except India. This underscores that the health of the tourism industry is directly tied to international flight capacity and connectivity.

The data paints a positive picture of a thriving tourism sector led by an unprecedented surge from India. The key strategic implications moving forward involve understanding the drivers behind the Indian boom, addressing the decline in Chinese visitors, and managing the industry's growth for long-term sustainability and diversification to build a resilient tourism economy.

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

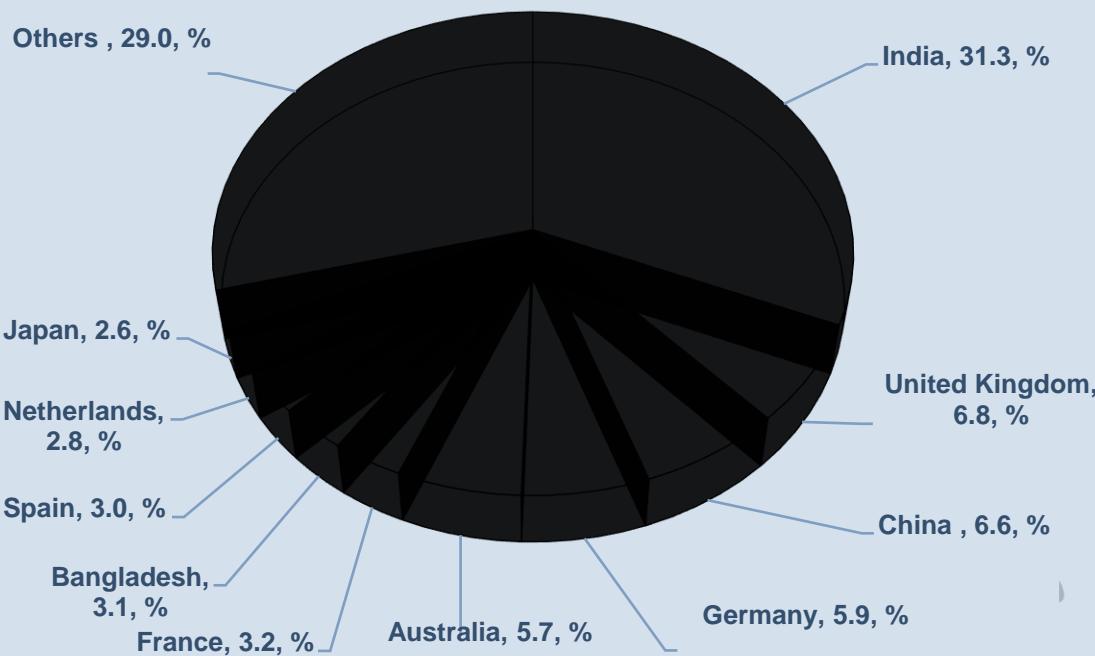
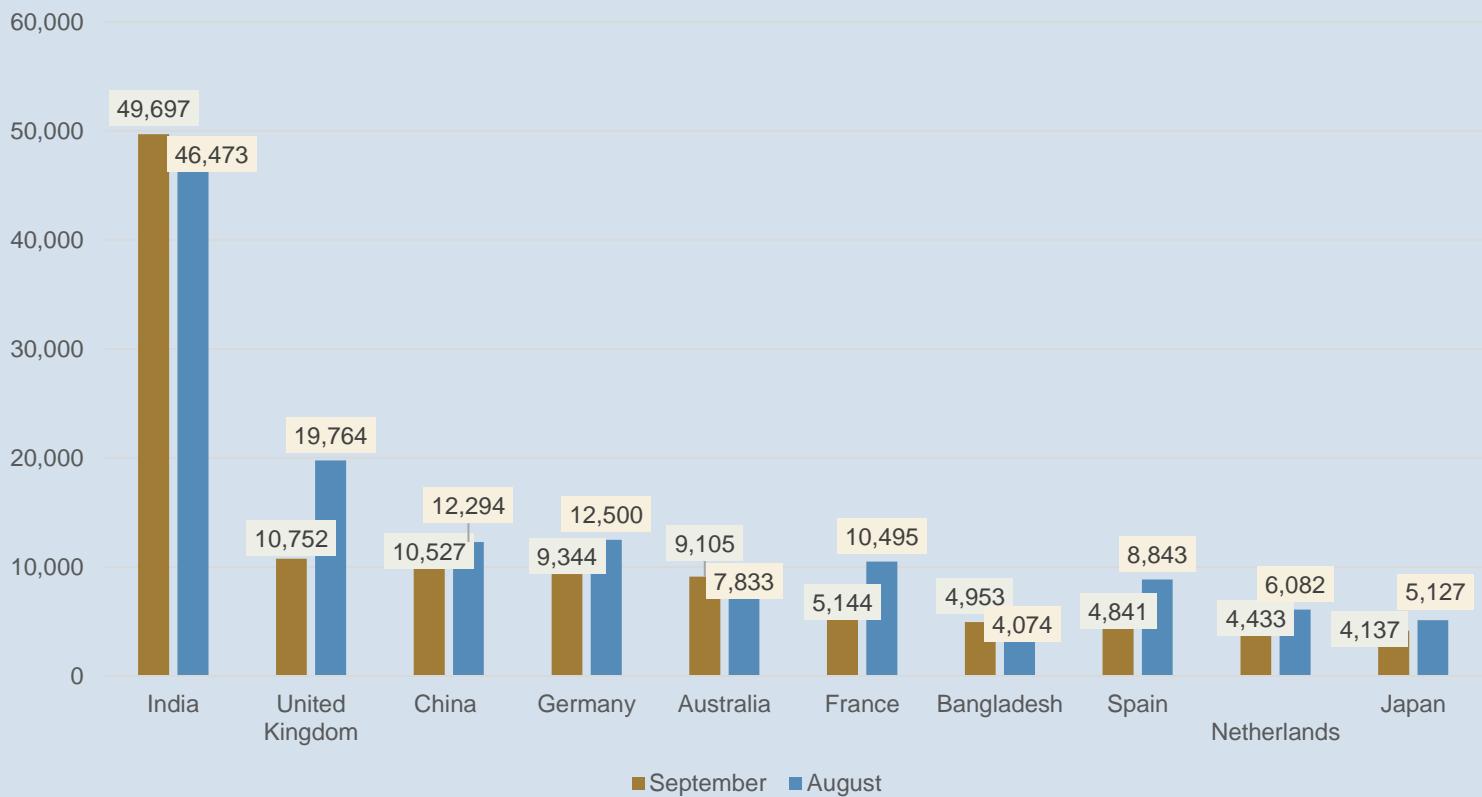


Table 2. Top ten source markets to Sri Lanka, September 2025

Rank	Country of Residence	Tourist arrivals (September 2025)			Tourist arrivals
		By Air	By Sea	Total	(September 2024)
1	India	49,593	104	49,697	27,884
2	United Kingdom	10,752	0	10,752	8,688
3	China	10,527	0	10,527	9,685
4	Germany	9,344	0	9,344	8,260
5	Australia	9,105	0	9,105	7,200
6	France	5,143	01	5,144	3,749
7	Bangladesh	4,953	0	4,953	4,178
8	Spain	4,841	0	4,841	4,166
9	Netherlands	4,433	0	4,433	3,725
10	Japan	4,137	0	4,137	3,526

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

Top ten source markets

January to September 2025

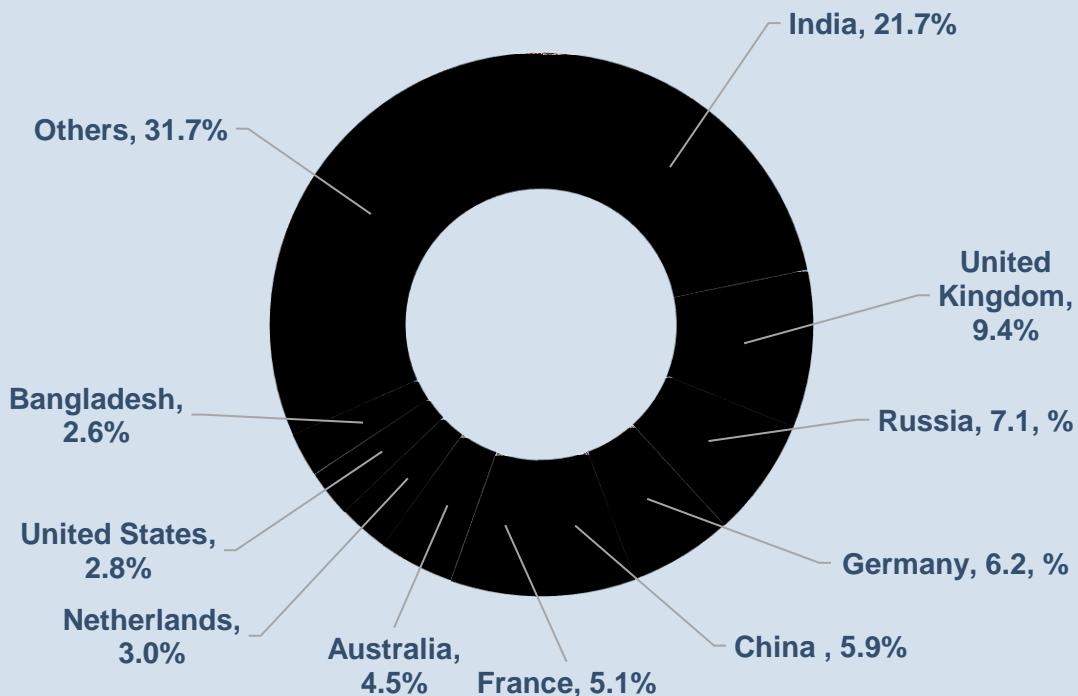
Cumulative tourist arrival data of key source markets from January to September 2025 reveals that, India continues to dominate as Sri Lanka's primary source market, contributing 375,292 arrivals a substantial increase of 88,736 visitors compared to the previous year. This not only solidifies India's position as the largest market. The United Kingdom maintains its position as the second key market with 161,893 arrivals, followed by the Russian Federation, Germany, and China. Notably, while most top markets showed growth, arrivals from Russia and China saw a slight decline, suggesting potential challenges or shifting travel patterns in these regions that may require attention.

A deeper analysis reveals impressive growth from several European and Asia Pacific markets. France, Australia, and the Netherlands all recorded strong double-digit growth, with France increasing by 17,065 arrivals and Australia by over 15,376. Bangladesh demonstrated the most remarkable percentage growth among the top markets, with arrivals surging from 28,294 to 45,438, an increase of over 60%. This diversification across geographical markets reduces Sri Lanka's dependency on any single source country and contributes to a more resilient tourism ecosystem.



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

Rank	Country of Residence	Tourist Arrivals (Jan ~ September 2025)	Tourist Arrivals Jan ~ September 2024)
1	India	375,292	286,556
2	United Kingdom	161,893	136,464
3	Russian Federation	122,144	127,232
4	Germany	106,988	99,571
5	China	101,590	104,222
6	France	88,155	71,090
7	Australia	77,380	62,004
8	Netherlands	52,210	39,977
9	United States	48,174	43,678
10	Bangladesh	45,438	28,294
11	Others	546,230	485,720
Total		1,725,494	1,484,808

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

Tourist arrivals by purpose of visit

September 2025

Out of the total tourist arrivals recorded in the month of September, the majority of visitors, 92,225 or 58.01%, arrived for pleasure or vacation. This shows that Sri Lanka continues to be viewed primarily as a leisure destination, with beaches, cultural heritage, and nature based attractions serving as the main pull factors for tourists.

Two midsized categories, MICE (Meetings, Incentives, Conferences, Exhibitions) and Visiting Friends and Relatives (VFR) each contributed around 7.5% of arrivals, with 12,054 and 12,022 tourists respectively. Together, these two groups make up around 15% of arrivals, pointing to opportunities for diversifying beyond leisure tourism. Business travel, which accounted for 5,618 arrivals or 3.53%, also reflects steady inflows that could be expanded by positioning Sri Lanka as a regional hub for corporate travel and conventions.

Smaller, niche categories such as sports (0.59%), health/Ayurvedic (0.41%), religious (0.26%), education (0.08%), and official travel (0.0025%) represent under 1% of arrivals each. While small in volume, these segments carry strong growth potential given Sri Lanka's cultural heritage, wellness traditions, and growing interest in sports tourism. Strategic investments in these areas could help create a more balanced and resilient tourism sector.

Overall, the data shows that Sri Lanka's tourism is still heavily dependent on leisure travel, but with clear potential to diversify. Strengthening leisure offerings, expanding MICE and diaspora related travel, and nurturing niche markets such as wellness, religious, and sports tourism could create a more sustainable and competitive industry in the long run.

Chart 4: Purpose of visit, September 2025

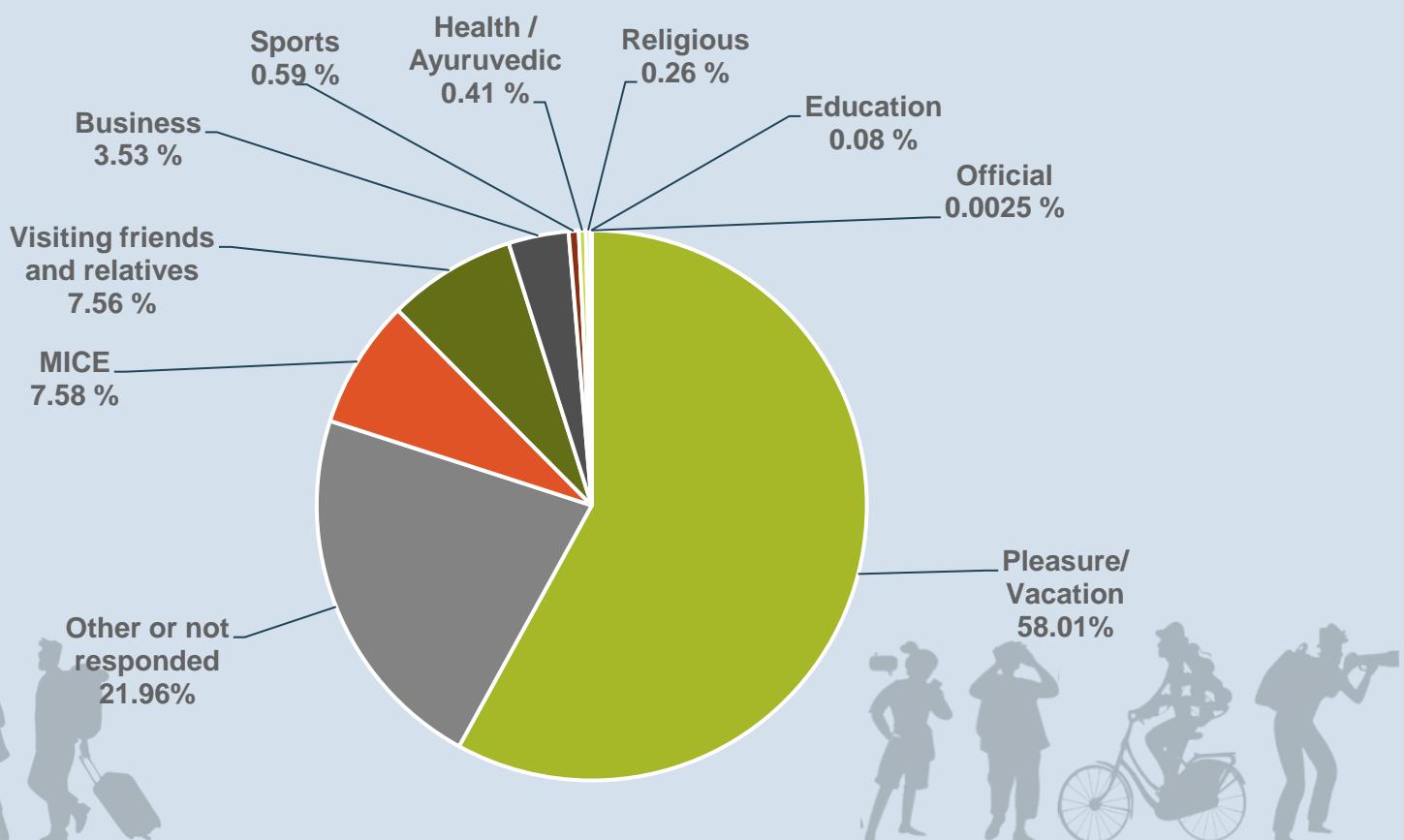
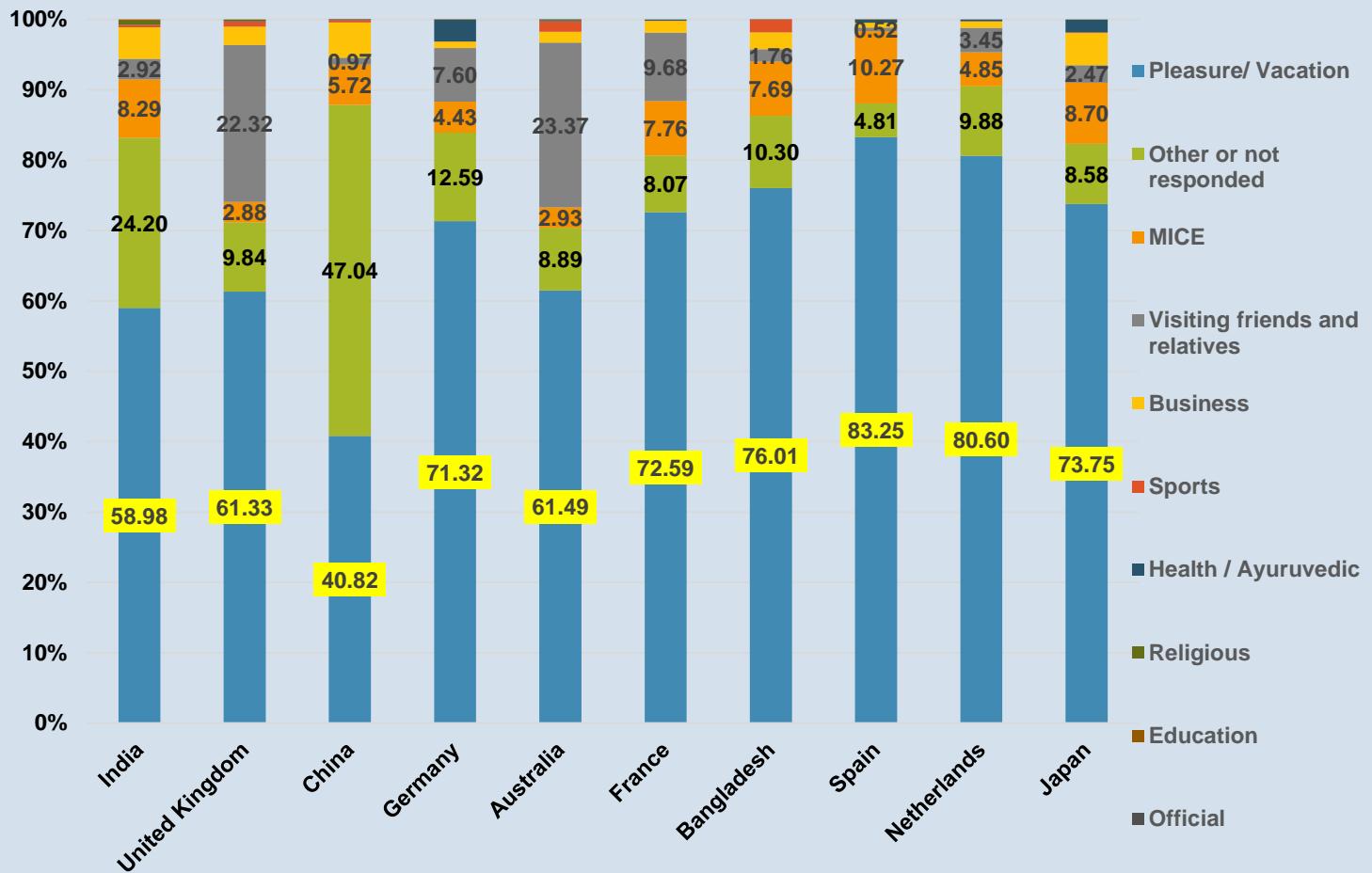


Chart 5: Purpose of visit vs main source markets



The data on tourist arrivals by the top source markets reveals that leisure tourism is the unequivocal engine of visitor arrivals, with "Pleasure/Vacation" being the dominant purpose across all ten source markets. This trend is particularly pronounced in European nations like Spain (83.25%), Netherland (80.60%) and France (72.59%), as well as in Bangladesh (76.01%), positioning them as premier holiday markets. However, a closer look uncovers significant national variations that define distinct tourist profiles. The United Kingdom and Australia stand out for their substantial "Visiting Friends and Relatives" (VFR) segment, at 22.32% and 23.37% respectively, indicating a strong diaspora connection that can be leveraged for resilient, year round travel.

In contrast, markets like India and China present more complex pictures. While pleasure travel leads for India (58.98%), it also shows strong showings in MICE (Meetings, Incentives, Conferences, Exhibitions) and business travel, highlighting its role as a diversified source market.

Beyond the primary purposes, several key secondary segments offer targeted opportunities. The MICE segment is a significant contributor from Spain, Japan, and India, identifying them as key sources for high value business events. Furthermore, a niche but strategically important "Health/Ayurvedic" segment is notably strong among German (3.06%) and Japanese (1.84%) tourists, revealing a clear target for wellness tourism marketing.

While a generic leisure focused strategy serves most markets well, the data compellingly argues for a nuanced approach. Tailored campaigns promoting VFR travel for the UK and Australia, wellness retreats for Germany and Japan, and MICE facilities for Spain, and Japan, India would capitalize on these unique strength.

Navigating the future: Global travel trends and their implications for Sri Lanka

The international travel and tourism (T&T) industry occupies a critical juncture in its developmental trajectory, exhibiting substantial growth potential while simultaneously confronting multifaceted operational challenges. Contemporary analysis by the World Economic Forum indicates that the sector is projected to generate approximately \$16 trillion in contribution to global gross domestic product by 2034. This expansion trajectory will be fundamentally influenced by an array of transformative forces, emergent growth vectors, and structural tension points requiring systematic strategic intervention.

Primary Growth Determinants: Catalysts for Sectoral Expansion

The analytical framework identifies key principle growth determinants positioned to fundamentally reshape the industry landscape:

Demographic and Psychographic Shifts in Traveler Composition: The global traveler demographic is undergoing significant transformation. Projections indicate that by 2030, the Indian and Chinese markets will collectively represent in excess of 25% of global international outbound travel volume. When integrated with the ascendancy of digitally native cohorts specifically Millennials and Generation Z this demographic transition is generating substantial demand for customized, experiential, and digitally-mediated travel products.

High Velocity Market Segments: Specific tourism subsectors are demonstrating growth trajectories substantially exceeding aggregate sectoral performance metrics:

- **Live Events Tourism:** Athletic competitions and musical festivals are experiencing exponential demand growth
- **Ecotourism:** Propelled by heightened environmental consciousness and preference for nature based experiences
- **MICE Tourism:** The meetings, incentives, conferences, and exhibitions segment represent a high yield market category
- **Wellness Tourism:** Health and wellness motivations constitute a primary driver of contemporary travel behaviour

Technological Integration as Operational Facilitator: The deployment of advanced technologies including artificial intelligence driven personalization algorithms, biometric identification systems, and Internet of Things (IoT) infrastructure is optimizing operational efficiency and enhancing visitor experience quality. Market analysis projects that the travel technology sector will experience near doubling in valuation by 2033.

Critical Tension Points: Structural Challenges Requiring Mitigation

Concurrent with these growth opportunities, the sector confronts significant structural challenges:

Vulnerability to Systemic Disruptions: Geopolitical instability, pandemic health events, and macroeconomic volatility possess the capacity to rapidly destabilize travel patterns, with potential economic losses projected at \$6 trillion by 2030.

Community-Visitor Interface Tensions: The phenomenon of overtourism in established destinations is precipitating infrastructural congestion, residential property market distortions, and sociocultural friction, thereby degrading both resident quality of life and visitor satisfaction metrics.

Environmental Degradation Pressures: The T&T sector accounts for approximately 8% of global greenhouse gas emissions, with tourist-generated waste volumes reaching twice the global per capita average. This presents a material threat to the natural capital assets that constitute the foundation of destination attractiveness.

Human Capital Deficiencies: The sector requires approximately 100 million additional workforce participants by 2034, yet confronts persistent challenges including elevated employee turnover rates, competency gaps, and suboptimal employment conditions that constrain talent acquisition and retention.

Capital Investment and Infrastructure Deficits: Accommodating a projected 30 billion tourist movements by 2034 necessitates substantial capital deployment in hospitality infrastructure, transportation networks, and utility systems. Current foreign direct investment levels remain below pre-pandemic thresholds.

Strategic Framework Application: Policy Recommendations for Sri Lanka

For Sri Lanka, designated within the World Economic Forum taxonomy as an "Emerging Tourism Destination," these global dynamics represent immediate operational realities that will determine its sustainable development pathway. The nation's substantial recovery performance in 2025, characterized by a 16.2% year-on-year growth in visitor arrivals during the initial nine-month period, establishes a robust platform for strategic engagement with these transformative forces.

Capitalizing on Growth Vectors for Sri Lankan Tourism Development

Demographic Shift Optimization: Sri Lanka demonstrates existing alignment with this trend trajectory. India constitutes the predominant source market, contributing approximately 375,000 arrivals through September 2025. Strategic priorities should encompass market penetration deepening while simultaneously developing differentiated product offerings targeting value conscious Indian travellers and experience oriented Generation Z segments from European and Australian markets.

High-Growth Segment Penetration: Sri Lanka's natural resource endowment demonstrates optimal alignment with global demand patterns:

- **Ecotourism and Wellness Tourism:** The nation's ecological diversity encompassing tropical rainforest ecosystems, coastal environments, and its indigenous Ayurvedic medical traditions positions it as a premier destination for ecotourism and wellness tourism development. This requires strategic investment in curated experiential products and premium grade infrastructure.
- **MICE Tourism:** Contemporary infrastructure investments can facilitate Sri Lanka's competitive positioning within the high value MICE segment, following the developmental model exemplified by Rwanda as documented in the reference report.

Digital Technology Integration: Systematic enhancement of digital infrastructure across the destination, promotion of cashless transaction systems, and deployment of artificial intelligence for precision marketing can substantially improve visitor experience quality and operational efficiency, particularly benefiting small and medium enterprise operators.

Strategic Mitigation of Structural Tension Points

Systemic Risk Management: Sri Lanka's recent experiential history with crisis events has generated acute institutional awareness. Resilience building requires further source market diversification and establishment of adaptive crisis response protocols to insulate the sector from future disruption scenarios.

Prevention of Overtourism Dynamics: To circumvent the trajectory observed in over tourism affected destinations, Sri Lanka must implement proactive visitor flow management strategies. This encompasses the development of secondary destination nodes including the Eastern Province coastal areas and other least developed areas to achieve geographic dispersion, coupled with implementation of community benefit distribution mechanisms ensuring tangible local economic participation.

Regenerative Tourism Implementation: Environmental pressure represents a critical vulnerability factor. Initiatives addressing coastal waste management, marine biodiversity conservation, and renewable energy adoption within the hospitality sector constitute not merely ethical imperatives but essential strategic interventions to preserve the destination's brand positioning.

Human Capital Development: Escalating arrival volumes generate corresponding workforce pressure. Sri Lanka must enhance career attractiveness within the tourism sector through improved vocational training programs, competitive compensation structures, and clearly articulated career progression pathways to ensure talent retention and maintenance of the destination's hospitality service reputation.

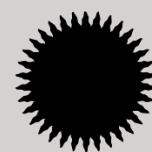
Infrastructure Investment Mobilization: Sustained growth trajectories demand capital allocation to efficient transportation systems, environmentally sustainable accommodation capacity, and utility infrastructure. Promotion of green infrastructure development paradigms and public-private partnership mechanisms will prove essential to capacity building while maintaining environmental and social sustainability parameters.

Conclusion

Sri Lanka's tourism recovery trajectory presents a strategic opportunity of significant magnitude. Through deliberate alignment with global high growth segments and proactive management of inherent structural tension points, the destination can effectuate a transition from volume-oriented development to value-based positioning, thereby achieving a resilient, socially inclusive, and environmentally sustainable tourism economy generating equitable benefits for both international visitors and domestic stakeholders.

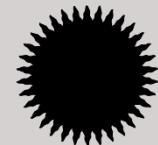
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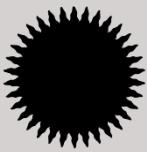


International tourist arrivals by country of residence

	September 2025			Tourist arrivals Sep 2024	% change Sep (25/24)	Total tourist arrivals up to Sep 2025	Total tourist arrivals up to Sep 2024	% change up to Sep (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
AMERICAS	6,656	0	6,656	4,961	34.2	90,021	81,718	10.2					
North America	6,158	0	6,158	4,655	32.3	85,382	77,439	10.3					
Canada	2,513	0	2,513	2,095	20.0	36,424	33,007	10.4					
Mexico	76	0	76	100	(24.0)	784	754	4.0					
United States	3,569	0	3,569	2,460	45.1	48,174	43,678	10.3					
Caribbean & Central America	107	0	107	62	72.6	781	719	8.6					
Costa Rica	05	0	05	02	150.0	83	73	13.7					
Jamaica	05	0	05	12	(58.3)	36	77	(53.2)					
Others	97	0	97	44	120.5	662	569	16.3					
South America	391	0	391	248	57.7	3,858	3,560	8.4					
Argentina	83	0	83	45	84.4	704	675	4.3					
Brazil	123	0	123	100	23.0	1,434	1,426	0.6					
Chile	38	0	38	32	18.8	489	431	13.5					
Colombia	58	0	58	26	123.1	521	493	5.7					
Others	89	0	89	45	97.8	710	535	32.7					
AFRICA	1,209	0	1,209	931	29.9	12,183	9,775	24.6					
North Africa	300	0	300	210	42.9	2,699	2,348	14.9					
Morocco	89	0	89	78	14.1	848	747	13.5					
Sudan	82	0	82	62	32.3	921	628	46.7					
Others	129	0	129	70	84.3	930	973	(4.4)					
Sub-Saharan Africa	909	0	909	721	26.1	9,484	7,427	27.7					
Kenya	68	0	68	79	(13.9)	903	566	59.5					
Mauritius	47	0	47	20	135.0	579	363	59.5					
Nigeria	30	0	30	18	66.7	106	57	86.0					
South Africa	409	0	409	299	36.8	3,627	3,204	13.2					
Others	355	0	355	305	16.4	4,269	3,237	31.9					



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	Tourist arrivals					Total tourist arrivals up to Sep 2025	Total tourist arrivals up to Sep 2024	% change up to Sep (25/24)		
	By Air	By Sea	Total			Total tourist arrivals up to Sep 2025	Total tourist arrivals up to Sep 2024	% change up to Sep (25/24)		
ASIA & PACIFIC	92,595	104	92,699	64,764	43.1	754,150	615,151	22.6		
North East Asia	15,257	0	15,257	13,839	10.2	139,225	134,045	3.9		
China	10,527	0	10,527	9,685	8.7	101,590	104,222	(2.5)		
Japan	4,137	0	4,137	3,526	17.3	28,799	22,260	29.4		
South Korea	567	0	567	608	(6.7)	8,678	7,470	16.2		
Others	26	0	26	20	30.0	158	93	69.9		
South East Asia	5,528	0	5,528	4,152	33.1	49,347	39,356	25.4		
Cambodia	25	0	25	55	(54.5)	1,033	1,012	2.1		
Indonesia	378	0	378	431	(12.3)	3,627	2,536	43.0		
Malaysia	2,570	0	2,570	1,954	31.5	17,471	14,053	24.3		
Myanmar	166	0	166	33	-	1,858	1,286	44.5		
Philippines	643	0	643	398	61.6	5,101	3,977	28.3		
Singapore	1,053	0	1,053	710	48.3	10,817	8,666	24.8		
Thailand	449	0	449	384	16.9	6,257	5,395	16.0		
Vietnam	216	0	216	183	18.0	2,897	2,257	28.4		
Others	28	0	28	04	-	286	174	64.4		
Oceania	10,350	0	10,350	8,285	24.9	87,120	70,295	23.9		
Australia	9,105	0	9,105	7,200	26.5	77,380	62,004	24.8		
New Zealand	1,200	0	1,200	1,033	16.2	9,411	8,025	17.3		
Others	45	0	45	52	(13.5)	329	266	23.7		
South Asia	61,460	104	61,564	38,488	60.0	478,458	371,455	28.8		
Afghanistan	05	0	05	05	-	65	125	(48.0)		
Bangladesh	4,953	0	4,953	4,178	18.5	45,438	28,294	60.6		
Bhutan	70	0	70	45	55.6	487	504	(3.4)		
India	49,593	104	49,697	27,884	78.2	375,292	286,556	31.0		
Iran	846	0	846	1,227	(31.1)	7,460	8,669	(13.9)		
Maldives	3,930	0	3,930	4,359	(9.8)	28,141	34,457	(18.3)		
Nepal	595	0	595	234	154.3	4,272	3,076	38.9		
Pakistan	1,468	0	1,468	556	164.0	17,303	9,774	77.0		
EUROPE	56,089	01	56,090	49,880	12.4	844,870	755,815	11.8		
Northern Europe	13,080	0	13,080	10,653	22.8	204,427	173,715	17.7		
Denmark	601	0	601	566	6.2	13,315	11,464	16.1		
Finland	193	0	193	165	17.0	3,095	2,753	12.4		
Norway	515	0	515	443	16.3	9,742	8,696	12.0		
Sweden	401	0	401	345	16.2	8,526	7,889	8.1		
United Kingdom	10,752	0	10,752	8,688	23.8	161,893	136,464	18.6		
Others	618	0	618	446	38.6	7,856	6,449	21.8		



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	Tourist arrivals							
	By Air	By Sea	Total					
Western Europe	23,595	01	23,596	19,956	18.2	302,914	259,312	16.8
Austria	708	0	708	757	(6.5)	12,924	12,080	7.0
Belgium	1,732	0	1,732	1,669	3.8	17,054	13,645	25.0
France	5,143	01	5,144	3,749	37.2	88,155	71,090	24.0
Germany	9,344	0	9,344	8,260	13.1	106,988	99,571	7.4
Netherlands	4,433	0	4,433	3,725	19.0	52,210	39,977	30.6
Switzerland	2,193	0	2,193	1,778	23.3	24,832	22,277	11.5
Others	42	0	42	18	133.3	751	672	11.8
Central/Eastern Europe	8,536	0	8,536	8,565	(0.3)	223,276	226,382	(1.4)
Belarus	208	0	208	177	17.5	5,958	7,592	(21.5)
Czech Republic	641	0	641	496	29.2	13,478	14,894	(9.5)
Estonia	39	0	39	45	(13.3)	2,837	2,859	(0.8)
Hungary	136	0	136	137	(0.7)	4,492	4,523	(0.7)
Kazakhstan	118	0	118	99	19.2	7,966	8,949	(11.0)
Lithuania	144	0	144	92	56.5	5,067	4,755	6.6
Poland	2,654	0	2,654	2,243	18.3	35,606	30,636	16.2
Romania	198	0	198	254	(22.0)	4,233	4,279	(1.1)
Russia	3,228	0	3,228	4,199	(23.1)	122,144	127,232	(4.0)
Slovakia	335	0	335	255	31.4	5,131	4,822	6.4
Ukraine	303	0	303	191	58.6	6,091	5,039	20.9
Others	532	0	532	377	41.1	10,273	10,802	(4.9)
Southern/Mediterranean Europe	10,878	0	10,878	10,706	1.6	114,253	96,406	18.5
Greece	220	0	220	106	107.5	3,035	1,918	58.2
Italy	2,340	0	2,340	1,902	23.0	39,030	29,346	33.0
Portugal	459	0	459	410	12.0	5,768	4,364	32.2
Spain	4,841	0	4,841	4,166	16.2	34,436	28,014	22.9
Turkey	423	0	423	361	17.2	6,085	4,841	25.7
Israel	2,136	0	2,136	3,142	(32.0)	17,553	20,515	(14.4)
Others	459	0	459	619	(25.8)	8,346	7,408	12.7
MIDDLE EAST	2,317	0	2,317	1,604	44.5	24,270	22,349	8.6
Bahrain	76	0	76	54	40.7	1,063	938	13.3
Egypt	261	0	261	232	12.5	3,122	2,840	9.9
Iraq	302	0	302	81	-	1,265	773	63.6
Jordan	177	0	177	151	17.2	2,099	1,926	9.0
Kuwait	142	0	142	119	19.3	1,529	1,569	(2.5)
Lebanon	261	0	261	163	60.1	2,510	2,575	(2.5)
Oman	199	0	199	185	7.6	2,103	2,309	(8.9)
Qatar	34	0	34	19	78.9	733	597	22.8
Saudi Arabia	326	0	326	319	2.2	4,639	4,639	0.0
United Arab Emirates	464	0	464	270	71.9	4,295	3,384	26.9
Others	75	0	75	11	-	912	799	14.1
TOTAL	158,866	105	158,971	122,140	30.2	1,725,494	1,484,808	16.2

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

The data on tourist arrivals by their last port of departure reveals that a handful of key cities function as the primary gateways, underscoring their critical role in the destination's tourism ecosystem.

The top four ports Chennai (11.65%), Doha (11.25%), Dubai (9.18%), and Abu Dhabi (7.95%) collectively account for over 40% of all tourist arrivals. This highlights Chennai's position as the single most important point of departure, likely due to its geographic proximity and strong cultural and economic links. The significant contributions from Doha, Dubai, and Abu Dhabi emphasize the vital function of Middle Eastern hubs as major international transit centers, connecting long haul flights from Europe, America, and other regions to the destination. The strong presence of other Indian cities like Mumbai, Bangalore, and Delhi further cements India's status as the dominant source market, with multiple direct flight connections.

Beyond these key regions, the list shows important secondary contributors. Southeast Asian hubs like Kuala Lumpur and Singapore play a notable role, while the presence of London and Australian cities like Melbourne and Sydney, though smaller in percentage, confirms a steady long haul tourist inflow from the West. The concentration of traffic is striking; the top 10 ports alone represent over 70% of all arrivals. This presents both an opportunity and a vulnerability. It allows for targeted marketing and resource allocation in these key cities but also exposes the tourism industry to significant risk from disruptions such as geopolitical issues, airline failures, or health crises in these specific hubs.

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

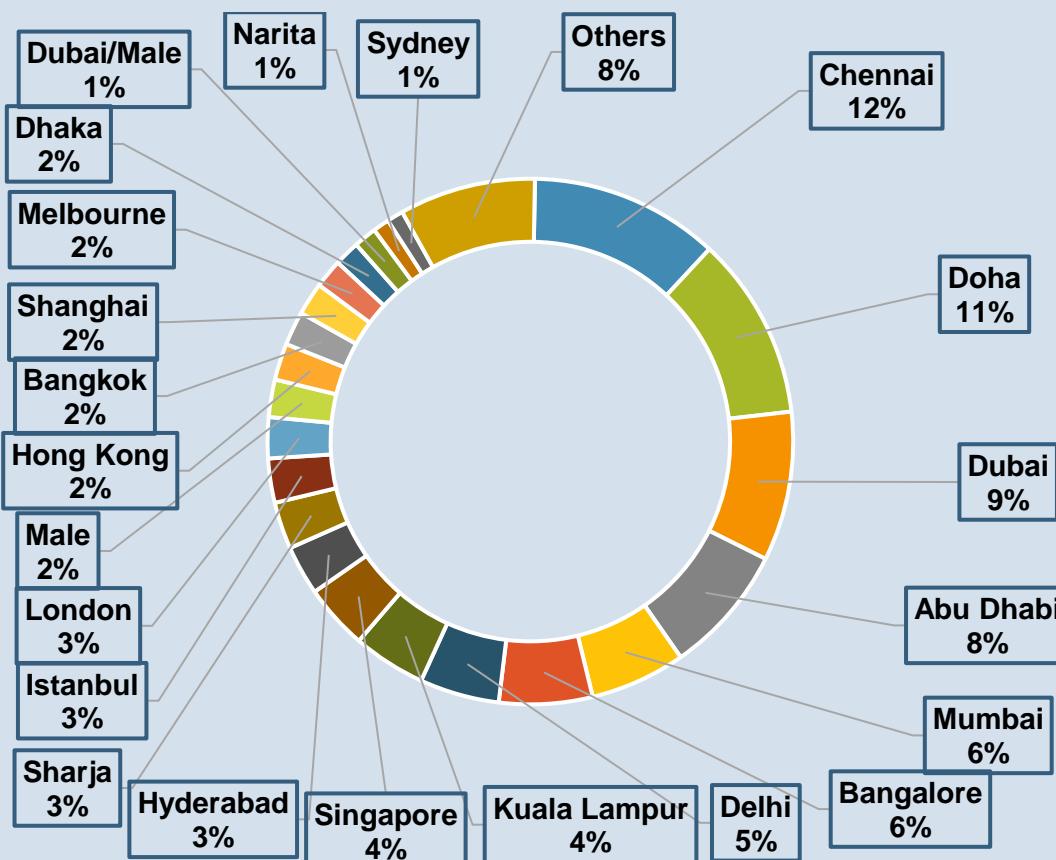
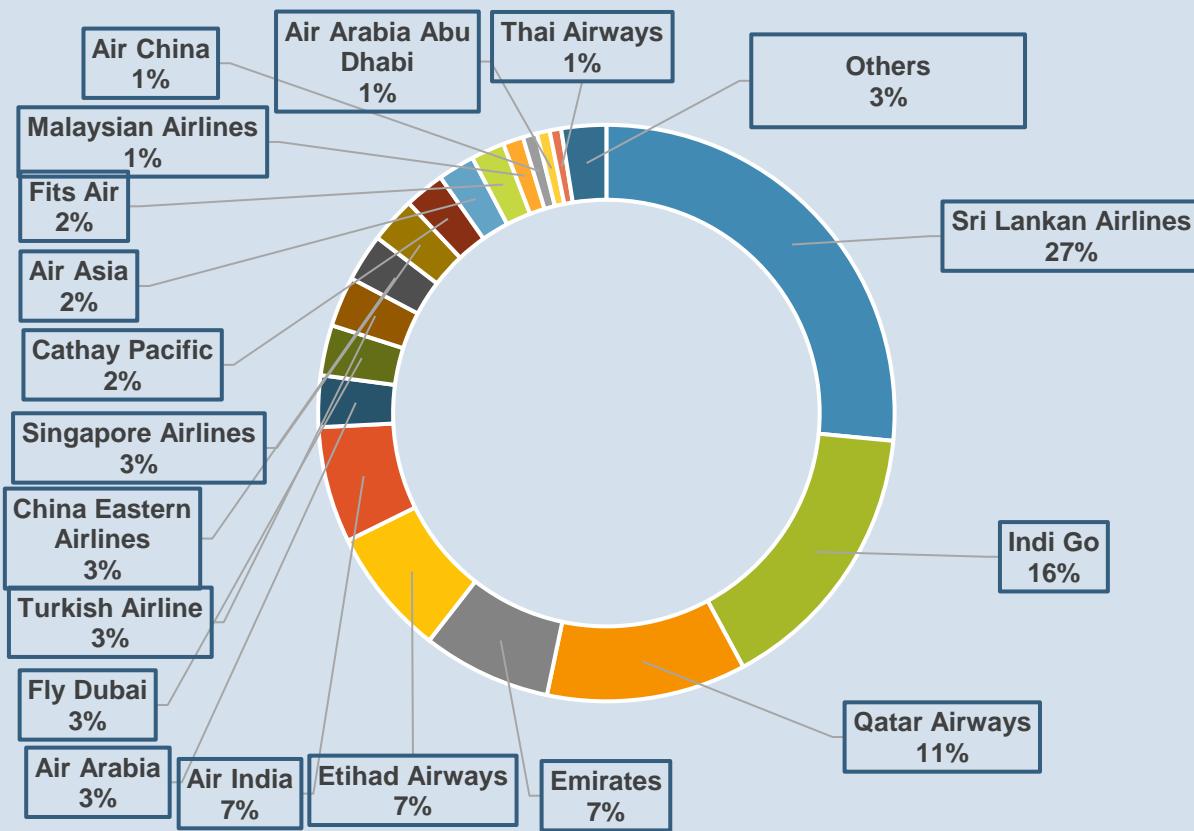


Chart 7. Main airlines to Sri Lanka, September 2025



The airline market share for tourist arrivals in Sri Lanka for the month of September reveals a landscape dominated by the national carrier, with significant contributions from a mix of international and regional airlines. Sri Lankan Airlines stands as the unequivocal market leader, carrying over a quarter (26.54%) of all tourists. This underscores its pivotal role as the primary aerial gateway to the country, leveraging its extensive network and frequency of flights to key source markets.

The composition of the top airlines highlights the critical importance of the Indian subcontinent and the Middle East as source and transit regions. Indi Go, a key Indian low cost carrier, is the second largest airline, responsible for 15.59% of arrivals, which aligns with India's status as a primary source market. Furthermore, the strong presence of Middle Eastern giants, Qatar Airways (11.18%), Emirates (7.22%), and Etihad Airways (7.17%) collectively accounting for over 25% of traffic, confirms the strategic role of hubs like Doha, Dubai, and Abu Dhabi in funneling international tourists, particularly from long haul markets in Europe and beyond. Air India also features prominently, reinforcing the high volume of travel from the region.

Beyond these major players, the market includes a long tail of other international carriers, each serving specific geographic niches. Airlines like Turkish Airlines, Singapore Airlines, and Cathay Pacific facilitate connectivity from Europe, Southeast Asia, and East Asia, respectively. The presence of Chinese carriers like China Eastern Airlines, though representing a smaller share, points to the nascent but direct connectivity with the Chinese market. This distribution indicates a healthy diversity in air access, reducing over reliance on a single carrier or region. However, the high concentration of traffic with the top six airlines (over 75%) also suggests that the tourism industry's fortunes are closely tied to the flight schedules and commercial health of these key operators, a vital factor for aviation and tourism strategy.

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

September 2025

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

The data on last departure airports analysed against the top source markets provides a crucial strategic view, revealing the specific air travel pathways used by the top ten tourist source markets to reach Sri Lanka. The analysis clearly demonstrates that there is no single route to the destination; instead, tourist arrival patterns are defined by strong regional affiliations and the gravitational pull of major international airline hubs. The dominance of specific last departure ports varies dramatically by source country, painting a picture of distinct geographic corridors.

The data solidifies India's position as the dominant market, with its arrivals primarily flowing through its own major cities, acting as direct points of departure. Chennai is the single largest gateway for Indian's, followed closely by Bangalore, Mumbai, and Delhi. This indicates robust direct air connectivity that bypasses the need for third country hubs. In stark contrast, long haul markets like the United Kingdom, Germany, France, and Spain show an overwhelming reliance on Middle Eastern hubs. For these European travelers, Dubai, Doha, and Abu Dhabi serve as the primary transit points, underscoring the competitive strength and convenient flight schedules of carriers like Emirates, Qatar Airways, and Etihad on these routes.

Other markets reveal more specialized routing patterns. Chinese tourists, for instance, show a heavy dependence on hubs within their region, with Shanghai, Hong Kong, Kuala Lumpur, and Singapore being key departure points. Similarly, Australian arrivals are heavily channeled through Singapore and, to a lesser extent, Kuala Lumpur, highlighting the role of Southeast Asia as a vital transit bridge. Unique niche routes also emerge, such as the significant flow of Bangladeshi tourists departing from Dhaka and Male.

This table is a map of Sri Lanka's aviation dependencies and opportunities. It confirms the critical importance of maintaining strong direct connections with India, while also highlighting the indispensable role of Middle Eastern and Southeast Asian hubs in accessing valuable long haul markets in Europe, Australia, and China. For tourism and aviation authorities, this data is essential for co-operative marketing with key airlines and airports, and for understanding the potential impact of disruptions at these critical transit points.

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

The above table provides a critical layer of understanding by revealing the airline preferences of the top ten tourist source markets, effectively mapping the competitive landscape of aviation connectivity to Sri Lanka. The data reveals that the choice of airline is not random but is deeply influenced by geographic proximity, existing airline alliances and partnerships, and the strength of specific national carriers in their home markets. The dominance of certain airlines varies dramatically from one source country to another, creating distinct travel corridors.

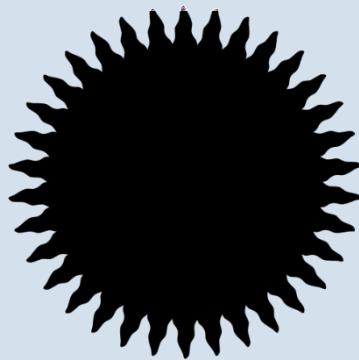
A clear dichotomy emerges between the Indian market and all others. For Indian tourists, the market is a direct duopoly between Sri Lankan Airlines (33.67%) and the low-cost carrier Indigo (44.72%), which together command nearly 80% of the traffic. This reflects intense direct competition on one of the most vital short haul routes. In stark contrast, long haul European travelers from the UK, Germany, France, Spain, and the Netherlands show an overwhelming reliance on the trio of Middle Eastern carriers: Qatar Airways, Emirates, and Etihad Airways. For instance, a remarkable 87% of Spanish tourists and 82% of Dutch tourists flew with one of these three airlines, highlighting the pivotal role of the Gulf hubs as transit points for European traffic.

Other markets demonstrate more diversified or niche airline allegiances. The Chinese market is fragmented, with a significant portion carried by its own carriers, China Eastern Airlines (33.35%) and Air China (11.80%), alongside other Asian airlines like Cathay

Pacific. Australian and Japanese tourists show a strong preference for Sri Lankan Airlines, but also heavily utilize Singapore Airlines and other Southeast Asian carriers, pointing to Singapore's role as a key southern transit hub. Notably, the Bangladeshi market relies on Sri Lankan airlines and significantly on regional low cost carriers, like Fits air capturing over 36% of its traffic, indicating a price sensitive travel segment.

This analysis underscores that Sri Lanka's tourism industry is supported by a multi polar aviation strategy. While the national carrier, Sri Lankan Airlines, plays a crucial role across several key markets, its influence is balanced by powerful international alliances and dominant foreign carriers that control access to specific regions. This data is invaluable and indicate that cooperative marketing should be strategically aligned not just with source countries, but with the specific airlines that act as the primary gateways for those tourists. It also reveals vulnerabilities, as shifts in airline strategy or disruptions at key hubs like Doha or Dubai could disproportionately affect arrivals from Europe.





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