



# MONTHLY TOURIST ARRIVALS REPORT:

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

**MAY 2025**




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## Introduction

The following document provides a synthesis of the most recent May 2025 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31<sup>st</sup> May 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 May figures indicating substantial year-on-year growth. In January 2025, arrivals rose to 252,761, marking a robust 21.4% increase from January 2024 (208,253). February saw 240,217 arrivals, up 10.0% from the previous year (218,350), while March recorded 229,298 arrivals, a 9.62% rise compared to March 2024 (209,181). Continuing this positive trajectory, April 2025 arrivals reached 174,608, representing a notable 17.3% increase over April 2024 (148,867).

May 2025 maintained this strong performance with 132,919 arrivals, an impressive 18.5% increase from May 2024 (112,128).

Cumulatively, for the period of January to May 2025, Sri Lanka has welcomed 1,029,803 tourists, showcasing a significant overall growth compared to the 896,779 tourists recorded in the corresponding period of 2024. This consistent double-digit growth across reported months underscores a robust recovery and expanding appeal of Sri Lanka as a tourist destination.

Major source markets, including India, the United Kingdom, China, Bangladesh, and Germany, have played a pivotal role in invigorating Sri Lanka's tourism sector during May. Their significant contributions have been instrumental in driving the surge in visitor arrivals and supporting the overall growth of the industry throughout this period.

| 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   | 132,919   | 18.5             |
| 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 | 1,029,803 |                  |



Tourist Arrivals | May 2025

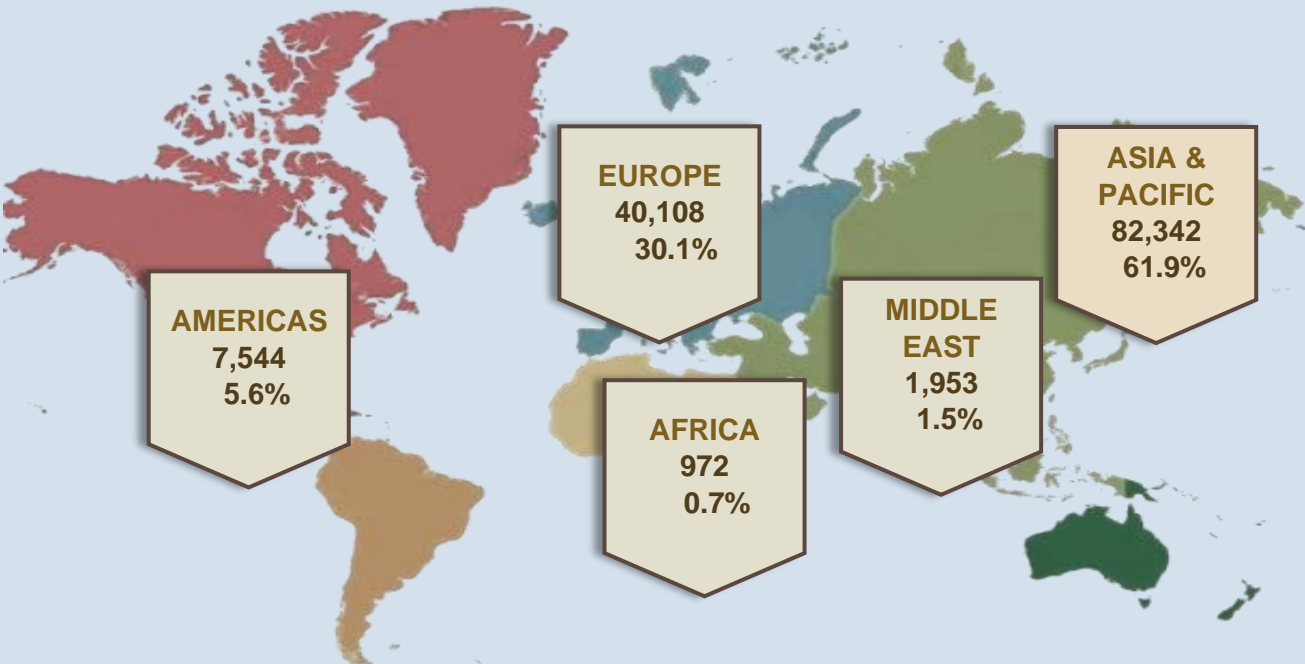
132,919



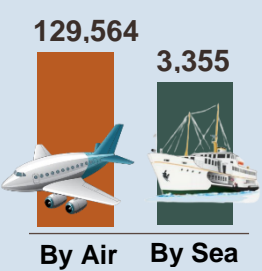


# Tourist arrivals by region and percentage share May 2025

Map 1. Tourist arrivals by region and percentage share



An analysis of tourist arrivals by region in May 2025 highlights the primary geographical sources of visitors to Sri Lanka. The Asia & Pacific region stands out as the largest contributor, accounting for 82,342 arrivals, which represents a significant 61.9% of the total. This dominance underscores the strong regional connectivity and perhaps shorter travel distances and cultural affinities that make Sri Lanka a highly accessible and attractive destination for travelers from this vast region.



Europe follows as the second-largest source region, contributing 40,108 arrivals, making up 30.1% of the total. Together, Asia & Pacific and Europe collectively represent the overwhelming majority of Sri Lanka's inbound tourists, emphasizing the country's strong appeal and established tourism infrastructure catering to both Western and regional travelers.





















The Americas contributed 7,544 arrivals (5.6%), while the Middle East and Africa accounted for comparatively smaller shares, with 1,953 arrivals (1.5%) and 972 arrivals (0.7%) respectively. This regional distribution indicates that Sri Lanka's tourism sector is currently much less reliant on these latter regions for overall volume, suggesting substantial untapped potential for growth.

The consistently high numbers from Asia & Pacific and Europe can be attributed to a combination of factors, including established travel patterns, extensive flight connectivity, cultural interests, and favorable travel packages. Conversely, the relatively low figures from the Middle East and Africa may reflect limitations such as fewer direct flight options, less targeted marketing efforts, or a lower awareness of Sri Lanka as a leisure destination within these regions. This heavy reliance on Europe and Asia & Pacific implies that while marketing and connectivity are strongest in these areas, the industry remains somewhat vulnerable to economic or political shifts within these key markets. Diversifying source markets, particularly by increasing promotional activities and improving air links with the Americas, Middle East, and Africa, could significantly help stabilize and foster overall tourist arrivals. Tailored marketing campaigns, enhanced flight connectivity, and targeted travel incentives could be instrumental in attracting more visitors from these underrepresented regions.



## Top primary markets and top potential markets











## Top primary markets, May 2025

|  |   |
|--|---|
|  <b>India</b><br>Arrivals: 47,001 / % Share: 35.4 01         |  <b>Maldives</b><br>Arrivals: 3,006 / % Share: 2.3 11      |
|  <b>United Kingdom</b><br>Arrivals: 9,221 / % Share: 6.9 02  |  <b>Netherlands</b><br>Arrivals: 2,329 / % Share: 1.8 12   |
|  <b>China</b><br>Arrivals: 8,803 / % Share: 6.6 03           |  <b>Japan</b><br>Arrivals: 2,126 / % Share: 1.6 13         |
|  <b>Bangladesh</b><br>Arrivals: 7,282 / % Share: 5.5 04      |  <b>Malaysia</b><br>Arrivals: 1,920 / % Share: 1.4 14      |
|  <b>Germany</b><br>Arrivals: 7,223 / % Share: 5.4 05        |  <b>Spain</b><br>Arrivals: 1,593 / % Share: 1.2 15        |
|  <b>Australia</b><br>Arrivals: 5,929 / % Share: 4.5 06     |  <b>Switzerland</b><br>Arrivals: 1,424 / % Share: 1.1 16 |
|  <b>France</b><br>Arrivals: 5,470 / % Share: 4.1 07        |  <b>Italy</b><br>Arrivals: 1,333 / % Share: 1.0 17       |
|  <b>United States</b><br>Arrivals: 3,607 / % Share: 2.7 08 |  <b>Poland</b><br>Arrivals: 1,078 / % Share: 0.8 18      |
|  <b>Canada</b><br>Arrivals: 3,412 / % Share: 2.6 09        |  <b>Singapore</b><br>Arrivals: 1,054 / % Share: 0.8 19   |
|  <b>Russia</b><br>Arrivals: 3,328 / % Share: 2.5 10        |  <b>Pakistan</b><br>Arrivals: 946 / % Share: 0.7 20      |

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, May 2025

|   |   |    |
|---|---|----|
|    | <b>Israel</b><br>Arrivals: 896 / % Share: 0.7       | 21 |
|    | <b>Denmark</b><br>Arrivals: 500 / % Share: 0.4      | 26 |
|    | <b>New Zealand</b><br>Arrivals: 840 / % Share: 0.6  | 22 |
|    | <b>Austria</b><br>Arrivals: 483 / % Share: 0.4      | 27 |
|    | <b>Belgium</b><br>Arrivals: 664 / % Share: 0.5      | 23 |
|    | <b>Philippines</b><br>Arrivals: 472 / % Share: 0.4  | 28 |
|    | <b>Thailand</b><br>Arrivals: 556 / % Share: 0.4     | 24 |
|    | <b>Indonesia</b><br>Arrivals: 471 / % Share: 0.4    | 29 |
|  | <b>South Korea</b><br>Arrivals: 544 / % Share: 0.4  | 25 |
|  | <b>Saudi Arabia</b><br>Arrivals: 433 / % Share: 0.3 | 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

## May 2025

An analysis of key source markets reveals that India stands as the undisputed leader, contributing a dominant 35.4% of total arrivals. This signifies an exceptionally strong and consistent inbound flow, likely driven by geographical proximity, cultural ties, and robust air connectivity. While this provides a strong foundation for Sri Lanka's tourism, such heavy reliance on a single market also presents a vulnerability; any significant negative shifts in Indian outbound travel could disproportionately impact overall arrivals.

Following India, the market share distribution becomes more fragmented. The United Kingdom (6.9%) and China (6.6%) are the next significant contributors, collectively accounting for around 13.5% of arrivals.

Bangladesh (5.5%), Germany (5.4%), and Australia (4.5%) form a mid-tier group of contributors. The consistent presence of Germany indicates a mature European market, often associated with higher-spending tourists and specialized interests (as seen in the "Health/Ayurvedic" purpose). Bangladesh's strong showing points to robust regional connections and perhaps a growing outbound travel market. Australia, as a long-haul market, signifies successful efforts in attracting visitors especially for VFR purposes despite the greater distance.

Further down the list, France (4.1%), the United States (2.7%), Canada (2.6%), and Russia (2.5%) represent smaller, but still important, segments. The European markets (France, Germany) highlight continued interest from traditional Western sources, while the Americas (US, Canada) represent markets with significant untapped potential, often associated with higher average spending. Russia's presence, while smaller, indicates the success of specific initiatives or direct flight connections from this market.

Understanding the unique characteristics and travel behaviors of each of these markets, is paramount for developing effective, tailored tourism strategies.

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

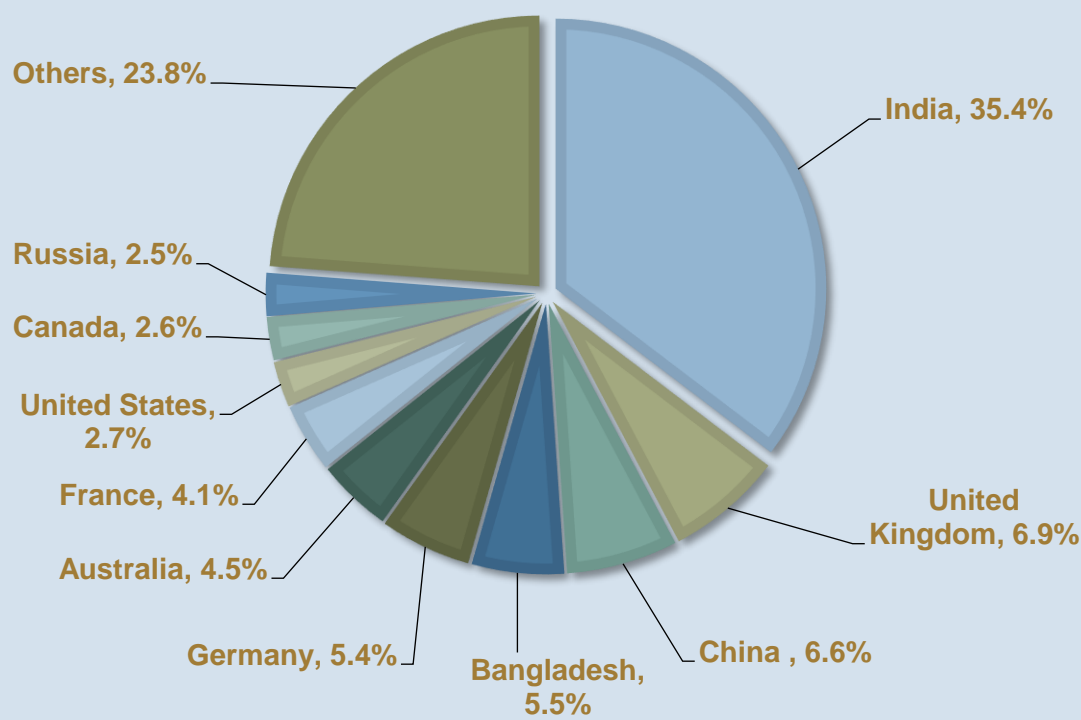


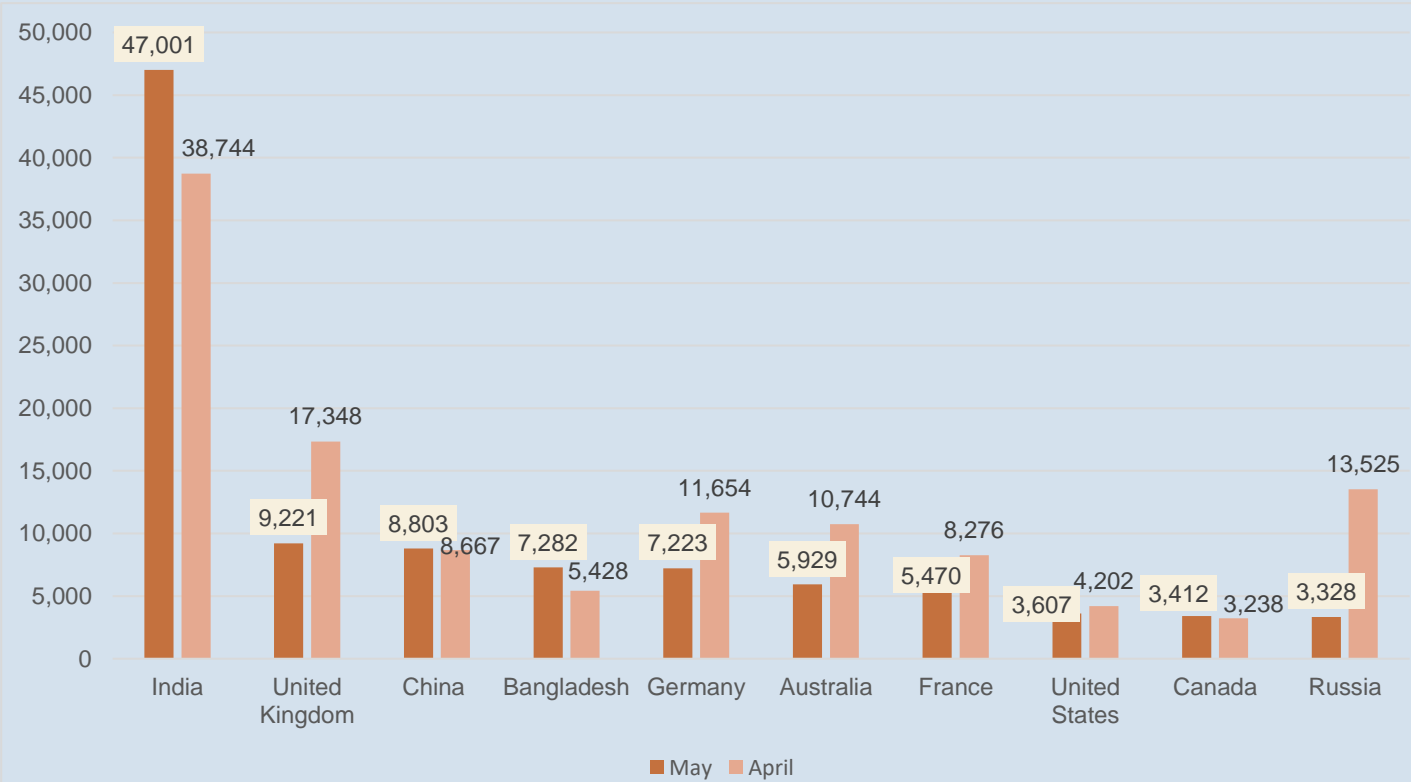




Table 2. Top ten source markets to Sri Lanka, May

| Rank | Country of Residence | Tourist Arrivals (May 2025) |        |        | Tourist Arrivals (May 2024) |
|------|----------------------|-----------------------------|--------|--------|-----------------------------|
|      |                      | By Air                      | By Sea | Total  |                             |
| 1    | India                | 46,272                      | 729    | 47,001 | 32,254                      |
| 2    | United Kingdom       | 9,160                       | 61     | 9,221  | 8,094                       |
| 3    | China                | 8,803                       | 0      | 8,803  | 7,930                       |
| 4    | Bangladesh           | 7,282                       | 0      | 7,282  | 2,878                       |
| 5    | Germany              | 5,343                       | 1,880  | 7,223  | 7,495                       |
| 6    | Australia            | 5,896                       | 33     | 5,929  | 5,465                       |
| 7    | France               | 5,465                       | 05     | 5,470  | 4,064                       |
| 8    | United States        | 3,234                       | 373    | 3,607  | 4,082                       |
| 9    | Canada               | 3,344                       | 68     | 3,412  | 3,294                       |
| 10   | Russian Federation   | 3,322                       | 06     | 3,328  | 4,384                       |

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





## Top ten source markets

### January to May 2025

Sri Lanka's tourism sector is demonstrating robust and diverse growth across its major source markets in the first five months of 2025, compared to the same period in 2024.

India remains the clear leader, with 204,060 arrivals in Jan-May 2025, an impressive 30.94% year-over-year increase from 155,837 in the same period of 2024. This substantial growth is driven by geographic proximity, strong cultural ties, and improved connectivity.

The Russian Federation sustained its position as the second-largest source market, with 110,421 visitors in Jan-May 2025. However, this represents a slight decline of 0.24% from 110,692 in Jan-May 2024. This indicates a relatively stable, but not growing, demand, possibly influenced by consistent flight connections and established travel patterns.

European markets present a dynamic picture. The United Kingdom saw arrivals rise significantly from 80,086 in Jan-May 2024 to 96,274 in Jan-May 2025, a robust 20.21% growth. Germany also experienced an increase from 65,514 to 69,078, marking a 5.44% growth. France stands out with particularly strong growth, rising from 46,238 to 57,112 arrivals, a 23.52% increase. Similarly, Poland recorded a promising 9.15% increase, from 22,849 to 24,941 arrivals. These positive trends from European markets likely benefit from favorable economic conditions, targeted marketing, and enhanced air links.

Australia also posted a significant 27.87% increase, with arrivals reaching 44,026 in Jan-May 2025, up from 34,429 in Jan-May 2024, underscoring Sri Lanka's appeal to long-haul travelers including expatriates.

China, however, recorded a 4.30% decline in arrivals, falling from 59,542 in Jan-May 2024 to 56,983 in Jan-May 2025. This highlights ongoing recovery challenges and increased competition from other Asian destinations, signaling a need for renewed engagement and tailored strategies to regain momentum in this important market.

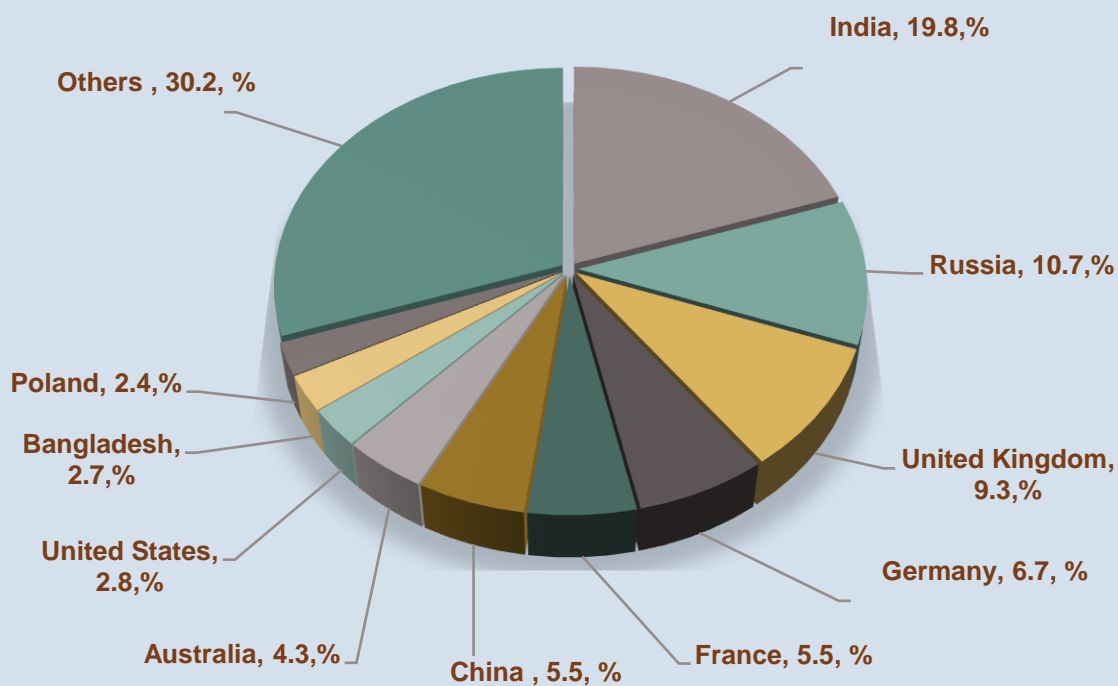
In contrast, the United States showed modest growth of 1.03%, with arrivals increasing from 28,694 to 28,991, signaling emerging opportunities in this market that could be further cultivated. A notable highlight is Bangladesh, which experienced an exceptional 142.59% surge in arrivals, growing from 11,258 in Jan-May 2024 to 27,311 in Jan-May 2025, indicating a rapidly emerging and significant market.

Overall, Sri Lanka's tourism sector benefits from strong performances in its traditional markets, particularly India and several European nations, while also seeing encouraging signs from emerging regions like Bangladesh and Australia. However, the decline from Russia and China signals the need for renewed engagement and tailored strategies to regain momentum and address specific challenges in those markets. Continued diversification of source markets, improved air links, and targeted promotions will be key to sustaining and accelerating overall tourist arrivals.

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

| Rank         | Country of Residence | Tourist Arrivals<br>(Jan ~ May.2025) | Tourist Arrivals<br>Jan ~ May. 2024) |
|--------------|----------------------|--------------------------------------|--------------------------------------|
| 1            | India                | 204,060                              | 155,837                              |
| 2            | Russian Federation   | 110,421                              | 110,692                              |
| 3            | United Kingdom       | 96,274                               | 80,086                               |
| 4            | Germany              | 69,078                               | 65,514                               |
| 5            | France               | 57,112                               | 46,238                               |
| 6            | China                | 56,983                               | 59,542                               |
| 7            | Australia            | 44,026                               | 34,429                               |
| 8            | United States        | 28,991                               | 28,694                               |
| 9            | Bangladesh           | 27,311                               | 11,258                               |
| 10           | Poland               | 24,941                               | 22,849                               |
| 11           | Others               | 310,606                              | 281,660                              |
| <b>Total</b> |                      | <b>1,029,803</b>                     | <b>896,799</b>                       |

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





# Tourist arrivals by purpose of visit

## May 2025

The analysis of tourist arrivals for May 2025 reveals that 'Pleasure/Vacation' continues to be the predominant purpose of visit, constituting a substantial majority of all inbound tourists (51%). This consistently high proportion reaffirms Sri Lanka's strong market positioning as a leisure destination. Complementing the leisure segment, 'Visiting Friends and Relatives' and 'MICE' (Meetings, Incentives, Conferences, and Exhibitions) represent key secondary purposes, contributing 8.35% and 6.15% respectively. These segments underscore the importance of diaspora engagement and the growing potential of business tourism. Smaller, yet strategically important, niche categories such as 'Business' (3%), 'Sports' (0.6%), and 'Health/Ayurvedic' (0.5%) also contribute to the visitor profile, indicating opportunities for focused development within specialized tourism sectors.

Chart 4: Purpose of visit

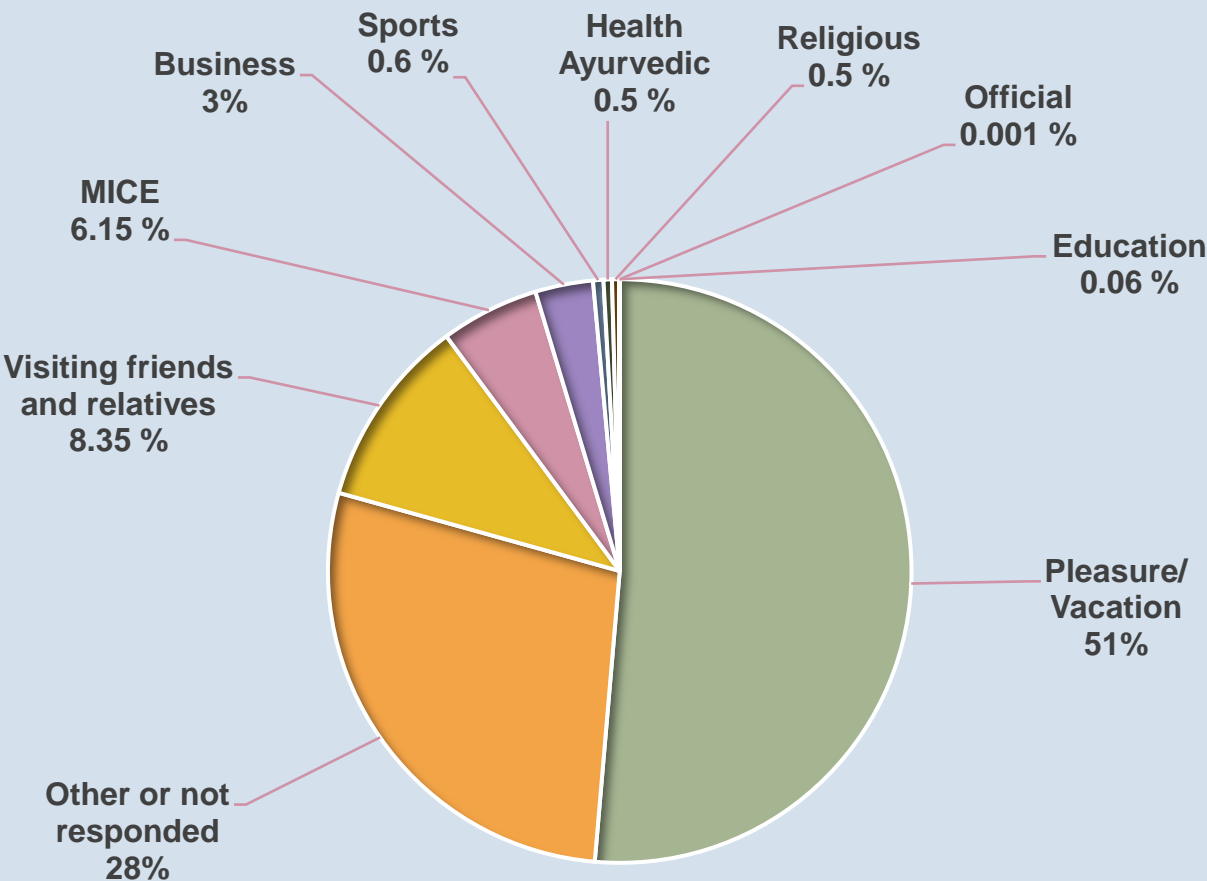
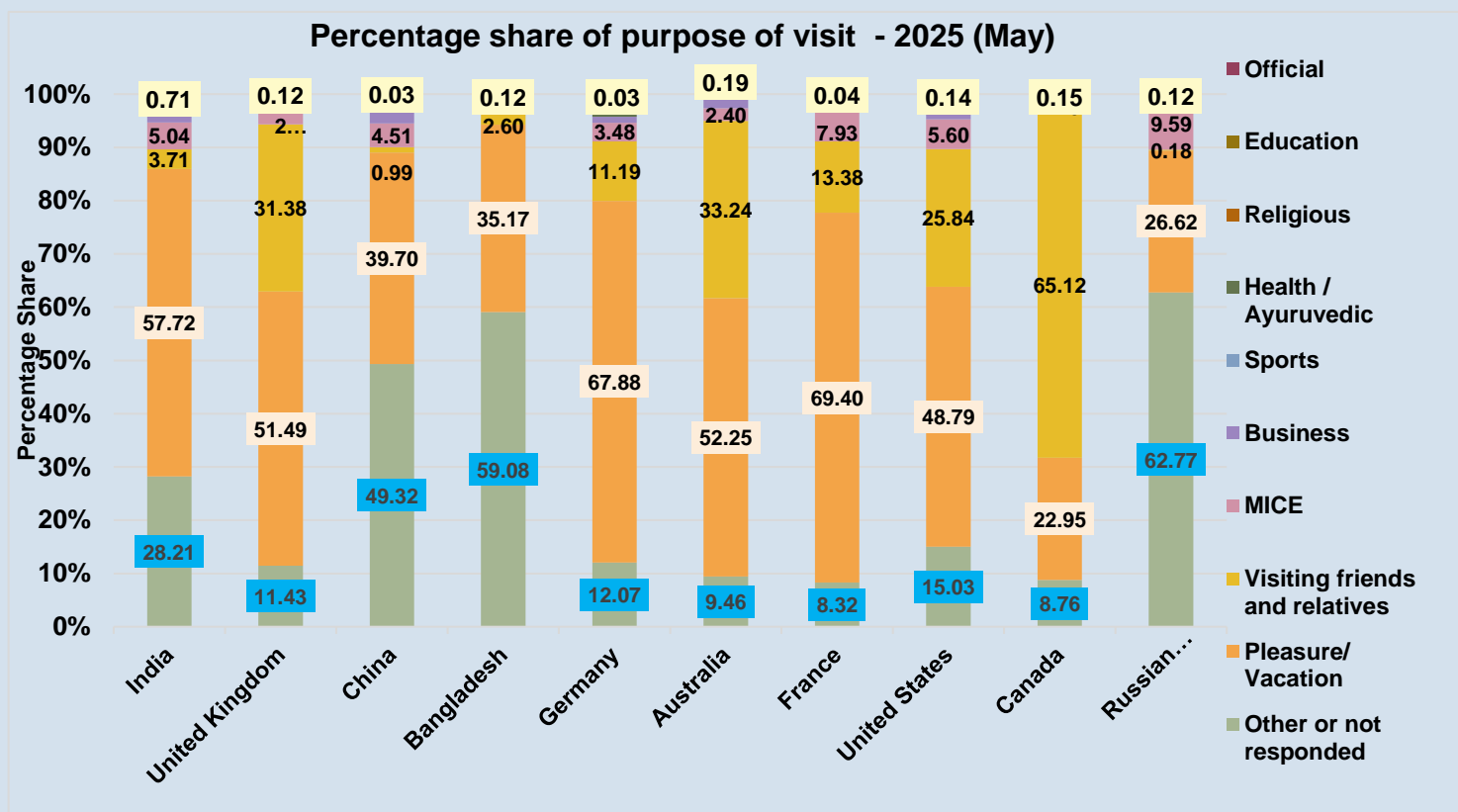


Chart 5: Purpose of visit vs main source markets



A deeper dive into the purpose of visit by top source markets for May 2025 reveals interesting market-specific dynamics. While 'Pleasure/Vacation' is generally dominant, its proportion varies significantly, ranging from a high of 69.40% for France to a low of 22.95% for Canada and 26.62% for the Russian Federation. This highlights diverse market preferences, with some nations strongly prioritizing leisure travel. Conversely, the 'Visiting Friends and Relatives' segment is exceptionally high for Canada (65.12%), and notably strong for the United Kingdom (31.38%) Australia (33.24%) and United States (25.84%) indicating robust community ties. The 'MICE' segment shows particular strength from the Russian Federation (9.59%) and France (7.93%), suggesting these markets are key for business-related travel and events. 'Health/Ayurvedic' purpose stands out for Germany (4.18%), indicating a specialized interest from this market. These market-specific trends emphasize the necessity of tailored marketing and product development strategies to effectively capture and serve the distinct motivations of tourists from each key source country.







## International tourist arrivals by country of residence

|                                | May 2025         |        |       | Tourist arrivals<br>May 2024 | % change<br>May<br>(25/24) | Total<br>tourist<br>arrivals<br>up to<br>May<br>2025 | Total<br>tourist<br>arrivals<br>up to<br>May<br>2024 | % change<br>up to<br>May<br>(25/24) |
|--------------------------------|------------------|--------|-------|------------------------------|----------------------------|--|--|-------------------------------------|
|                                | Tourist arrivals |        |       |                              |                            |  |  |                                     |
|                                | By Air           | By Sea | Total |                              |                            |  |  |                                     |
| AMERICAS                       | 7,086            | 458    | 7,544 | 7,785                        | (3.1)                      | 52,227   | 51,014   | 2.4                                 |
| North America                  | 6,653            | 454    | 7,107 | 7,433                        | (4.4)                      | 49,398   | 48,168   | 2.6                                 |
| Canada                         | 3,344            | 68     | 3,412 | 3,294                        | 3.6                        | 19,877   | 18,960   | 4.8                                 |
| Mexico                         | 75               | 13     | 88    | 57                           | 54.4                       | 530  | 514  | 3.1                                 |
| United States                  | 3,234            | 373    | 3,607 | 4,082                        | (11.6)                     | 28,991   | 28,694   | 1.0                                 |
| Caribbean &<br>Central America | 78               | 02     | 80    | 63                           | 27.0                       | 401  | 446  | (10.1)                              |
| Costa Rica                     | 10               | 02     | 12    | 07                           | 71.4                       | 58   | 63   | (7.9)                               |
| Jamaica                        | 03               | 0      | 03    | 07                           | (57.1)                     | 15   | 41   | (63.4)                              |
| Others                         | 65               | 0      | 65    | 49                           | 32.7                       | 328  | 342  | (4.1)                               |
| South America                  | 355              | 02     | 357   | 289                          | 23.5                       | 2,428  | 2,400  | 1.2                                 |
| Argentina                      | 60               | 0      | 60    | 44                           | 36.4                       | 466  | 486  | (4.1)                               |
| Brazil                         | 131              | 01     | 132   | 106                          | 24.5                       | 934  | 952  | (1.9)                               |
| Chile                          | 41               | 0      | 41    | 42                           | (2.4)                      | 310  | 289  | 7.3                                 |
| Colombia                       | 56               | 0      | 56    | 40                           | 40.0                       | 291  | 321  | (9.3)                               |
| Others                         | 67               | 01     | 68    | 57                           | 19.3                       | 427  | 352  | 21.3                                |
| AFRICA                         | 972              | 0      | 972   | 700                          | 38.9                       | 6,112  | 5,287  | 15.6                                |
| North Africa                   | 266              | 0      | 266   | 213                          | 24.9                       | 1,265  | 1,200  | 5.4                                 |
| Morocco                        | 108              | 0      | 108   | 59                           | 83.1                       | 452  | 390  | 15.9                                |
| Sudan                          | 66               | 0      | 66    | 69                           | (4.3)                      | 316  | 250  | 26.4                                |
| Others                         | 92               | 0      | 92    | 85                           | 8.2                        | 497  | 560  | (11.3)                              |
| Sub-Saharan<br>Africa          | 706              | 0      | 706   | 487                          | 45.0                       | 4,847  | 4,087  | 18.6                                |
| Kenya                          | 71               | 0      | 71    | 45                           | 57.8                       | 350  | 276  | 26.8                                |
| Mauritius                      | 56               | 0      | 56    | 25                           | 124.0                      | 354  | 228  | 55.3                                |
| Nigeria                        | 14               | 0      | 14    | 0                            | —                          | 42   | 24   | 75.0                                |
| South Africa                   | 198              | 0      | 198   | 195                          | 1.5                        | 1,995  | 1,899  | 5.1                                 |
| Others                         | 367              | 0      | 367   | 222                          | 65.3                       | 2,106  | 1,660  | 26.9                                |



## Monthly Tourist Arrivals Report May 2025

|                 | May 2025         |        |        | Tourist arrivals<br>May 2024 | % change<br>May<br>(25/24) | Total<br>tourist<br>arrivals<br>up to<br>May<br>2025 | Total<br>tourist<br>arrivals<br>up to<br>May<br>2024 | % change<br>up to<br>May<br>(25/24) |
|-----------------|------------------|--------|--------|------------------------------|----------------------------|--|--|-------------------------------------|
|                 | Tourist arrivals |        |        |                              |                            |  |  |                                     |
|                 | By Air           | By Sea | Total  |                              |                            |  |  |                                     |
| ASIA & PACIFIC  | 81,561           | 781    | 82,342 | 64,773                       | 27.1                       | 411,429  | 334,464  | 23.0                                |
| North East Asia | 11,491           | 2      | 11,493 | 10,090                       | 13.9                       | 77,140   | 74,922   | 3.0                                 |
| China           | 8,803            | 0      | 8,803  | 7,930                        | 11.0                       | 56,983   | 59,542   | (4.3)                               |
| Japan           | 2,124            | 02     | 2,126  | 1,581                        | 34.5                       | 14,366   | 10,764   | 33.5                                |
| South Korea     | 544              | 0      | 544    | 571                          | (4.7)                      | 5,711  | 4,576  | 24.8                                |
| Others          | 20               | 0      | 20     | 08                           | 150.0                      | 80   | 40   | 100.0                               |
| South East Asia | 4,981            | 9      | 4,990  | 3,792                        | 31.6                       | 26,575   | 21,804   | 21.9                                |
| Cambodia        | 28               | 0      | 28     | 82                           | (65.9)                     | 862  | 858  | 0.5                                 |
| Indonesia       | 471              | 0      | 471    | 218                          | 116.1                      | 2,025  | 1,267  | 59.8                                |
| Malaysia        | 1,917            | 03     | 1,920  | 1,204                        | 59.5                       | 9,202  | 7,548  | 21.9                                |
| Myanmar         | 203              | 0      | 203    | 83                           | 144.6                      | 642  | 525  | 22.3                                |
| Philippines     | 468              | 04     | 472    | 395                          | 19.5                       | 2,427  | 2,070  | 17.2                                |
| Singapore       | 1,054            | 0      | 1,054  | 914                          | 15.3                       | 5,375  | 4,604  | 16.7                                |
| Thailand        | 554              | 02     | 556    | 583                          | (4.6)                      | 4,023  | 3,566  | 12.8                                |
| Vietnam         | 250              | 0      | 250    | 290                          | (13.8)                     | 1,852  | 1,265  | 46.4                                |
| Others          | 36               | 0      | 36     | 23                           | 56.5                       | 167  | 101  | 65.3                                |
| Oceania         | 6,761            | 41     | 6,802  | 6,147                        | 10.7                       | 49,211   | 38,677   | 27.2                                |
| Australia       | 5,896            | 33     | 5,929  | 5,465                        | 8.5                        | 44,026   | 34,429   | 27.9                                |
| New Zealand     | 832              | 08     | 840    | 664                          | 26.5                       | 4,977  | 4,111  | 21.1                                |
| Others          | 33               | 0      | 33     | 18                           | 83.3                       | 208  | 137  | 51.8                                |
| South Asia      | 58,328           | 729    | 59,057 | 44,744                       | 32.0                       | 258,503  | 199,061  | 29.9                                |
| Afghanistan     | 10               | 0      | 10     | 20                           | (50.0)                     | 54   | 85   | (36.5)                              |
| Bangladesh      | 7,282            | 0      | 7,282  | 2,878                        | 153.0                      | 27,311   | 11,258   | 142.6                               |
| Bhutan          | 55               | 0      | 55     | 52                           | 5.8                        | 280  | 346  | (19.1)                              |
| India           | 46,272           | 729    | 47,001 | 32,254                       | 45.7                       | 204,060  | 155,837  | 30.9                                |
| Iran            | 354              | 0      | 354    | 280                          | 26.4                       | 5,782  | 5,902  | (2.0)                               |
| Maldives        | 3,006            | 0      | 3,006  | 8,040                        | (62.6)                     | 13,296   | 18,694   | (28.9)                              |
| Nepal           | 403              | 0      | 403    | 282                          | 42.9                       | 2,300  | 2,008  | 14.5                                |
| Pakistan        | 946              | 0      | 946    | 938                          | 0.9                        | 5,420  | 4,931  | 9.9                                 |
| EUROPE          | 37,991           | 2,116  | 40,108 | 37,357                       | 7.4                        | 549,244  | 496,219  | 10.7                                |
| Norther Europe  | 10,989           | 67     | 11,056 | 9,657                        | 14.5                       | 124,016  | 104,239  | 19.0                                |
| Denmark         | 498              | 02     | 500    | 410                          | 22.0                       | 8,650  | 7,431  | 16.4                                |
| Finland         | 208              | 0      | 208    | 159                          | 30.8                       | 2,494  | 2,264  | 10.2                                |
| Norway          | 355              | 0      | 355    | 379                          | (6.3)                      | 5,258  | 4,515  | 16.5                                |
| Sweden          | 285              | 01     | 286    | 278                          | 2.9                        | 6,467  | 5,970  | 8.3                                 |
| United Kingdom  | 9,160            | 61     | 9,221  | 8,094                        | 13.9                       | 96,274   | 80,086   | 20.2                                |
| Others          | 483              | 03     | 486    | 337                          | 44.2                       | 4,873  | 3,973  | 22.7                                |



## Monthly Tourist Arrivals Report May 2025

|                               | May 2025         |        |         | Tourist arrivals<br>May 2024 | % change<br>May (25/24) | Total tourist arrivals up to May 2025 | Total tourist arrivals up to May 2024 | % change up to May (25/24) |
|-------------------------------|------------------|--------|---------|------------------------------|-------------------------|---------------------------------------|---------------------------------------|----------------------------|
|                               | Tourist arrivals |        |         |                              |                         |                                       |                                       |                            |
|                               | By Air           | By Sea | Total   |                              |                         |                                       |                                       |                            |
| Western Europe                | 15,652           | 1,974  | 17,626  | 15,881                       | 11.0                    | 180,430                               | 155,962                               | 15.7                       |
| Austria                       | 461              | 22     | 483     | 544                          | (11.2)                  | 8,458                                 | 8,067                                 | 4.8                        |
| Belgium                       | 656              | 08     | 664     | 549                          | 20.9                    | 7,629                                 | 5,918                                 | 28.9                       |
| France                        | 5,465            | 05     | 5,470   | 4,064                        | 34.6                    | 57,112                                | 46,238                                | 23.5                       |
| Germany                       | 5,343            | 1,880  | 7,223   | 7,495                        | (3.6)                   | 69,078                                | 65,514                                | 5.4                        |
| Netherlands                   | 2,311            | 18     | 2,329   | 1,845                        | 26.2                    | 23,716                                | 17,531                                | 35.3                       |
| Switzerland                   | 1,385            | 39     | 1,424   | 1,345                        | 5.9                     | 13,993                                | 12,263                                | 14.1                       |
| Others                        | 31               | 02     | 33      | 39                           | (15.4)                  | 444                                   | 431                                   | 3.0                        |
| Central/Eastern Europe        | 6,447            | 40     | 6,487   | 6,957                        | (6.8)                   | 189,886                               | 192,053                               | (1.1)                      |
| Belarus                       | 148              | 0      | 148     | 195                          | (24.1)                  | 5,346                                 | 6,838                                 | (21.8)                     |
| Czech Republic                | 347              | 07     | 354     | 314                          | 12.7                    | 9,971                                 | 11,917                                | (16.3)                     |
| Estonia                       | 28               | 0      | 28      | 11                           | 154.5                   | 2,742                                 | 2,745                                 | (0.1)                      |
| Hungary                       | 128              | 05     | 133     | 78                           | 70.5                    | 3,726                                 | 3,755                                 | (0.8)                      |
| Kazakhstan                    | 207              | 0      | 207     | 65                           | 218.5                   | 7,614                                 | 8,515                                 | (10.6)                     |
| Lithuania                     | 101              | 01     | 102     | 69                           | 47.8                    | 4,536                                 | 4,305                                 | 5.4                        |
| Poland                        | 1,068            | 10     | 1,078   | 1,002                        | 7.6                     | 24,941                                | 22,849                                | 9.2                        |
| Romania                       | 188              | 02     | 190     | 147                          | 29.3                    | 3,188                                 | 3,233                                 | (1.4)                      |
| Russia                        | 3,322            | 06     | 3,328   | 4,384                        | (24.1)                  | 110,421                               | 110,692                               | (0.2)                      |
| Slovakia                      | 208              | 04     | 212     | 173                          | 22.5                    | 3,997                                 | 3,822                                 | 4.6                        |
| Ukraine                       | 232              | 02     | 234     | 203                          | 15.3                    | 5,023                                 | 4,225                                 | 18.9                       |
| Others                        | 470              | 03     | 473     | 316                          | 49.7                    | 8,381                                 | 9,157                                 | (8.5)                      |
| Southern/Mediterranean Europe | 4,904            | 35     | 4,939   | 4,862                        | 1.6                     | 54,912                                | 43,965                                | 24.9                       |
| Greece                        | 140              | 0      | 140     | 133                          | 5.3                     | 1,703                                 | 1,272                                 | 33.9                       |
| Italy                         | 1,324            | 09     | 1,333   | 1,010                        | 32.0                    | 17,383                                | 12,436                                | 39.8                       |
| Portugal                      | 306              | 06     | 312     | 314                          | (0.6)                   | 3,439                                 | 2,655                                 | 29.5                       |
| Spain                         | 1,575            | 18     | 1,593   | 1,369                        | 16.4                    | 12,509                                | 10,281                                | 21.7                       |
| Turkey                        | 383              | 01     | 384     | 294                          | 30.6                    | 3,789                                 | 3,057                                 | 23.9                       |
| Israel                        | 896              | 0      | 896     | 1,506                        | (40.5)                  | 10,475                                | 9,648                                 | 8.6                        |
| Others                        | 280              | 01     | 281     | 236                          | 19.1                    | 5,614                                 | 4,616                                 | 21.6                       |
| MIDDLE EAST                   | 1,953            | 0      | 1,953   | 1,513                        | 29.1                    | 10,791                                | 9,795                                 | 10.2                       |
| Bahrain                       | 54               | 0      | 54      | 68                           | (20.6)                  | 391                                   | 385                                   | 1.6                        |
| Egypt                         | 298              | 0      | 298     | 223                          | 33.6                    | 1,834                                 | 1,652                                 | 11.0                       |
| Iraq                          | 65               | 0      | 65      | 101                          | (35.6)                  | 457                                   | 308                                   | 48.4                       |
| Jordan                        | 169              | 0      | 169     | 149                          | 13.4                    | 1,183                                 | 954                                   | 24.0                       |
| Kuwait                        | 106              | 0      | 106     | 77                           | 37.7                    | 746                                   | 814                                   | (8.4)                      |
| Lebanon                       | 169              | 0      | 169     | 216                          | (21.8)                  | 1,498                                 | 1,577                                 | (5.0)                      |
| Oman                          | 136              | 0      | 136     | 139                          | (2.2)                   | 712                                   | 644                                   | 10.6                       |
| Qatar                         | 47               | 0      | 47      | 39                           | 20.5                    | 272                                   | 240                                   | 13.3                       |
| Saudi Arabia                  | 433              | 0      | 433     | 213                          | 103.3                   | 1,895                                 | 1,724                                 | 9.9                        |
| United Arab Emirates          | 400              | 0      | 400     | 229                          | 74.7                    | 1,429                                 | 1,125                                 | 27.0                       |
| Others                        | 76               | 0      | 76      | 59                           | 28.8                    | 374                                   | 372                                   | 0.5                        |
| TOTAL                         | 129,564          | 3,355  | 132,919 | 112,128                      | 18.5                    | 1,029,803                             | 896,799                               | 14.8                       |



## Main last departure airports and airlines to Sri Lanka, May 2025

The analysis of last departure airports for tourists arriving in Sri Lanka offers valuable insights into current travel patterns and global connectivity. Chennai leads the list, accounting for a significant 14.10% of total arrivals, followed closely by key Middle Eastern hubs: Dubai (8.25%), Abu Dhabi (7.04%), and Doha (6.79%). This clearly underscores the pivotal role of these Gulf cities as major transit points, leveraging their extensive global airline networks to connect travelers from diverse regions, including Europe, Africa, and the Americas, to Sri Lanka.

Indian cities collectively form a substantial portion of arrivals, with Mumbai (7.33%), Bangalore (6.00%), Delhi (5.22%), and Hyderabad (3.55%) joining Chennai to highlight robust air connectivity and strong bilateral travel ties between India and Sri Lanka. This strong showing from Indian airports directly correlates with India's position as one of Sri Lanka's top source markets.

Beyond these primary hubs, several other key Asian cities demonstrate Sri Lanka's integration into major regional air networks, including Singapore (4.04%), Kuala Lumpur (3.65%), Shanghai (2.49%), Bangkok (2.07%), and Hong Kong (1.29%). European connectivity is also evident with London (3.03%) and Istanbul (1.99%) appearing on the list, suggesting direct or convenient connecting flights from these major European gateways. Additionally, Moscow (0.94%) facilitates travel from Russia, while Dhaka (1.47%) and Sharjah (1.85%) contribute to arrivals from Bangladesh and other parts of the Middle East. Australian cities like Melbourne (1.38%) and Sydney (1.02%) reflect long-haul travel patterns. This detailed breakdown of last departure airports is crucial for optimizing flight routes, enhancing airline partnerships, and implementing geographically targeted marketing initiatives to bolster tourist arrivals.

An analysis of tourist arrivals to Sri Lanka by airlines/ cruise lines reveals a clear hierarchy of carriers facilitating inbound tourism. Sri Lankan Airlines, as the national carrier, naturally leads with a dominant 27% of arrivals, demonstrating its crucial role in connecting the country to global markets. This is followed by a strong presence from Indian carriers, with Indigo accounting for 19% and Air India for 9%, collectively highlighting the significant volume of Indian tourists arriving in Sri Lanka. This strong performance by Indian airlines is consistent with India being a top source market for Sri Lanka.

Middle Eastern airlines also play a substantial role, with Emirates (7%), Qatar Airways (7%), Etihad Airways (6%), and Fly Dubai (2%) collectively channeling a considerable number of travelers, leveraging their extensive international networks to connect passengers from various continents. China Eastern Airlines (3.31%) shows a notable contribution from the Chinese market, while Singapore Airlines (2.23%) and Turkish Airlines (1.99%) provide further connectivity from Southeast Asia and Europe/Middle East, respectively.

Smaller, but still significant, contributions come from FlixBus (1.93%), Air Arabia (1.85%), Aida Stella (1.52%), Air Asia (1.33%), Cathay Pacific (1.29%), Thai Air Asia (0.98%), Malaysia Airlines (0.98%), and Aeroflot (0.94%). This airline-specific data is invaluable for strategic engagement with carriers, identifying opportunities for route expansion, and coordinating marketing efforts to maximize passenger loads and facilitate seamless travel to Sri Lanka.



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

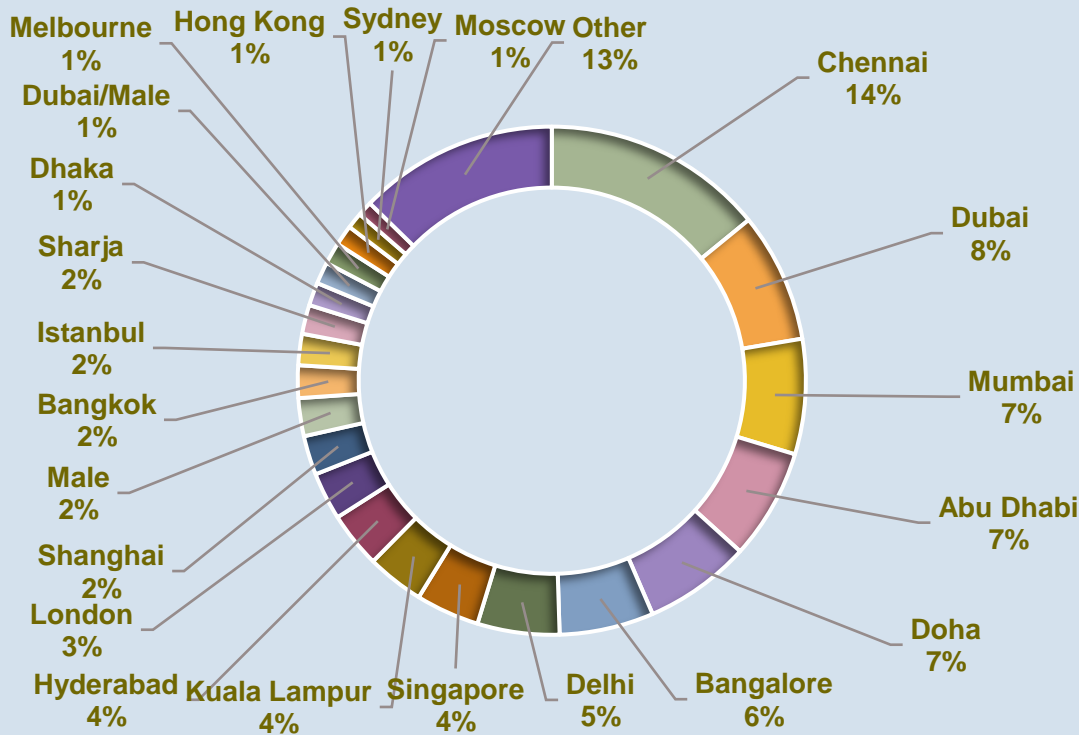
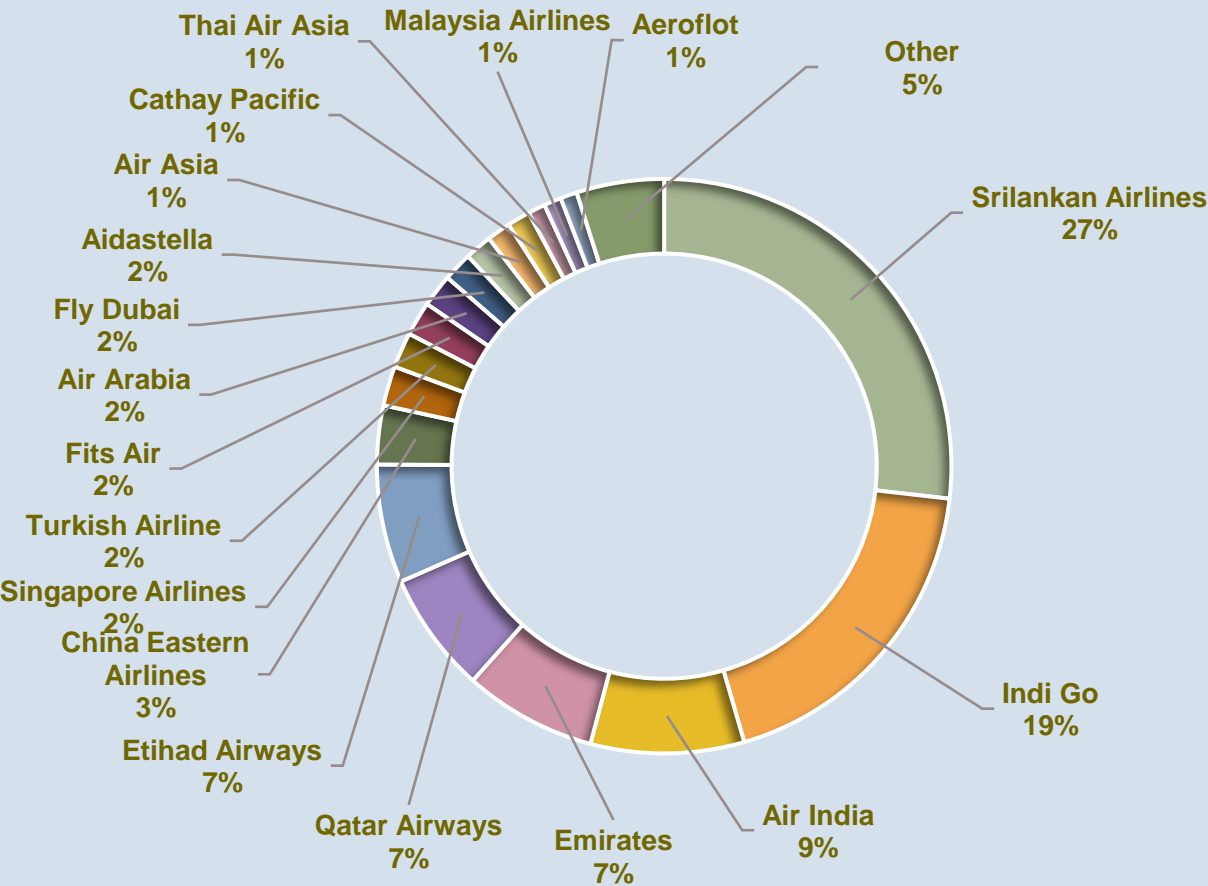


Chart 7. Main airlines to Sri Lanka, May 2025







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

An examination of the last departure airports for tourists from Sri Lanka's top source markets provides granular detail on specific travel corridors. Indian tourists, as expected from a dominant source market, primarily depart from major Indian cities, with Chennai leading significantly (16,016 arrivals), followed by Mumbai (8,266), Bangalore (7,417), Delhi (3,728), and Hyderabad (4,111). This pattern underscores the robust direct and frequent flight options available from various parts of India.

For tourists from the United Kingdom, London serves as the primary departure point (3,124 arrivals), indicating strong direct flight connections. However, a significant reliance on Middle Eastern hubs is also evident, with Dubai (1,001), Doha (1,768), and Abu Dhabi (1,016) featuring prominently as connecting flight origins. Similarly, German tourists also show a strong preference for Middle Eastern hubs as primary departure points, with Abu Dhabi (1,257), Dubai (1,237) and Doha (1,012) being key. London (103) and Istanbul (371) also contribute to their itineraries, indicating multi-stop journeys. French tourists predominantly depart from Dubai (1,839), Doha (1,016), and Istanbul (568), further solidifying the role of these connecting hubs for European travelers.

Chinese tourists primarily depart from Shanghai (2,645 arrivals), but a substantial number also originate from regional hubs such as Kuala Lumpur (454), Singapore (358), and Bangkok (306), indicating a mixed reliance on direct flights and connections through Southeast Asian gateways. For Bangladesh, Dhaka is a significant departure point (1,709), as anticipated, but Chennai (1,474) and Delhi (1,533) also play roles, reflecting a combination of direct flights and regional connections.

Long-haul markets also exhibit distinct patterns. Australian visitors primarily use Singapore (1,859) and Melbourne (1507) as their last departure airports, indicating a strong reliance on Southeast Asian and Middle Eastern transit hubs. Tourists from the United States frequently utilize Doha (692), Dubai (288), and Abu Dhabi (458) as key transit points, alongside Singapore (222), underscoring multi-leg journeys often involving Middle Eastern and Asian hubs. Canadian tourists similarly rely on Middle Eastern transit through Dubai (874) and Doha (316), serving as a significant connecting hub. Finally, for the Russian Federation, Moscow (1,247) serves as a primary departure point, complemented by Sharjah (681) as a direct or connecting hub, reflecting direct flights or connections through the UAE.

Overall, this detailed breakdown by source market and last departure airport is crucial for understanding the specific travel dynamics of each market. It enables targeted route development strategies, collaborative marketing with airlines operating key connections, and optimizing connectivity to better serve the diverse geographic origins of Sri Lanka's tourist base.



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

| Country            | Chennai | Dubai | Mumbai | Abu Dhabi | Doha  | Bangalore | Delhi | Singapore | Kuala Lumpur | Hyderabad | London | Shanghai | Male | Bangkok | Istanbul | Sharja | Dhaka | Dubai/Male | Melbourne | Others | Total  |
|--------------------|---------|-------|--------|-----------|-------|-----------|-------|-----------|--------------|-----------|--------|----------|------|---------|----------|--------|-------|------------|-----------|--------|--------|
| India              | 16,016  | 735   | 8,266  | 390       | 143   | 7,417     | 3,728 | 346       | 324          | 4,111     | 18     | 10       | 251  | 403     | 7        | 199    | 15    | 49         | 107       | 4,466  | 47,001 |
| United Kingdom     | 254     | 1,001 | 107    | 1,016     | 1,768 | 60        | 244   | 216       | 294          | 24        | 3,124  | 28       | 64   | 152     | 129      | 48     | 39    | 62         | 34        | 557    | 9,221  |
| China              | 44      | 129   | 13     | 75        | 30    | 14        | 32    | 358       | 454          | 3         | 1      | 2,645    | 190  | 306     | 7        | 13     | 64    | 28         | 1         | 4,396  | 8,803  |
| Bangladesh         | 1,474   | 93    | 783    | 28        | 35    | 21        | 1,533 | 8         | 75           | 428       | 1      | 7        | 964  | 41      | 3        | 25     | 1,709 | 3          |           | 51     | 7,282  |
| Germany            | 49      | 1,237 | 113    | 1,257     | 1,012 | 31        | 94    | 117       | 141          | 5         | 103    | 10       | 39   | 83      | 371      | 31     | 5     | 30         | 5         | 2,490  | 7,223  |
| Australia          | 59      | 87    | 24     | 44        | 44    | 25        | 279   | 1,859     | 515          | 17        | 18     | 10       | 24   | 97      | 8        | 11     | 6     | 25         | 1,507     | 1,270  | 5,929  |
| France             | 62      | 1,839 | 39     | 710       | 1,016 | 22        | 82    | 81        | 124          | 10        | 58     | 6        | 30   | 68      | 568      | 19     | 9     | 12         |           | 715    | 5,470  |
| United States      | 187     | 284   | 88     | 458       | 692   | 146       | 100   | 222       | 78           | 66        | 140    | 20       | 48   | 81      | 162      | 18     | 24    | 19         | 4         | 770    | 3,607  |
| Canada             | 131     | 874   | 29     | 612       | 316   | 18        | 67    | 77        | 47           | 8         | 282    | 11       | 19   | 52      | 24       | 8      | 2     | 10         | 8         | 817    | 3,412  |
| Russian Federation | 19      | 270   | 16     | 556       | 63    | 7         | 45    | 23        | 76           | 7         | 4      | 65       | 75   | 36      | 21       | 681    | 8     | 43         |           | 1,313  | 3,328  |

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

| Country            | Srilankan Airlines | Indi Go | Air India | Emirates | Qatar Airways | Etihad Airways | China Eastern Airlines | Singapore Airlines | Turkish Airline | Fits Air | Air Arabia | Fly Dubai | Air Asia | Cathay Pacific | Thai Air Asia | Malaysia Airlines | Aeroflot | Air China | Other | Total  |
|--------------------|--------------------|---------|-----------|----------|---------------|----------------|------------------------|--------------------|-----------------|----------|------------|-----------|----------|----------------|---------------|-------------------|----------|-----------|-------|--------|
| India              | 32.89              | 45.19   | 16.69     | 0.72     | 0.24          | 0.74           | 0.03                   | 0.14               | 0.01            | 0.16     | 0.42       | 0.52      | 0.09     | 0.03           | 0.06          | 0.05              | 0.00     | 0.01      | 1.98  | 100.00 |
| United Kingdom     | 40.88              | 3.12    | 2.49      | 10.29    | 19.44         | 10.83          | 0.34                   | 0.78               | 1.40            | 0.60     | 0.52       | 1.01      | 2.03     | 0.43           | 1.96          | 0.49              | 0.00     | 0.01      | 3.36  | 100.00 |
| China              | 12.42              | 0.41    | 0.55      | 0.91     | 0.28          | 0.74           | 41.85                  | 2.69               | 0.08            | 1.70     | 0.15       | 0.48      | 2.47     | 11.60          | 1.45          | 1.50              | 0.00     | 12.46     | 8.27  | 100.00 |
| Bangladesh         | 18.17              | 30.05   | 28.12     | 0.25     | 0.47          | 0.37           | 0.10                   | 0.01               | 0.04            | 21.13    | 0.34       | 0.11      | 0.08     | 0.01           | 0.05          | 0.07              | 0.01     | 0.01      | 0.59  | 100.00 |
| Germany            | 10.83              | 1.00    | 1.72      | 15.69    | 14.16         | 17.35          | 0.15                   | 0.47               | 5.14            | 0.60     | 0.43       | 1.44      | 1.41     | 0.08           | 0.98          | 0.18              | 0.00     | 0.00      | 28.38 | 100.00 |
| Australia          | 56.81              | 0.83    | 2.21      | 1.57     | 0.74          | 0.67           | 0.19                   | 21.15              | 0.13            | 0.13     | 0.19       | 0.35      | 1.79     | 2.31           | 0.83          | 5.70              | 0.00     | 0.00      | 4.40  | 100.00 |
| France             | 13.86              | 1.32    | 1.57      | 32.45    | 19.03         | 12.82          | 0.20                   | 0.18               | 10.38           | 0.49     | 0.35       | 1.13      | 1.43     | 0.26           | 1.83          | 0.60              | 0.00     | 0.00      | 2.10  | 100.00 |
| United States      | 17.33              | 8.34    | 3.91      | 6.10     | 19.10         | 12.53          | 0.64                   | 4.88               | 4.49            | 0.67     | 0.50       | 1.50      | 1.03     | 3.66           | 0.86          | 0.44              | 0.00     | 0.00      | 14.03 | 100.00 |
| Canada             | 34.11              | 3.25    | 2.08      | 21.66    | 8.53          | 17.88          | 0.38                   | 0.82               | 0.70            | 0.44     | 0.23       | 1.17      | 0.79     | 3.60           | 1.03          | 0.06              | 0.00     | 0.12      | 3.14  | 100.00 |
| Russian Federation | 3.37               | 0.99    | 1.20      | 4.63     | 1.83          | 10.79          | 2.01                   | 0.06               | 0.63            | 2.04     | 20.46      | 4.09      | 1.56     | 0.03           | 1.86          | 0.21              | 36.42    | 0.03      | 7.78  | 100.00 |



## Monthly Tourist Arrivals Report May 2025

An analysis of last departure airport among key source markets reveals distinct patterns. For India, Sri Lankan Airlines carries a significant share (32.89%), but is closely rivaled by Indian budget carrier Indigo (45.19%), and Air India (16.69%), collectively highlighting the dominant role of both national and Indian airlines in facilitating travel from this key market. United Kingdom tourists show a strong preference for Sri Lankan Airlines (40.88%), followed by Qatar Airways (19.44%), with Etihad Airways (10.83%) also having a notable presence. This indicates a reliance on a mix of direct flights and connecting services through Middle Eastern hubs.

For China, China Eastern Airlines is the primary carrier (41.85%), showcasing direct routes. Sri Lankan Airlines (12.42%) and Air China (12.46%) also contribute. Bangladesh travelers heavily rely on IndiGo (30.05%) and Air India (28.12%) indicating strong regional connectivity with India, which then likely connects to Sri Lanka. Germany demonstrates a clear preference for Middle Eastern airlines, with Emirates (15.69%), Etihad Airways (17.35%), and Qatar Airways (14.16%) being prominent. Sri Lankan Airlines (10.83%) and Turkish Airline (5.14%) also play roles, reflecting diverse connecting options. For Australia, Sri Lankan Airlines (56.81%) is the dominant carrier, suggesting strong direct or well-connected services. Singapore Airlines (21.15%) and Cathay Pacific (2.31%) also contribute significantly, highlighting reliance on Southeast Asian and Middle Eastern hubs.

France presents an interesting dynamic, with Emirates (32.45%) and Qatar Airways (19.03%) being the leading airlines, underscoring the strong role of Middle Eastern carriers as connecting points from Europe. Sri Lankan Airlines (13.86%) also holds a notable share. United States tourists predominantly use Middle Eastern carriers for their journey, with Qatar Airways (19.10%), and Etihad Airways (12.53%) being key. Sri Lankan Airlines (17.33%) also contributes, likely facilitating connections. Similarly, Canada also relies heavily on Middle Eastern airlines, with Emirates (21.66%) and Etihad Airways (17.88%) as major carriers, alongside Sri Lankan Airlines (34.11%). Finally, for the Russian Federation, Aeroflot (36.42%) is the primary airline, indicating a direct or preferred route. Air Arabia (20.46%) also plays a significant role, suggesting connections through Sharjah.

This airline-specific market breakdown is invaluable for understanding the competitive landscape of air travel to Sri Lanka. It allows for targeted collaboration with leading airlines from each source market, identification of potential new route opportunities, and the development of joint marketing initiatives to enhance tourist flow and accessibility."





**Research & International Relations Division**

**011 2426800 Ext. 151/155**

**research@srilanka.travel**

**[www.sltda.gov.lk](http://www.sltda.gov.lk)**