

Introduction

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



Table of Contents

Summary-----	1
Tourist arrivals by region and percentage share, August 2025-----	2
Top primary markets and top potential markets, August 2025-----	3
Top ten source markets, August 2025-----	5
Top ten Source markets, January to August 2025-----	7
Tourist arrivals by purpose of visit, August 2025-----	9
Sri Lanka's Tourism Recovery: Journey Back to 2018 Levels -----	11
International tourist arrivals by country of residence 2025-----	14
Main last departure airports and airlines to Sri Lanka, August 2025-----	17
Top ten markets versus main last departure airports and Main airlines to Sri Lanka August 2025-----	20





Summary

Tourist arrivals to Sri Lanka indicates a consistently positive trend in tourist arrivals for the first eight months of 2025 compared to the same period in 2024. Every month from January to August shows a year over year increase, resulting in a substantial overall growth of 14.9% for this period, equating to over 200,000 additional visitors. The growth was particularly strong in June and January, which saw increases exceeding 21%.

In August, this momentum was notably reinforced by strong performance in key source markets.

India, the United Kingdom, Germany, China, and Italy played a pivotal role in revitalizing Sri Lanka's tourism sector, contributing significantly to the month's 20.4% growth in arrivals. Their continued engagement reflects effective targeted marketing, restored travel confidence, and possibly strengthened diplomatic and air travel ties. This diversified market base not only boosts arrival numbers but also reduces seasonal and economic dependency on any single region, supporting a more resilient and sustainable growth path for the industry.

Table 1. Monthly tourist arrivals, August 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		
October	135,907		
November	184,158		
December	248,592		
TOTAL	2,053,465	1,566,523	

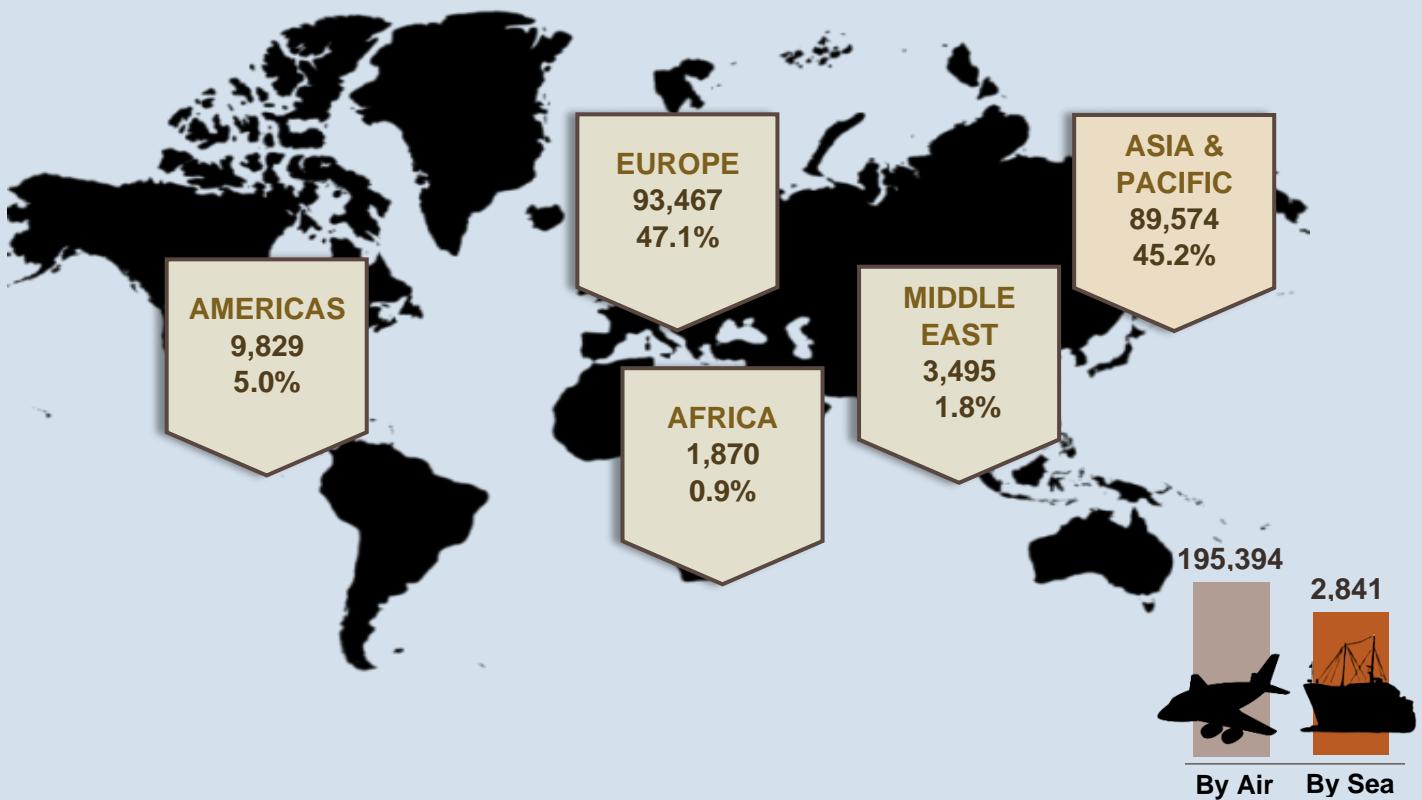
Tourist Arrivals | August 2025

198,235

Tourist arrivals by region and percentage share

August 2025

Map 1. Tourist arrivals by region and percentage share



Tourist arrivals to Sri Lanka in August reveals a clear dominance of two key regions: Europe and Asia & the Pacific. Europe contributed 93,467 visitors, accounting for 47.1% of all arrivals, underscoring the continued importance of traditional source countries like the UK, Germany, and France. Asia & the Pacific followed closely with 89,574 arrivals, representing 45.2% of the total, driven largely by proximity and strong travel links with India and China, as well as growing interest from other Southeast Asian and Pacific nations. Together, these two regions formed the overwhelming majority of tourists, highlighting both the strength and potential vulnerability of Sri Lanka's reliance on these markets.

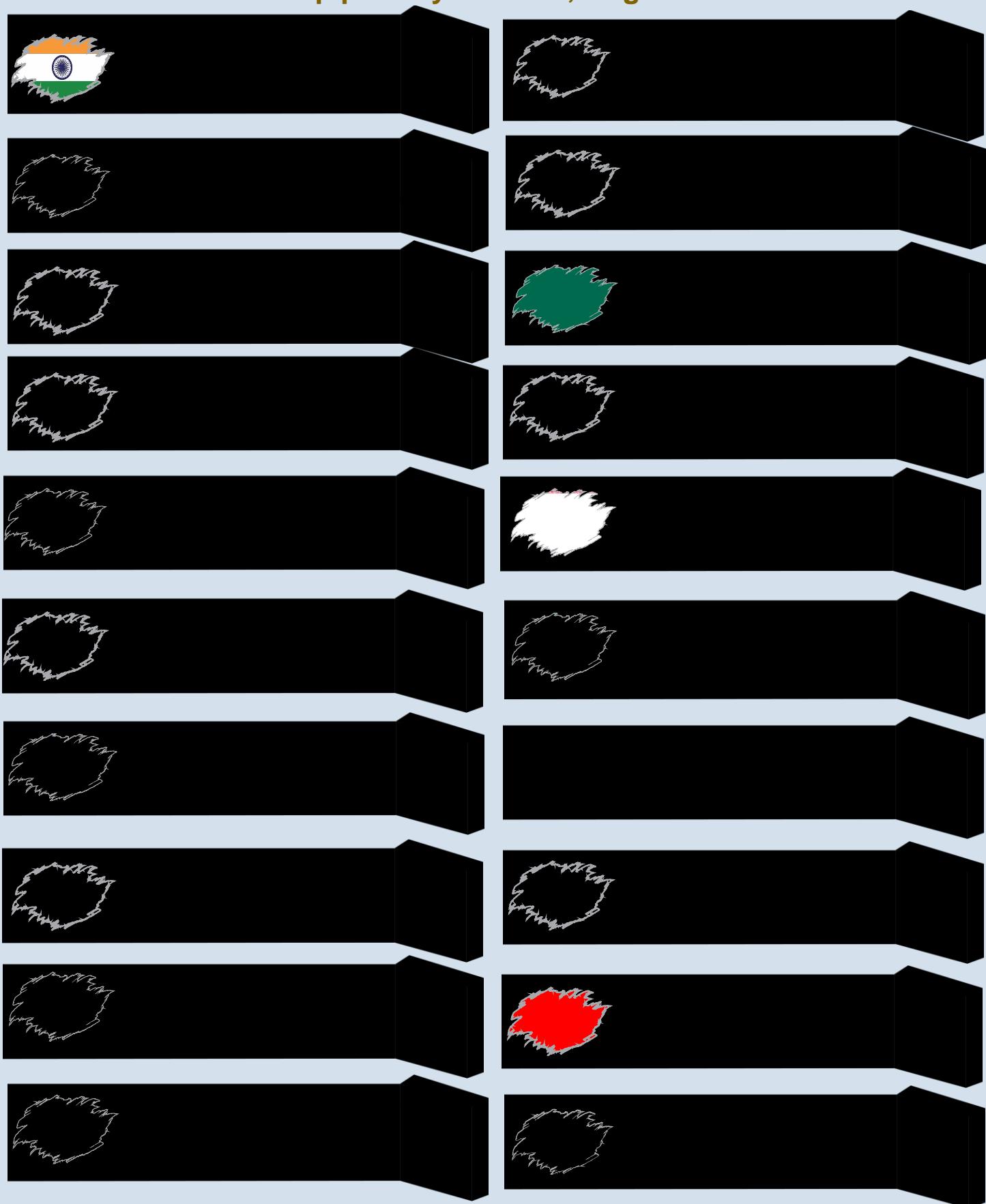
Other regions played comparatively minor roles. The Americas accounted for 5.0% of arrivals, with 9,829 visitors, indicating modest but valuable engagement from the United States and Canada. The Middle East contributed 3,495 tourists (1.8%), suggesting emerging though still limited interest from countries in this region. Africa, with just 1,870 arrivals (0.9%), remained the smallest source region, representing a largely untapped market with potential for future growth.





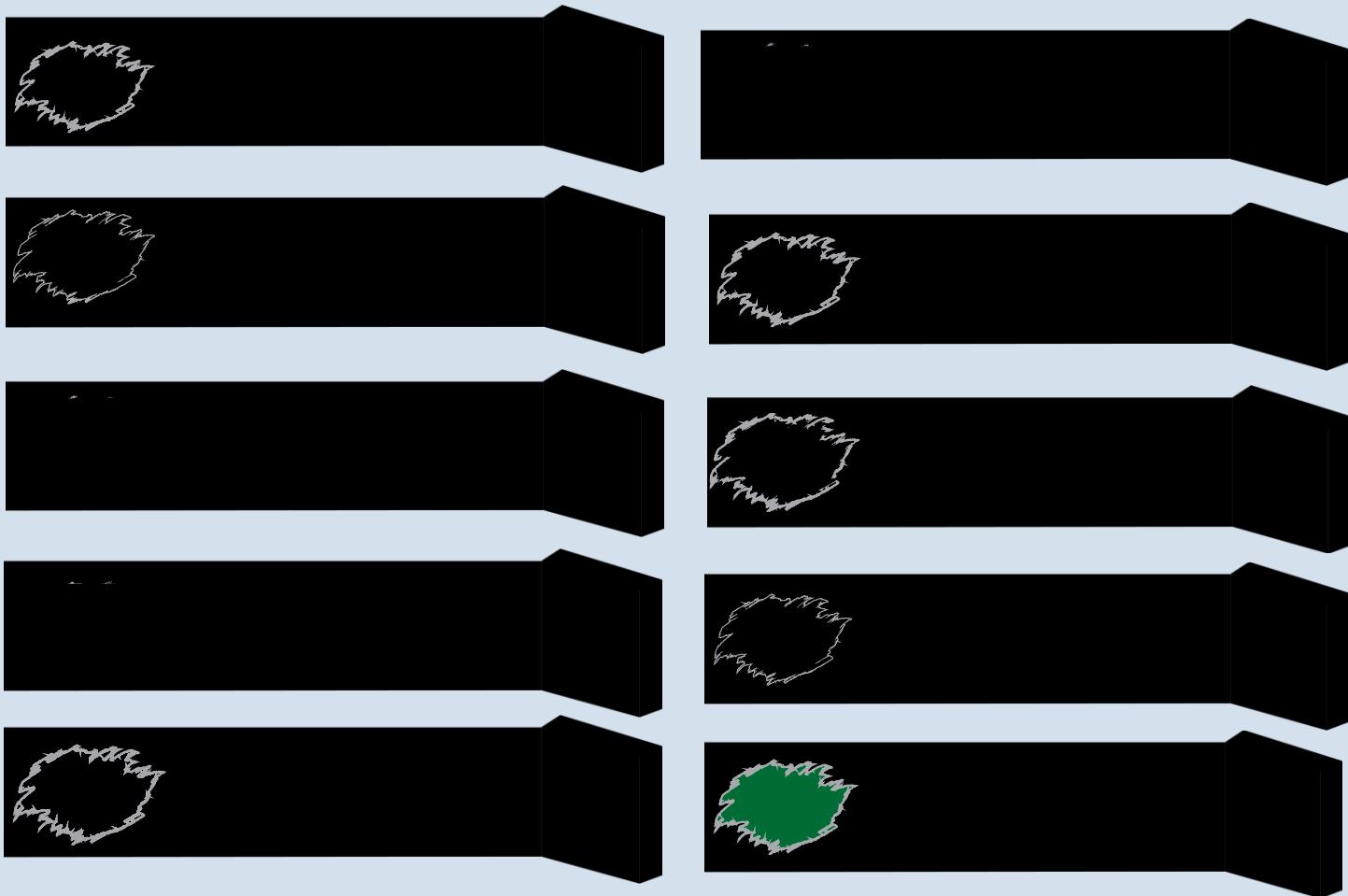
Top primary markets and top potential markets

Top primary markets, August 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, August 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

August 2025

The tourist arrival data for August 2025 reveals a tourism sector in Sri Lanka that is not only thriving but experiencing robust and widespread growth. The most striking feature is the overwhelming dominance of India as the primary source market. Indian tourists, numbering 46,473,(23.4%) surpassed the combined total of the second and third ranked markets (the UK and Germany). This represents a remarkable 40.7% year on year increase, solidifying India's irreplaceable role due to its geographical proximity, cultural affinity and cost effective travel options. A unique aspect of the Indian market is its significant number of arrivals by sea (2,735), a feature absent in all other top markets, indicating specialized travel infrastructure like ferry services that cater to this specific demographic.

Beyond India, the data underscores the critical importance of the European market to Sri Lanka's tourism economy. Six of the top ten source nations are European, the United Kingdom, Germany, Italy, France, Spain, and the Netherlands, collectively contributing over 70,000 tourists. More importantly, these markets are exhibiting exceptionally strong growth rates, with Italy (27.8%), France (22.1%), and Spain (21.8%) leading the charge. This powerful rebound suggests that Sri Lanka remains a highly attractive long-haul destination for European travelers.

The performance of other Asian markets presents a more nuanced picture. China, holding the fourth position, showed only a modest 1.7% growth. This suggests a slower than expected recovery of Chinese outbound travel post pandemic or a potential shift in travel preferences away from traditional packages. In contrast, Japan, though in tenth place, recorded the highest percentage growth among all top markets at 25%, signalling a promising and expanding interest from this high spending demographic. The consistent presence of Australia in the top ten further confirms Sri Lanka's appeal across diverse long haul markets.

The strategic implications for Sri Lanka are clear. While continuing to nurture and expand its vital partnership with India, it is vital to diversify its portfolio. Capitalizing on the booming European demand is essential, but so is fostering the recovery of the Chinese market and locking in the emerging interest from Japan and other regions. This data ultimately paints a picture of a successful recovery, built on a foundation of strong traditional markets while revealing opportunities for future growth and stability.

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

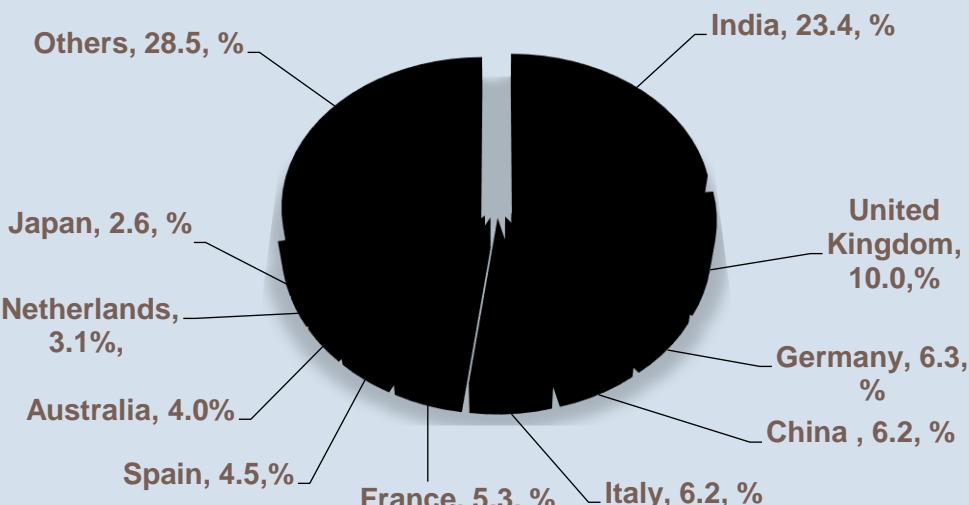
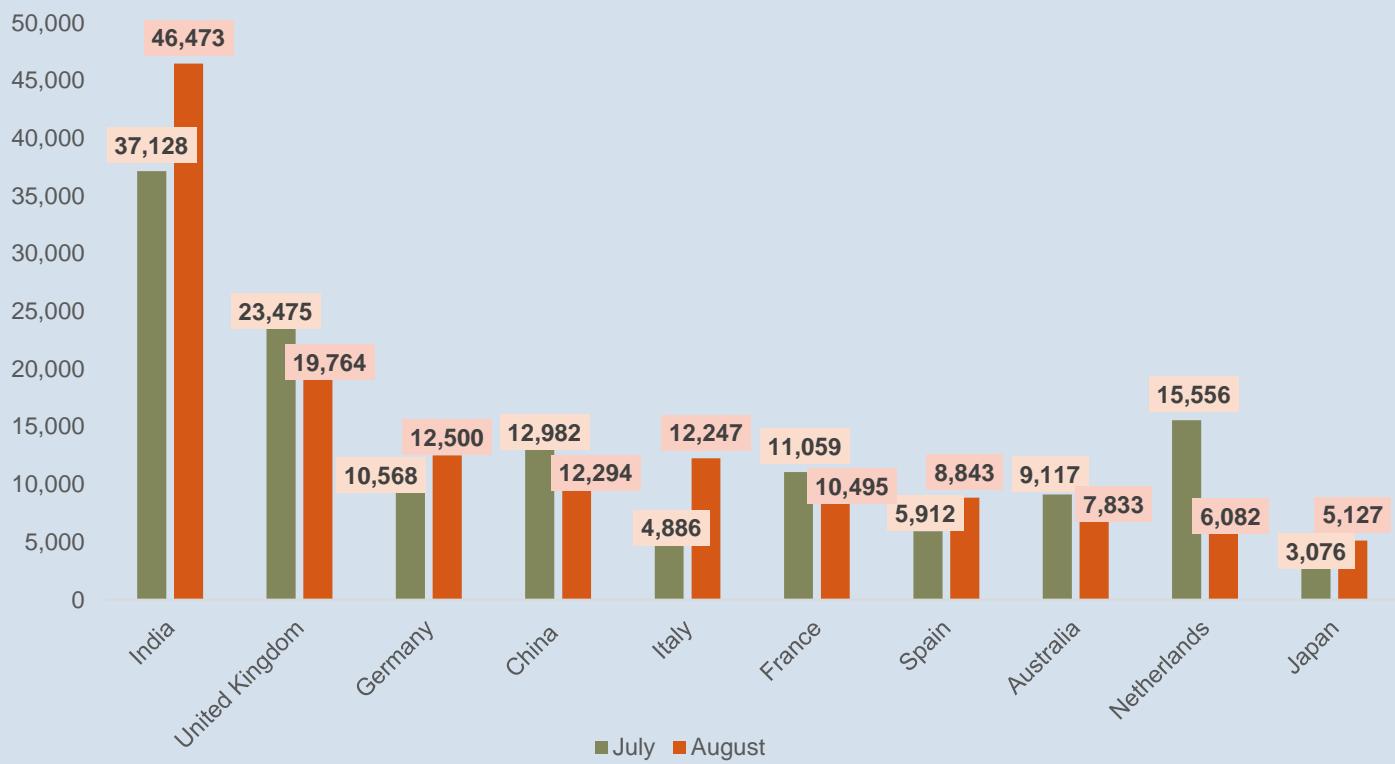


Table 2. Top ten source markets to Sri Lanka, August 2025

Rank	Country of Residence	Tourist arrivals (August 2025)			Tourist arrivals (August 2024)
		By Air	By Sea	Total	
1	India	43,738	2,735	46,473	33,031
2	United Kingdom	19,723	41	19,764	17,587
3	Germany	12,500	0	12,500	10,623
4	China	12,294	0	12,294	12,088
5	Italy	12,245	02	12,247	9,586
6	France	10,479	16	10,495	8,596
7	Spain	8,843	0	8,843	7,262
8	Australia	7,832	01	7,833	6,687
9	Netherlands	6,080	02	6,082	5,355
10	Japan	5,126	01	5,127	4,102

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

Top ten source markets

January to August 2025

The cumulative data of top source markets from January to August 2025 reveals a robust and healthy recovery trajectory for Sri Lanka's tourism industry, with total arrivals reaching over 1.56 million. The growth is not uniform across all markets, however, presenting a complex picture of shifting trends, emerging opportunities, and specific challenges that define the current tourism landscape.

India's position as the undisputed cornerstone of Sri Lankan tourism is overwhelmingly confirmed in this cumulative data. With a staggering 325,595 arrivals, Indian tourists account for a massive portion of the total market share. The 25.9% year on year growth further solidifies this dominance, highlighting the irreplaceable role of geographical proximity, cultural ties, and affordable travel options. The consistent high volume from India provides a stable foundation for the entire sector. Furthermore, the European market continues to be a powerhouse of reliable, high spending visitors. The United Kingdom (2nd), Germany (4th), France (6th), and the Netherlands (8th) all show strong double digit growth, indicating that Sri Lanka remains a premier long haul destination for European travellers. This performance is complemented by strong showings from other traditional markets like Australia (7th) and the United States (9th), which also posted healthy increases.

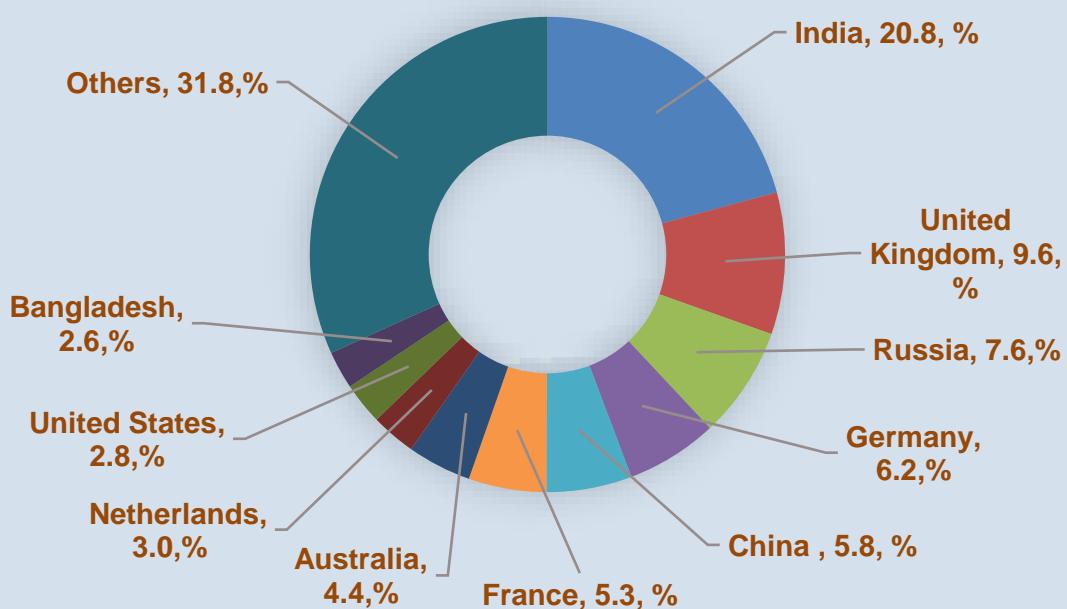
However, the data also reveals notable setbacks in two key markets: the Russian Federation and China. Russia, which was likely a top three market in 2024, has seen a 3.3% decline in arrivals. Similarly, China has experienced a 3.7% decrease. These contractions stand in stark contrast to the widespread growth elsewhere and suggest specific headwinds, such as ongoing economic and travel restrictions impacting outbound Russian tourism, and a slower than expected recovery and potential shift in travel preferences in the Chinese market.

The most striking story within this data is the dramatic emergence of Bangladesh as a major source market. Jumping into the top ten at number 10, arrivals from Bangladesh skyrocketed by an astonishing 67.9%. This phenomenal growth indicates a successful tapping of a new and rapidly expanding market, likely driven by short haul travel and business ties.



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

Rank	Country of Residence	Tourist Arrivals (Jan ~ August 2025)	Tourist Arrivals Jan ~ August 2024
1	India	325,595	258,672
2	United Kingdom	151,141	127,776
3	Russian Federation	118,916	123,033
4	Germany	97,644	91,311
5	China	91,063	94,537
6	France	83,011	67,341
7	Australia	68,275	54,804
8	Netherlands	47,777	36,252
9	United States	44,605	41,218
10	Bangladesh	40,485	24,116
11	Others	498,011	443,608
Total		1,566,523	1,362,668

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

Tourist arrivals by purpose of visit

August 2025

Tourist arrivals to Sri Lanka in August demonstrated the country's continued strength as a premier leisure destination, with visitor arrival data revealing distinct travel patterns and market opportunities.

Out of the total 198,235 arrivals, a majority of 117,404 tourists, accounting for (59.22 percent), visited the country for pleasure and vacation purposes. This underscores Sri Lanka's strong positioning as a leisure destination, driven by its cultural heritage, beaches, wildlife, and natural landscapes. The fact that nearly six out of every ten tourists fall into this category highlights the central role leisure plays in sustaining the tourism industry.

Visiting Friends and Relatives (VFR) is another important segment, comprising 20,630 arrivals, or (10.41 percent) of the total. This figure reflects the strong presence of the Sri Lankan diaspora abroad and their role in sustaining inbound travel. Meanwhile, Meetings, Incentives, Conferences, and Exhibitions (MICE) contributed 14,885 tourists, representing (7.51 percent). This is a significant share that highlights the potential of Sri Lanka to grow further as a business and events destination, particularly with improved infrastructure and marketing.

Smaller but noteworthy segments include business travel with 4,498 arrivals (2.27 percent), health and ayurvedic tourism with 673 arrivals (0.34 percent), and religious tourism with 553 arrivals (0.28 percent). Sports and education related visits remain very low, at only 244 (0.12 percent) and 239 (0.12 percent), respectively. While these categories contribute minimally at present, they offer opportunities for growth if strategically developed, given Sri Lanka's strengths in wellness, cultural heritage, sports events, and academic exchanges.

Overall, the analysis suggests that Sri Lanka remains predominantly a leisure destination, though diaspora related travel and MICE tourism also play significant roles. The smaller segments remain underutilized but provide scope for diversification of the tourism product base. While reinforcing the country's leisure appeal, greater emphasis should be placed on diversifying into high value niche markets such as wellness, religious, sports, and education tourism, alongside strengthening diaspora linkages and MICE opportunities.

Chart 4: Purpose of visit, August 2025

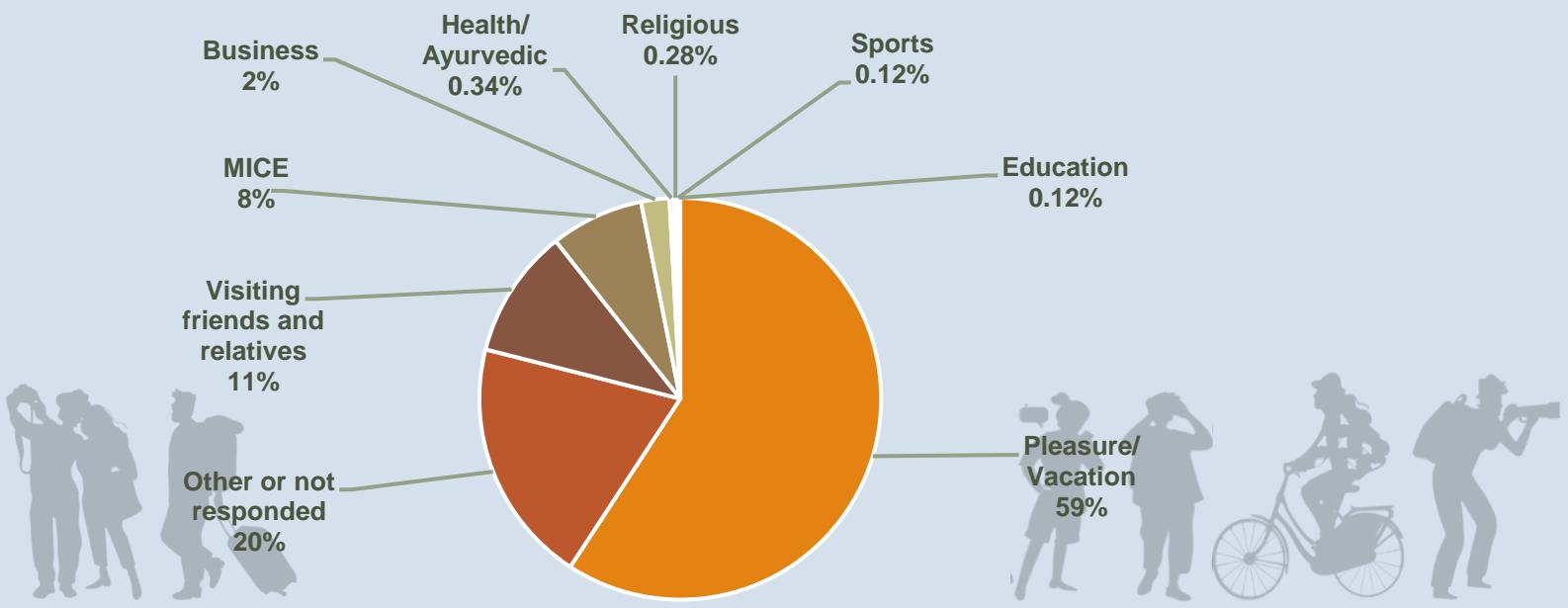
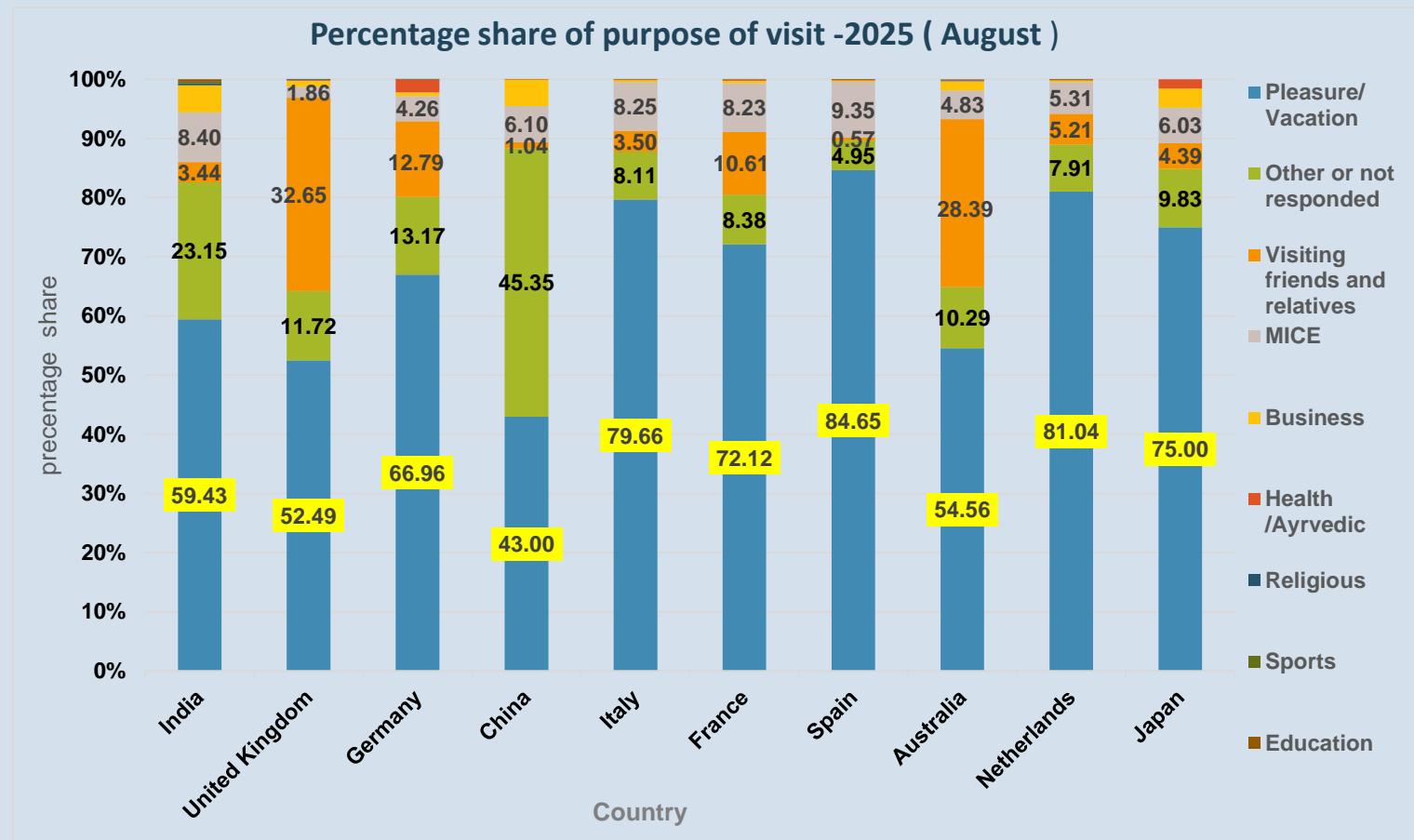


Chart 5: Purpose of visit vs main source markets



This chart reveals a complex and varied landscape of tourist motivations, with leisure travel emerging as the dominant purpose across most key markets. European nations, in particular, exhibit an exceptionally high propensity for vacation travel, with Spain, Netherlands, Italy and France all showing rates over 70%. This underscores the destination's strong appeal as a holiday spot for these regions. In addition to these tourists from European markets, tourists from Japan and Germany also demonstrate a considerable leisure orientation. A closer look uncovers other critical segments. The Visiting Friends and Relatives (VFR) category is crucial for understanding travel from the United Kingdom and Australia, where it accounts for nearly a third of arrivals. This points strongly to historical diaspora connections and migration patterns. In contrast, business related travel is led by India and China.

Furthermore, niche segments, while small, show targeted appeal. Health and Ayurvedic tourism, for instance, finds its primary audience in German and Japanese tourists, aligning with wellness promotion strategies. This data acts as a strategic map: it argues for highly tailored marketing campaigns, promoting VFR and leisure to the UK and Australia, wellness to Germany and Japan, and business travel to India.

Sri Lanka's Tourism Recovery: Journey Back to 2018 Levels

Introduction

Sri Lanka's tourism industry, once a cornerstone of the nation's economy, has experienced a turbulent journey over the past decade. The island nation reached its tourism zenith in 2018, only to face unprecedented challenges in subsequent years. Understanding the path from peak performance to recovery provides crucial insights into the resilience of Sri Lanka's tourism sector and the broader implications for the country's economic stability.

The Golden Year: 2018 Tourism Peak

In 2018, Sri Lanka's tourism industry achieved remarkable success, recording exactly 2,333,796 tourist arrivals. This represented the highest number of international arrivals in the country's tourism history, establishing the benchmark for all future recovery efforts. These visitors contributed significantly to the economy, spending a total of US\$4.3 billion in the country.

The 2018 figures reflected years of strategic tourism development, improved infrastructure, and successful marketing campaigns that positioned Sri Lanka as an attractive destination for international travelers. The country had successfully leveraged its diverse attractions, from pristine beaches and ancient cultural sites to lush hill country and abundant wildlife to create a compelling tourism proposition.

The Decline and Challenges (2019-2022)

Sri Lanka's tourism success story faced severe disruptions beginning in 2019. Tourist arrivals plummeted to 1,913,702 an 18% decline from the 2018 peak following the Easter Sunday bombings in April 2019. This marked the beginning of a prolonged period of decline that would test the industry's resilience.

The situation deteriorated dramatically with the onset of the COVID -19 pandemic. In 2020, tourist arrivals collapsed to just 507,704 visitors, representing a catastrophic 78.3% drop from 2018 levels and a 73.5% decline from the already reduced 2019 numbers. The pandemic brought international travel to a virtual standstill.

The industry hit its lowest point in 2021, with only 194,495 arrivals, a staggering 91.7% decline from 2018 and a further 61.7% drop from 2020. This represented less than one twelfth of the peak 2018 arrivals, highlighting the devastating impact of prolonged border closures and travel restrictions.

Recovery began tentatively in 2022, with arrivals increasing to 719,978 a remarkable 270.1% increase from 2021, though still 69.1% below 2018 levels. The economic crisis that engulfed Sri Lanka in 2022 complicated recovery efforts, creating additional barriers through infrastructure challenges, fuel shortages, and negative international perception.

The Recovery Phase: 2023 Analysis

By 2023, Sri Lanka welcomed 1,487,303 international visitors, representing a robust 106.6% increase from 2022 levels. This dramatic year over year growth demonstrated the industry's strong recovery momentum and renewed international confidence in Sri Lanka as a travel destination.

However, when measured against the 2018 benchmark, the 2023 figures reveal the substantial recovery gap that remained. With 1,487,303 arrivals representing 36.3% below 2018 levels, Sri Lanka had recovered.

approximately 63.7% of its peak tourism performance. This meant that nearly 846,493 fewer tourists visited Sri Lanka in 2023 compared to the record year of 2018.

The 2023 recovery showed that while the acute crisis phase had passed, the industry still required significant effort to return to pre crisis performance levels. The positive trajectory indicated that recovery strategies were working, but full restoration remained a work in progress.

Table: 04 Comparative Analysis: 2018 vs 2023-2025

Year	Tourist Arrivals	Percentage change vs 2018	Percentage change vs previous year	Evolution
2018	2,333,796	0.0	-	Baseline
2019	1,913,702	(18.0)	(18.0)	Decline phase
2020	507,704	(78.3)	(73.5)	Devastation phase
2021	194,495	(91.7)	(61.7)	
2022	719,978	(69.1)	270.2	Rapid recovery phase
2023	1,487,303	(36.3)	106.6	
2024	2,053,465	(12.0)	38.0	Strong Consolidation phase
2025 (January – August)	1,566,523	1.0	14.9	Stabilization phase

This progression indicates that while dramatic growth rates were unsustainable, Sri Lanka has maintained positive momentum sufficient to approach and potentially exceed 2018 levels.

Recent Progress and Future Outlook

The data shows accelerating recovery momentum continuing into 2024. Tourist arrivals reached 2,053,465 visitors, representing a 38% increase from 2023 and bringing Sri Lanka to 88% of its 2018 peak performance. This marked a significant milestone, with the country recovering nearly nine-tenths of its pre-crisis tourism levels.

The 2024 performance demonstrates that Sri Lanka is on a clear trajectory toward full recovery. The year over year growth rates tell a compelling story: from 270.9% growth in 2022 (off a very low base), to 106.6% growth in 2023, to 38% growth in 2024, showing sustained momentum despite the decreasing growth rates as the base numbers increase.

With only a 12% gap remaining to reach 2018 levels, Sri Lanka appears positioned to achieve full tourism recovery, provided current positive trends continue and no major external disruptions occur.

Sri Lanka's journey to recover tourism to 2018 levels illustrates both the vulnerability of the tourism industry to external shocks and its remarkable capacity for resilience and strategic recovery. The data reveals an extraordinary story of decline and revival: from a peak of 2,333,796 visitors in 2018, through a devastating low of 194,495 in 2021 (representing a 91.7% decline), to near complete recovery with 2,053,465 visitors by 2024.

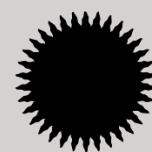
The 2025 partial year data marks a pivotal moment in this recovery narrative. With 1,566,523 visitors in the first nine months achieving just 32.8% growth over 2018 baseline levels, Sri Lanka appears poised to finally match or marginally exceed its pre crisis performance. This represents the successful completion of a seven year recovery journey that tested the industry's resilience through multiple crises.

Future Trajectory

Having achieved the primary objective of matching 2018 levels, Sri Lanka's tourism industry now faces a new challenge: transitioning from recovery mode to sustainable growth mode. The 14.9% growth rate in 2025, while positive, suggests the need for strategic innovation to prevent stagnation and achieve new growth targets.

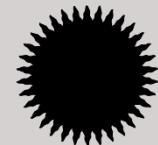
The path forward requires Sri Lanka to leverage the lessons learned during its recovery journey such as resilience, adaptability, and strategic focus to establish new performance benchmarks that position the country not just as a recovered destination, but as a leading, innovative tourism market in South Asia capable of sustained growth beyond historical peaks. Success in this next phase will transform the recovery story into a foundation for long term tourism leadership in the region.



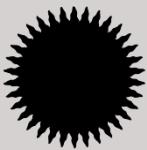


International tourist arrivals by country of residence

	August 2025			Tourist arrivals August 2024	% change August (25/24)	Total tourist arrivals up to August 2025	Total tourist arrivals up to August 2024	% change up to August (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
AMERICAS	9,799	30	9,829	7,833	25.5	83,365	76,757	8.6					
North America	9,346	30	9,376	7,465	25.6	79,224	72,784	8.8					
Canada	4,322	11	4,333	3,868	12.0	33,911	30,912	9.7					
Mexico	73	0	73	58	25.9	708	654	8.3					
United States	4,951	19	4,970	3,539	40.4	44,605	41,218	8.2					
Caribbean & Central America	98	0	98	54	81.5	674	661	2.0					
Costa Rica	06	0	06	02	200.0	78	71	9.9					
Jamaica	05	0	05	05	-	31	65	(52.3)					
Others	87	0	87	47	85.1	565	525	7.6					
South America	355	0	355	314	13.1	3,467	3,312	4.7					
Argentina	54	0	54	43	25.6	621	630	(1.4)					
Brazil	134	0	134	129	3.9	1,311	1,326	(1.1)					
Chile	39	0	39	42	(7.1)	451	399	13.0					
Colombia	60	0	60	51	17.6	463	467	(0.9)					
Others	68	0	68	49	38.8	621	490	26.7					
AFRICA	1,870	0	1,870	1,207	54.9	10,972	8,844	24.1					
North Africa	530	0	530	293	80.9	2,399	2,138	12.2					
Morocco	132	0	132	112	17.9	759	669	13.5					
Sudan	288	0	288	78	269.2	839	566	48.2					
Others	110	0	110	103	6.8	801	903	(11.3)					
Sub-Saharan Africa	1,340	0	1,340	914	46.6	8,573	6,706	27.8					
Kenya	93	0	93	54	72.2	835	487	71.5					
Mauritius	60	0	60	57	5.3	532	343	55.1					
Nigeria	12	0	12	05	140.0	76	39	94.9					
South Africa	460	0	460	324	42.0	3,218	2,905	10.8					
Others	715	0	715	474	50.8	3,912	2,932	33.4					



	August 2025			Tourist arrivals August 2024	% change August (25/24)	Total tourist arrivals up to August 2025	Total tourist arrivals up to August 2024	% change up to August (25/24)		
	Tourist arrivals					Total tourist arrivals up to August 2025	Total tourist arrivals up to August 2024			
	By Air	By Sea	Total			Total tourist arrivals up to August 2025	Total tourist arrivals up to August 2024			
ASIA & PACIFIC	86,831	2,743	89,574	71,851	24.7	661,453	550,387	20.2		
North East Asia	18,261	01	18,262	16,889	8.1	123,968	120,206	3.1		
China	12,294	0	12,294	12,088	1.7	91,063	94,537	(3.7)		
Japan	5,126	01	5,127	4,102	25.0	24,662	18,734	31.6		
South Korea	808	0	808	698	15.8	8,111	6,862	18.2		
Others	33	0	33	01	-	132	73	80.8		
South East Asia	6,157	02	6,159	4,890	26.0	43,819	35,204	24.5		
Cambodia	37	0	37	25	48.0	1,008	957	5.3		
Indonesia	487	0	487	291	67.4	3,249	2,105	54.3		
Malaysia	2,157	0	2,157	1,571	37.3	14,901	12,099	23.2		
Myanmar	527	0	527	417	26.4	1,692	1,253	35.0		
Philippines	678	0	678	465	45.8	4,458	3,579	24.6		
Singapore	1,260	02	1,262	1,215	3.9	9,764	7,956	22.7		
Thailand	682	0	682	598	14.0	5,808	5,011	15.9		
Vietnam	308	0	308	293	5.1	2,681	2,074	29.3		
Others	21	0	21	15	40.0	258	170	51.8		
Oceania	8,907	01	8,908	7,722	15.4	76,772	62,010	23.8		
Australia	7,832	01	7,833	6,687	17.1	68,275	54,804	24.6		
New Zealand	1,044	0	1,044	1,011	3.3	8,211	6,992	17.4		
Others	31	0	31	24	29.2	286	214	33.6		
South Asia	53,506	2,739	56,245	42,350	32.8	416,894	332,967	25.2		
Afghanistan	03	0	03	18	(83.3)	60	120	(50.0)		
Bangladesh	4,074	0	4,074	3,877	5.1	40,485	24,116	67.9		
Bhutan	44	0	44	51	(13.7)	417	459	(9.2)		
India	43,738	2,735	46,473	33,031	40.7	325,595	258,672	25.9		
Iran	485	0	485	883	(45.1)	6,614	7,442	(11.1)		
Maldives	3,003	0	3,003	3,198	(6.1)	24,211	30,098	(19.6)		
Nepal	579	04	583	252	131.3	3,677	2,842	29.4		
Pakistan	1,580	0	1,580	1,040	51.9	15,835	9,218	71.8		
EUROPE	93,399	68	93,467	80,934	15.5	788,780	705,935	11.7		
Northern Europe	22,173	43	22,216	19,676	12.9	191,347	163,062	17.3		
Denmark	737	2	739	606	21.9	12,714	10,898	16.7		
Finland	113	0	113	100	13.0	2,902	2,588	12.1		
Norway	514	0	514	486	5.8	9,227	8,253	11.8		
Sweden	341	0	341	290	17.6	8,125	7,544	7.7		
United Kingdom	19,723	41	19,764	17,587	12.4	151,141	127,776	18.3		
Others	745	0	745	607	22.7	7,238	6,003	20.6		



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	Tourist arrivals		Total					
	By Air	By Sea						
Western Europe	34,747	20	34,767	29,447	18.1	279,318	239,356	16.7
Austria	1,425	0	1,425	1,150	23.9	12,216	11,323	7.9
Belgium	2,047	0	2,047	1,751	16.9	15,322	11,976	27.9
France	10,479	16	10,495	8,596	22.1	83,011	67,341	23.3
Germany	12,500	0	12,500	10,623	17.7	97,644	91,311	6.9
Netherlands	6,080	02	6,082	5,355	13.6	47,777	36,252	31.8
Switzerland	2,065	02	2,067	1,856	11.4	22,639	20,499	10.4
Others	151	0	151	116	30.2	709	654	8.4
Central/Eastern Europe	9,895	01	9,896	9,310	6.3	214,740	217,817	(1.4)
Belarus	181	0	181	199	(9.0)	5,750	7,415	(22.5)
Czech Republic	874	0	874	822	6.3	12,837	14,398	(10.8)
Estonia	16	0	16	15	6.7	2,798	2,814	(0.6)
Hungary	239	0	239	261	(8.4)	4,356	4,386	(0.7)
Kazakhstan	60	0	60	71	(15.5)	7,848	8,850	(11.3)
Lithuania	117	0	117	111	5.4	4,923	4,663	5.6
Poland	3,403	01	3,404	2,240	52.0	32,952	28,393	16.1
Romania	397	0	397	336	18.2	4,035	4,025	0.2
Russia	3,446	0	3,446	4,351	(20.8)	118,916	123,033	(3.3)
Slovakia	346	0	346	290	19.3	4,796	4,567	5.0
Ukraine	272	0	272	203	34.0	5,788	4,848	19.4
Others	544	0	544	411	32.4	9,741	10,425	(6.6)
Southern/Mediterranean Europe	26,584	4	26,588	22,501	18.2	103,375	85,700	20.6
Greece	844	0	844	339	149.0	2,815	1,812	55.4
Italy	12,245	02	12,247	9,586	27.8	36,690	27,444	33.7
Portugal	647	01	648	667	(2.8)	5,309	3,954	34.3
Spain	8,843	0	8,843	7,262	21.8	29,595	23,848	24.1
Turkey	606	0	606	448	35.3	5,662	4,480	26.4
Israel	2,403	0	2,403	3,248	(26.0)	15,417	17,373	(11.3)
Others	996	01	997	951	4.8	7,887	6,789	16.2
MIDDLE EAST	3,495	0	3,495	2,784	25.5	21,953	20,745	5.8
Bahrain	134	0	134	140	(4.3)	987	884	11.7
Egypt	274	0	274	265	3.4	2,861	2,608	9.7
Iraq	204	0	204	172	18.6	963	692	39.2
Jordan	191	0	191	173	10.4	1,922	1,775	8.3
Kuwait	232	0	232	207	12.1	1,387	1,450	(4.3)
Lebanon	240	0	240	244	(1.6)	2,249	2,412	(6.8)
Oman	388	0	388	473	(18.0)	1,904	2,124	(10.4)
Qatar	159	0	159	102	55.9	699	578	20.9
Saudi Arabia	690	0	690	330	109.1	4,313	4,320	(0.2)
United Arab Emirates	820	0	820	562	45.9	3,831	3,114	23.0
Others	163	0	163	116	40.5	837	788	6.2
TOTAL	195,394	2,841	198,235	164,609	20.4	1,566,523	1,362,668	15.0

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

Data detailing the last departure ports of tourists arrived in Sri Lanka in August 2025, provides a critical map of the country's air connectivity and the primary gateways through which its tourism industry is accessed. The most striking finding is the overwhelming dominance of Middle Eastern aviation hubs, which collectively serve as the main transit points for a vast majority of visitors. Doha, with 25,085 passengers (12.65%), stands as the single largest departure port, closely followed by Dubai at 23,302 (11.75%). Abu Dhabi (8.71%) and Sharjah (3.93%) further cement the pivotal role of Gulf carriers such as Qatar Airways, Emirates, Etihad, and Air Arabia in funneling tourists from across Europe, the Americas, and Africa through their efficient and extensive networks to Colombo.

The second most significant group of departure ports are located in India, underscoring its dual role as a top source market and a vital aviation partner. Chennai, as the closest major Indian metro, is the third largest port of departure with 18,201 passengers (9.18%), highlighting strong regional ties. This is complemented by significant traffic from other major Indian cities including Delhi (5.11%), Mumbai (4.96%), Bangalore (4.28%), and Hyderabad (1.95%), demonstrating excellent direct flight connectivity across the Indian subcontinent that caters to both point to point travel and some transit traffic.

Beyond these two dominant regions, the table reveals the importance of key hubs in Southeast Asia and Europe. Kuala Lumpur (3.78%) and Singapore (3.52%) act as crucial secondary gateways, primarily connecting tourists from Australia and Southeast Asia via airlines like Malaysia Airlines and Singapore Airlines. Istanbul's position (3.21%) reflects the rapid growth of Turkish Airlines as a major connector, linking Sri Lanka to numerous destinations across Europe and beyond. London (2.80%) remains the primary direct long haul link to Europe and a key entry point for the important UK market.

The list also confirms the existence of important direct flight connections to niche but valuable markets. The presence of Shanghai (1.92%), Chengdu (1.04%), Hong Kong (1.44%), and Narita/Tokyo (1.00%) points to direct air links that are essential for attracting tourists from key East Asian source markets like China and Japan without the need for a layover. Similarly, Melbourne (1.25%) represents a direct connection to Australia. This comprehensive data ultimately paints a picture of a tourism economy highly reliant on a few foreign airline hubs for global access, which has profound implications for aviation strategy and targeted tourism marketing at these critical transit points.

The data detailing the airlines used by tourists arriving in Sri Lanka in August 2025 reveals a highly competitive and strategically layered aviation market. The national carrier, Sri Lankan Airlines, asserts its dominant position as the clear market leader, transporting 48,890 passengers and capturing nearly a quarter of all tourist arrivals with a 24.66% share. This signifies its critical role in the country's tourism infrastructure. However, the overwhelming majority of the market, approximately 75%, is served by foreign airlines, highlighting both the intense competition and Sri Lanka's deep integration into global aviation networks.

The most powerful bloc of these foreign carriers hails from the Middle East, collectively forming the largest competitive force. Qatar Airways stands as the second largest individual airline with a 12.28% share, followed closely by Emirates at 9.36% and Etihad Airways at 7.65%. Their influence is further amplified by other regional players like Air Arabia (3.93%) and Fly Dubai (3.79). Together, airlines based in the Middle East account

for a staggering combined market share of over 37%, underscoring the indispensable role of hubs like Doha, Dubai, and Abu Dhabi in connecting Sri Lanka to source markets across Europe, the Americas, and Africa.

A particularly striking insight is the remarkable performance of the Indian low cost carrier Indi Go, which captured a 12.06% market share with 23,906 passengers. This makes it the third largest airline, even surpassing Emirates in volume. This figure powerfully emphasizes the immense volume of traffic from India and the successful penetration of a low cost model catering to price sensitive tourists and visitors. Other key players include Air India, which holds a 5.80% share, reinforcing the strong air links with the subcontinent, and Turkish Airlines, whose 3.21% share confirms its growing role as a key connector from Europe and other regions. The presence of Chinese carriers like China Eastern (2.59%) and Air China (1.04%) caters to the important Chinese market, while Southeast Asian airlines such as Singapore Airlines (2.13%) and Air Asia (1.97%) serve their respective hubs. The remaining traffic is divided among carriers like Fits Air, Cathay Pacific, and others, which collectively account for the final 4.2% of arrivals.

The strategic implications of this market structure are significant. Sri Lanka's tourism industry, while benefiting from its strong national carrier, is notably dependent on the capacity and routing strategies of foreign airlines, particularly the powerful Middle Eastern conglomerates. The extraordinary success of IndiGo points to a major opportunity for further deepening ties with the Indian travel market through low cost carriers. Ultimately, this data serves as a crucial tool for understanding the competitive dynamics of the aviation sector and identifying the key airline partnerships that are most vital for bringing tourists to the country.

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

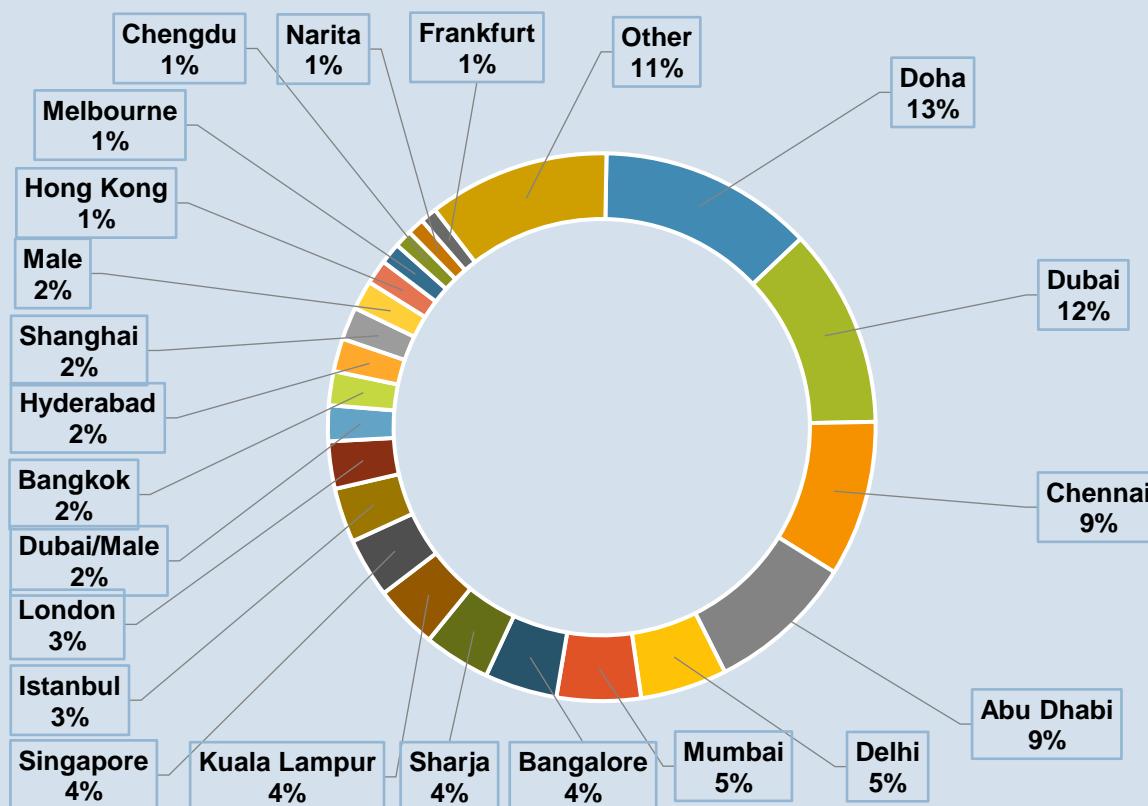
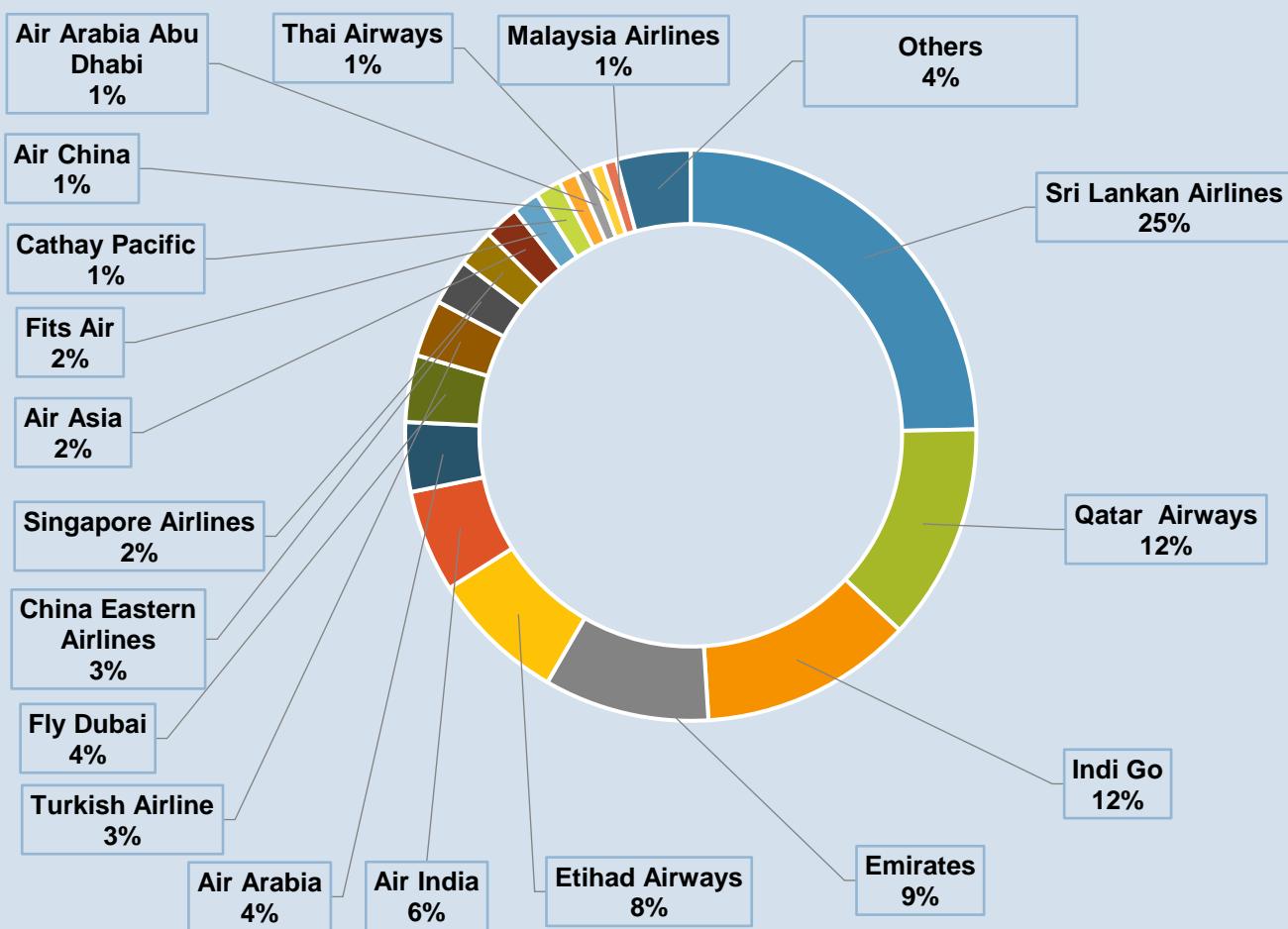


Chart 7. Main airlines to Sri Lanka, August 2025

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

August 2025

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

Cross tabulation of Sri Lanka's top ten tourist source markets and their preferred ports of departure for August 2025, offers unparalleled insight into travel patterns and airline hub preferences based on nationality. The data reveals that a tourist's country of origin is the primary determinant of their chosen gateway to Sri Lanka, painting a clear picture of global aviation route networks and geographic convenience.

The travel patterns for the Indian market are the most straightforward and distinct. The vast majority of Indian tourists arrive on direct flights from their own major cities, with minimal reliance on international hubs. A staggering 15,230 departed from Chennai, followed by 7,366 from Bangalore, 6,211 from Mumbai, and 5,755 from Delhi. This overwhelming use of direct connections (Hyderabad also contributed 3,553) means that Middle Eastern hubs play an almost negligible role for Indian travelers, who clearly prioritize direct access.

In stark contrast, tourists from Europe are overwhelmingly funneled through Middle Eastern hubs. For travelers from the United Kingdom, Doha (5,197) and Dubai (3,322) are the top two departure points, significantly outweighing direct flights from London (4,645). This pattern is even more pronounced for German, Italian, French, and Spanish tourists. For instance, majorities from these nations transit through hubs like Doha, Dubai, and Abu Dhabi, with Istanbul also serving as a key gateway, particularly for Spanish (1,507) and Italian (1,159) visitors. This underscores the dominant role of airlines like Qatar Airways, Emirates, Etihad, and Turkish Airlines in connecting continental Europe to Sri Lanka.

The Chinese and Japanese markets demonstrate a strong preference for transit hubs within Asia rather than the Middle East. For Chinese tourists, the primary points of departure are Shanghai (2,910) and Hong Kong (1,426), with significant numbers also traveling via Kuala Lumpur (1,088) and Bangkok (599). Similarly, Japanese tourists most frequently used Kuala Lumpur (635), Bangkok (585), and Singapore (491), with direct connections from Shanghai (511) also playing a role. This highlights the importance of Southeast Asian hubs and regional carriers for East Asian travel flows.

Finally, the Australian market displays the most unique and focused routing. The data shows an overwhelming dependence on a single hub: Singapore. A massive (2,663) Australian tourists transited through Singapore, a number that dwarfs the second most popular option, the direct connection from Melbourne (2,151). This clearly establishes Singapore Airlines as the carrier of choice for Australian visitors, with very few opting for Middle Eastern or other transit points, illustrating a highly streamlined travel corridor between Australia and Sri Lanka via Singapore.

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

visiting Sri Lanka in August 2025 reveals that the choice of airline is profoundly influenced by a tourist's country of origin, dictated by geographic proximity, existing aviation agreements, and the strength of specific airline hubs. The data clearly segments the markets into distinct groups based on their reliance on the national carrier, Middle Eastern airlines, or regional connectors.

The most striking pattern is the dominance of point to point travel for geographically proximate markets. India exemplifies this, with a staggering 43.27% of all its tourists choosing the low cost carrier IndiGo, highlighting a massive price sensitive segment. This is complemented by Sri Lankan Airlines (31.00%) and Air India (15.36%), showcasing a market served primarily by direct flights from the subcontinent with minimal use of Middle Eastern hubs. Similarly, Australia and Japan show a strong reliance on their most logical connector. A commanding 58.76% of Australian tourists flew with Sri Lankan Airlines, likely on direct flights or convenient connections, while another 23.67% used Singapore Airlines,

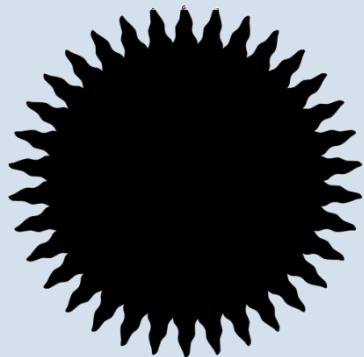
reflecting the importance of the Singapore hub. For Japan, Sri Lankan Airlines (51.57%) is also the leading carrier, but a significant portion of traffic is distributed among East Asian carriers like China Eastern (10.10%), Air Asia (8.89%), and Singapore Airlines (5.89%), indicating the use of regional hubs like Shanghai and Singapore for connectivity.

In direct contrast, long haul markets from Europe are overwhelmingly dependent on the big three Middle Eastern carriers (Qatar Airways, Emirates, and Etihad Airways) and Turkish Airlines. For instance, the United Kingdom spreads its traffic across Sri Lankan Airlines (31.27%), Qatar Airways (25.86%), and Emirates (17.75%). This pattern is even more pronounced for continental European nations. Germany's arrivals are heavily reliant on Qatar Airways (26.80%), Emirates (19.82%), and Etihad Airways (16.32%). France uses a similar mix, while Italy and Spain show a particularly strong preference for Etihad Airways (20.07% and 22.85% respectively) and Turkish Airlines (9.46% and 17.04%). The Netherlands presents the most extreme case of Middle Eastern hub dependency, with a massive 32.59% share for Qatar Airways and 26.77% for Emirates. The national carrier holds a much smaller share in these European markets, underscoring the competitive power of the Gulf hubs.

The Chinese market stands alone with a unique pattern, being the only one dominated by its own national carriers rather than Middle Eastern or Sri Lankan airlines. China Eastern Airlines is the clear leader with a 34.07% share, followed by Air China (16.16%). This indicates that a majority of Chinese tourists arrive via direct flights or through Chinese hubs. The remaining traffic is split among other Asian carriers like Cathay Pacific (11.49%) and Air Asia (5.05%), with Sri Lankan Airlines capturing a modest 14.82% of this market.

In conclusion, this data is vital for strategic planning. It shows Sri Lankan Airlines' solid position in the South Asian and East Asian markets but also its significant vulnerability to the competitive pricing and extensive networks of the Middle Eastern giants in its valuable European source markets. The overwhelming preference for specific airlines in each region provides a clear roadmap for targeted marketing campaigns and commercial partnerships, suggesting that tourism authorities should collaborate closely with Qatar Airways for the Dutch and German markets, with Etihad for Italian and Spanish tourists, and with Singapore Airlines for the Australian market to maximize arrival numbers.





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