MONTHLY TOURIST ARRIVALS REPORT:

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

APRIL 2025

Sri Lanka Tourism Development Authority

Introduction

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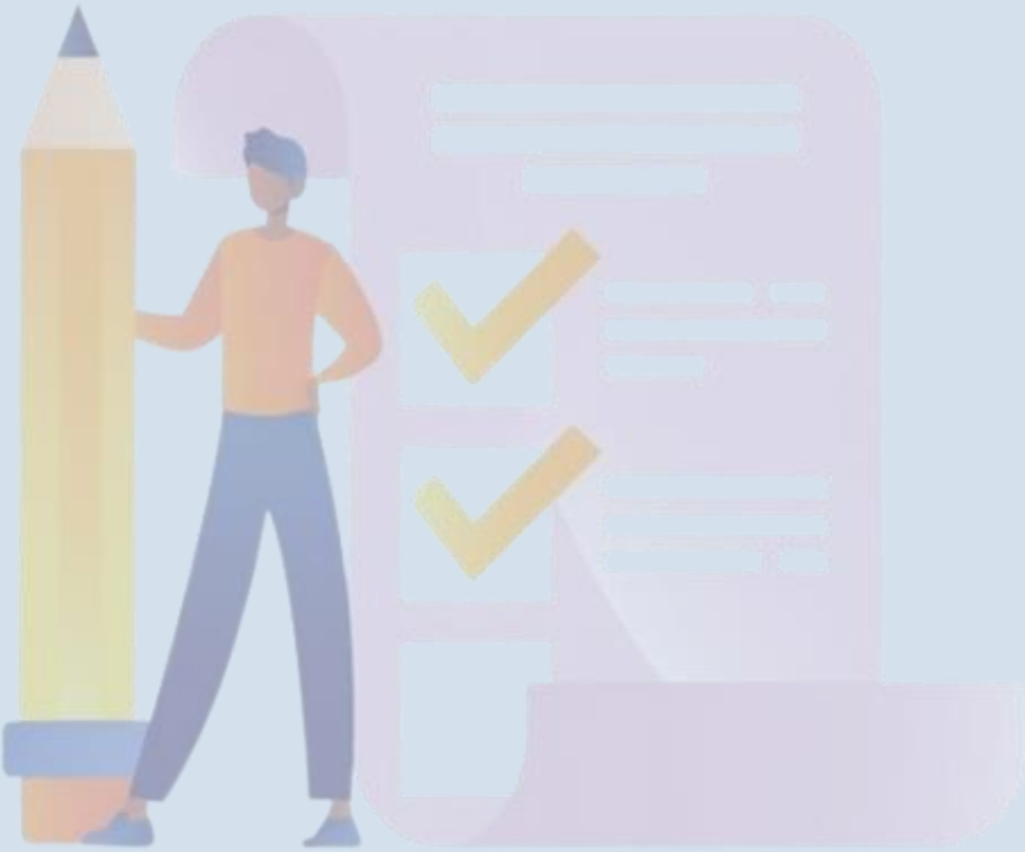


Summary

Sri Lanka's tourism sector is demonstrating strong momentum in early 2025, with January to April figures indicating substantial year-on-year growth. The monthly tourist arrivals data for Sri Lanka shows a strong upward trend in the first four months of 2025 compared to the same period in 2024. In January 2025, arrivals rose to 252,761, marking a 21.4% increase from January 2024. February saw 240,217 arrivals, up 10% from the previous year, while March recorded 229,298 arrivals, a 9.62% rise. April 2025 arrivals reached 174,608, representing a 17.3% increase over April 2024.

This strong growth at the start of the year suggests a robust recovery or expansion in the tourism sector, likely driven by improved global travel conditions, and greater international confidence in Sri Lanka as a destination.

Major source markets such as India, the United Kingdom, Russia, Germany, and Australia played a pivotal role in boosting Sri Lanka's tourism sector in April. These countries made significant contributions to the surge in visitor arrivals, providing vital support and driving the overall growth in the industry during this period.

Table 1. Monthly tourist arrivals, April 2025

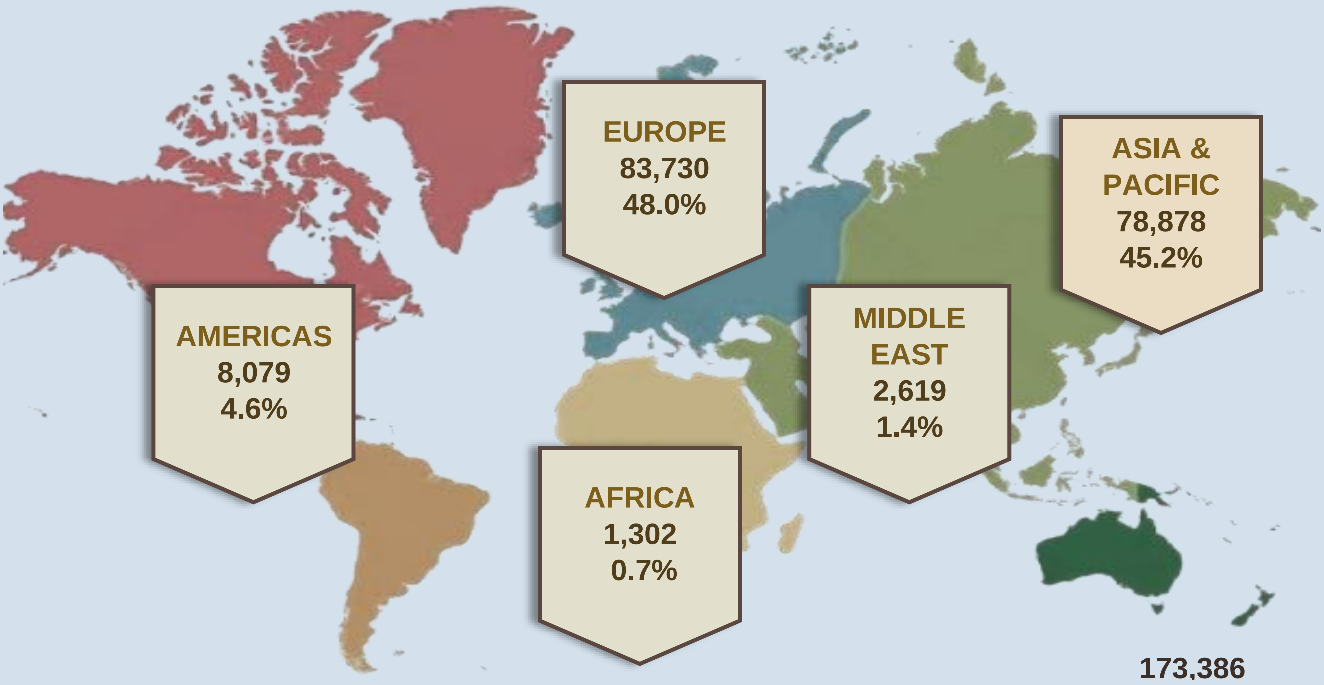
Month	2024	2025	% Change 2025/24
January	208,253	252,761	21.4
February	218,350	240,217	10.0
March	209,181	229,298	9.62
April	148,867	174,608	17.3
May	112,128		
June	113,470		
July	187,810		
August	164,609		
September	122,140		
October	135,907		
November	184,158		
December	248,592		
TOTAL	2,053,465	896,884	

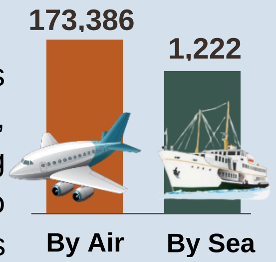
Tourist Arrivals | April 2025

174,608

Tourist arrivals by region and percentage share April 2025

Map 1. Tourist arrivals by region and percentage share





Europe is the largest source region, contributing 83,730 arrivals, which accounts for 48% of the total. The Asia & Pacific region follows closely with 78,878 arrivals, making up 45.2%. Together, these two regions represent the overwhelming majority of Sri Lanka's inbound tourists, highlighting the country's strong appeal to both Western and regional travelers. The Americas contributed 8,079 arrivals (4.6%), while the Middle East and Africa accounted for only 2,619 (1.4%) and 1,302 (0.7%) arrivals, respectively. This indicates that Sri Lanka's tourism sector is much less dependent on these regions, and there may be untapped potential for growth.

The high numbers from Europe may be attributed to seasonal travel patterns, cultural interests, and favourable travel packages, while proximity and ease of travel likely drive arrivals from the Asia & Pacific region. The relatively low figures from the Middle East and Africa may reflect limited direct flights, or less targeted marketing.

The heavy reliance on Europe and Asia & Pacific suggests that Sri Lanka's marketing and connectivity are strongest in these regions. However, this also means the industry is vulnerable to economic or political changes in these markets. Diversifying source markets-especially by increasing promotion and improving air links with the Americas, Middle East, and Africa-could help stabilize and grow overall tourist arrivals. Tailored marketing campaigns, improved flight connectivity, and targeted travel incentives could help attract more visitors from these underrepresented regions.

Top primary markets and top potential markets

Top primary markets, April 2025

Rank	Market	Arrivals	% Share
01	India	**38,744**	**22.2**
02	United Kingdom	**17,348**	**9.9**
03	Russia	**13,525**	**7.7**
04	Germany	**11,654**	**6.7**
05	Australia	**10,744**	**6.2**
06	China	**8,667**	**5.0**
07	France	**8,276**	**4.7**
08	Bangladesh	**5,428**	**3.1**
09	Netherlands	**4,476**	**2.6**
10	United States	**4,202**	**2.4**
11	Italy	**3,633**	**2.1**
12	Switzerland	**3,241**	**1.9**
13	Canada	**3,238**	**1.9**
14	Spain	**3,144**	**1.8**
15	Maldives	**2,516**	**1.4**
16	Japan	**2,374**	**1.4**
17	Poland	**2,098**	**1.2**
18	Israel	**1,821**	**1.0**
19	Belgium	**1,623**	**0.9**
20	Malaysia	**1,486**	**0.9**

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, April 2025

New Zealand
Arrivals: **1,434 / % Share: 0.8** — **21**

Denmark
Arrivals: **1,316 / % Share: 0.8** — **22**

Czech Republic
Arrivals: **1,227 / % Share: 0.7** — **23**

Thailand
Arrivals: **1,220 / % Share: 0.7** — **24**

Pakistan
Arrivals: **1,156 / % Share: 0.7** — **25**

Austria
Arrivals: **1,087 / % Share: 0.6** — **26**

Singapore
Arrivals: **1,060 / % Share: 0.6** — **27**

Norway
Arrivals: **878 / % Share: 0.5** — **28**

Vietnam
Arrivals: **778 / % Share: 0.4** — **29**

Portugal
Arrivals: **763 / % Share: 0.4** — **30**

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

April 2025

Tourist arrivals to Sri Lanka from its top ten source markets in April 2025 reveals notable changes compared to April 2024. India remains the leading source, with arrivals increasing significantly from 27,304 to 38,744, reflecting a 41.9% growth. The United Kingdom also showed a strong rise, up 31.7% to 17,348 visitors. Germany, Australia, Bangladesh, and the Netherlands all recorded substantial increases, with Bangladesh more than doubling its arrivals from 2,354 to 5,428, indicating growing regional interest and possibly improved connectivity or promotions. In contrast, arrivals from Russia declined by 10.5%, likely due to geopolitical or economic factors affecting outbound travel. China and France saw slight decreases, while the United States experienced a notable drop of 24.6%, which could be attributed to long-haul travel hesitancy, economic conditions, or competition from other destinations. Overall, the variations in arrivals can be linked to factors such as enhanced air and sea connectivity, successful marketing campaigns, regional proximity, economic conditions in source countries, and global travel trends, all influencing the flow of tourists to Sri Lanka.

The vast majority of tourists still arrive by air, which is expected due to Sri Lanka's Island geography and the convenience of international flights. However, arrivals by sea, while a smaller proportion, are not insignificant for certain markets. For example, India saw 540 arrivals by sea, the highest among all countries, followed by the United States (339), Australia (88), the United Kingdom (55), and the Netherlands (24). This suggests that cruise tourism and ferry connections, especially with nearby countries like India, are contributing to the overall tourism numbers and have room for further development.

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

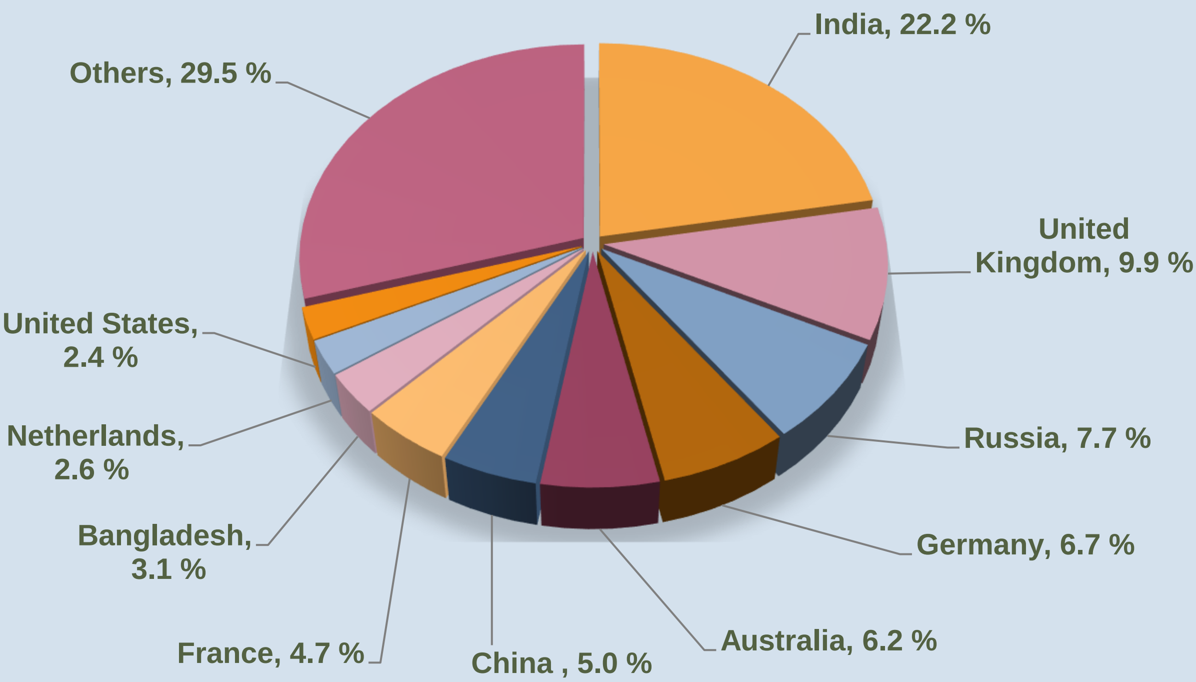
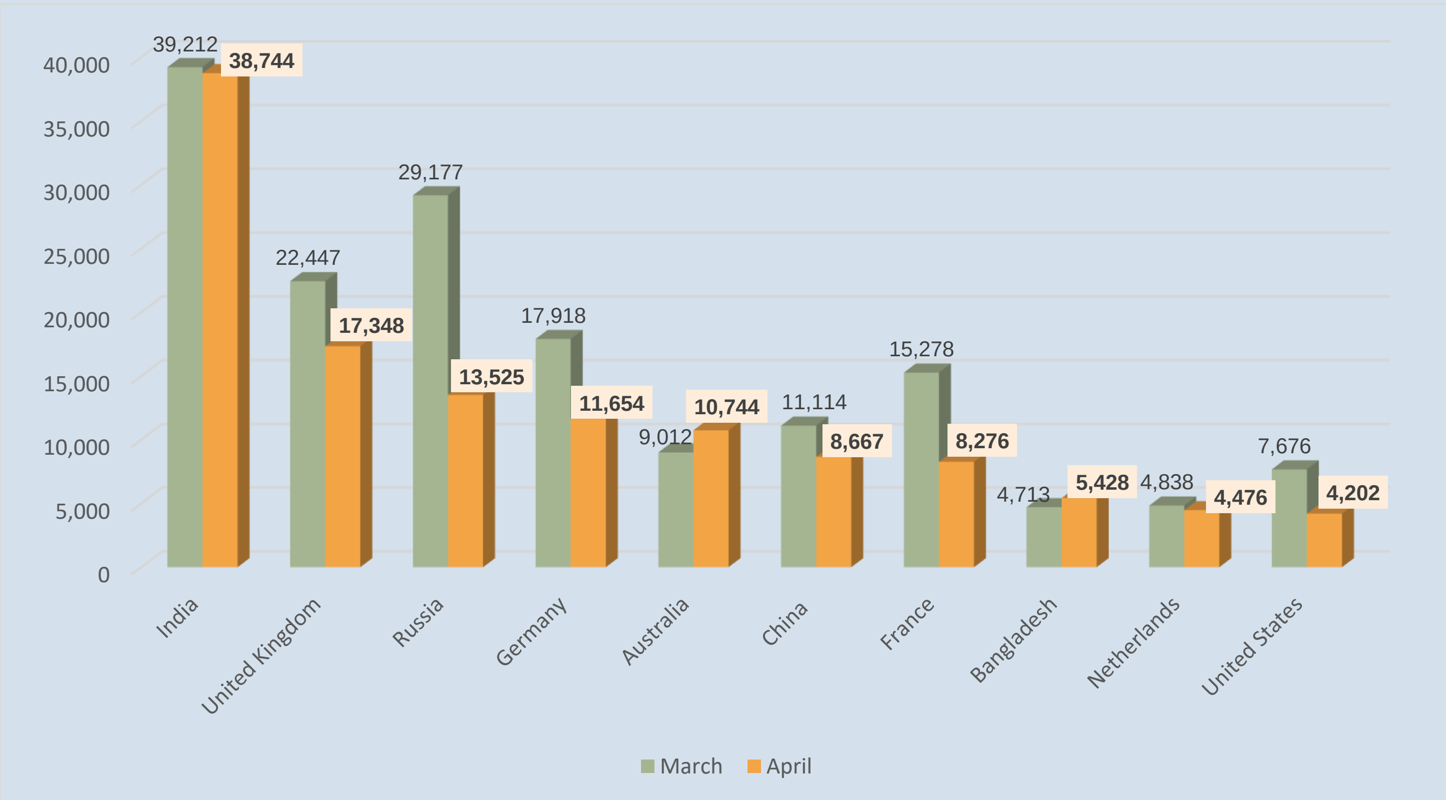


Table 2. Top ten source markets to Sri Lanka, April

Rank	Country of Residence	Tourist Arrivals (April 2025)			Tourist Arrivals (April 2024)
		By Air	By Sea	Total	
1	India	38,204	540	38,744	27,304
2	United Kingdom	17,293	55	17,348	13,173
3	Russian Federation	13,525	0	13,525	15,103
4	Germany	11,632	22	11,654	9,843
5	Australia	10,656	88	10,744	7,202
6	China	8,666	1	8,667	8,969
7	France	8,255	21	8,276	8,792
8	Bangladesh	5,428	0	5,428	2,354
9	Netherlands	4,452	24	4,476	3,437
10	United States	3,863	339	4,202	5,574

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



Top ten source markets

January to April 2025

Sri Lanka’s tourism sector continues to display robust and diverse growth across its major source markets in the first four months of 2025. India remains the clear leader, with 157,059 arrivals-an impressive 27.1% year-over-year increase from 123,583 in the same period of 2024. This growth is driven by geographic proximity, cultural ties, and improved connectivity, further supported by a notable number of arrivals by sea, indicating the potential for maritime tourism expansion.

Russia sustains its position as the second-largest source market, with 107,093 visitors, reflecting steady performance and a marginal 0.7% increase. This suggests a stable demand, possibly influenced by consistent flight connections and established travel patterns.

European markets present a dynamic picture. The United Kingdom saw arrivals rise from 71,992 to 87,053 (21.0% growth), while Germany increased from 58,019 to 61,855 (6.6%). France and the Netherlands stand out with strong growth rates of 22.5% and 36.4% respectively, likely benefiting from favourable economic conditions, targeted marketing, and enhanced air links. Australia also posted a significant 31.5% increase, with arrivals reaching 38,309, underscoring Sri Lanka’s appeal to long-haul travelers including expatriats.

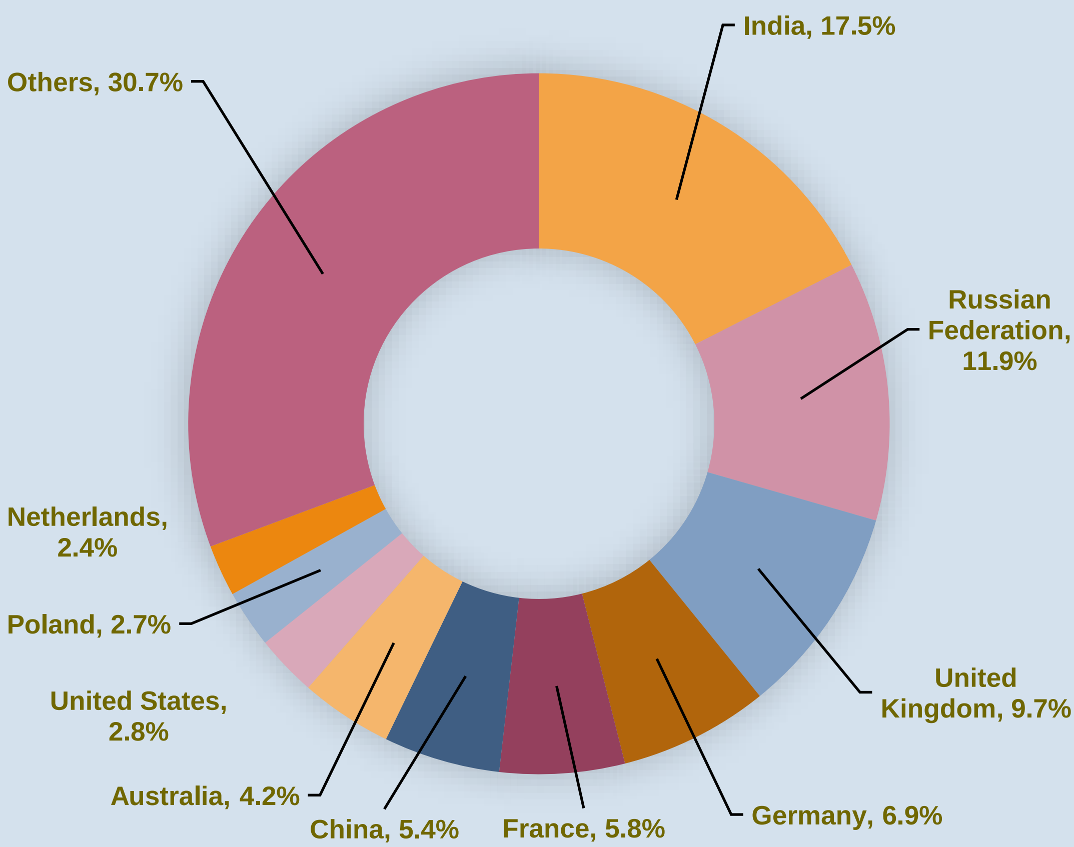
China, however, recorded a 6.7% decline in arrivals (from 51,612 to 48,180), highlighting ongoing recovery challenges, possible travel restrictions, or increased competition from other Asian destinations. In contrast, the United States and Poland showed promising growth of 2.8% and 9.2% respectively, signaling emerging opportunities in these markets.

The country benefits from strong performances in its traditional markets while also seeing encouraging signs from emerging regions. However, the decline from China signals the need for renewed engagement and tailored strategies to regain momentum in that important market.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ April. 2025)	Tourist Arrivals Jan ~ April. 2024)
1	India	157,059	123,583
2	Russian Federation	107,093	106,308
3	United Kingdom	87,053	71,992
4	Germany	61,855	58,019
5	France	51,642	42,174
6	China	48,180	51,612
7	Australia	38,097	28,964
8	United States	25,384	24,612
9	Poland	23,863	21,847
10	Netherlands	21,387	15,686
11	Others	275,271	239,854
Total		**896,884**	**784,651**

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



Tourist arrivals by purpose of visit

April 2025

Leisure tourism remains the dominant purpose of travel to Sri Lanka, accounting for 57% of all international arrivals. This underscores the country's strong appeal as a holiday destination, owing to its scenic beaches, rich cultural heritage, and natural attractions.

Travel to visit friends and relatives constitutes 8.35% of arrivals, highlighting the role of the Sri Lankan diaspora and family ties in driving inbound travel. Meanwhile, the MICE segment (Meetings, Incentives, Conferences, and Exhibitions) makes up 6.15%, reflecting a significant presence of business-related tourism—a potentially high-value market for the hospitality industry.

Smaller segments include business travel (2%), health and Ayurvedic tourism (0.6%), religious tourism (0.5%), sports tourism (0.5%), education-related travel (0.06%), and official visits (0.001%). While these non-leisure segments represent a smaller share, they point to a diverse range of motivations drawing visitors to the country.

Chart 4: Purpose of visit

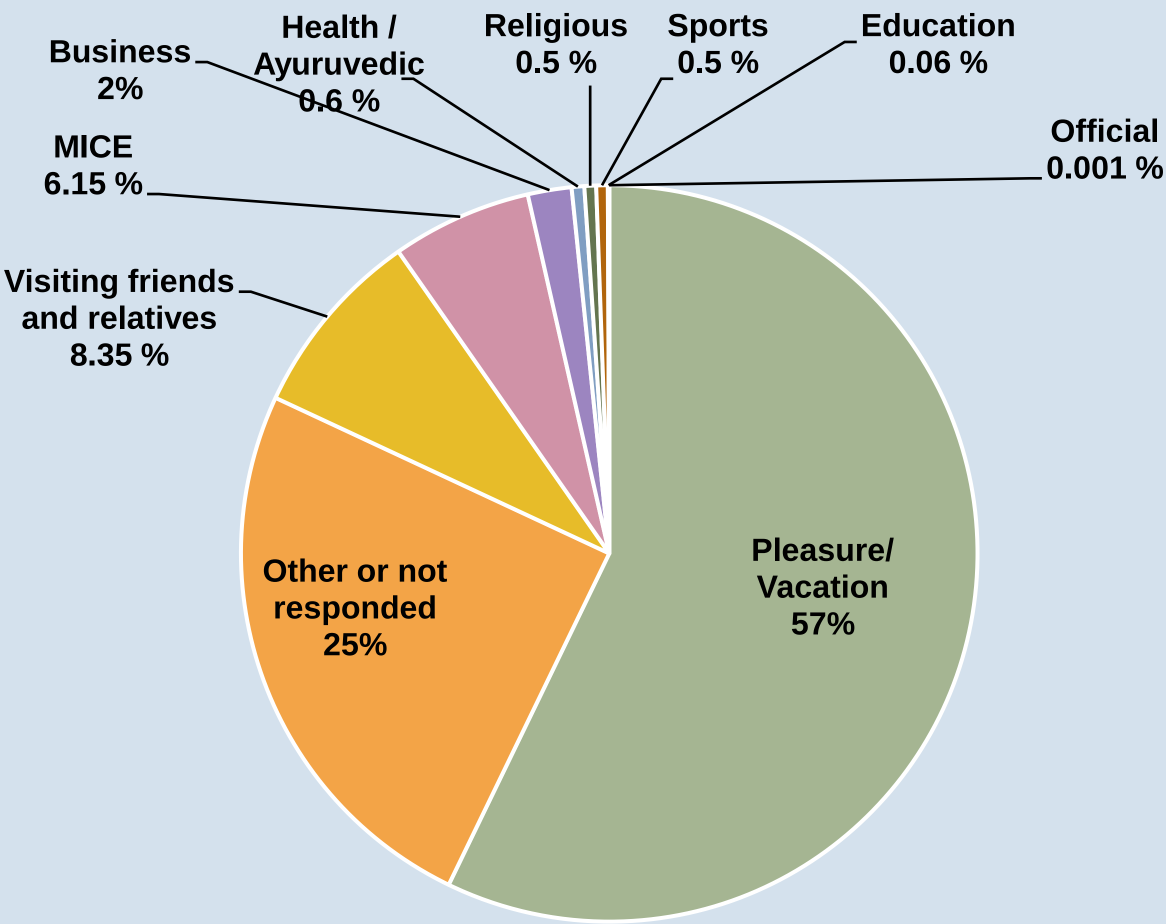
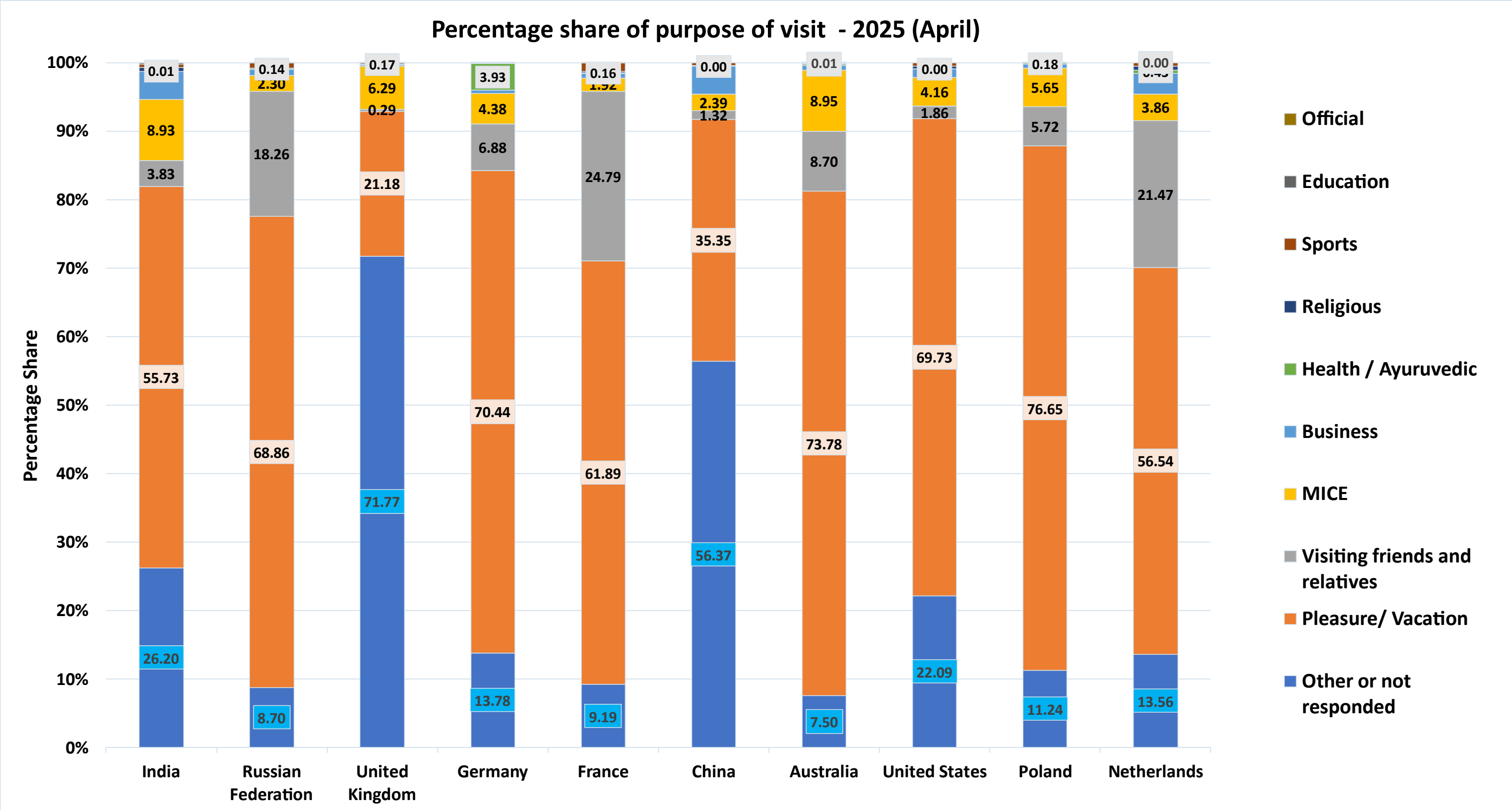


Chart 5: Purpose of visit vs main source markets



An analysis of the table on the purpose of visit by top source markets reveals that leisure and vacation travel is the dominant reason for most markets, with particularly high shares among Poland (76.65%), Australia (73.78%), the United States (69.73%), the Russian Federation (68.86%), Germany (70.44%), France (61.89%), and the Netherlands (56.54%). India also shows a majority of visitors coming for leisure (55.73%), though this is lower compared to Western markets, while China stands out with only 35.35% of its visitors traveling for leisure. Visiting friends and relatives is especially significant for France (24.79%), the Netherlands (21.47%), the Russian Federation (18.26%), and Australia (8.70%), reflecting strong diaspora connections. MICE (Meetings, Incentives, Conferences, and Exhibitions) tourism is most prominent for Australia (8.95%), India (8.93%), the United States (4.16%), and Poland (5.65%), with moderate representation from other markets. Business travel is most pronounced among Indian (4.06%) and Chinese (4.06%) visitors, with smaller shares from the Netherlands (3.02%) and other countries. Health and Ayurvedic tourism is a niche segment, most popular with German travelers (3.93%), while other markets show minimal interest. Travel for religious, sports, education, and official purposes remains marginal across all markets, generally below 1%. Overall, the data underscores the dominance of leisure tourism, the importance of diaspora ties for visiting friends and relatives, and varying levels of business and MICE travel across different source market.

International tourist arrivals by country of residence

	April 2025 Tourist arrivals			Tourist arrivals April 2024	% Change April (25/24)	Total tourist arrivals up to April 2025	Total tourist arrivals up to April 2024	% Change up to April (25/24)
	By Air	By Sea	Total					
AMERICAS	**7,678**	**401**	**8,079**	**9,978**	**(19.0)**	**44,683**	**43,229**	**3.4**
North America	**7,151**	**396**	**7,547**	**9,323**	**(19.0)**	**42,291**	**40,735**	**3.8**
Canada	3,181	57	3,238	3,594	(9.9)	16,465	15,666	5.1
Mexico	107	0	107	155	(31.0)	442	457	(3.3)
United States	3,863	339	4,202	5,574	(24.6)	25,384	24,612	3.1
Caribbean & Central America	**63**	**01**	**64**	**78**	**(17.9)**	**321**	**383**	**(16.2)**
Costa Rica	09	0	09	11	(18.2)	46	56	(17.9)
Jamaica	02	0	02	01	100.0	12	34	(64.7)
Others	52	01	53	66	(19.7)	263	293	(10.2)
South America	**464**	**04**	**468**	**577**	**(18.9)**	**2,071**	**2,111**	**(1.9)**
Argentina	62	0	62	102	(39.2)	406	442	(8.1)
Brazil	178	0	178	239	(25.5)	802	846	(5.2)
Chile	60	01	61	53	15.1	269	247	8.9
Colombia	62	0	62	88	(29.5)	235	281	(16.4)
Others	102	03	105	95	10.5	359	295	21.7
AFRICA	**1,300**	**2**	**1,302**	**1,396**	**(6.7)**	**5,140**	**4,587**	**12.1**
North Africa	**277**	**0**	**277**	**389**	**(28.8)**	**999**	**987**	**1.2**
Morocco	95	0	95	131	(27.5)	344	331	3.9
Sudan	102	0	102	68	50.0	250	181	38.1
Others	80	0	80	190	(57.9)	405	475	(14.7)
Sub-Saharan Africa	**1,023**	**2**	**1,025**	**1,007**	**1.8**	**4,141**	**3,600**	**15.0**
Kenya	79	0	79	45	75.6	279	231	20.8
Mauritius	82	0	82	59	39.0	298	203	46.8
Nigeria	04	0	04	09	(55.6)	28	24	16.7
South Africa	368	02	370	474	(21.9)	1,797	1,704	5.5
Others	490	0	490	420	16.7	1,739	1,438	20.9

	April 2025 Tourist arrivals			Tourist arrivals April 2024	% Change April (25/24)	Total tourist arrivals up to April 2025	Total tourist arrivals up to April 2024	% Change up to April (25/24)
	By Air	By Sea	Total					
ASIA & PACIFIC	**78,213**	**665**	**78,878**	**58,378**	**35.1**	**329,087**	**269,691**	**22.0**
North East Asia	**11,630**	**11**	**11,641**	**11,559**	**0.7**	**65,647**	**64,832**	**1.3**
China	8,666	01	8,667	8,969	(3.4)	48,180	51,612	(6.6)
Japan	2,368	06	2,374	1,949	21.8	12,240	9,183	33.3
South Korea	580	04	584	637	(8.3)	5,167	4,005	29.0
Others	16	0	16	04	300.0	60	32	87.5
South East Asia	**6,283**	**9**	**6,292**	**4,339**	**45.0**	**21,585**	**18,012**	**19.8**
Cambodia	551	0	551	162	240.1	834	776	7.5
Indonesia	446	0	446	248	79.8	1,554	1,049	48.1
Malaysia	1,479	07	1,486	1,277	16.4	7,282	6,344	14.8
Myanmar	166	0	166	125	32.8	439	442	(0.7)
Philippines	565	0	565	578	(2.2)	1,955	1,675	16.7
Singapore	1,058	02	1,060	858	23.5	4,321	3,690	17.1
Thailand	1,220	0	1,220	834	46.3	3,467	2,983	16.2
Vietnam	778	0	778	235	231.1	1,602	975	64.3
Others	20	0	20	22	(9.1)	131	78	67.9
Oceania	**12,144**	**105**	**12,249**	**8,353**	**46.6**	**42,409**	**32,530**	**30.4**
Australia	10,656	88	10,744	7,202	49.2	38,097	28,964	31.5
New Zealand	1,417	17	1,434	1,116	28.5	4,137	3,447	20.0
Others	71	0	71	35	102.9	175	119	47.1
South Asia	**48,156**	**540**	**48,696**	**34,127**	**42.7**	**199,446**	**154,317**	**29.2**
Afghanistan	21	0	21	0	-	44	65	(32.3)
Bangladesh	5,428	0	5,428	2,354	130.6	20,029	8,380	139.0
Bhutan	72	0	72	24	200.0	225	294	(23.5)
India	38,204	540	38,744	27,304	41.9	157,059	123,583	27.1
Iran	232	0	232	426	(45.5)	5,428	5,622	(3.5)
Maldives	2,516	0	2,516	2,938	(14.4)	10,290	10,654	(3.4)
Nepal	527	0	527	284	85.6	1,897	1,726	9.9
Pakistan	1,156	0	1,156	797	45.0	4,474	3,993	12.0
EUROPE	**83,576**	**154**	**83,730**	**76,250**	**9.8**	**509,136**	**458,862**	**11.0**
Norther Europe	**21,398**	**57**	**21,455**	**16,180**	**32.6**	**112,960**	**94,582**	**19.4**
Denmark	1,315	01	1,316	822	60.1	8,150	7,021	16.1
Finland	236	0	236	238	(0.8)	2,286	2,105	8.6
Norway	878	0	878	548	60.2	4,903	4,136	18.5
Sweden	696	0	696	537	29.6	6,181	5,692	8.6
United Kingdom	17,293	55	17,348	13,173	31.7	87,053	71,992	20.9
Others	980	01	981	862	13.8	4,387	3,636	20.7

	April 2025			Tourist arrivals April 2024	% Change April (25/24)	Total tourist arrivals up to April 2025	Total tourist arrivals up to April 2024	% Change up to April (25/24)
	Tourist arrivals							
	By Air	By Sea	Total					
Western Europe	**30,416**	**80**	**30,496**	**26,729**	**14.1**	**162,804**	**140,081**	**16.2**
Austria	1,083	04	1,087	1,092	(0.5)	7,975	7,523	6.0
Belgium	1,620	03	1,623	914	77.6	6,965	5,369	29.7
France	8,255	21	8,276	8,792	(5.9)	51,642	42,174	22.4
Germany	11,632	22	11,654	9,843	18.4	61,855	58,019	6.6
Netherlands	4,452	24	4,476	3,437	30.2	21,387	15,686	36.3
Switzerland	3,237	04	3,241	2,557	26.8	12,569	10,918	15.1
Others	137	02	139	94	47.9	411	392	4.8
Central/Eastern Europe	**20,353**	**05**	**20,358**	**23,162**	**(12.1)**	**183,399**	**185,096**	**(0.9)**
Belarus	436	0	436	752	(42.0)	5,198	6,643	(21.8)
Czech Republic	1,227	0	1,227	1,279	(4.1)	9,617	11,603	(17.1)
Estonia	108	0	108	236	(54.2)	2,714	2,734	(0.7)
Hungary	419	02	421	237	77.6	3,593	3,677	(2.3)
Kazakhstan	121	0	121	152	(20.4)	7,407	8,450	(12.3)
Lithuania	178	0	178	401	(55.6)	4,434	4,236	4.7
Poland	2,096	02	2,098	2,349	(10.7)	23,863	21,847	9.2
Romania	455	01	456	655	(30.4)	2,998	3,086	(2.9)
Russia	13,525	0	13,525	15,103	(10.4)	107,093	106,308	0.7
Slovakia	627	0	627	535	17.2	3,785	3,649	3.7
Ukraine	411	0	411	437	(5.9)	4,789	4,022	19.1
Others	750	0	750	1,026	(26.9)	7,908	8,841	(10.6)
Southern/ Mediterranean Europe	**11,409**	**12**	**11,421**	**10,179**	**12.2**	**49,973**	**39,103**	**27.8**
Greece	423	0	423	306	38.2	1,563	1,139	37.2
Italy	3,629	04	3,633	2,245	61.8	16,050	11,426	40.5
Portugal	762	01	763	530	44.0	3,127	2,341	33.6
Spain	3,138	06	3,144	2,166	45.2	10,916	8,912	22.5
Turkey	533	0	533	910	(41.4)	3,405	2,763	23.2
Israel	1,821	0	1,821	3,169	(42.5)	9,579	8,142	17.6
Others	1,103	01	1,104	853	29.4	5,333	4,380	21.8
MIDDLE EAST	**2,619**	**0**	**2,619**	**2,865**	**(8.6)**	**8,838**	**8,282**	**6.7**
Bahrain	77	0	77	85	(9.4)	337	317	6.3
Egypt	434	0	434	458	(5.2)	1,536	1,429	7.5
Iraq	89	0	89	58	53.4	392	207	89.4
Jordan	210	0	210	313	(32.9)	1,014	805	26.0
Kuwait	132	0	132	225	(41.3)	640	737	(13.2)
Lebanon	353	0	353	671	(47.4)	1,329	1,361	(2.4)
Oman	183	0	183	125	46.4	576	505	14.1
Qatar	107	0	107	99	8.1	225	201	11.9
Saudi Arabia	416	0	416	360	15.6	1,462	1,511	(3.2)
United Arab Emirates	502	0	502	378	32.8	1,029	896	14.8
Others	116	0	116	93	24.7	298	313	(4.8)
TOTAL	**173,386**	**1,222**	**174,608**	**148,867**	**17.3**	**896,884**	**784,651**	**14.3**

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

Last departure airports for tourists arriving in Sri Lanka offers valuable insights into travel patterns and connectivity. Dubai tops the list, accounting for 12% of arrivals, followed by Doha (9%), Chennai and Abu Dhabi (8%). This underscores the pivotal role of Middle Eastern hubs as major transit points for international travelers to Sri Lanka, reflecting both the extensive global networks of airlines based in the Gulf and the popularity of these routes for connecting flights from Europe, Africa, and the Americas. Indian cities also feature prominently: Chennai (8%), Mumbai (6%), Bangalore (6%), Delhi (4%), and Hyderabad (2%) collectively contribute a significant share, highlighting the strong air connectivity and close travel ties between India and Sri Lanka. This pattern is consistent with India's position as Sri Lanka's top source market. Other key Asian and global hubs such as Singapore (4%), Kuala Lumpur (3%), Bangkok (2%), and Hong Kong (2%) further demonstrate Sri Lanka's integration into major regional air networks. European cities like London (3%) and Istanbul (3%) also appear, indicating direct or convenient connecting flights from Europe. Moscow (2%) and Sharjah (3%) are notable for their roles in facilitating travel from Russia and the Middle East, respectively.

Among the airlines carrying tourists to Sri Lanka, Sri Lankan Airlines leads the market, carrying 47,280 passengers and accounting for 27% of total arrivals. This dominant position highlights the national carrier's crucial role in connecting Sri Lanka with major source markets, both regionally and globally.

Qatar Airways (9%) and Emirates (9%) follow as the other most significant carriers, together responsible for over 18% of arrivals. Their strong presence reflects the importance of Middle Eastern transit hubs-Doha and Dubai-in facilitating long-haul travel from Europe, the Americas, and Africa to Sri Lanka.

Indian carriers such as IndiGo (11%) and Air India (6%) also feature prominently, underscoring the robust air connectivity and high tourist flow between India and Sri Lanka. Etihad Airways (7%), Fly Dubai (3%), and Air Arabia (3%) further reinforce the role of Gulf-based airlines as key connectors.

European and Russian airlines, including Red Wings Airlines (3%), & Aeroflot (2%), indicate a notable influx of tourists from Russia. The presence of Turkish Airlines (3%) and Singapore Airlines (2%) highlights Sri Lanka's direct links to both Europe and Southeast Asia.

Other Asian carriers such as China Eastern Airline (2%), Cathay Pacific (2%) illustrate the growing, though still modest, contribution of East Asian markets. AirAsia (2%) and FITS Air (1%) also add to the diversity of carriers serving Sri Lanka. This diversity not only enhances accessibility for tourists from various regions but also underscores the importance of maintaining strong partnerships and expanding air service agreements to further boost Sri Lanka's tourism sector.

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

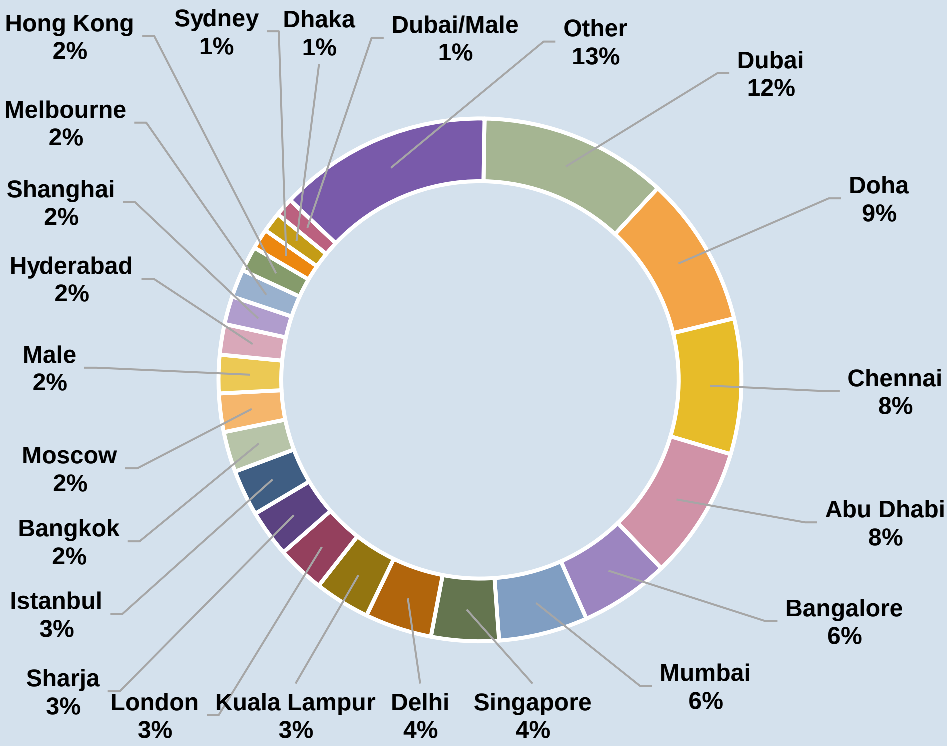
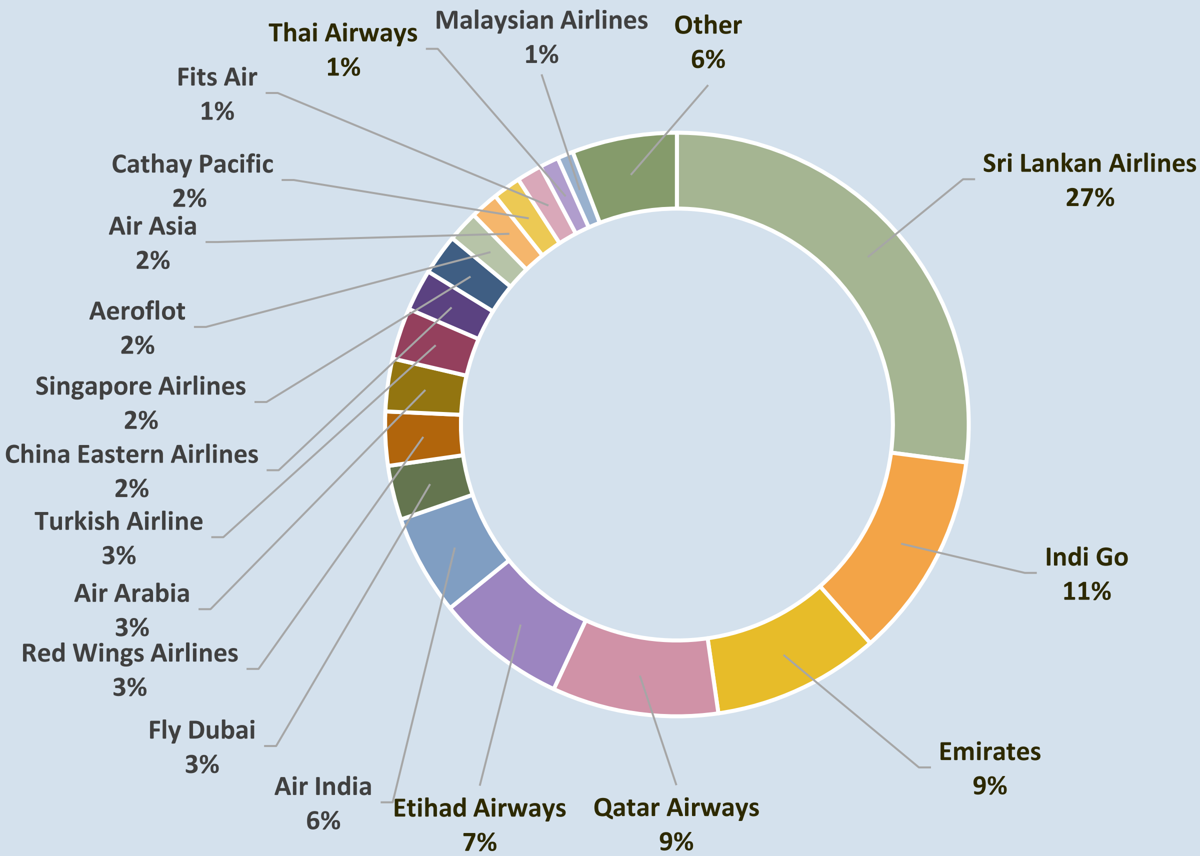


Chart 7. Main airlines to Sri Lanka, April 2025



Top ten markets versus main last departure airports and Main airlines to Sri Lanka
April 2025

A detailed breakdown of airline preferences among tourists from Sri Lanka's top source markets, reveals distinct patterns based on geographic proximity, airline connectivity, and market-specific factors.

For Indian travelers, IndiGo is the most preferred carrier, accounting for 42.71% of arrivals, closely followed by Sri Lankan Airlines at 38.79%. Air India also holds a significant share (13.69%), underscoring the dominance of Indian and Sri Lankan carriers in facilitating travel between the two countries. This heavy reliance on regional airlines reflects the high frequency of direct flights and the strong bilateral connectivity between India and Sri Lanka.

Tourists from the United Kingdom show a more diversified airline preference. Sri Lankan Airlines leads with 32.92%, but Middle Eastern carriers such as Qatar Airways (17.24%), Emirates (17.92%), and Etihad Airways (10.30%) collectively account for a substantial portion, highlighting the importance of Gulf transit hubs. This pattern is similarly observed among German, French, and Dutch travelers, where Sri Lankan Airlines remains a key player, but Qatar Airways, Emirates, and Etihad Airways also command significant shares due to their extensive European networks and convenient connections.

The Russian market exhibits a unique trend, with Red Wings Airlines (37.25%) and Aeroflot (21.93%) dominating, indicating a strong preference for direct services from Russian carriers. Sri Lankan Airlines and Middle Eastern airlines play a much smaller role for Russian tourists.

For Australian visitors, Sri Lankan Airlines is the overwhelming favorite (51.47%), followed by Singapore Airlines (21.3%) reflecting the limited direct options and the reliance on Singapore for long-haul travel. Meanwhile, travelers from China display a more fragmented pattern, with China Eastern Airlines (36.83%) leading, followed by Cathey pacific(16.5%) indicating the importance of both direct and regional connections.

Bangladeshi tourists overwhelmingly favour Sri Lankan Airlines (45.91%) and Fits Air (26.9%), mirroring the trend seen in the Indian market, while the United States market is more dispersed, with Sri Lankan Airlines (20.35%), Qatar Airways (20.49%), and a significant "Others" category (13.23%) reflecting the variety of possible routes and stopovers for long-haul travel.

Overall, the data highlights Sri Lankan Airlines' strong presence across most markets, especially in regional and long-haul segments. Middle Eastern carriers (Qatar Airways, Emirates, Etihad Airways, Fly Dubai, and Air Arabia) collectively play a pivotal role in connecting Europe, Australia, and the US to Sri Lanka, leveraging their strategic hub locations. The dominance of national and regional carriers in markets like India, Bangladesh, Russia, and China underscores the importance of direct connectivity and market-specific airline partnerships in shaping travel preferences to Sri Lanka.

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

Country	Sri Lankan Airline	Indi Go	Emirates	Qatar Airways	Etihad Airways	Air India	Fly Dubai	Red Wings	Air Arabia	Turkish Airline	China Eastern Airlines	Singapore Airline	Aeroflot	Air Asia	Cathey Pacific	Fits Air	Thai Airways	Malaysian Airline	Others	Total
India	38.79	42.71	0.83	0.28	0.27	13.69	0.52	0.00	0.32	0.02	0.03	0.08	0.00	0.07	0.09	0.21	0.05	0.03	2.02	100.00
United Kingdom	32.92	2.93	17.92	17.24	10.30	4.88	2.03	0.00	0.63	2.12	0.28	0.77	0.00	1.64	1.04	0.27	0.47	0.32	4.25	100.00
Russian Federation	1.70	0.71	1.67	0.64	6.18	0.37	2.22	37.25	15.25	0.18	0.69	0.01	21.93	0.47	0.04	0.54	0.04	0.02	10.10	100.00
Germany	21.60	1.49	18.80	18.40	13.21	6.86	3.90	0.00	1.07	8.28	0.25	0.29	0.02	1.06	0.27	0.58	0.34	0.13	3.46	100.00
Australia	51.47	1.25	2.17	0.62	0.43	3.25	0.21	0.00	0.07	0.09	0.18	21.37	0.00	3.19	3.24	0.13	2.06	5.96	4.32	100.00
China	12.22	0.48	0.52	0.30	0.40	0.28	0.36	0.00	0.15	0.05	36.83	1.64	0.00	2.24	16.53	0.78	2.58	1.74	22.89	100.00
France	24.48	1.84	14.78	20.42	16.05	2.28	1.49	0.00	0.58	11.85	0.24	0.42	0.01	1.58	0.53	0.29	0.23	0.10	2.83	100.00
Bangladesh	45.91	18.48	0.70	0.53	0.28	4.20	0.20	0.00	0.24	0.02	0.04	0.02	0.00	0.13	0.00	26.92	0.17	0.02	2.16	100.00
Netherlands	13.43	0.85	22.92	17.34	17.96	11.26	2.99	0.00	0.31	6.46	0.29	0.16	0.00	1.99	0.31	0.29	0.16	0.27	3.02	100.00
United States	20.35	6.59	7.71	20.49	10.88	3.33	1.64	0.00	0.52	2.86	1.07	2.78	0.00	1.45	3.86	0.76	1.69	0.79	13.23	100.00

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

Country	Dubai	Doha	Chennai	Abu Dhabi	Bangalore	Mumbai	Singapore	Delhi	Kuala Lampur	London	Sharja	Istanbul	Bangkok	Moscow	Male	Hyderabad	Shanghai	Melbourne	Hong Kong	Others	Total
India	677	139	11,816	191	8,437	6,816	186	3,245	174	18	123	8	237	0	101	2,949	9	62	33	3,523	38,744
United Kingdom	3,292	3,010	438	1,912	195	462	415	684	435	4,219	109	367	298	0	134	68	43	80	180	1,007	17,348
Russian Federation	537	87	52	1,597	38	48	30	29	91	3	2,062	25	50	4,028	84	13	91	1	5	4,654	13,525
Germany	2,541	2,137	129	1,568	132	832	144	453	167	75	125	965	136	5	64	31	23	12	31	2,084	11,654
Australia	234	73	142	50	70	70	3,211	418	1,078	30	7	10	317	0	42	21	15	2,573	348	2,035	10,744
China	165	31	16	43	19	31	299	20	498	3	13	4	382	0	127	5	2,274	11	1,433	3,293	8,667
France	1,237	1,717	112	1,344	93	175	140	172	170	99	48	981	98	1	38	16	18	3	44	1,770	8,276
Bangladesh	74	31	980	22	12	24	16	211	106	0	13	1	21	0	1,849	20	0	0	0	2,048	5,428
Netherlands	1,120	764	31	825	21	274	59	506	119	42	12	289	49	0	31	1	9	2	14	308	4,476
United States	378	869	228	481	175	107	214	131	133	52	22	120	172	0	75	61	36	7	162	779	4,202

An analysis of last departure airports among Sri Lanka's key source markets reveals distinct connectivity patterns that shape inbound tourism. India, the leading contributor with 38,744 arrivals, relies heavily on direct regional routes, as Chennai (11,816), Bangalore (8,437), and Mumbai (6,816) together account for nearly two-thirds of Indian visitors. This underscores the dominance of short-haul, direct connections for the Indian market, facilitating ease of travel and high volumes.

In contrast, Russian travelers (13,525 arrivals) predominantly depart via Moscow (4,028), but also utilize Middle Eastern hubs like Sharjah (2,062) and Abu Dhabi (1,597), reflecting limited direct connectivity and a reliance on charter services or Gulf carriers. European source markets, such as the United Kingdom (17,348 arrivals) and Germany (11,654 arrivals), demonstrate a strong dependence on Middle Eastern transit points. British and German tourists frequently route through Dubai (3,292 and 2,541, respectively), Doha (3,010 and 2,137), and Abu Dhabi, while London remains a significant direct gateway for the UK (4,219).

French travelers (8,276 arrivals) also favour Doha (1,717) and Abu Dhabi (1,344) as transit points. Chinese visitors (8,667 arrivals) utilize both direct flights from Shanghai (2,274) and regional Southeast Asian hubs like Hong Kong (1,433) and Kuala Lumpur (498), indicating the importance of these transit points for connectivity. Australian travelers (10,744 arrivals) show a distinctive preference for Singapore (3,211) and Melbourne (2,573) as departure points, while American visitors (4,202 arrivals) are more dispersed across multiple hubs, with no single dominant airport.

These trends highlight a clear divide: regional short-haul markets like India benefit from direct connections, while long-haul markets-especially in Europe and Russia-depend on Gulf and Southeast Asian transit hubs. The strategic importance of airports in Dubai, Doha, and Singapore is evident, suggesting that optimizing partnerships and connectivity through these hubs could further enhance Sri Lanka’s appeal to long-haul travelers. Additionally, the reliance on unconventional routes and specialized transit points may represent opportunities for targeted marketing and route development to capture niche tourism segments.

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