



MONTHLY TOURIST ARRIVALS REPORT:

A MONTHLY SNAPSHOT OF INTERNATIONAL ARRIVALS TO
SRI LANKA FROM IMMIGRATION STATISTICS

MARCH 2025

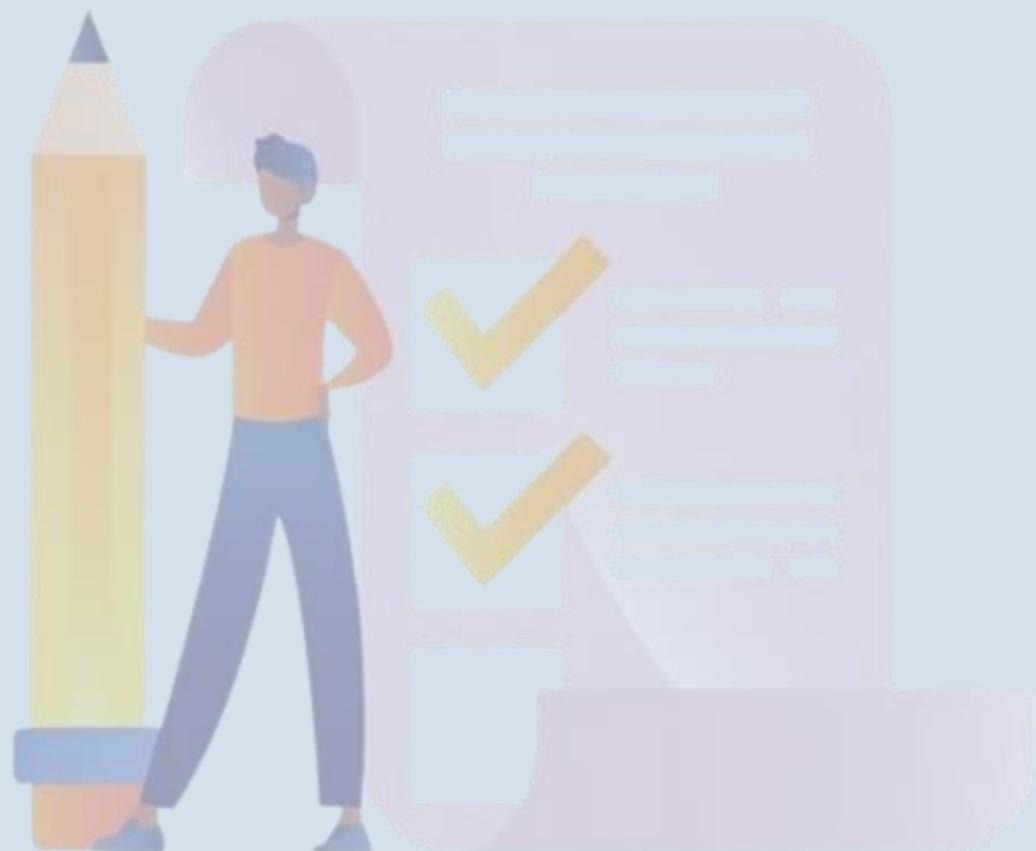
Introduction

The following document provides a synthesis of the most recent March 2025 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st March 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 industry shows robust performance in early 2025, with January-March statistics revealing significant growth. The first quarter recorded 722,276 tourist arrivals, representing 35.2% of 2024's annual total (2,053,465). January led with 252,761 visitors (21.4% year-over-year increase), followed by February with 240,217 (+10.0%) and March with 229,298 (+9.62%).

While growth remains positive throughout Q1, the declining growth rate (from 21.4% to 9.62%) may indicate normalization after peak holiday periods or emerging seasonal patterns. This follows 2024's trends where December-February were peak months and May-June experienced lower visitor numbers due to various conditions.

If Q1 momentum continues, 2025 could significantly outperform 2024's totals. However, uncertainties remain regarding traditionally low seasons and global economic factors. To maintain this positive trajectory, strategic priorities should include sustained marketing efforts, targeted promotions during expected seasonal dips, and infrastructure improvements.

Key source markets including India, Russia, the United Kingdom, Germany, and France played a crucial role in strengthening Sri Lanka's tourism performance in March. These markets made substantial contributions that drove the growth in visitor numbers, providing essential support to the country's tourism sector.

Table 1. Monthly tourist arrivals, March 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	9.62
April	148,867		
May	112,128		
June	113,470		
July	187,810		
August	164,609		
September	122,140		
October	135,907		
November	184,158		
December	248,592		
TOTAL	2,053,465	722,276	



Tourist Arrivals | March 2025

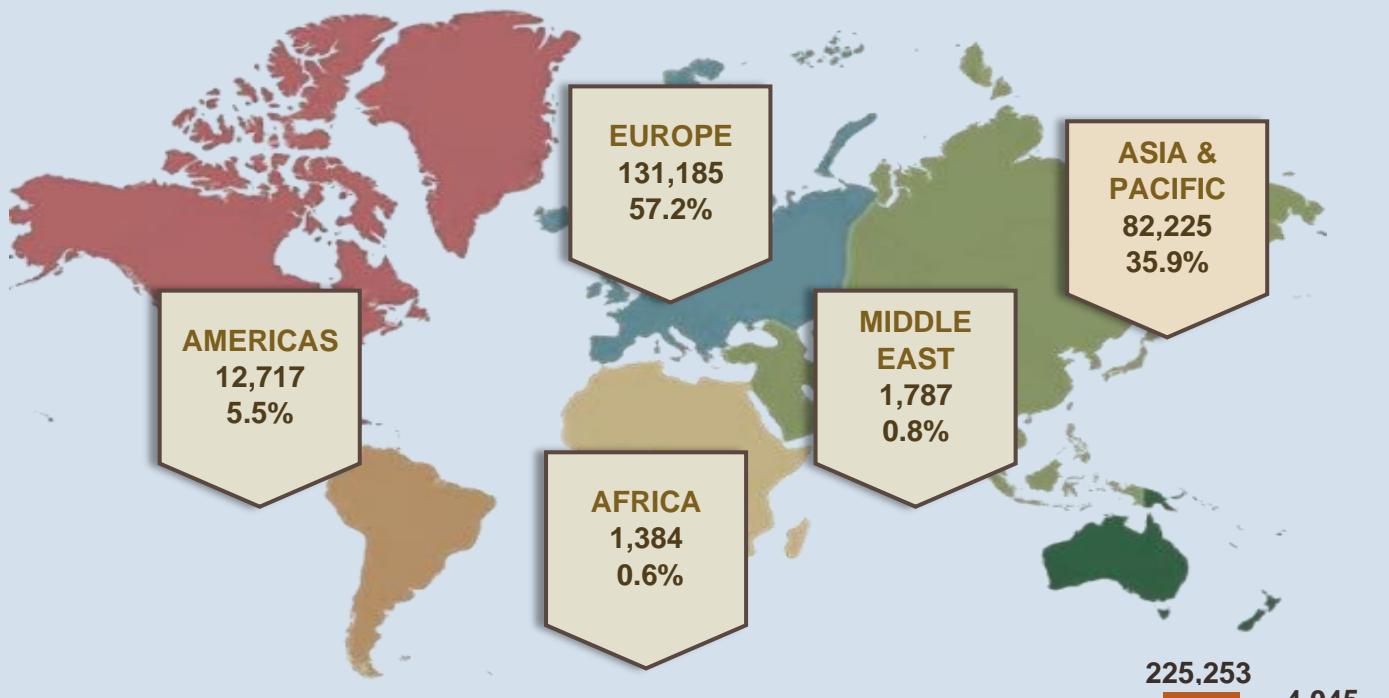
229,298



Tourist arrivals by region and percentage share

March 2025

Map 1. Tourist arrivals by region and percentage share

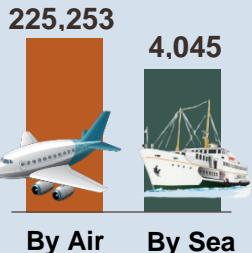


The regional breakdown of Sri Lanka's tourism reveals significant market concentration, with Europe (57.2%, 131,185 visitors) and Asia & Pacific (35.9%, 82,225 visitors) collectively representing 93.1% of all arrivals.

Europe's dominant position likely results from colonial connections, established travel patterns, and strong flight networks, while the Asia-Pacific region benefits from geographic proximity and cultural affiliations with important source countries like India and China.

By comparison, contributions from the Americas (5.5%, 12,717 visitors), Middle East (0.8%, 1,787 visitors), and Africa (0.6%, 1,384 visitors) remain marginal, representing missed opportunities for growth. These underserved regions offer distinct potential: the Middle East for high-end tourism, Africa for environmental experiences, and the Americas for specialized interests such as wildlife observation.

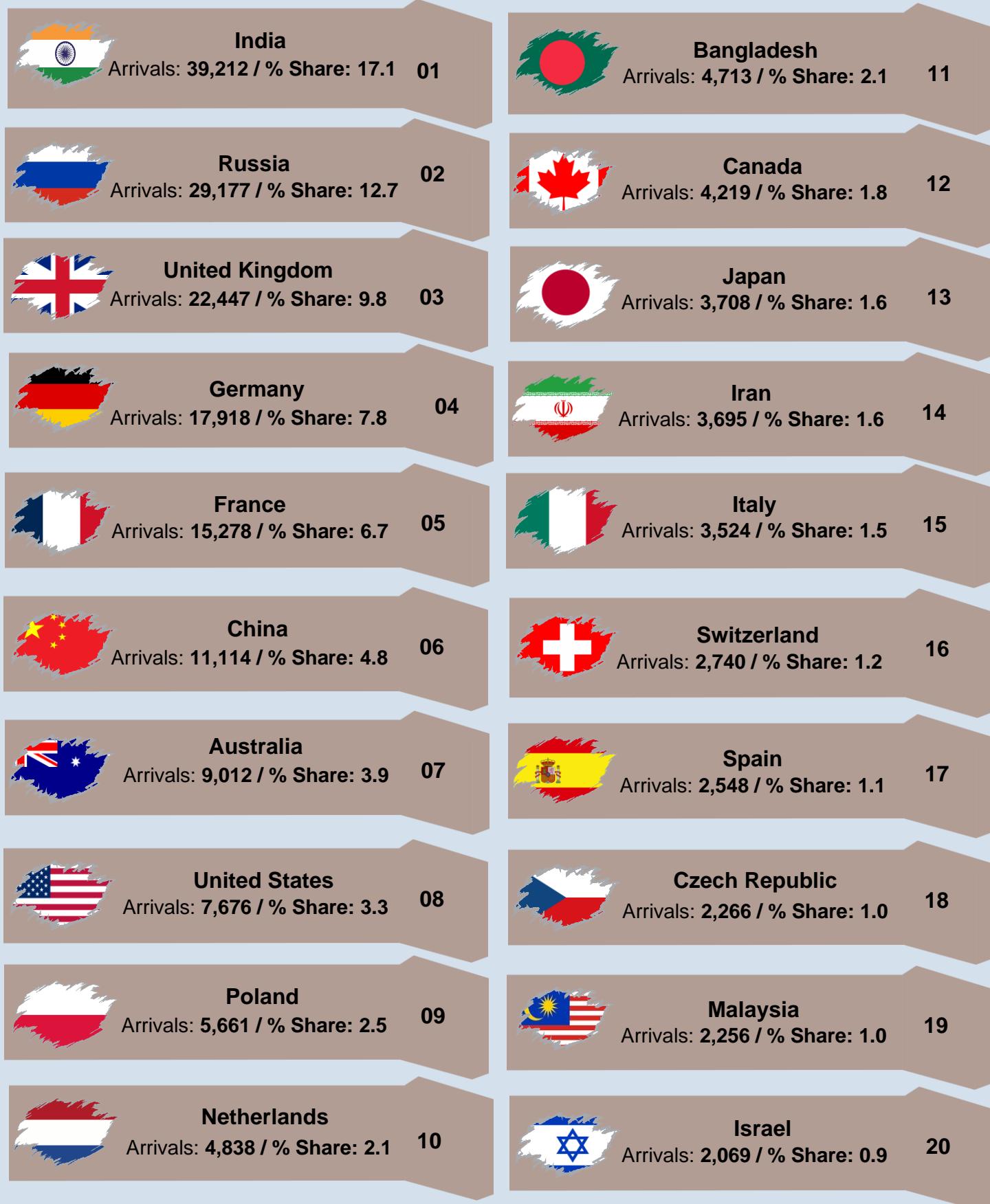
To reduce vulnerability to regional economic fluctuations and build a more sustainable tourism sector, Sri Lanka should focus on broadening its visitor base through improved flight connections, streamlined visa regulations, and targeted marketing initiatives specific to each underrepresented region. Addressing these imbalances could stimulate growth while creating a more resilient tourism ecosystem less susceptible to localized market disruptions.





Top primary markets and top potential markets

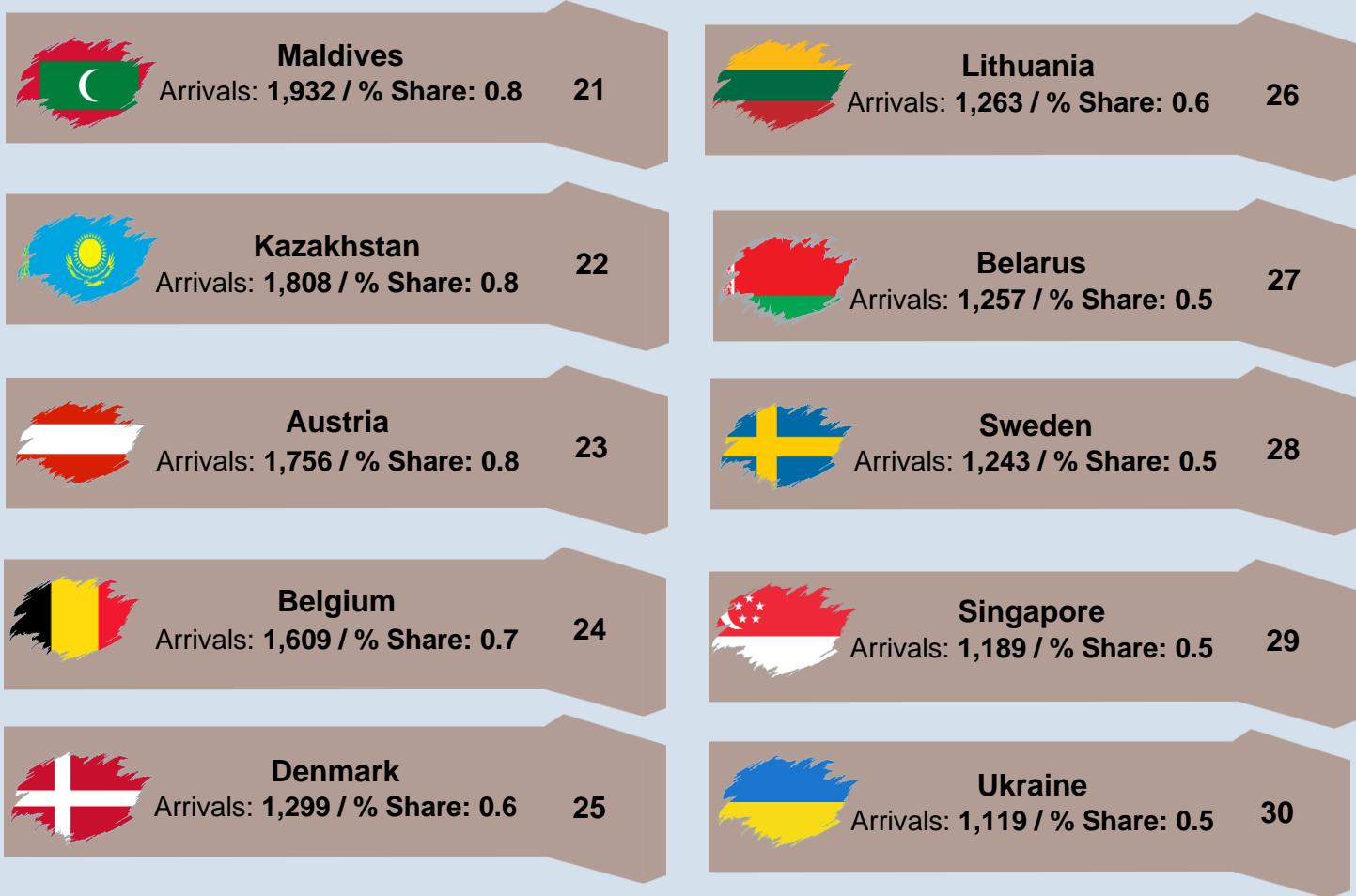
Top primary markets, March 2025



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, March 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

March 2025

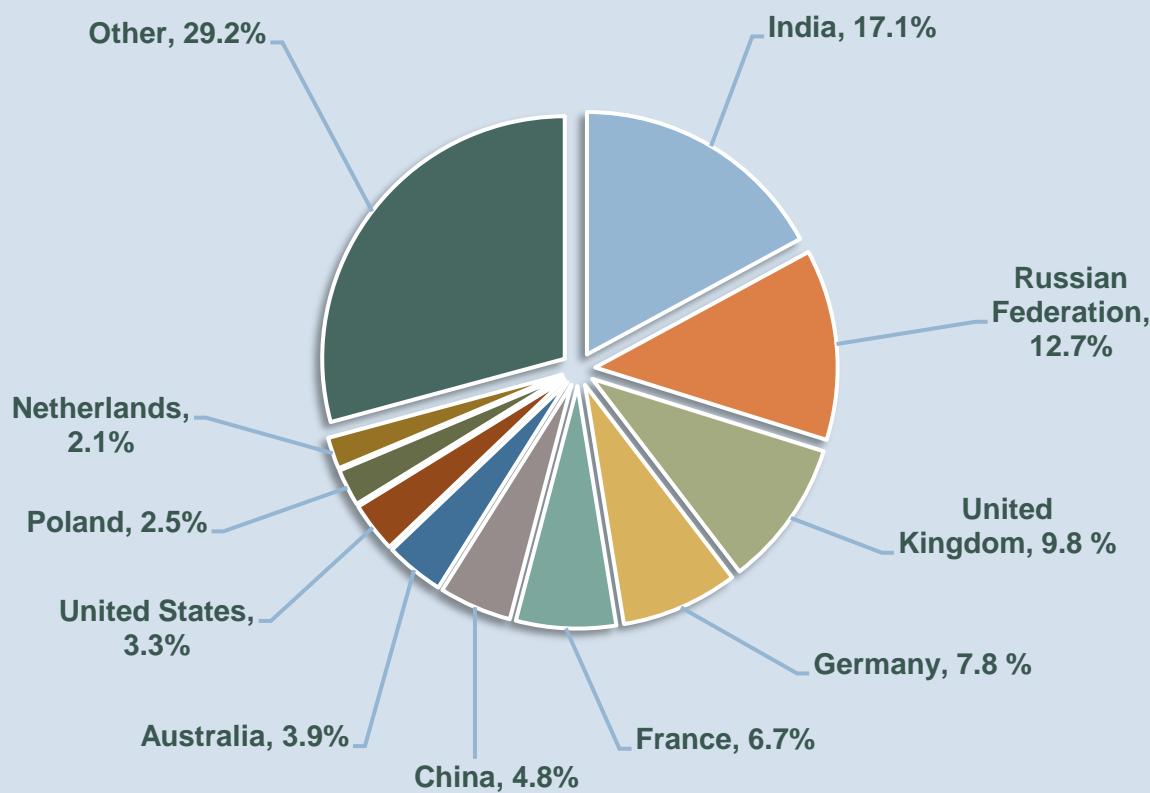
Sri Lanka's March 2025 tourism data reveals distinctive market patterns across various source countries. India continues to lead with 39,212 visitors (23.1% year-over-year increase), benefiting from geographic closeness and shared cultural heritage. Russian arrivals remain resilient at 29,177 (4.1% growth) despite ongoing international tensions, while tourist arrivals from France shows exceptional momentum with 15,278 visitors (39.4% increase).

The European market presents contrasting results with the United Kingdom showing modest growth (22,447 arrivals, +4.2%) against Germany's slight contraction (-2.2%). China's continuing struggle is evident in its 19.6% decline to 11,114 visitors, suggesting lingering post-pandemic recovery issues. Meanwhile, emerging European markets display promising potential, with Poland growing 18.2% and the Netherlands surging 30.5%.

Maritime tourism presents a developing opportunity, particularly with sea arrivals from the United States (2,184 visitors) and India (753 visitors). To maximize these trends, Sri Lanka should enhance flight connections with high-performing markets, develop targeted promotional strategies for underperforming regions like China, and invest in cruise tourism facilities.

These insights highlight the importance of a balanced approach that nurtures traditional European markets while simultaneously developing emerging opportunities across Asia and Eastern Europe, addressing market-specific challenges to foster sustainable tourism development.

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



**Table 2. Top ten source markets to Sri Lanka, March**

Rank	Country of Residence	Tourist Arrivals (March 2025)			Tourist Arrivals (March 2024)
		By Air	By Sea	Total	
1	India	38,459	753	39,212	31,853
2	Russian Federation	29,176	01	29,177	28,016
3	United Kingdom	22,306	141	22,447	21,540
4	Germany	17,883	35	17,918	18,324
5	France	15,262	16	15,278	10,960
6	China	11,096	18	11,114	13,836
7	Australia	8,650	362	9,012	8,852
8	United States	5,492	2,184	7,676	7,617
9	Poland	5,658	03	5,661	4,789
10	Netherlands	4,807	31	4,838	3,707

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



Top ten source markets

January to March 2025

Sri Lanka's January to March tourist arrivals reveal dynamic growth patterns across source markets. India dominates with 118,315 visitors (22.9% year-over-year increase), leveraging geographical closeness and cultural connections. Russia maintains its strong position with 93,568 arrivals, though with more modest growth (2.6%).

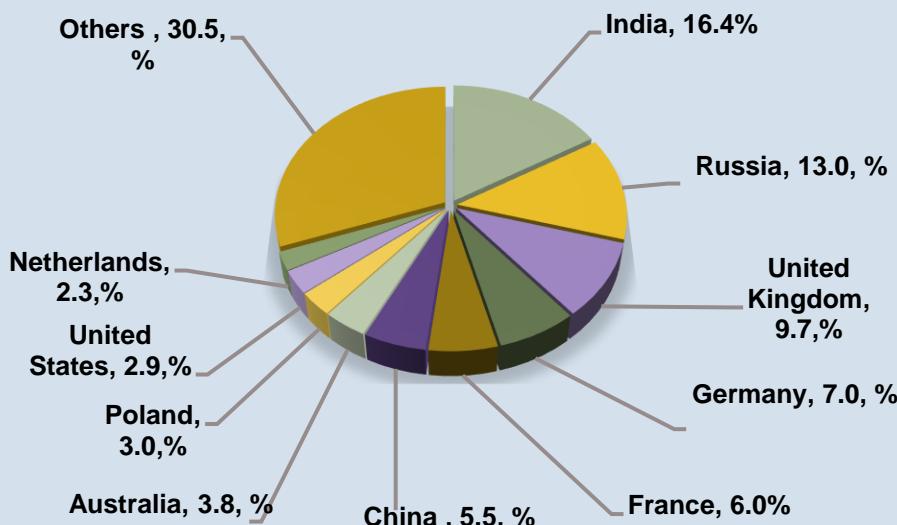
European markets show varied performance, with France and the Netherlands emerging as standout performers, growing 30.0% and 38.0% respectively—likely reflecting favorable domestic conditions such as disposable income levels, successful marketing initiatives and enhanced flight options. The United Kingdom (18.5% growth) and Australia (25.7% growth) also demonstrate substantial increases, indicating broader appeal across diverse markets.

China presents a concerning trend with a 7.3% decline, suggesting ongoing recovery difficulties or increased competition from alternative destinations. Meanwhile, emerging contributors like Poland (11.6% growth) and the United States (11.3% growth) show promising development.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ March. 2025)	Tourist Arrivals Jan ~ March. 2024)
1	India	118,315	96,279
2	Russian Federation	93,568	91,205
3	United Kingdom	69,705	58,819
4	Germany	50,201	48,176
5	France	43,366	33,382
6	China	39,513	42,643
7	Australia	27,353	21,762
8	Poland	21,765	19,498
9	United States	21,182	19,038
10	Netherlands	16,911	12,249
11	Other	220,397	192,733
Total		722,276	635,784

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





Tourist arrivals by purpose of visit

March 2025

Sri Lanka's tourism landscape is primarily dominated by leisure and vacation travel at 55.7%, highlighting the country's strong appeal for its beaches, heritage sites, and natural beauty. The country also attracts visitors through secondary segments including MICE tourism (5.7%) and visiting friends and relatives (5.6%), indicating Sri Lanka's emerging importance for business events and connections with its diaspora communities. Niche markets remain relatively unexplored, with business travel (1.9%), health/Ayurvedic tourism (0.6%), and religious pilgrimages (0.2%) showing potential for growth, while sports tourism (0.2%), educational visits (0.03%), and official travel (0.0004%) constitute minimal portions of the market. This distribution demonstrates Sri Lanka's success in attracting recreational tourists while also revealing opportunities to develop MICE, wellness, and cultural/religious tourism and create more diverse tourism strategies.

Chart 4: Purpose of visit

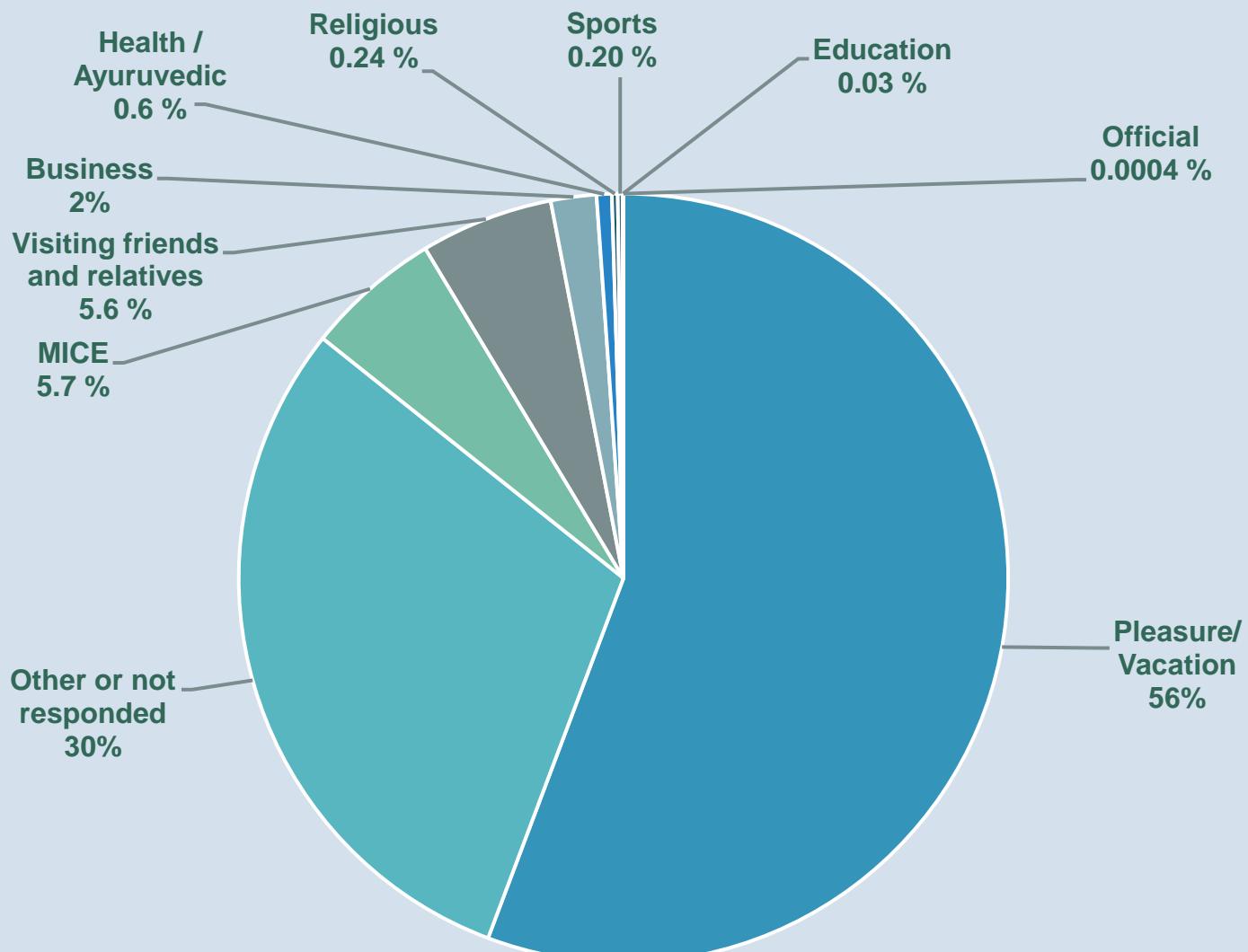
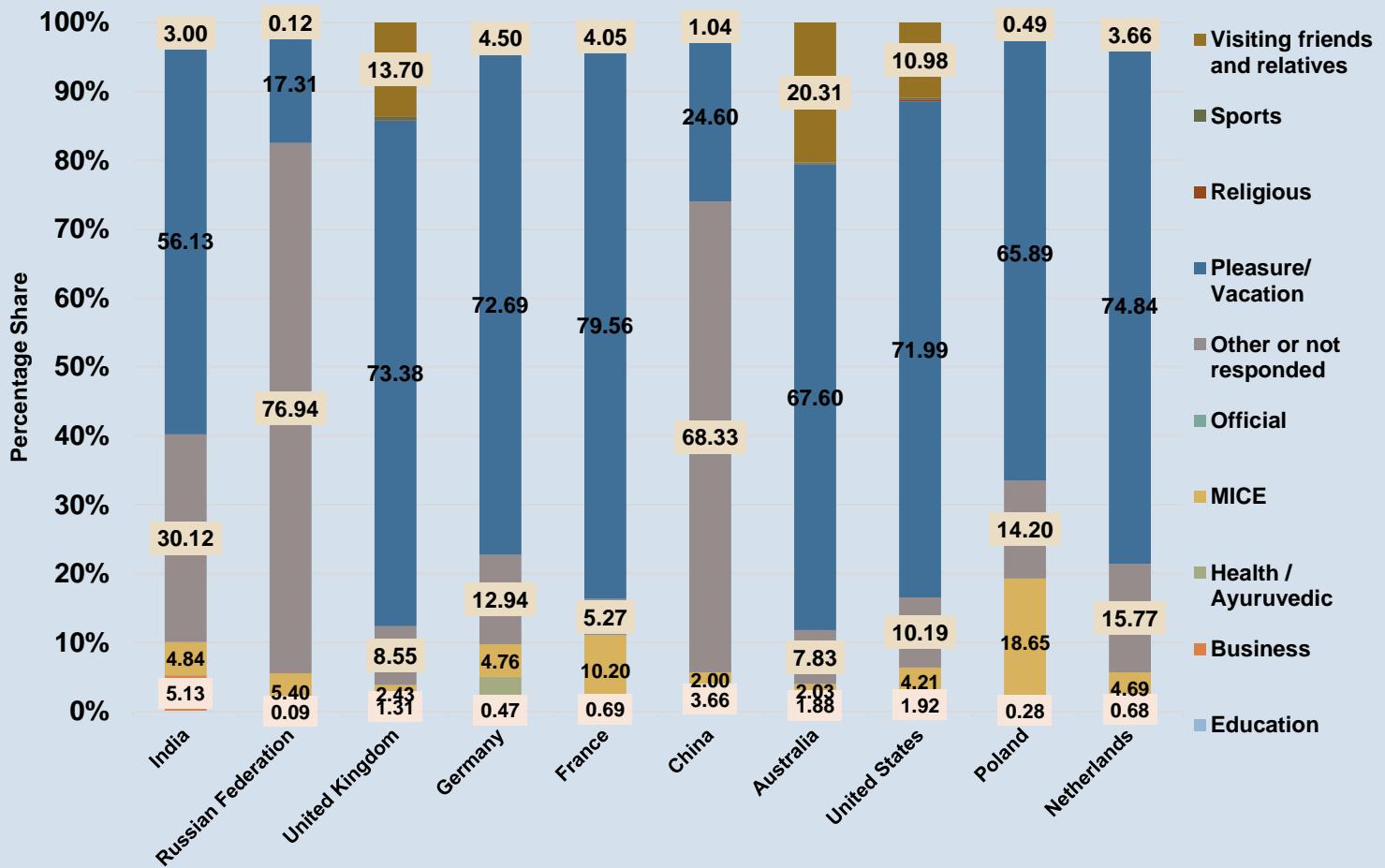




Chart 5: Purpose of visit vs main source markets

Percentage share of purpose of visit - 2025 (March)



Tourist arrivals analysed by their source markets reveals distinct patterns across key source markets, with leisure tourism commanding the highest share among Western markets - notably France (79.56%), Netherlands (74.84%), United Kingdom (73.38%), and United States (71.99%). Market-specific trends demonstrate valuable segmentation opportunities: India shows a balanced distribution across leisure (56.13%), business (5.13%), and visiting friends/relatives (3%), while Poland exhibits remarkable strength in MICE tourism (18.65%), positioning it as a potential growth market for conferences and business events.

Diaspora connections are particularly evident with Australia (20.31%) and United Kingdom (13.70%) leading in the visiting friends and relative's category. Germany stands out for health/Ayurvedic tourism interest (4.54%), suggesting opportunities for wellness-focused packages. MICE tourism shows promising development among tourists from Poland, France (10.20%), and Netherlands (4.69%), indicating potential for business infrastructure expansion.

Religious tourism remains a niche segment, with India showing the highest share (0.41%). Sports and education tourism remain underdeveloped across all markets (<1%), representing untapped potential. Thus, it is important to sustain leisure marketing in Western markets, positioning Sri Lanka as a regional MICE hub targeting Polish travelers, promoting Ayurvedic packages to German and Dutch visitors, and strengthening diaspora engagement through targeted services for Australian and UK visitors, all while developing strategies to diversify our tourism offerings beyond the dominant leisure segment.



Enhancing Sri Lanka's tourism: The power of attraction development and standardization

Tourism in Sri Lanka has long been centered around its breathtaking landscapes, rich cultural heritage, and diverse wildlife. While the country has well-established standards for hotels and other tourism-related services and activities, there remains a significant gap in standardization and development guidelines for tourist attractions. This gap presents a major challenge, as attractions are the fundamental components that drive tourist arrivals. Travelers do not visit Sri Lanka merely to stay in hotels; they come to experience the country's unique cultural, natural, and historical sites. Without structured attraction development and standardization, the potential for sustainable tourism growth remains underutilized.

The need for attraction development and standardization

Attractions serve as the primary motivators for travel. Whether it is the ancient rock fortress of Sigiriya, the serene beaches of the southern coast, or the wildlife safaris in Yala National Park, these sites define Sri Lanka's tourism appeal. Leiper's Tourism System Model (1990) provides a structured way to understand how attractions function within the broader tourism ecosystem. This model highlights the interconnection between tourists, generating regions, transit routes, and destinations, emphasizing that tourism attractions are one of the key factors that drives travel. Without compelling attractions, tourism cannot thrive. However, the lack of comprehensive development and standardization for attractions can lead to inconsistent visitor experiences, environmental degradation, and inefficient management. While Sri Lanka has a structured grading system for hotels, restaurants, and tour operators, similar mechanisms for attractions are either nonexistent or fragmented among various authorities. Without clear guidelines, many attractions suffer from overcrowding, poor infrastructure, and inadequate visitor management.

Best practices from other countries

- Several countries have successfully implemented attraction development and standardization policies that Sri Lanka can learn from. For instance:
- Costa Rica: The Certificate for Sustainable Tourism (CST) program applies to attractions and natural areas, not just accommodations, providing a holistic approach to destination development.
- Singapore has a highly structured approach to attraction development, with its Integrated Resorts, Gardens by the Bay, and Sentosa Island adhering to rigorous quality and service standards, enhancing the overall visitor experience.
- China's tourist attraction rating system categorizes attractions into five levels (A to AAAAA), with AAAAA being the highest, based on criteria like quality, management, and uniqueness, overseen by the Ministry of Culture and Tourism
- The Japan Sustainable Tourism Standard for Destinations (JSTS-D) was developed as Japan's national approach to sustainable destination management.

By adopting similar structured approaches, Sri Lanka can ensure that its attractions are well-developed, properly managed, and provide high-quality experiences that meet international standards.



The Role of GSTC Guidelines in Attraction Development

A globally recognized framework that Sri Lanka can adopt for attraction standardization is the Global Sustainable Tourism Council (GSTC) guidelines on attractions and destinations. These guidelines provide comprehensive criteria for sustainable destination management, cultural heritage protection, environmental conservation, and community involvement. Implementing GSTC standards for Sri Lankan attractions would:

- Ensure environmental responsibility by minimizing the ecological footprint of tourism activities.
- Improve visitor experience through better facilities, interpretation, and accessibility.
- Promote responsible tourism by engaging local communities in conservation and tourism-related benefits.
- Enhance Sri Lanka's competitiveness as a sustainable tourism destination.

Recently, Sigiriya was awarded the Bronze Level Certification by Green Destinations, signifying its commitment to sustainability. This success can be replicated across other major attractions, creating a network of standardized and sustainably managed sites that elevate Sri Lanka's global tourism profile.

The role of attraction management and Destination Management Organizations (DMOs)

One of the key challenges in Sri Lanka's tourism landscape is the fragmented ownership and management of attractions. Many tourist sites fall under the purview of multiple government departments and institutions, resulting in uncoordinated efforts and inefficiencies. Unlike in other countries where dedicated Attraction Management Organizations (AMOs) or Destination Management Organizations (DMOs) oversee attractions holistically, Sri Lanka lacks a unified approach to managing its sites.

For example, in Singapore, organizations like Sentosa Development Corporation take comprehensive roles in developing and standardizing attractions in the island. They ensure consistency in quality, branding, visitor services, and environmental management. Similarly, Sri Lanka must establish a coordinated governance either for each attraction or as a separate body where relevant tourism authorities, heritage conservation bodies, and environmental agencies work together in managing and developing attractions effectively.

The way forward: A coordinated effort for sustainable attractions

Sri Lanka must prioritize attraction development and standardization as a core component of its tourism strategy. This requires a collaborative effort between the Government and private sector stakeholders. A national framework for attraction standardization, guided by international best practices and GSTC criteria, should be introduced to ensure sustainable development, proper infrastructure, and high-quality visitor experiences.

Moreover, leveraging the success of Sigiriya's Green Destinations certification, other attraction can be guided towards similar sustainability benchmarks. Attraction development and standardization are crucial for Sri Lanka to maximize its tourism potential. Without well-managed and high-quality attractions, the country risks losing competitiveness in the global tourism market. Implementing internationally recognized frameworks like the GSTC guidelines, adopting best practices from leading tourism destinations, and fostering a coordinated management approach will be instrumental in ensuring sustainable and well-developed attractions. By prioritizing attraction development and standardization, Sri Lanka can ensure that its treasures—both natural and cultural—remain not just preserved, but thriving, for generations of travelers to come.



International tourist arrivals by country of residence

	March 2025			Tourist arrivals March 2024	% Change March (25/24)	Total tourist arrivals up to March 2025	Total tourist arrivals up to March 2024	% Change up to March (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
AMERICAS	10,175	2,542	12,717	12,381	2.7	36,604	33,251	10.1					
North America	9,497	2,533	12,030	11,762	2.3	34,744	31,412	10.6					
Canada	3,892	327	4,219	4,034	4.6	13,227	12,072	9.6					
Mexico	113	22	135	111	21.6	335	302	10.9					
United States	5,492	2,184	7,676	7,617	0.8	21,182	19,038	11.3					
Caribbean & Central America	101	0	101	123	(17.9)	257	305	(15.7)					
Costa Rica	15	0	15	11	36.4	37	45	(17.8)					
Jamaica	02	0	02	18	(88.9)	10	33	(69.7)					
Others	84	0	84	94	(10.6)	210	227	(7.5)					
South America	577	9	586	496	18.1	1,603	1,534	4.5					
Argentina	101	0	101	120	(15.8)	344	340	1.2					
Brazil	206	07	213	159	34.0	624	607	2.8					
Chile	84	02	86	77	11.7	208	194	7.2					
Colombia	84	0	84	69	21.7	173	193	(10.4)					
Others	102	0	102	71	43.7	254	200	27.0					
AFRICA	1,372	12	1,384	1,144	21.0	3,838	3,191	20.3					
North Africa	177	0	177	86	105.8	722	598	20.7					
Morocco	65	0	65	35	85.7	249	200	24.5					
Sudan	23	0	23	14	64.3	148	113	31.0					
Others	89	0	89	37	140.5	325	285	14.0					
Sub-Saharan Africa	1,195	12	1,207	1,058	14.1	3,116	2,593	20.2					
Kenya	103	0	103	80	28.8	200	186	7.5					
Mauritius	77	0	77	43	79.1	216	144	50.0					
Nigeria	06	0	06	03	100.0	24	15	60.0					
South Africa	657	12	669	548	22.1	1,427	1,230	16.0					
Others	352	0	352	384	(8.3)	1,249	1,018	22.7					



	March 2025			Tourist arrivals March 2024	% Change March (25/24)	Total tourist arrivals up to March 2025	Total tourist arrivals up to March 2024	% Change up to March (25/24)					
	Tourist arrivals												
	By Air	By Sea	Total										
ASIA & PACIFIC	81,040	1,185	82,225	72,295	13.7	250,209	211,313	18.4					
North East Asia	15,773	24	15,797	17,279	(8.6)	54,006	53,273	1.4					
China	11,096	18	11,114	13,836	(19.7)	39,513	42,643	(7.3)					
Japan	3,706	02	3,708	2,575	44.0	9,866	7,234	36.4					
South Korea	959	04	963	861	11.8	4,583	3,368	36.1					
Others	12	0	12	07	71.4	44	28	57.1					
South East Asia	5,776	23	5,799	5,435	6.7	15,293	13,673	11.8					
Cambodia	125	0	125	531	(76.5)	283	614	(53.9)					
Indonesia	313	0	313	257	21.8	1,108	801	38.3					
Malaysia	2,246	10	2,256	1,721	31.1	5,796	5,067	14.4					
Myanmar	93	01	94	110	(14.5)	273	317	(13.9)					
Philippines	581	04	585	395	48.1	1,390	1,097	26.7					
Singapore	1,182	07	1,189	1,166	2.0	3,261	2,832	15.1					
Thailand	902	01	903	928	(2.7)	2,247	2,149	4.6					
Vietnam	314	0	314	304	3.3	824	740	11.4					
Others	20	0	20	23	(13.0)	111	56	98.2					
Oceania	9,625	385	10,010	9,933	0.8	30,160	24,177	24.7					
Australia	8,650	362	9,012	8,852	1.8	27,353	21,762	25.7					
New Zealand	942	23	965	1,032	(6.5)	2,703	2,331	16.0					
Others	33	0	33	49	(32.7)	104	84	23.8					
South Asia	49,866	753	50,619	39,648	27.7	150,750	120,190	25.4					
Afghanistan	02	0	02	18	(88.9)	23	65	(64.6)					
Bangladesh	4,713	0	4,713	1,308	260.3	14,601	6,026	142.3					
Bhutan	22	0	22	68	(67.6)	153	270	(43.3)					
India	38,459	753	39,212	31,853	23.1	118,315	96,279	22.9					
Iran	3,695	0	3,695	3,589	3.0	5,196	5,196	0					
Maldives	1,932	0	1,932	1,562	23.7	7,774	7,716	0.8					
Nepal	307	0	307	309	(0.6)	1,370	1,442	(5.0)					
Pakistan	736	0	736	941	(21.8)	3,318	3,196	3.8					
EUROPE	130,879	306	131,185	122,600	7.0	425,406	382,612	11.2					
Northern Europe	27,495	163	27,658	26,899	2.8	91,505	78,402	16.7					
Denmark	1,293	06	1,299	1,497	(13.2)	6,834	6,199	10.2					
Finland	449	03	452	464	(2.6)	2,050	1,867	9.8					
Norway	958	02	960	1,033	(7.1)	4,025	3,588	12.2					
Sweden	1,239	04	1,243	1,331	(6.6)	5,485	5,155	6.4					
United Kingdom	22,306	141	22,447	21,540	4.2	69,705	58,819	18.5					
Others	1,250	07	1,257	1,034	21.6	3,406	2,774	22.8					



	March 2025			Tourist arrivals March 2024	% Change March (25/24)	Total tourist arrivals up to March 2025	Total tourist arrivals up to March 2024	% Change up to March (25/24)
	Tourist arrivals							
	By Air	By Sea	Total					
Western Europe	44,120	96	44,216	38,862	13.8	132,308	113,352	16.7
Austria	1,754	02	1,756	1,674	4.9	6,888	6,431	7.1
Belgium	1,605	04	1,609	1,565	2.8	5,342	4,455	19.9
France	15,262	16	15,278	10,960	39.4	43,366	33,382	29.9
Germany	17,883	35	17,918	18,324	(2.2)	50,201	48,176	4.2
Netherlands	4,807	31	4,838	3,707	30.5	16,911	12,249	38.1
Switzerland	2,733	07	2,740	2,522	8.6	9,328	8,361	11.6
Others	76	01	77	110	(30.0)	272	298	(8.7)
Central/Eastern Europe	47,948	24	47,972	47,070	1.9	163,041	161,934	0.7
Belarus	1,257	0	1,257	1,665	(24.5)	4,762	5,891	(19.2)
Czech Republic	2,266	0	2,266	2,988	(24.5)	8,390	10,324	(18.7)
Estonia	757	0	757	690	9.7	2,606	2,498	4.3
Hungary	689	06	695	585	18.8	3,172	3,440	(7.8)
Kazakhstan	1,808	0	1,808	2,266	(20.2)	7,286	8,298	(12.2)
Lithuania	1,260	03	1,263	1,219	3.6	4,256	3,835	11.0
Poland	5,658	03	5,661	4,789	18.2	21,765	19,498	11.6
Romania	754	06	760	638	19.1	2,542	2,431	4.6
Russia	29,176	01	29,177	28,016	4.1	93,568	91,205	2.6
Slovakia	830	02	832	945	(12.0)	3,158	3,114	1.4
Ukraine	1,117	02	1,119	907	23.4	4,378	3,585	22.1
Others	2,376	01	2,377	2,362	0.6	7,158	7,815	(8.4)
Southern/Mediterranean Europe	11,316	23	11,339	9,769	16.1	38,552	28,924	33.3
Greece	330	0	330	305	8.2	1,140	833	36.9
Italy	3,518	06	3,524	2,502	40.8	12,417	9,181	35.2
Portugal	872	04	876	670	30.7	2,364	1,811	30.5
Spain	2,541	07	2,548	2,706	(5.8)	7,772	6,746	15.2
Turkey	988	04	992	473	109.7	2,872	1,853	55.0
Israel	2,068	01	2,069	2,212	(6.5)	7,758	4,973	56.0
Others	999	01	1,000	901	11.0	4,229	3,527	19.9
MIDDLE EAST	1,787	0	1,787	761	134.8	6,219	5,417	14.8
Bahrain	52	0	52	29	79.3	260	232	12.1
Egypt	276	0	276	99	178.8	1,102	971	13.5
Iraq	58	0	58	21	176.2	303	149	103.4
Jordan	329	0	329	85	287.1	804	492	63.4
Kuwait	130	0	130	59	120.3	508	512	(0.8)
Lebanon	474	0	474	242	95.9	976	690	41.4
Oman	25	0	25	28	(10.7)	393	380	3.4
Qatar	39	0	39	16	143.8	118	102	15.7
Saudi Arabia	201	0	201	91	120.9	1,046	1,151	(9.1)
United Arab Emirates	165	0	165	72	129.2	527	518	1.7
Others	38	0	38	19	100.0	182	220	(17.3)
TOTAL	225,253	4,045	229,298	209,181	9.6	722,276	635,784	13.6

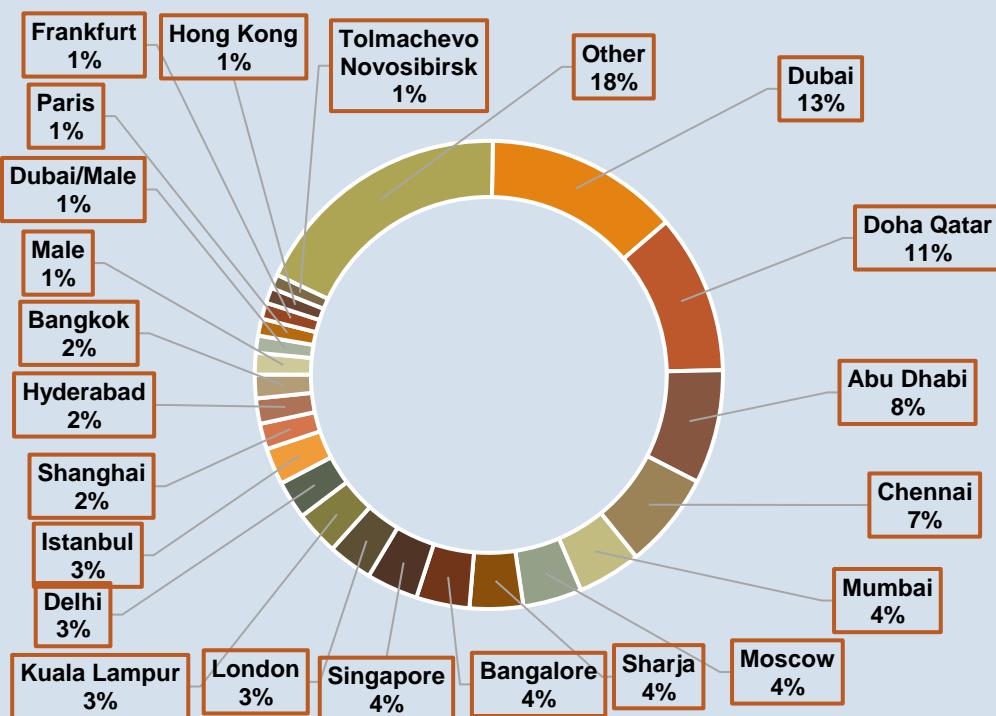
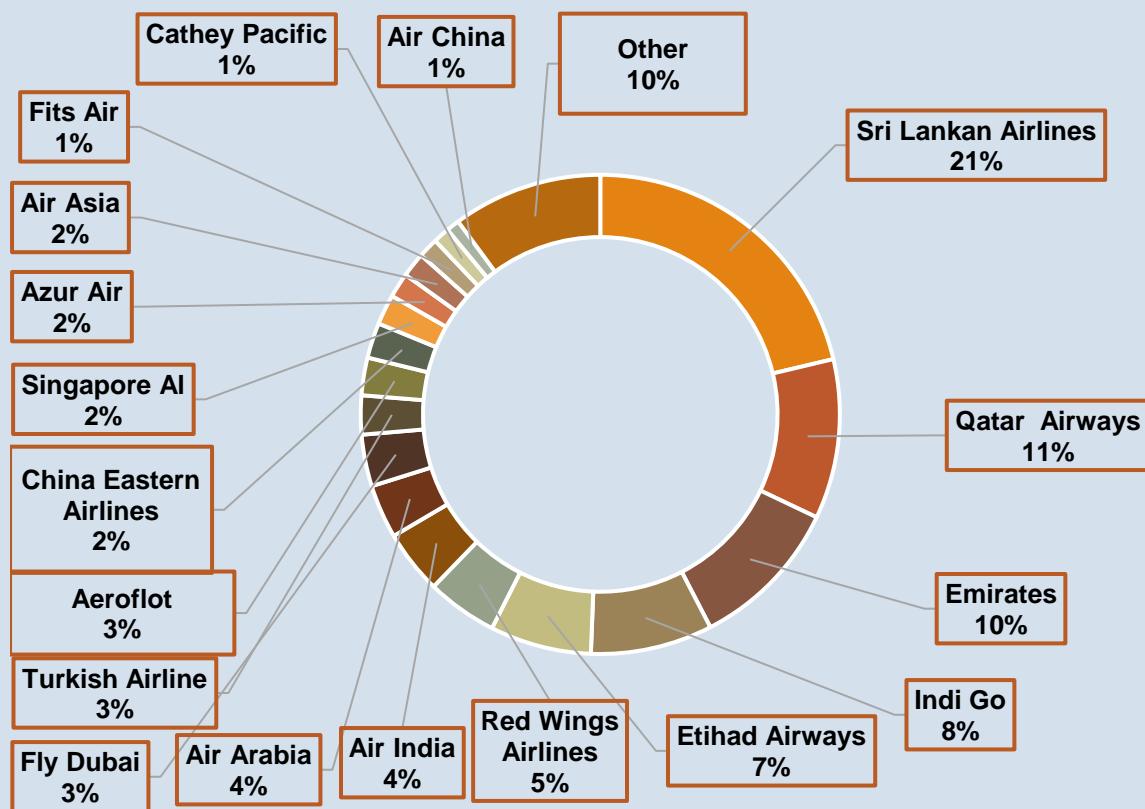


Main last departure airports and airlines to Sri Lanka, March 2025

An analysis of last ports of departure to Sri Lanka reveals Dubai as the primary last port of departure with 30,722 passengers (13.40%), followed closely by Doha (25,220 passengers, 11.00%) and Abu Dhabi (18,023 passengers, 7.86%). These figures highlight the critical importance of Middle Eastern aviation hubs as key transit points for travelers headed to Sri Lanka. The Indian subcontinent maintains significant influence with Chennai, Mumbai, Bangalore, and Delhi collectively accounting for 17.34% of arrivals, demonstrating robust regional connectivity. European departure points including London, Paris, and Frankfurt contribute a combined 6.38% of arrivals, while major Asian cities like Singapore, Kuala Lumpur, and Bangkok serve as important feeder markets. The data indicates that 18.24% of visitors depart from various other international locations, pointing to a diverse but scattered market base. These findings emphasize the strategic value of strengthening relationships with major global transit hubs and enhancing marketing efforts in key regional markets to drive continued growth in Sri Lanka's tourism sector.

An examination of airlines serving Sri Lanka reveals Sri Lankan Airlines as the market leader with 48,821 passengers (21.29%), highlighting the national carrier's crucial role in the country's global connectivity. Middle Eastern airlines form the second-most significant group, with Qatar Airways (10.77%), Emirates (10.34%), and Etihad Airways (6.84%) collectively bringing 28.25% of travelers through their strategic hubs in Doha, Dubai, and Abu Dhabi, which serve as essential transit points for long-haul passengers from Europe and beyond. The Indian market shows strong representation through Indigo (8.23%) and Air India (4.29%), reflecting the importance of proximity and cultural connections driving regional travel demand. Russian carriers Red Wings Airlines (4.78%) and Aeroflot (2.54%) indicate a growing niche segment from Russia likely linked to seasonal tourism, while Asian airlines including China Eastern (2.37%), Singapore Airlines (2.04%), and Air Asia (1.66%) point to developing opportunities in East and Southeast Asian markets. A diverse mix of smaller carriers comprises 10.11% of arrivals, suggesting potential for further market diversification. These patterns emphasize the importance of maintaining Sri Lankan Airlines' strong position, nurturing partnerships with Gulf carriers, expanding cooperation with Indian and Southeast Asian airlines, and strategically engaging with emerging market carriers to enhance tourism resilience and growth potential.



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



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

March 2025

An examination of airline preferences across Sri Lanka's key tourist markets reveals distinctive travel patterns and connectivity dynamics. India, the primary source market, heavily utilizes Sri Lankan Airlines (39.68%) and Indigo (36.18%), with Indian carriers collectively handling 91.75% of arrivals, highlighting the importance of direct regional flights and cultural connections. Russian travelers predominantly fly with Red Wings Airlines (36.18%) and Aeroflot (19.52%), which together account for nearly 56% of arrivals, complemented by Air Arabia (13.13%) serving as an important transit option, reflecting Russia's charter-focused travel patterns.

European markets from the UK, Germany, and France show strong preference for Middle Eastern carriers (Qatar Airways, Emirates, Etihad), which collectively represent 40-55% of arrivals, underscoring Sri Lanka's reliance on Gulf transit hubs for long-haul connectivity. Sri Lankan Airlines maintains significant presence particularly in the UK market (34.17%), suggesting established route strength or brand loyalty. Chinese visitors primarily use China Eastern (36.40%) and Air China (17.81%), demonstrating the impact of direct flights and national carrier partnerships, while Australian travelers favour Sri Lankan Airlines (45.25%) and Singapore Airlines (26.99%), likely reflecting specific route offerings catering to diaspora and vacation travelers.

The United States and Poland exhibit fragmented airline usage patterns indicating diverse transit options and opportunities for targeted aviation partnerships. These patterns highlight the strategic importance of fostering regional carrier relationships for short-haul markets, strengthening alliances with Middle Eastern airlines for European connectivity, developing specialized partnerships for charter-driven markets like Russia, and exploring new direct routes to address connectivity gaps in fragmented markets, thereby enhancing Sri Lanka's accessibility as a global tourism destination.

Table 4. Top ten markets vs. main airlines to Sri Lanka, March

Country	Sri Lankan Airlines	Qatar Airways	Emirates	IndiGo	Ethihad Airways	Red Wings Airlines	Air India	Air Arabia	Fly Dubai	Turkish Airline	Aeroflot	China Eastern Airlines	Singapore Airlines	Azur Air	Air Asia	Flys Air	Cathay Pacific	Air China	Others	Total
India	39.68	0.37	1.49	36.18	0.61	0.00	15.89	0.98	0.91	0.02	0.00	0.02	0.21	0.00	0.13	0.45	0.07	0.01	2.96	100.00
Russian Federation	1.09	1.00	1.55	0.47	4.23	36.18	0.38	13.13	1.65	0.25	19.52	0.79	0.02	12.35	0.69	0.44	0.07	0.01	6.19	100.00
United Kingdom	34.17	18.88	17.89	2.51	11.56	0.00	2.61	0.74	2.71	0.98	0.00	0.13	0.69	0.00	1.66	0.85	0.40	0.00	4.21	100.00
Germany	18.80	22.29	23.78	1.40	14.11	0.00	3.07	0.74	3.35	5.58	0.02	0.25	0.36	0.06	1.21	0.28	0.16	0.03	4.52	100.00
France	19.32	28.74	23.28	1.17	10.31	0.00	1.02	0.39	2.25	7.61	0.00	0.11	0.18	0.00	1.09	0.48	0.24	0.00	3.81	100.00
China	11.08	0.38	0.99	0.36	0.61	0.00	0.13	0.21	0.46	0.05	0.01	36.40	3.23	0.00	3.87	0.94	12.74	17.81	10.74	100.00
Australia	45.25	0.94	2.67	1.29	1.32	0.00	2.86	0.21	1.09	0.04	0.00	0.18	26.99	0.00	1.93	0.20	2.33	0.02	12.67	100.00
United States	14.03	14.24	6.55	5.91	7.39	0.00	5.26	0.56	1.84	2.10	0.00	0.94	3.67	0.00	2.03	0.39	2.51	0.04	32.53	100.00
Poland	3.32	14.03	9.56	0.74	2.33	0.00	0.26	8.89	16.36	3.00	0.12	0.00	0.02	0.02	0.85	0.99	0.02	0.00	39.50	100.00
Netherlands	6.24	25.18	23.07	1.32	21.46	0.00	7.05	0.21	1.86	4.51	0.02	0.14	0.35	0.00	3.43	0.60	0.27	0.00	4.30	100.00

**Table 5. Top ten markets vs. main last departure airports to Sri Lanka, March**

Country	Dubai	Doha/Qatar	Abu Dhabi	Chennai	Mumbai	Moscow	Sharja	Bangalore	Singapore	London	Kuala Lumpur	Delhi	Istanbul	Shanghai	Hyderabad	Bangkok	Male	Dubai/Male	Paris	Others	Total
India	1,264	219	391	10,914	7,269	1	386	7,227	276	19	157	3,049	8	7	3,689	606	100	71	2	3,557	39,212
Russian Federation	924	297	2,532	95	66	8,843	3,851	35	56	5	252	87	73	191	16	71	136	106		11,541	29,177
United Kingdom	4,639	4,356	2,734	498	465	1	166	177	488	6,015	526	379	213	24	56	180	128	234	9	1,159	22,447
Germany	4,455	4,030	2,550	210	838	11	129	118	233	98	269	209	932	40	13	201	107	432	91	2,952	17,918
France	3,661	4,409	1,631	183	243		60	69	123	98	198	127	1,141	15	3	104	53	324	2,198	638	15,278
China	165	42	68	128	13	1	123	20	533	5	840	15	6	2,905	3	494	152	32		5,569	11,114
Australia	332	86	152	102	88		22	48	3,350	17	609	429	4	8	13	145	54	24	2	3,527	9,012
United States	615	1,108	595	305	288		46	172	451	84	219	352	150	60	104	147	74	62	7	2,837	7,676
Poland	1,437	798	173	28	62	8	503	30	8	26	57	28	170		2	8	58	51		2,214	5,661
Netherlands	1,177	1,226	1,046	43	56	1	11	32	66	25	197	342	213	2	3	49	36	40	6	267	4,838

An analysis of last departure airports among Sri Lanka's key source markets reveals distinctive connectivity trends shaping tourism flows. India, the top contributor (39,212 arrivals), primarily utilizes direct regional connections, with Chennai (10,914), Mumbai (7,269), and Bangalore (7,227) collectively handling approximately 65% of Indian visitors, emphasizing the significance of short-haul routes. Russian tourists (29,177 arrivals), conversely, predominantly travel via Moscow (8,843) and Middle Eastern hubs including Sharjah (3,851) and Abu Dhabi (2,532), reflecting limited direct flight options and reliance on charter services or Gulf carriers.

European markets demonstrate strong dependence on Middle Eastern transit points. British (22,447 arrivals) and German (17,918) travelers frequently route through Dubai (4,639 and 4,455 respectively), Doha (4,356 and 4,030), and Abu Dhabi (2,734 and 2,550), while London serves as a direct departure point for 6,015 UK visitors. French travelers (15,278 arrivals) similarly favour Doha (4,409) and Dubai (3,661), with limited direct departures from Paris (638).

Chinese visitors (11,114 arrivals) notably utilize Singapore (533) and Kuala Lumpur (840) as key transit hubs, alongside direct flights from Shanghai (2,905). Australian travelers (9,012 arrivals) show a unique preference for Singapore (3,350) as a departure point, while American visitors (7,676 arrivals) distribute across multiple hubs without a dominant port. These patterns highlight the contrast between regional short-haul markets and long-haul destinations requiring transit connections, underscore the strategic importance of Gulf airports for European and Russian markets, reveal growth potential via Southeast Asian hubs for Chinese travelers, and identify unconventional routes that may represent specialized tourism segments. These insights suggest the need for both strengthening direct regional connections and optimizing transit partnerships to enhance long-haul market access.





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