
Introduction

The following document provides a synthesis of the most recent November 2025 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st Nov 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 demonstrates strong recovery momentum, with visitor arrivals through the first eleven months of 2025 showing substantial growth compared to the corresponding period in 2024. When comparing the two years month by month, every recorded month in 2025 shows positive growth over 2024, highlighting increased traveller confidence. The cumulative arrivals from January to November already amount to 2,103,593, demonstrating a solid upward trajectory and a growth of 16.6% in comparison to same period last year.

Seasonal patterns remain evident, yet the growth is spread across almost all periods of the year. The highest increase is observed in September, which recorded an impressive 30.2% rise, suggesting that Sri Lanka is successfully attracting more visitors during the traditional shoulder season. Strong double digit growth is also visible in January, June, October, April, May, August, and November, which collectively point to a consistent rise in demand across multiple tourism periods.

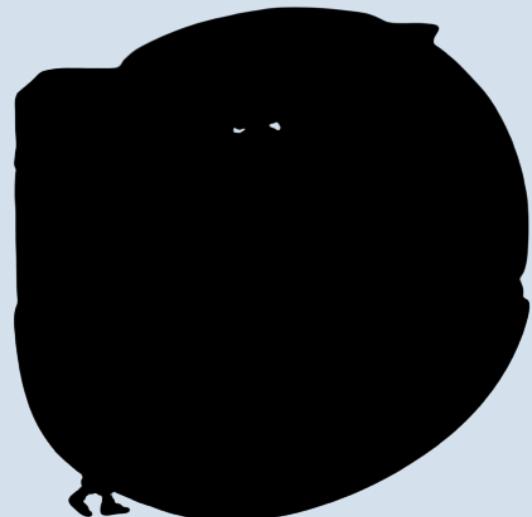
This indicates that the recovery is not limited to the high season, but rather is balanced throughout the year, enhancing sector resilience.

Several factors are likely contributing to the strong growth performance. Improved air connectivity, especially from India, the Middle East, Russia, and key European markets, is likely to have supported increased arrivals. In addition, the global tourism rebound during 2025 appears to be benefitting the country as travellers continue returning to destinations offering nature, culture, and outdoor experiences.

Overall, the data portrays a sector that is recovering steadily and strengthening throughout 2025. If December follows the year's growth patterns, Sri Lanka could achieve its growth targets, marking an encouraging milestone in post-crisis recovery. The consistent expansion across most months reflects improving competitiveness and growing global interest, positioning the tourism industry for further growth in the coming years.

Table 1. Monthly tourist arrivals, November 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		
TOTAL	2,053,465	2,103,593	

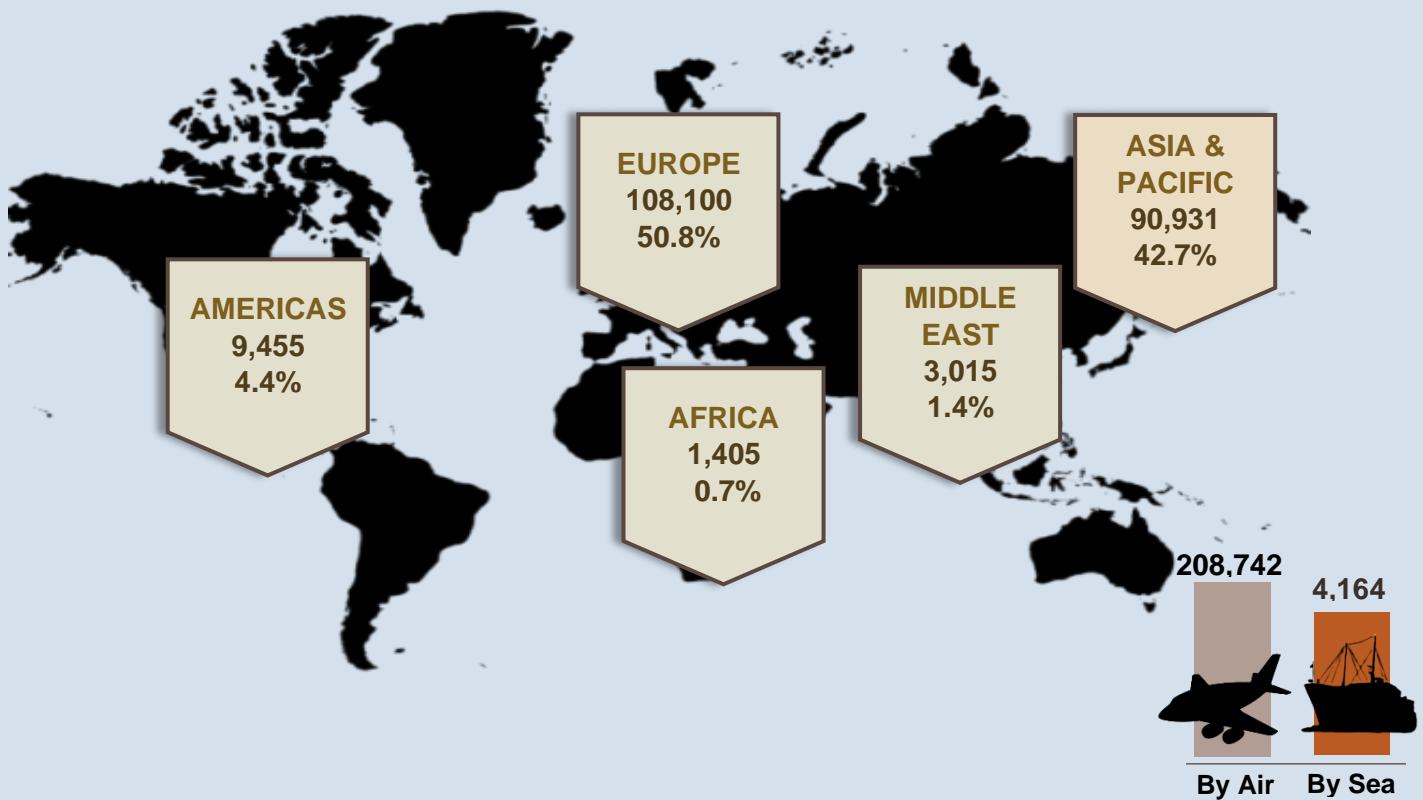


Tourist Arrivals | November 2025

212,906

Tourist arrivals by region and percentage share November 2025

Map 1. Tourist arrivals by region and percentage share



Sri Lanka's November 2025 tourist arrival data reveals a concentrated visitor base from specific global regions, with a total of 212,906 international arrivals. Europe emerged as the dominant source market, contributing 108,100 tourists, which represents 50.8% of all visitors. This substantial European presence underscores the island nation's strong appeal to travelers from this region, likely driven by favourable winter tourism patterns and established travel connections.

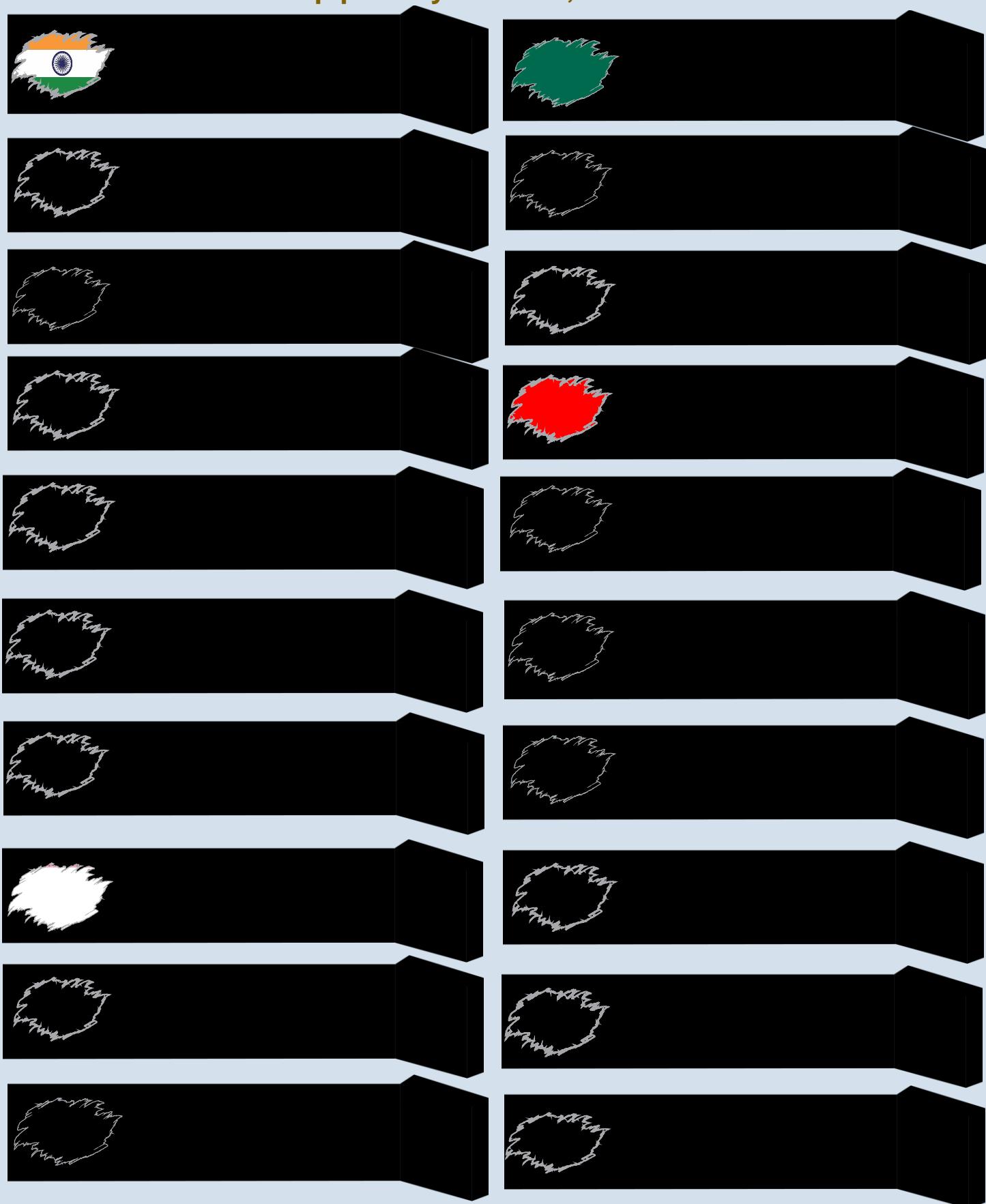
The Asia & Pacific region secured the second position with 90,931 arrivals, accounting for 42.7% of the total. Combined, these two regions represent 93.5% of all tourist arrivals, highlighting Sri Lanka's heavy dependence on European and Asian markets. The Americas contributed 9,455 visitors (4.4%), while the Middle East and Africa remained modest contributors with 3,015 (1.4%) and 1,405 (0.7%) arrivals respectively.





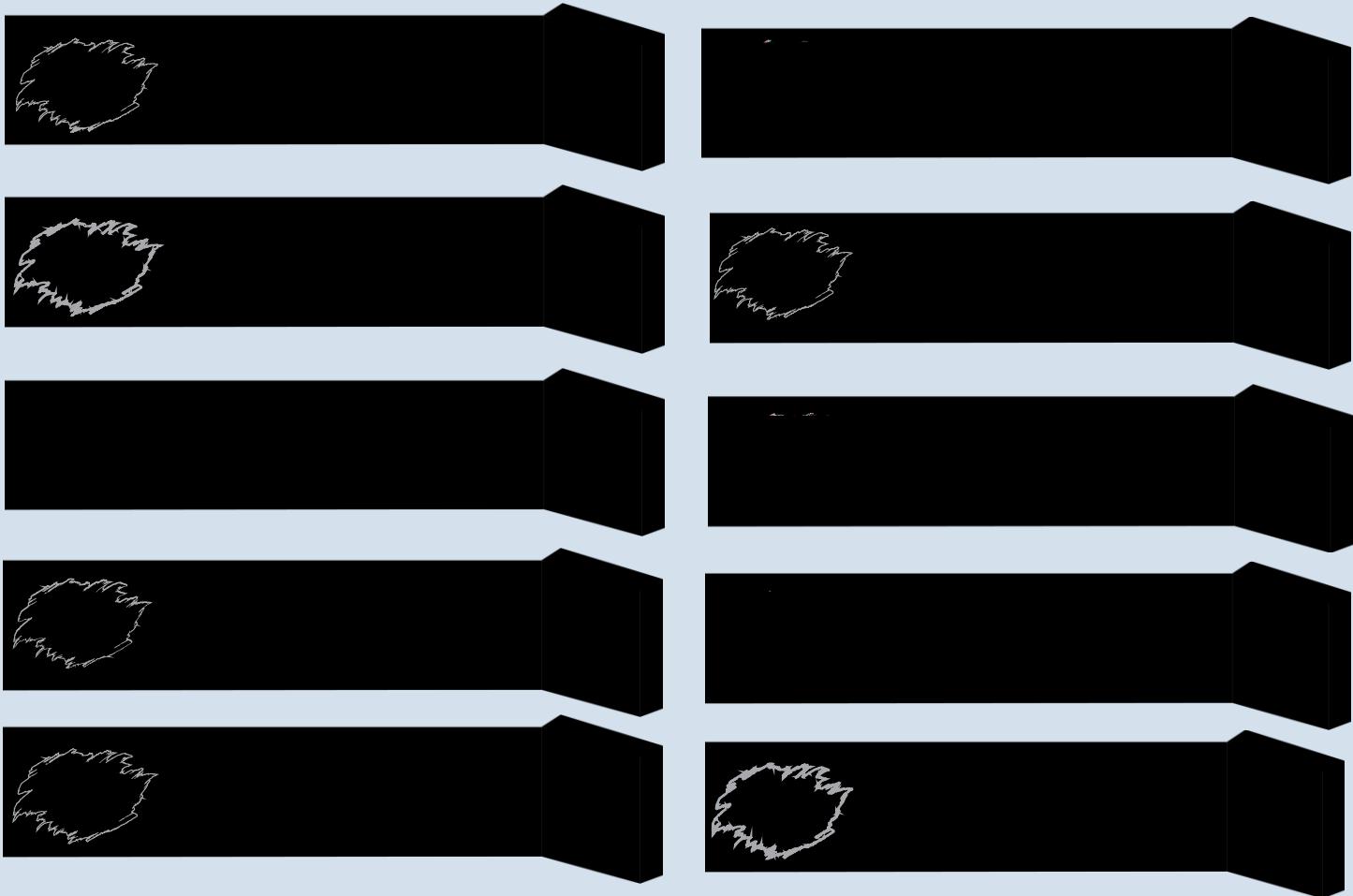
Top primary markets and top potential markets

Top primary markets, November 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, November 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

November 2025

Sri Lanka's November 2025 tourist arrivals data reveals significant insights into its key source markets. India emerges as the dominant contributor with 51,391 arrivals, representing approximately 24.1% of total visitors and demonstrating a robust 25% year-over-year growth compared to November 2024's 41,120 arrivals. Russia maintains its position as the second-largest source market with 24,953 visitors, though notably experiencing a 14% decline from the previous year's 29,053 arrivals. The United Kingdom ranks third with 16,915 arrivals, showing impressive 31% growth, followed by Germany with 14,518 visitors (15% increase). European markets collectively demonstrate strong performance, with France contributing 8,459 arrivals (27% growth) and Spain adding 4,666 visitors (28% growth). Australia secured fifth position with 9,384 arrivals, marking an 18% increase, while China contributed 9,217 visitors (10% growth). Poland and the United States complete the top ten with 5,331 and 5,284 arrivals respectively. These top ten source markets collectively account for approximately 60% of November's total arrivals, indicating healthy market diversification while highlighting opportunities for further expansion in underrepresented regions, particularly the Americas and emerging Asian markets.

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

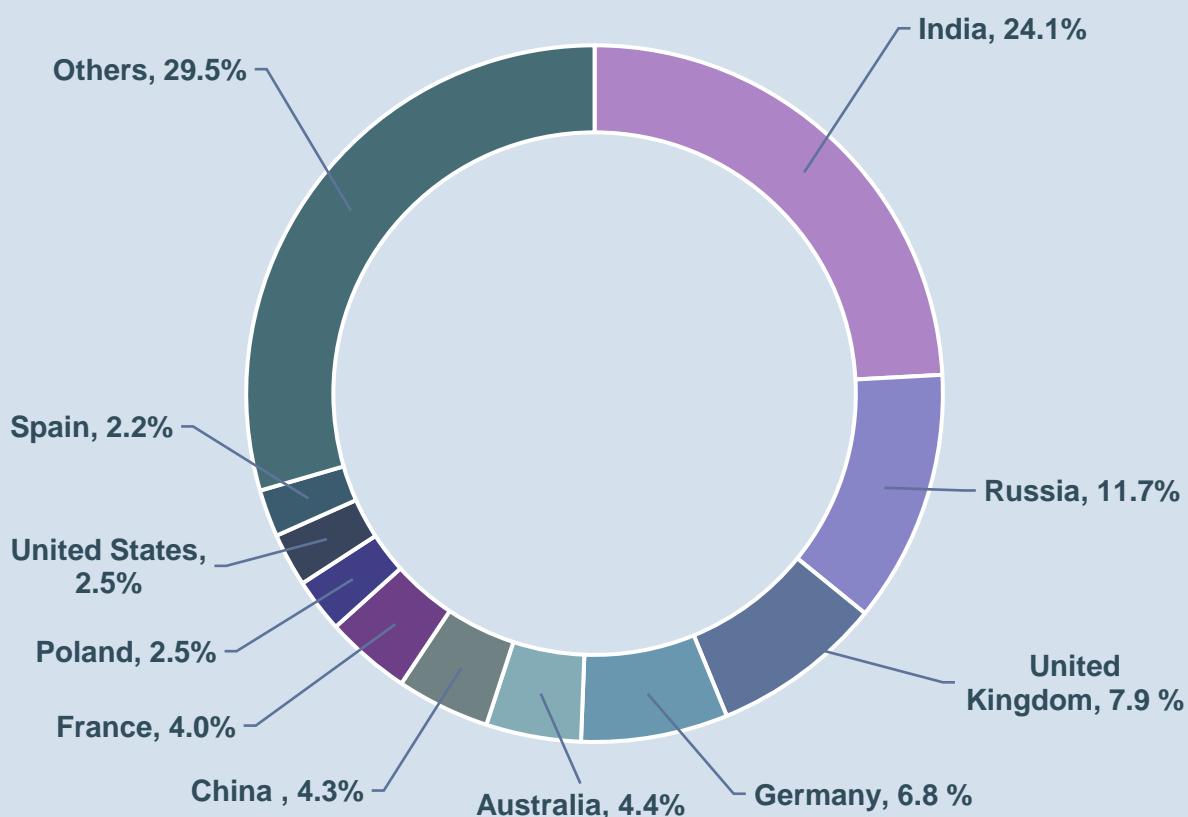
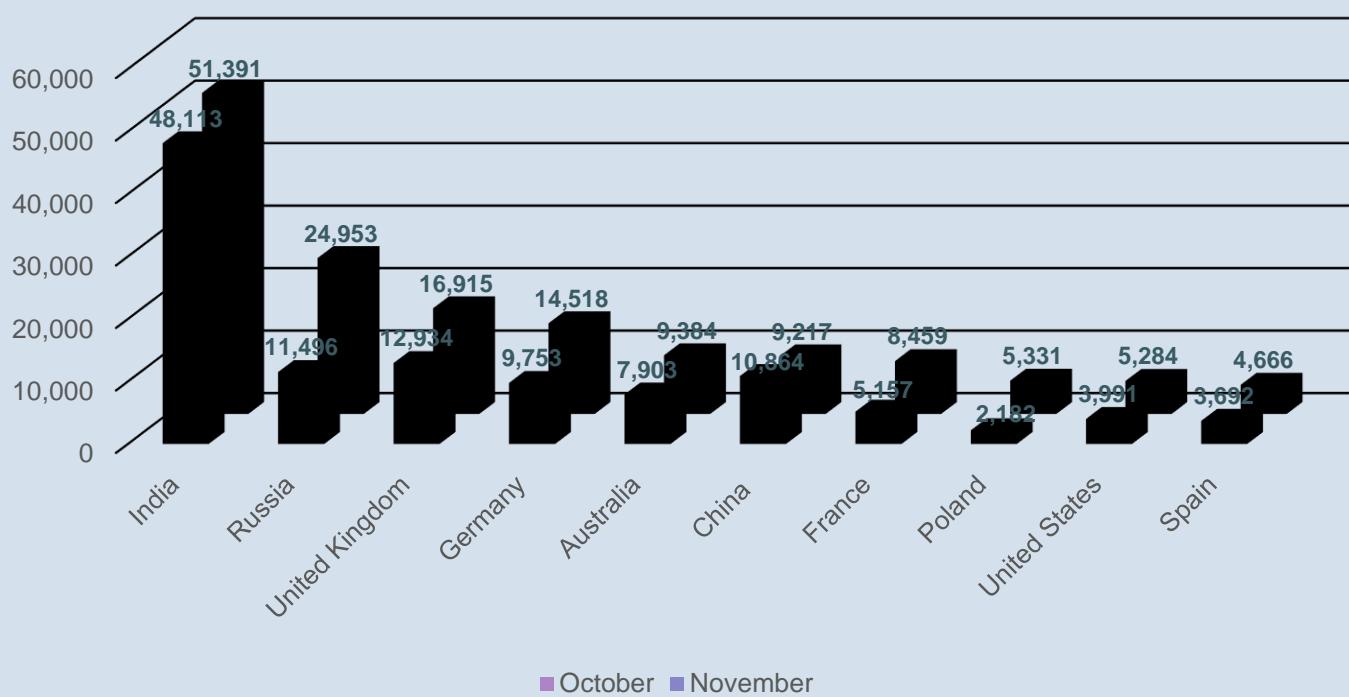


Table 2. Top ten source markets to Sri Lanka, November 2025

Rank	Country of Residence	Tourist arrivals (November 2025)			Tourist arrivals (November 2024)
		By Air	By Sea	Total	
1	India	51,349	42	51,391	41,120
2	Russia	24,921	32	24,953	29,053
3	United Kingdom	15,064	1,851	16,915	12,912
4	Germany	14,442	76	14,518	12,593
5	Australia	8,871	513	9,384	7,937
6	China	9,203	14	9,217	8,371
7	France	8,447	12	8,459	6,665
8	Poland	5,326	05	5,331	5,164
9	United States	4,616	668	5,284	4,472
10	Spain	4,621	45	4,666	3,655

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

Top ten source markets

January to November 2025

Examining Sri Lanka's top source markets up to November 2025 unveils distinct performance tiers, established growth leaders, an exceptional breakout market, and underperforming segments demanding targeted intervention. India solidified its position as the leading source market with 474,796 arrivals, marking an impressive 30.4% growth over the previous year's 364,093 visitors. The United Kingdom emerged as the second-largest contributor with 191,742 arrivals, reflecting a 20.2% increase, while Germany secured third place with 131,259 visitors, up 8.1% from 2024.

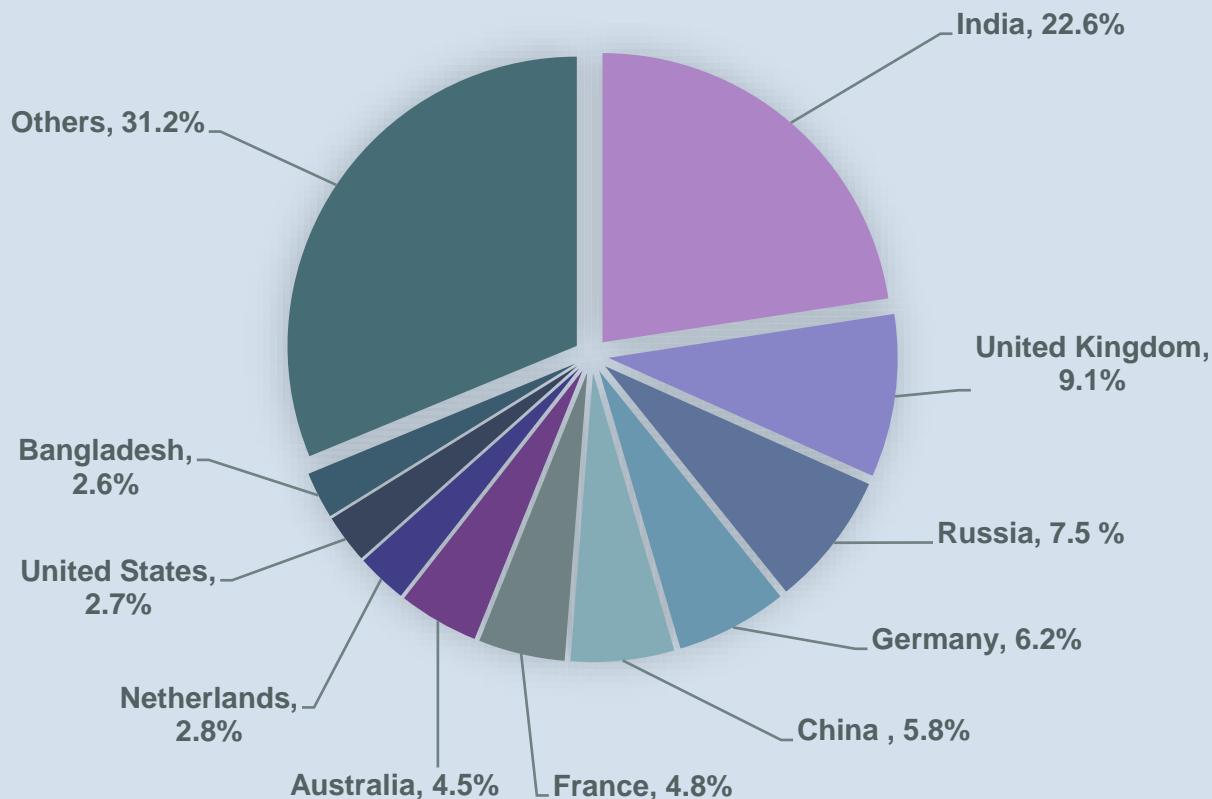
Several markets exhibited exceptional growth trajectories, most notably Bangladesh with a 55.7% surge to 55,110 arrivals, followed by Australia at 23.8% growth reaching 94,667 visitors, and France with 23.4% growth totaling 101,771 arrivals. The Netherlands also showed strong performance with 28.9% growth. However, the Russian Federation experienced a 4.8% decline to 158,593 arrivals, representing the only major market contraction.

Collectively, these trends point toward a positive recovery trajectory for Sri Lanka, while also highlighting the need for balanced source-market development, risk mitigation, and tailored promotional strategies.



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

Rank	Country of Residence	Tourist Arrivals (Jan ~ Nov 2025)	Tourist Arrivals Jan ~ Nov 2024)
1	India	474,796	364,093
2	United Kingdom	191,742	159,582
3	Russian Federation	158,593	166,652
4	Germany	131,259	121,381
5	China	121,671	121,757
6	France	101,771	82,443
7	Australia	94,667	76,464
8	Netherlands	59,589	46,223
9	United States	57,449	51,320
10	Bangladesh	55,110	35,401
11	Others	656,946	579,557
Total		2,103,593	1,804,873

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

Tourist arrivals by purpose of visit

November 2025

An analysis of arrival patterns by the travel motivations reflects the island's diverse appeal as a multifaceted destination catering to varied traveler motivations. Leisure and vacation travel constituted the predominant segment, accounting for 68.86% (146,608 arrivals) of total visitors. This substantial proportion underscores Sri Lanka's established reputation as a premier holiday destination, attracting travelers seeking authentic cultural experiences, pristine beaches, wildlife encounters, and adventure tourism opportunities.

Meetings, Incentives, Conferences, and Events (MICE) tourism emerged as the second-largest category with 22,130 arrivals (10.39%), demonstrating Sri Lanka's growing competitiveness in the business events sector. This segment represents significant potential for high-yield tourism, typically generating substantial per visitor expenditure while promoting the destination during off peak seasons.

VFR travel accounted for 14,627 arrivals (6.87%), representing an important diaspora driven segment that maintains strong connections between Sri Lanka and its global community. This category often results in extended stays, dispersed economic benefits across regions, and authentic cultural exchange.

Business travel contributed 5,740 arrivals (2.70%), indicating commercial connectivity and trade relationships. Notably, health and Ayurvedic tourism attracted 1,681 visitors (0.79%), highlighting Sri Lanka's potential in wellness tourism and traditional medicine. Religious tourism (981 arrivals, 0.46%), sports tourism (682 arrivals, 0.32%), and education related travel (167 arrivals, 0.1%) represent emerging niche markets with opportunities for targeted development and marketing strategies.

The diversified purpose of visit profile demonstrates Sri Lanka's ability to appeal to multiple market segments simultaneously. While leisure tourism remains the foundation, the significant MICE component and emerging specialized segments indicate a maturing tourism economy with enhanced resilience. Strategic focus on strengthening niche segments, particularly health and wellness, sports tourism, and educational travel presents opportunities for sustainable growth, seasonal balance, and differentiated market positioning in an increasingly competitive regional landscape.

Chart 4: Purpose of visit, November 2025

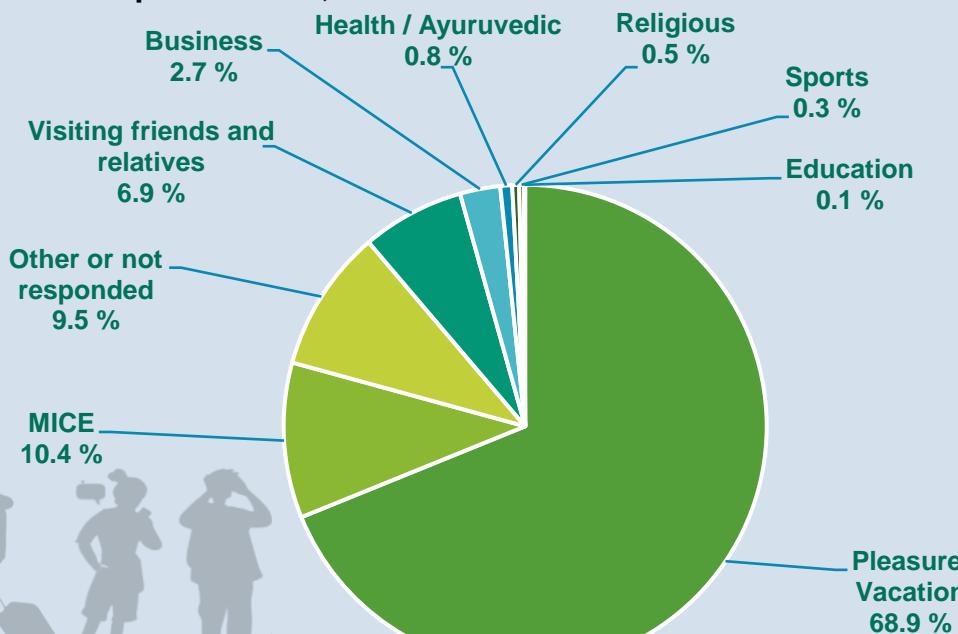


Chart 5: Purpose of visit vs main source markets



The disaggregated data by source market reveals distinct travel motivations across key markets, offering critical insights for targeted destination marketing and product development strategies.

Several markets demonstrate overwhelming leisure orientation, with France (81.97%), Spain (81.23%), Germany (80.15%), and United Kingdom (76.22%) leading in holiday travel. These Western European markets exhibit classic vacation travel patterns, seeking Sri Lanka's cultural heritage, beaches, and nature-based experiences. Poland (76.55%) similarly reflects strong leisure demand, while Russian Federation (71.46%) and China (69.72%) maintain substantial holiday travel components. This pattern validates Sri Lanka's positioning as an exotic, experience-rich destination for long haul European travelers and indicates opportunities for premium leisure product development.

Significant variation exists in MICE travel across markets. Poland (18.03%) and Russian Federation (18.66%) show exceptionally high MICE participation, suggesting strong business event connectivity and corporate incentive travel from these markets. India (13.02%) and Spain (11.96%) also demonstrate robust MICE segments. Conversely, traditional leisure markets like United Kingdom (2.87%), Australia (2.33%), and Germany (5.38%) show minimal MICE activity. This disparity indicates opportunities to promote Sri Lanka's conference and events infrastructure more aggressively to Western European corporate markets while maintaining strong MICE partnerships with Eastern European and South Asian business communities.

Australia (26.30%) exhibits the highest VFR proportion, reflecting Sri Lanka's significant diaspora population in Australia and strong bilateral migration ties. United States (18.87%) and United Kingdom (13.93%) similarly show elevated VFR travel, consistent with established Sri Lankan communities in these countries. VFR travel represents stable, recession resistant demand with extended stay patterns and dispersed regional economic impact.

China (7.36%) demonstrates the highest business travel proportion, reflecting growing trade relationships and investment activities. India (4.45%) shows moderate business travel, while most other markets register minimal business specific visits (below 2%).

Germany (4.98%) emerges as the leading market for health and Ayurvedic tourism, significantly outperforming all other source markets. This indicates strong German awareness and appreciation of Sri Lanka's traditional medicine offerings. Spain (0.56%), Poland (0.38%), and France (0.30%) show modest but notable wellness tourism interest. The exceptionally low penetration from India (0.01%), Russian Federation (0.13%), and United Kingdom (0.18%) represents untapped potential, particularly given India's cultural familiarity with Ayurveda and Russia's historical wellness tourism propensity.

Religious tourism remains marginal across all markets, with India (0.53%) and Poland (0.51%) showing the highest rates likely reflecting Buddhist pilgrimage from India and Catholic heritage tours from Poland. Sports tourism registers minimal presence across all markets (under 0.5%), indicating significant development potential. Educational travel similarly shows limited penetration, with United Kingdom (0.13%) and United States (0.11%) representing small student exchange or academic conference activity.

Natural Disasters and Tourism Recovery: Global Lessons and Sri Lanka's Own Journey Forward

Introduction

Natural disasters strike without warning, leaving devastation in their wake and testing the resilience of nations and communities. For countries where tourism serves as a vital economic pillar, the impact extends far beyond immediate physical damage, cancellations cascade, confidence erodes, and livelihoods hang in the balance. As Sri Lanka confronts the aftermath of a catastrophic cyclone, we stand at a critical juncture. Yet history offers us hope as nations across the world have faced similar crises and emerged stronger, transforming tragedy into opportunity through strategic action, unwavering determination, and collective effort.

Importantly, Sri Lanka itself carries recent, hard-won lessons from two profound crises that, while not natural disasters, devastated the tourism sector with equal force, the 2019 Easter Sunday attacks and the COVID-19 pandemic. These experiences, painful as they were, have equipped our nation with invaluable insights into crisis management, recovery strategies, and the remarkable resilience of both our tourism industry and our people.

The Global Pattern: Crisis and Recovery

The relationship between natural disasters and tourism follows a recognizable pattern. Initial shock leads to sharp declines in visitor arrivals, in affected regions. This immediate crisis phase, however, represents only the beginning of the journey. What distinguishes successful recovery stories from prolonged decline is not the severity of the disaster itself, but rather the quality, speed, and coordination of the response that follows.

Post-disaster tourism decline can be attributed to three interconnected factors. Direct physical impacts compromise a destination's operational capacity to receive and serve tourists. Beyond infrastructural concerns, heightened risk perception leads travelers to avoid areas they consider dangerous. Additionally, moral and ethical considerations may deter potential visitors who question the appropriateness of tourism activity in communities experiencing hardship and recovery. (Kozak et al., as cited in Rosselló et al.)

Media representation also significantly influences public risk perception. Continuous exposure to disaster coverage creates an impression of escalating global vulnerability among general audiences. The tourism sector exemplifies how perception shapes reality, as travelers select destinations through both rational assessment and subjective evaluation. Consequently, destination risk perception has emerged as a critical determinant in tourist decision-making behavior (Becken et al. as cited in Rosselló et al.).

Despite these formidable challenges, numerous destinations have successfully navigated post-disaster recovery and rebuilt their tourism sectors, offering valuable lessons in resilience and strategic intervention.

Thailand's Resilience: Community at the Heart of Recovery

The 2004 Indian Ocean tsunami devastated Thailand's iconic coastal destinations Phuket, Khao Lak, and the Phi Phi Islands. The loss was immeasurable, yet Thailand's response showcased the power of combining rapid infrastructure development with community-centered recovery.

Rebuilding began immediately, focusing on hotels, beaches, and transport networks. But Thailand went further, establishing strict safety protocols and early warning systems to prevent future tragedies. Community-based tourism projects ensured that local populations weren't just passive recipients of aid but active participants in rebuilding their own futures.

Within two years, tourist arrivals had rebounded dramatically. Phuket reclaimed its position as one of the world's premier beach destinations, and tourism became the engine driving broader economic recovery. Thailand demonstrated that when communities are empowered and safety is prioritized, confidence returns rapidly (Karantzavelou, 2007).

The Caribbean's United Response: Strength in Collaboration

When Hurricanes Irma and Maria tore through the Caribbean in 2017, individual islands faced catastrophic damage. Yet the region's response illustrated the power of collective action. The "Caribbean Is Open" campaign was strategically brilliant it acknowledged affected areas while emphasizing that many destinations remained ready to welcome visitors.

This transparent, coordinated approach prevented the entire region from being tarred by impacts affecting only certain islands. Quick restoration of cruise ports and airports maintained connectivity, while hotels rebuilt using climate-resilient designs that promised greater safety for the future. By 2019, cruise arrivals had surged beyond pre-hurricane levels, and several islands reported their strongest tourism numbers in history.

The Caribbean's experience underscores a crucial lesson: in an interconnected tourism ecosystem, coordinated regional messaging can protect and restore confidence more effectively than isolated individual efforts (News deck, 2017).

The Path Forward for Sri Lanka

As Sri Lanka begins its cyclone recovery journey, it is not done as novices in crisis management but as a nation that has faced profound challenges before and emerged stronger. The immediate task involves honest assessment of damage, transparent communication with international markets, and rapid restoration of critical tourism infrastructure.

The integration of comprehensive emergency and disaster response plans across all tourism sectors is no longer optional but essential for future resilience. Creating strong links between tourism and disaster risk reduction is particularly critical in destinations heavily dependent on tourism. Business enterprises and attraction sites in the tourism sector require strong disaster management capacity to formulate appropriate early warning mechanisms and response protocols. This includes incorporating tourist well-being into emergency plans, with clear evacuation procedures and visitor protection strategies. The shift must move from reactive response and recovery approaches toward proactive reduction and readiness strategies. By embedding disaster preparedness into every level of tourism operations, Sri Lanka can minimize future disruptions, protect both visitors and communities, and demonstrate the professional crisis management capabilities that rebuild international confidence. This cyclone, devastating as it is, affects specific geographic areas rather than the entire destination. Unlike the Easter attacks that created nationwide security concerns, or COVID-19 that closed borders completely, cyclone recovery allows targeted restoration in affected areas while maintaining operations in unaffected regions.

This geographic specificity can actually accelerate overall destination recovery if we communicate clearly about where tourism can continue immediately and where focused rebuilding is occurring.

Sri Lanka can leverage lessons from the Caribbean's "Caribbean Is Open" campaign, emphasizing that significant portions of Sri Lanka remain ready to welcome visitors while affected areas undergo rapid restoration. COVID-19 experience can be applied with domestic tourism to maintain some economic activity in the sector during international market recovery. Easter attack recovery experience can be used to manage international perceptions and gradually rebuild confidence through demonstrated progress.

Conclusion

Natural disasters test nations in profound ways, but they also reveal character and catalyze transformation. Japan, Thailand, the Caribbean, and countless other destinations have proven that tourism can not only recover from catastrophic events but can emerge more resilient, sustainable, and successful than before.

Sri Lanka's tourism story carries its own chapters of crisis and recovery. Sri Lanka has faced terrorism that targeted our visitors and our values. Sri Lanka has weathered a global pandemic that closed our borders and silenced the airports. Each time, Sri Lanka demonstrated that the spirit of Sri Lankan hospitality, the beauty of the island, and the resilience of people cannot be broken by any crisis.

This cyclone represents another challenge, but it is one that is faced with experience, knowledge, and proven capacity for recovery. Past recovery efforts have illuminated the path forward. Trust returns through transparent communication, recovery accelerates with rapid infrastructure restoration, effectiveness multiplies through coordinated action, and future disruption diminishes with resilience investment.

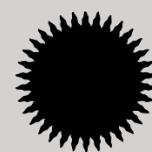
The global community has shown that destinations which respond with transparency, speed, coordination, and vision don't just survive disasters; they demonstrate the resilience and adaptability that make them even more compelling to visitors seeking authentic, meaningful travel experiences. Sri Lanka has already proven this truth through our own recovery journeys.

The path forward will demand dedication, investment, and collaboration. Yet this journey is not undertaken as novices, but as a nation that has learned, adapted, and strengthened itself through past adversity. The tourism sector will recover, as it has done before, and visitors will once again be received with the warmth and graciousness that have long been the hallmarks of Sri Lankan hospitality.

This is not the first crisis Sri Lanka has faced, nor will it be the last. The recent cyclone has posed significant challenges, yet both global and national history demonstrate a clear path to recovery. It is now a collective responsibility to move forward with confidence shaped by experience and with hope anchored in proven resilience. Sri Lanka's recovery story is already being written, and like the stories that came before, it will be one of determination, collaboration, and ultimate triumph.

Reference:

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International tourist arrivals by country of residence

	November 2025			Tourist arrivals Nov 2024	% change Nov (25/24)	Total tourist arrivals up to Nov 2025	Total tourist arrivals up to Nov 2024	% change up to Nov (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
AMERICAS	8,295	1,160	9,455	8,144	16.1	106,506	95,960	11.0					
North America	7,690	1,074	8,764	7,644	14.7	100,675	90,682	11.0					
Canada	2,959	368	3,327	3,085	7.8	42,195	38,431	9.8					
Mexico	115	38	153	87	75.9	1,031	931	10.7					
United States	4,616	668	5,284	4,472	18.2	57,449	51,320	11.9					
Caribbean & Central America	102	15	117	98	19.4	997	926	7.7					
Costa Rica	07	0	07	09	(22.2)	101	87	16.1					
Jamaica	03	0	03	05	(40.0)	44	91	(51.6)					
Others	92	15	107	84	27.4	852	748	13.9					
South America	503	71	574	402	42.8	4,834	4,352	11.1					
Argentina	108	02	110	66	66.7	884	832	6.3					
Brazil	188	69	257	186	38.2	1,847	1,737	6.3					
Chile	70	0	70	34	105.9	613	505	21.4					
Colombia	73	0	73	52	40.4	661	607	8.9					
Others	64	0	64	64	-	829	671	23.5					
AFRICA	1,400	5	1,405	1,120	25.4	14,808	11,930	24.1					
North Africa	383	0	383	255	50.2	3,369	3,009	12.0					
Morocco	91	0	91	74	23.0	1,021	921	10.9					
Sudan	172	0	172	111	55.0	1,183	854	38.5					
Others	120	0	120	70	71.4	1,165	1,234	(5.6)					
Sub-Saharan Africa	1,017	05	1,022	865	18.2	11,439	8,921	28.2					
Kenya	61	0	61	62	(1.6)	1,052	670	57.0					
Mauritius	179	01	180	120	50.0	828	504	64.3					
Nigeria	10	0	10	19	(47.4)	155	83	86.7					
South Africa	392	04	396	320	23.8	4,460	3,783	17.9					
Others	375	0	375	344	9.0	4,944	3,881	27.4					


 Monthly Tourist Arrivals Report November 2025

	November 2025			Tourist arrivals Nov 2024	% change Nov (25/24)	Total tourist arrivals up to Nov 2025	Total tourist arrivals up to Nov 2024	% change up to Nov (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
ASIA & PACIFIC	90,279	652	90,931	75,241	20.9	932,558	758,878	22.9					
North East Asia	12,971	21	12,992	11,752	10.6	166,458	158,231	5.2					
China	9,203	14	9,217	8,371	10.1	121,671	121,757	(0.1)					
Japan	2,697	07	2,704	2,178	24.2	33,756	26,830	25.8					
South Korea	1,042	0	1,042	1,188	(12.3)	10,825	9,534	13.5					
Others	29	0	29	15	93.3	206	110	87.3					
South East Asia	6,184	24	6,208	4,696	32.2	60,535	47,414	27.7					
Cambodia	59	0	59	53	11.3	1,121	1,124	(0.3)					
Indonesia	612	04	616	532	15.8	4,599	3,365	36.7					
Malaysia	2,152	03	2,155	1,467	46.9	21,436	16,533	29.7					
Myanmar	380	0	380	65	-	2,410	1,433	68.2					
Philippines	573	07	580	398	45.7	6,269	4,782	31.1					
Singapore	1,268	09	1,277	1,197	6.7	13,105	10,580	23.9					
Thailand	830	01	831	622	33.6	7,812	6,598	18.4					
Vietnam	292	0	292	346	(15.6)	3,462	2,805	23.4					
Others	18	0	18	16	12.5	321	194	65.5					
Oceania	9,979	565	10,544	8,893	18.6	106,687	86,518	23.3					
Australia	8,871	513	9,384	7,937	18.2	94,667	76,464	23.8					
New Zealand	1,074	52	1,126	915	23.1	11,606	9,720	19.4					
Others	34	0	34	41	(17.1)	414	334	24.0					
South Asia	61,145	42	61,187	49,900	22.6	598,878	466,715	28.3					
Afghanistan	03	0	03	05	(40.0)	72	137	(47.4)					
Bangladesh	4,151	0	4,151	3,375	23.0	55,110	35,401	55.7					
Bhutan	58	0	58	80	(27.5)	596	625	(4.6)					
India	51,349	42	51,391	41,120	25.0	474,796	364,093	30.4					
Iran	1,051	0	1,051	804	30.7	9,143	10,064	(9.2)					
Maldives	2,357	0	2,357	2,982	(21.0)	33,278	40,319	(17.5)					
Nepal	455	0	455	386	17.9	5,182	4,014	29.1					
Pakistan	1,721	0	1,721	1,148	49.9	20,701	12,062	71.6					
EUROPE	105,759	2,341	108,100	97,141	11.3	1,020,091	911,533	11.9					
Northern Europe	20,105	1,939	22,044	17,158	28.5	243,036	203,917	19.2					
Denmark	1,141	05	1,146	1,036	10.6	15,430	13,239	16.5					
Finland	700	04	704	534	31.8	4,249	3,502	21.3					
Norway	964	04	968	783	23.6	11,284	9,921	13.7					
Sweden	1,275	08	1,283	1,132	13.3	10,670	9,737	9.6					
United Kingdom	15,064	1,851	16,915	12,912	31.0	191,742	159,582	20.2					
Others	961	67	1,028	761	35.1	9,661	7,936	21.7					

	November 2025			Tourist arrivals Nov 2024	% change Nov (25/24)	Total tourist arrivals up to Nov 2025	Total tourist arrivals up to Nov 2024	% change up to Nov (25/24)
	Tourist arrivals		Total					
	By Air	By Sea	Total					
Western Europe	33,457	127	33,584	28,307	18.6	358,706	308,002	16.5
Austria	1,763	03	1,766	1,705	3.6	15,568	14,702	5.9
Belgium	1,557	15	1,572	1,390	13.1	19,503	15,882	22.8
France	8,447	12	8,459	6,665	26.9	101,771	82,443	23.4
Germany	14,442	76	14,518	12,593	15.3	131,259	121,381	8.1
Netherlands	3,925	13	3,938	3,387	16.3	59,589	46,223	28.9
Switzerland	3,224	08	3,232	2,490	29.8	30,143	26,583	13.4
Others	99	0	99	77	28.6	873	788	10.8
Central/Eastern Europe	39,752	98	39,850	42,399	(6.0)	281,881	285,754	(1.4)
Belarus	1,820	0	1,820	1,429	27.4	8,497	9,525	(10.8)
Czech Republic	2,009	05	2,014	1,357	48.4	16,367	16,980	(3.6)
Estonia	432	0	432	234	84.6	3,445	3,224	6.9
Hungary	529	0	529	648	(18.4)	5,455	5,602	(2.6)
Kazakhstan	297	01	298	289	3.1	8,510	9,451	(10.0)
Lithuania	505	02	507	488	3.9	5,845	5,528	5.7
Poland	5,326	05	5,331	5,164	3.2	43,119	37,932	13.7
Romania	429	22	451	531	(15.1)	5,036	5,164	(2.5)
Russia	24,921	32	24,953	29,053	(14.1)	158,593	166,652	(4.8)
Slovakia	811	19	830	736	12.8	6,346	5,997	5.8
Ukraine	886	09	895	554	61.6	7,515	5,943	26.5
Others	1,787	03	1,790	1,916	(6.6)	13,153	13,756	(4.4)
Southern/Mediterranean Europe	12,445	177	12,622	9,277	36.1	136,468	113,860	19.9
Greece	508	01	509	260	95.8	3,813	2,320	64.4
Italy	2,990	15	3,005	2,237	34.3	43,948	33,014	33.1
Portugal	976	45	1,021	856	19.3	7,281	5,853	24.4
Spain	4,621	45	4,666	3,655	27.7	42,794	35,127	21.8
Turkey	735	31	766	620	23.5	7,434	5,870	26.6
Israel	1,594	0	1,594	878	81.5	21,076	22,791	(7.5)
Others	1,021	40	1,061	771	37.6	10,122	8,885	13.9
MIDDLE EAST	3,009	06	3,015	2,512	20.0	29,630	26,572	11.5
Bahrain	105	0	105	86	22.1	1,229	1,088	13.0
Egypt	447	03	450	456	(1.3)	3,877	3,578	8.4
Iraq	101	0	101	79	27.8	1,560	916	70.3
Jordan	351	0	351	224	56.7	2,704	2,465	9.7
Kuwait	99	0	99	96	3.1	1,739	1,735	0.2
Lebanon	333	0	333	332	0.3	3,085	3,017	2.3
Oman	170	0	170	170	-	2,473	2,634	(6.1)
Qatar	36	0	36	34	5.9	807	664	21.5
Saudi Arabia	822	03	825	644	28.1	5,785	5,534	4.5
United Arab Emirates	430	0	430	282	52.5	5,257	3,970	32.4
Others	115	0	115	109	5.5	1,114	971	14.7
TOTAL	208,742	4,164	212,906	184,158	15.6	2,103,593	1,804,873	16.6

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

The distribution of tourist arrivals across last departure airports reveals Sri Lanka's connectivity landscape, market access patterns, and strategic gateway dependencies.

Dubai emerges as the primary gateway with 25,319 arrivals (11.89%), reflecting Sri Lanka's strategic positioning on East West travel corridors, and the UAE's role as a global aviation hub. Doha follows with 19,402 departures (9.11%), demonstrating Qatar Airways' significant market penetration. Abu Dhabi contributes 16,416 arrivals (7.71%), completing the Middle Eastern trio that collectively accounts for 28.71% of all arrivals. This concentration underscores the critical importance of Gulf carrier partnerships and the vulnerability of Sri Lanka's tourism sector to Middle Eastern aviation dynamics, geopolitical stability, and airline commercial strategies.

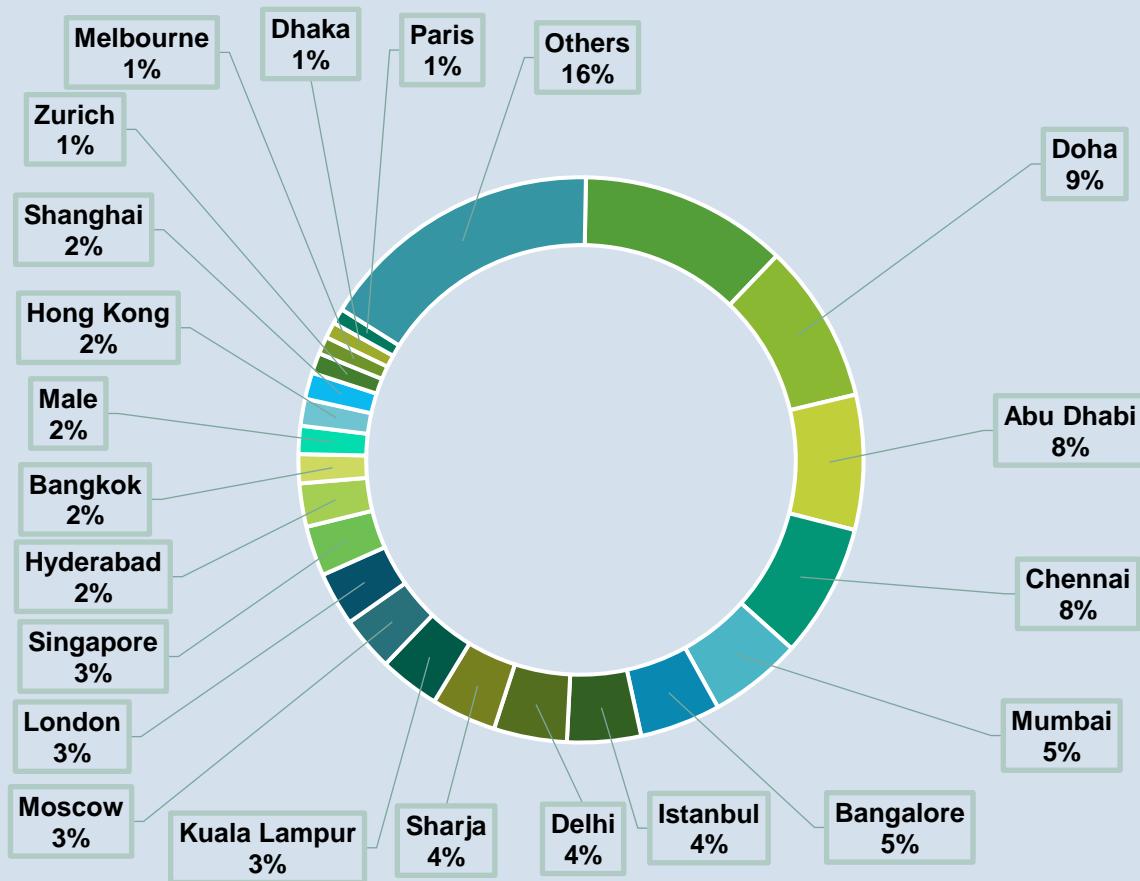
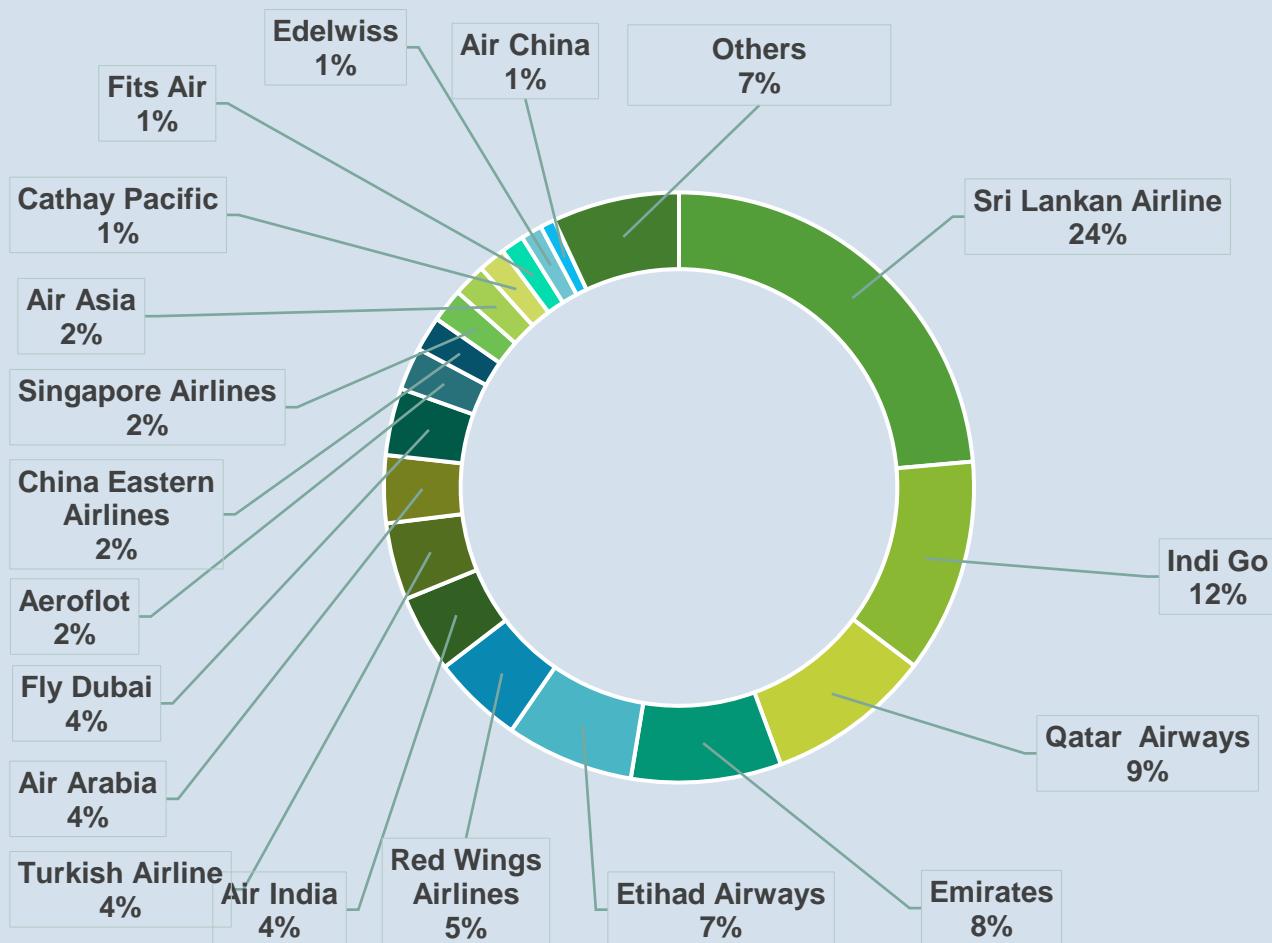
Indian cities constitute the second-largest gateway cluster. Chennai leads with 16,240 arrivals (7.63%), benefiting from geographic proximity and strong cultural-historical ties. Mumbai (11,350, 5.33%), Bangalore (9,850, 4.63%), Delhi (8,901, 4.18%), and Hyderabad (5,273, 2.48%) collectively represent 24.25% of total arrivals, demonstrating India's position as a crucial source market with multiple direct connectivity points. The diversified Indian gateway portfolio indicates both leisure and business travel across multiple cities, reducing dependency on single-point connectivity.

Kuala Lumpur (7,370, 3.46%) and Singapore (6,092, 2.86%) serve as Southeast Asian hubs, facilitating connections from broader Asia-Pacific markets including Australia, Indonesia, and East Asia. Bangkok (3,532, 1.66%) provides supplementary regional connectivity. Shanghai (3,217, 1.51%) and Hong Kong (3,291, 1.55%) represent Chinese market access, though relatively modest volumes suggest limited direct China connectivity, likely reflecting visa policies, direct flight availability, or broader Chinese outbound travel patterns.

London (6,526, 3.07%) stands as the primary European gateway. Istanbul (8,985, 4.22%) demonstrates Turkish Airlines' significant role in connecting European and Middle Eastern travelers. Zurich (2,467, 1.16%) and Paris (1,876, 0.88%) show limited continental European direct connectivity, suggesting many European travelers route through Middle Eastern hubs. Moscow (6,633, 3.12%) indicates dedicated Russian Federation connectivity, consistent with that market's strong performance.

In Europe, London is the dominant gateway, supported by British Airways and Sri Lankan Airlines, while Istanbul plays a strong connecting role through Turkish Airlines. Other European cities such as Zurich and Paris contribute smaller volumes, suggesting most European arrivals transit via Middle Eastern hubs. Moscow reflects stable Russian connectivity. Long-haul access from Melbourne shows modest Australian volumes, with many travelers likely connecting via Asian hubs.

Leveraging Sri Lanka's geographic position as a regional hub, optimizing seasonal routes, and improving airport infrastructure including Colombo and regional airports would support traffic growth, reduce hub dependency, and enhance tourism sector resilience.

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

The data on main airlines utilized by tourists reveals a high concentration of tourist traffic on low cost and regional carriers. Sri Lankan Airlines dominates with a significant 24% share, which can be attributed to its status as the national carrier offering extensive regional connectivity and frequent flights to Colombo. Following closely is Indigo, with a 12% share, underscoring strong tourist inflow from India and highlighting the importance of budget-conscious travel options for visitors to the island.

Furthermore, there is a strong presence of Middle Eastern carriers, collectively accounting for a substantial portion of arrivals. Qatar Airways (9%), Emirates (8%), and Etihad Airways (7%) together make up 24% of the share, indicating that a major gateway for tourists, especially from long-haul markets like Europe and the Americas, is through the hubs in the Gulf region. This points to Sri Lanka's connectivity via these global transit points as a critical factor in its tourism flow.

The data also shows moderate usage of a diverse set of other international airlines. Carriers such as Turkish Airlines, Air India, Air Arabia, Fly Dubai, and Red Wings Airlines each hold around 4-5% of the share. This diversity suggests healthy tourist interest from varied origin markets, including Russia, the United Arab Emirates, Turkey, and India, reflecting Sri Lanka's broadening appeal across Eastern Europe, the CIS nations, and the Middle East.

In contrast, the usage of major Asian and Western carriers appears minimal. Airlines like Singapore Airlines, Air China, China Eastern, and Cathay Pacific each account for only 1-2% of the tourist traffic. This relatively low share may indicate fewer direct flight connections or less targeted promotional efforts in these regions, presenting a potential growth opportunity to attract more visitors from East and Southeast Asia through improved air links and marketing initiatives.

Overall, the popularity of low-cost and budget airlines like Air Asia, Air Arabia, and Indigo highlights the price-sensitive nature of a significant segment of tourists traveling to Sri Lanka. The data suggests that affordable travel options are a key driver, particularly from neighboring India and the Middle East.

Sri Lanka's tourist arrivals are heavily reliant on its national carrier and regional budget airlines, with Middle Eastern hubs playing a crucial bridging role, while opportunities exist to deepen engagement with airlines from other Asian and Western markets.

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

November 2025

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

Data revealing tourists' last port of departure before arriving in Sri Lanka provides critical insights into routing preferences, hub dependencies, and direct versus indirect connectivity patterns across key source markets.

Indian travelers (51,391 total) demonstrate highly dispersed routing with Chennai (14,101, 27.4%) as the dominant departure point, followed by Mumbai (9,652, 18.8%) and Bangalore (8,668, 16.9%), collectively accounting for 63.1% of Indian arrivals.

Russian travelers (24,953 total) show concentrated departure patterns with Moscow (6,523, 26.1%) as the primary gateway, but notably Sharjah (2,755, 11.0%), Abu Dhabi (2,737, 11.0%), and Dubai (2,378, 9.5%) collectively account for 31.5% of Russian departures. This significant Gulf hub routing suggests Russian travelers either stopover in the UAE or utilize Gulf carriers for competitive pricing and connectivity.

UK travelers (16,915 total) exhibit London (5,080, 30.0%) as the dominant departure point, yet significant volumes route through Dubai (2,200, 13.0%), Doha (2,891, 17.1%), and Abu Dhabi (1,613, 9.5%), collectively representing 39.6% of UK arrivals. This substantial Middle Eastern hub dependency indicates many UK travelers utilize Gulf carriers rather than direct British Airways or Sri Lankan Airlines services, likely driven by pricing, frequency, or connecting itineraries from regional UK airports.

German travelers (14,518 total) demonstrate heavy Middle Eastern hub dependency with Doha (3,506, 24.1%), Dubai (2,913, 20.1%), and Abu Dhabi (2,156, 14.9%) accounting for 59.1% of departures. Limited direct connectivity from German cities forces reliance on Gulf carriers.

Australian travelers (9,384 total) show highly fragmented routing with Singapore (2,768, 29.5%) as the leading hub, followed by Kuala Lumpur (1,153, 12.3%) and diverse other Asian connections. Chinese travelers (9,217 total) route primarily through Shanghai (2,635, 28.6%) and Hong Kong (1,518, 16.5%), yet substantial volumes also depart from Dubai (196), Kuala Lumpur (562), Bangkok (455), indicating many Chinese travelers utilize third-country hubs.

French travelers (8,459 total) exhibit extreme hub dependency with Dubai (2,396, 28.3%), Doha (1,850, 21.9%), and Istanbul (1,508, 17.8%) collectively accounting for 68.0% of departures. Direct Paris departures are minimal, forcing French travelers to route through Middle Eastern or Asian hubs, indicating a significant direct connectivity gap for this important European market. Polish travelers (5,331 total) demonstrate concentrated patterns with Dubai (1,413, 26.5%), Sharja (820, 15.3%) and Abu Dhabi (640, 12.0%) accounting for 49.3% of departures. American travelers (5,284 total) show highly dispersed routing through Doha (943, 17.8%), Dubai (482, 9.1%). Spanish travelers (4,666 total) route through Doha (1,677, 35.9%), Abu Dhabi (1,192, 25.5%), and Dubai (705, 15.1%), collectively representing 76.5% of departures.

This routing analysis reveals that while Sri Lanka benefits from Gulf carrier connectivity, strategic over-dependence creates vulnerability. Prioritizing direct services to key European cities, Australian gateways, and potentially North American hubs would reduce dependency, enhance destination competitiveness, and stimulate market growth through improved accessibility.

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

The distribution of airline preferences across key source markets reveals distinct carrier dominance patterns, routing behaviours, and strategic implications for airline partnerships and destination marketing.

Indian travelers demonstrate strong preference for Indigo (42.17%) and Sri Lankan Airlines (39.35%), collectively capturing 81.52% of the Indian market. Air India (12.42%) adds supplementary capacity. This pattern reflects India's competitive low-cost carrier market

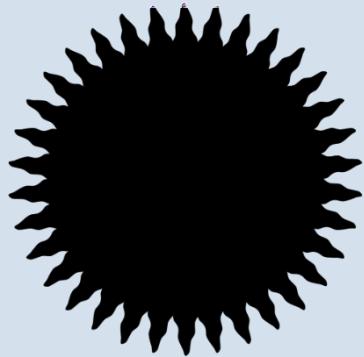
(Indigo), combined with Sri Lankan Airlines' extensive Indian network and historical bilateral connectivity.

Russian travelers show remarkable concentration with Red Wings Airlines (41.87%) capturing the plurality, followed by Aeroflot (19.77%) and Air Arabia (11.04%). The combined 72.68% market share of Russian carriers indicates strong direct service from Moscow, though the significant Air Arabia presence (11.04%) suggests budget-conscious travelers utilize UAE-based low-cost carriers.

UK travelers favour Sri Lankan Airlines (38.08%) as the leading carrier, yet Qatar Airways (17.14%), Emirates (11.58%), and various other carriers collectively represent 62% of the market. This fragmentation indicates competitive pressure from Gulf carriers despite direct London service. German travelers demonstrate overwhelming Gulf carrier preference with Qatar Airways (24.11%) and Emirates (18.09%) capturing 42.20%, complemented by Etihad Airways (14.62%). Australian travelers heavily favor Sri Lankan Airlines (44.48%) and Singapore Airlines (22.72%), collectively representing 67.20% of the market. This indicates successful direct Colombo-Melbourne/Sydney services complemented by Singapore hub connectivity. Chinese travelers show remarkable concentration with China Eastern Airlines (36.45%) capturing over one-third of the market, followed by Air China (17.39%) and Cathay Pacific (15.86%). The combined 69.70% Chinese carrier share indicates strong bilateral aviation relationship and direct service preference. French travelers exhibit extreme Gulf carrier dependency with Emirates (26.27%) and Qatar Airways (21.69%) capturing 47.96%, supplemented by Turkish Airline (17.83%). Polish travelers demonstrate concentrated preferences with Fly Dubai (18.66%), Air Arabia (15.38%), among top carriers. American travelers exhibit highly fragmented carrier preferences with Sri Lankan Airlines (19.42%) leading, followed by Qatar Airways (17.75%)

Spanish travelers show extreme Gulf carrier concentration with Qatar Airways (36.65%) and Etihad Airways (25.44%) capturing 62.09%, complemented by Emirates (14.10%). Combined Gulf carrier share reaches 76.19%, the highest among analyzed markets.

This carrier preference analysis reveals that while SriLankan Airlines maintains strong positions in key markets, Gulf carrier dominance in European corridors creates strategic vulnerability. Prioritizing direct European services, strengthening alliance partnerships, and expanding low-cost carrier collaborations would enhance market competitiveness, reduce hub dependency, and improve destination accessibility across diverse traveler segments.



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