



MONTHLY TOURIST ARRIVALS REPORT:

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

JULY 2025



Introduction

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

Tourist arrivals to Sri Lanka show robust growth in 2025, with arrivals for January July reaching 1,368,288, a significant 14.2% increase compared to the same period in 2024. Every month in 2025 recorded higher arrivals than its 2024 counterpart, with particularly strong growth in January (+21.4%), June (+21.8%), May (+18.5%), and April (+17.3%). While growth moderated somewhat in February (+10.0%), March (+9.62%), and notably in July (+6.6%), the overall trend is positive. Having already achieved 67% of 2024's full-year total within the first seven months, and with the peak season (August-December) still ahead,

Sri Lanka is well positioned to significantly surpass the 2024 total of 2,053,465 arrivals barring major disruptions. This positive trend may suggests the effectiveness of factors such as improved airline connectivity, and streamlined visa processes.

In July, key source markets including India, the United Kingdom, the Netherlands, China, and France played a pivotal role in revitalizing Sri Lanka's tourism sector. Their strong contributions significantly boosted tourist arrivals and supported the continued growth of the industry during this period.

Table 1. Monthly tourist arrivals, July 2025

Month	2024	2025	% Change 2025/24
January	208,253	252,761	21.4
February	218,350	240,217	10.0
March	209,181	229,298	9.6
April	148,867	174,608	17.3
May	112,128	132,919	18.5
June	113,470	138,241	21.8
July	187,810	200,244	6.6
August	164,609		
September	122,140		
October	135,907		
November	184,158		
December	248,592		
TOTAL	2,053,465	1,368,288	



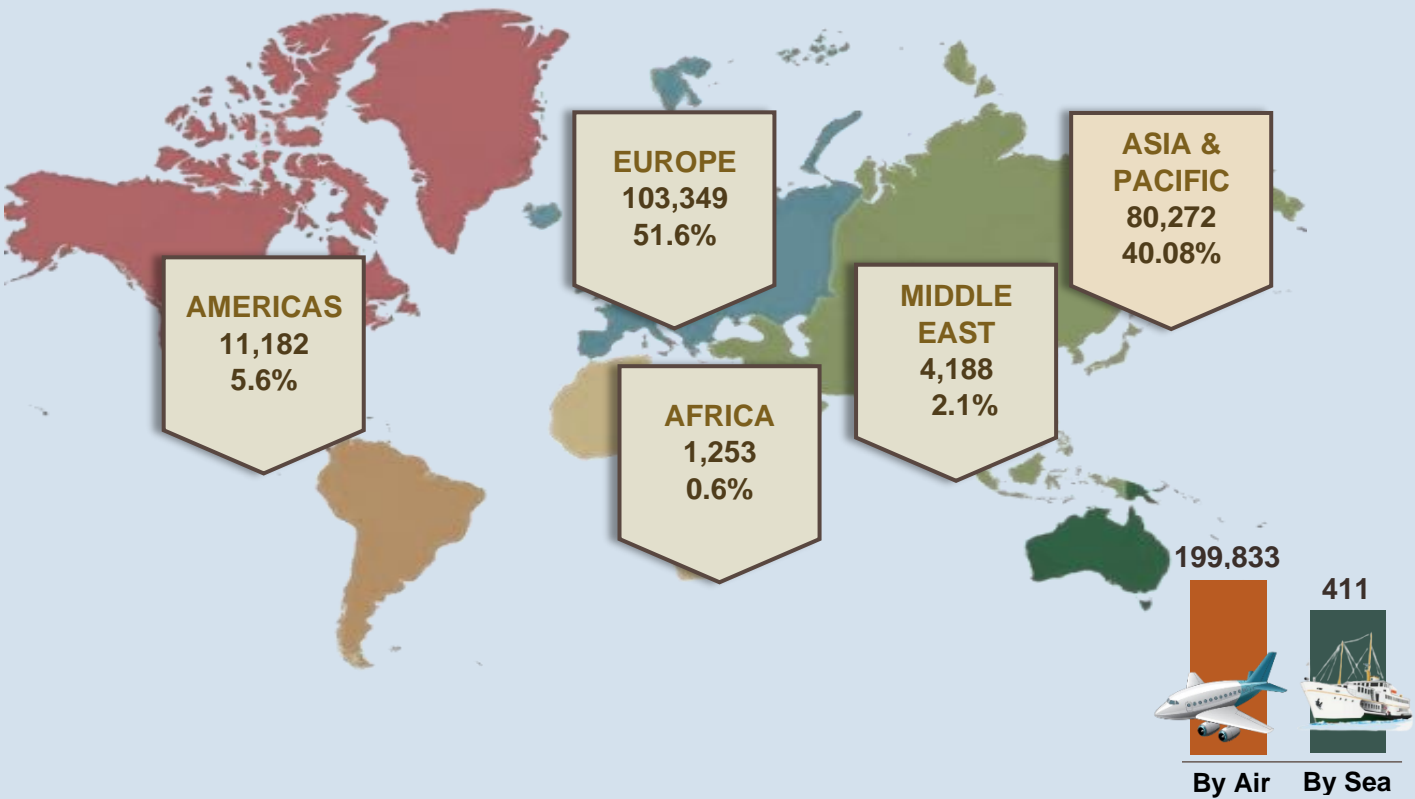
Tourist Arrivals | July 2025

200,244



Tourist arrivals by region and percentage share July 2025

Map 1. Tourist arrivals by region and percentage share




















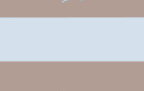


Tourist arrivals by regions reveals a highly concentrated source market for Sri Lanka's tourism, dominated overwhelmingly by Europe and Asia & the Pacific. Europe is the single largest source region, contributing 103,349 arrivals (51.6%), representing more than half of all tourists. Asia & the Pacific is the second major contributor, accounting for 80,272 arrivals (40.08%). Together, these two regions account for a substantial 91.68% of total tourist arrivals. The Americas represent a much smaller segment at 11,182 arrivals (5.6%), while the Middle East (4,188 arrivals, 2.1%) and Africa (1,253 arrivals, 0.6%) currently constitute very minor source markets. This distribution underscores Sri Lanka's strong appeal to traditional European holidaymakers and its proximity driven advantage within Asia, while highlighting significant potential for growth diversification, particularly in the Americas and Middle Eastern markets. The sustained high arrival numbers from Asia & Pacific and Europe can be attributed to steady travel demand, robust air connectivity, cultural appeal, and attractive travel packages. In contrast, the lower figures from the Middle East and Africa may stem from limited direct flight options, reduced marketing outreach, or lower awareness of Sri Lanka as a travel destination. This regional concentration reveals a level of vulnerability, especially if disruptions impact the dominant source markets.





Top primary markets and top potential markets











Top primary markets, July 2025

 India Arrivals: 37,128 / % Share: 18.5 01	 Switzerland Arrivals: 4,990 / % Share: 2.5 11
 United Kingdom Arrivals: 23,475 / % Share: 11.7 02	 Italy Arrivals: 4,886 / % Share: 2.4 12
 Netherlands Arrivals: 15,556 / % Share: 7.8 03	 Maldives Arrivals: 4,755 / % Share: 2.4 13
 China Arrivals: 12,982 / % Share: 6.5 04	 Belgium Arrivals: 4,511 / % Share: 2.3 14
 France Arrivals: 11,059 / % Share: 5.5 05	 Poland Arrivals: 3,469 / % Share: 1.7 15
 Germany Arrivals: 10,568 / % Share: 5.3 06	 Bangladesh Arrivals: 3,274 / % Share: 1.6 16
 Australia Arrivals: 9,117 / % Share: 4.6 07	 Russia Arrivals: 3,158 / % Share: 1.6 17
 Spain Arrivals: 5,912 / % Share: 3.0 08	 Japan Arrivals: 3,076 / % Share: 1.5 18
 Canada Arrivals: 5,462 / % Share: 2.7 09	 Denmark Arrivals: 2,509 / % Share: 1.3 19
 United States Arrivals: 5,222 / % Share: 2.6 10	 Pakistan Arrivals: 2,002 / % Share: 1.0 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, July 2025

	Norway Arrivals: 1,982 / % Share: 1.0	21		Singapore Arrivals: 1,297 / % Share: 0.6	26
	Israel Arrivals: 1,966 / % Share: 0.1	22		New Zealand Arrivals: 1,106 / % Share: 0.6	27
	Austria Arrivals: 1,846 / % Share: 0.9	23		Saudi Arabia Arrivals: 1,068 / % Share: 0.5	28
	Malaysia Arrivals: 1,712 / % Share: 0.9	24		South Korea Arrivals: 932 / % Share: 0.5	29
	Czech Republic Arrivals: 1,367 / % Share: 0.7	25		United Arab Emirates Arrivals: 862 / % 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

July 2025

In July 2025, India retained its position as Sri Lanka's largest source market with 37,128 arrivals (36,774 by air, 354 by sea), though this represented a -9.8% decline compared to July 2024 (41,173). The United Kingdom surged to second place with 23,475 arrivals (23,470 by air, 5 by sea), marking robust +12.7% year on year growth. The Netherlands demonstrated exceptional performance, ranking third with 15,556 arrivals (15,555 by air, 1 by sea) and the highest growth rate among top markets at +36.1%. China held fourth place with 12,982 arrivals (all by air) but saw a marginal -5.1% decline. France recorded strong growth (+17.6%), securing fifth place with 11,059 arrivals (11,042 by air, 17 by sea). Germany remained stable in sixth place with 10,568 arrivals (10,563 by air, 5 by sea), reflecting a negligible -0.5% change. Australia grew significantly (+23.7%) to seventh place with 9,117 arrivals (9,116 by air, 1 by sea), while Spain saw remarkable +40.0% growth to eighth place (5,912 arrivals, all by air). Canada and the United States rounded out the top ten with solid increases: Canada ranked ninth with 5,462 arrivals (5,455 by air, 7 by sea; +13.3% growth), and the United States tenth with 5,222 arrivals (5,217 by air, 5 by sea; +5.2% growth). Collectively, arrivals were overwhelmingly by air (>99.9% for all markets except India), and 8 of the top 10 markets exhibited positive growth, underscoring broad based recovery momentum despite challenges in India and China.

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

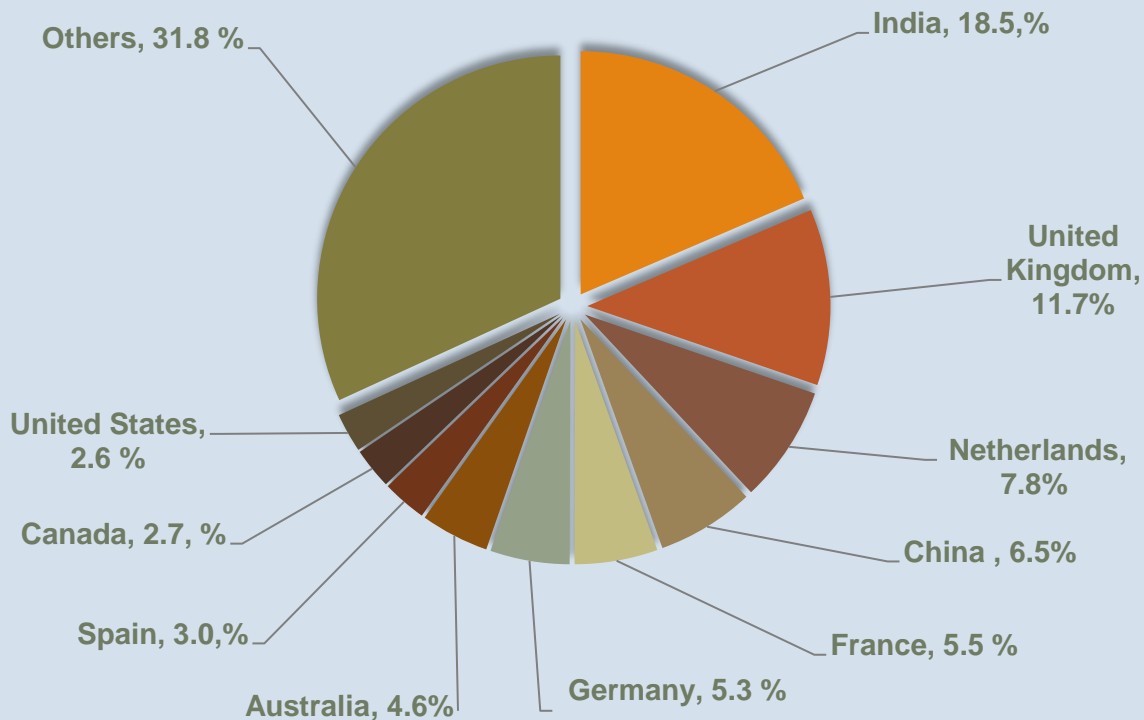
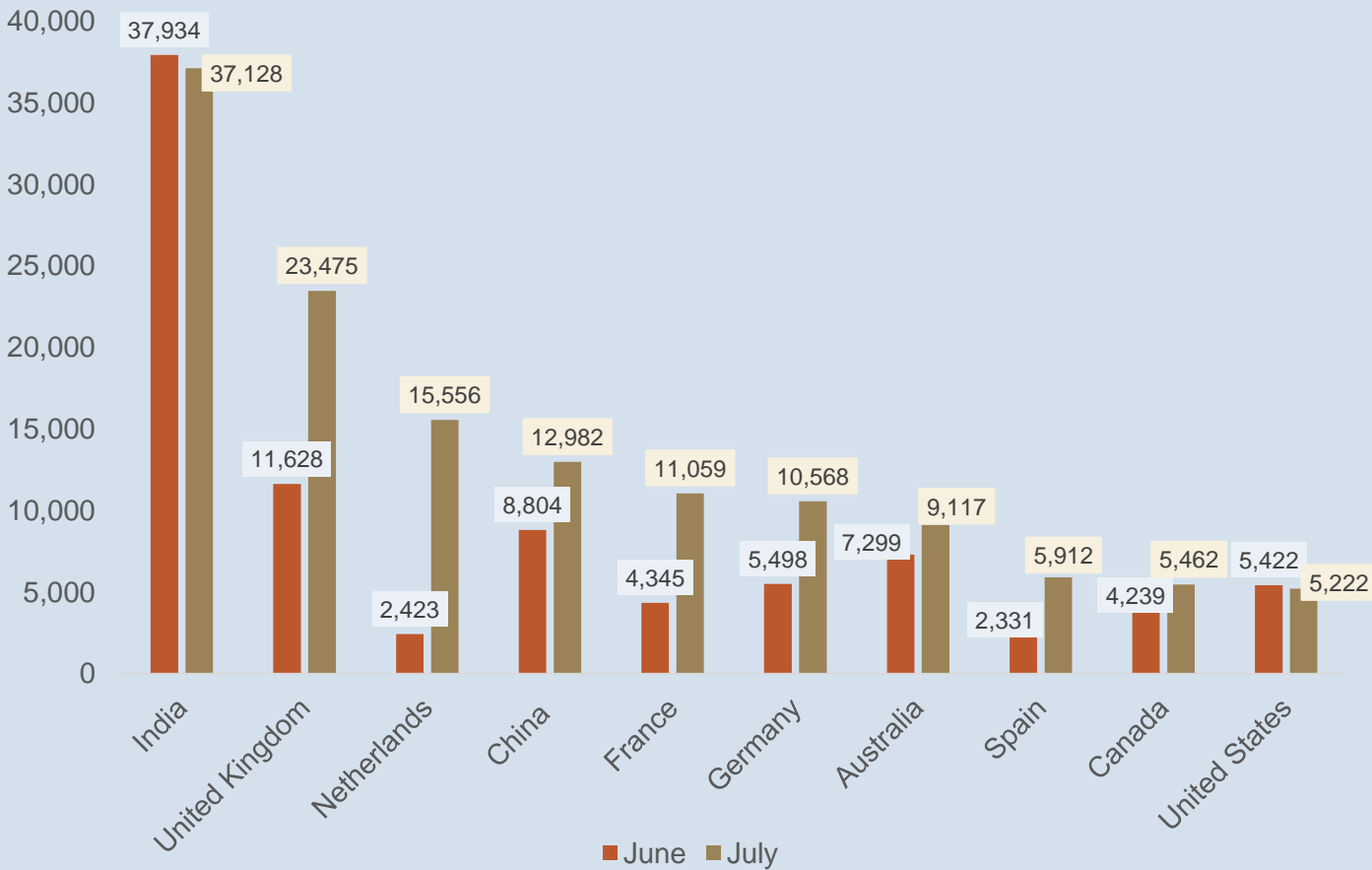




Table 2. Top ten source markets to Sri Lanka, July 2025

Rank	Country of Residence	Tourist arrivals (July 2025)			Tourist arrivals (July 2024)
		By Air	By Sea	Total	
1	India	36,774	354	37,128	41,173
2	United Kingdom	23,470	05	23,475	20,837
3	Netherlands	15,555	01	15,556	11,431
4	China	12,982	0	12,982	13,685
5	France	11,042	17	11,059	9,405
6	Germany	10,563	05	10,568	10,618
7	Australia	9,116	01	9,117	7,371
8	Spain	5,912	0	5,912	4,224
9	Canada	5,455	07	5,462	4,821
10	United States	5,217	05	5,222	4,962

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





Top ten source markets

January to July 2025

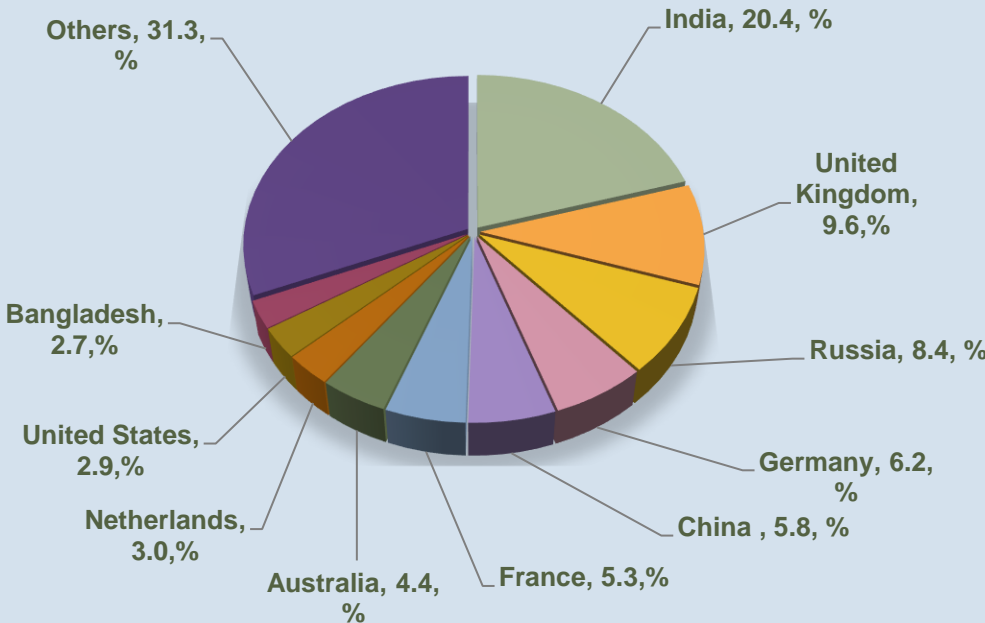
Cumulative tourist arrivals from January to July 2025 underscore India's dominant position as Sri Lanka's primary source market, contributing 279,122 arrivals, a substantial 23.7% increase compared to the same period in 2024 (225,641). The United Kingdom retained second place with 131,377 arrivals (+19.2% year-on-year), while the Russian Federation ranked third despite a slight decline of 2.7% (115,470 vs 118,682). Germany saw moderate growth (85,144 arrivals; +5.5%), whereas China experienced a notable 4.5% contraction (78,769 vs 82,449). European markets demonstrated robust momentum: France surged 23.4% (72,516 arrivals), and the Netherlands delivered exceptional 35.0% growth (41,695 arrivals). Australia grew strongly by 25.6% (60,442 arrivals), while the United States recorded a modest 5.2% increase (39,635). Bangladesh emerged as the fastest growing top market (+79.9%), leaping to tenth place with 36,411 arrivals.

This highlights India's critical anchor role, Europe's sustained recovery (excluding Russia), China's persistent challenges, and the remarkable emergence of Bangladesh as a high growth market.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~ July 2025)	Tourist Arrivals Jan ~ July 2024)
1	India	279,122	225,641
2	United Kingdom	131,377	110,189
3	Russian Federation	115,470	118,682
4	Germany	85,144	80,688
5	China	78,769	82,449
6	France	72,516	58,745
7	Australia	60,442	48,117
8	Netherlands	41,695	30,897
9	United States	39,635	37,679
10	Bangladesh	36,411	20,239
11	Others	427,707	384,733
Total		1,368,288	1,198,059

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





Tourist arrivals by purpose of visit

July 2025

Sri Lanka attracted 200,244 international visitors in July 2025, demonstrating its growing recovery as a tourist destination. Leisure travelers dominated arrivals, accounting for 56% (111,910 visitors) who came primarily for holidays and recreational purposes, underscoring the island nation's enduring popularity for its pristine coastlines, rich cultural heritage, and diverse natural attractions.

The diaspora connection remained significant, with visitors coming to see friends and relatives representing 14.30% (28,635 people) of total arrivals, reflecting the valuable role of overseas Sri Lankan communities in sustaining tourism flows. Meanwhile, the meetings, incentives, conferences, and exhibitions (MICE) sector captured 5.42% (of arrivals, while business travelers comprised 2.22%, both indicating untapped potential that could be expanded through enhanced infrastructure development and focused marketing strategies.

Several specialized tourism segments showed minimal presence but offer promising growth prospects: sports tourism (0.6%), Health and Ayurvedic treatments (0.3%), religious pilgrimages (0.2%), and educational travel (0.08%). These areas remain significantly underutilized despite Sri Lanka's natural advantages in traditional medicine, spiritual tourism, and cultural learning experiences.

Moving forward, Sri Lanka's tourism strategy should focus on consolidating its position in the leisure market. Priority should be given to developing high potential niche markets, particularly wellness tourism, the MICE industry, and diaspora focused travel products through strategic partnerships and targeted promotional campaigns.

Chart 4: Purpose of visit, July 2025

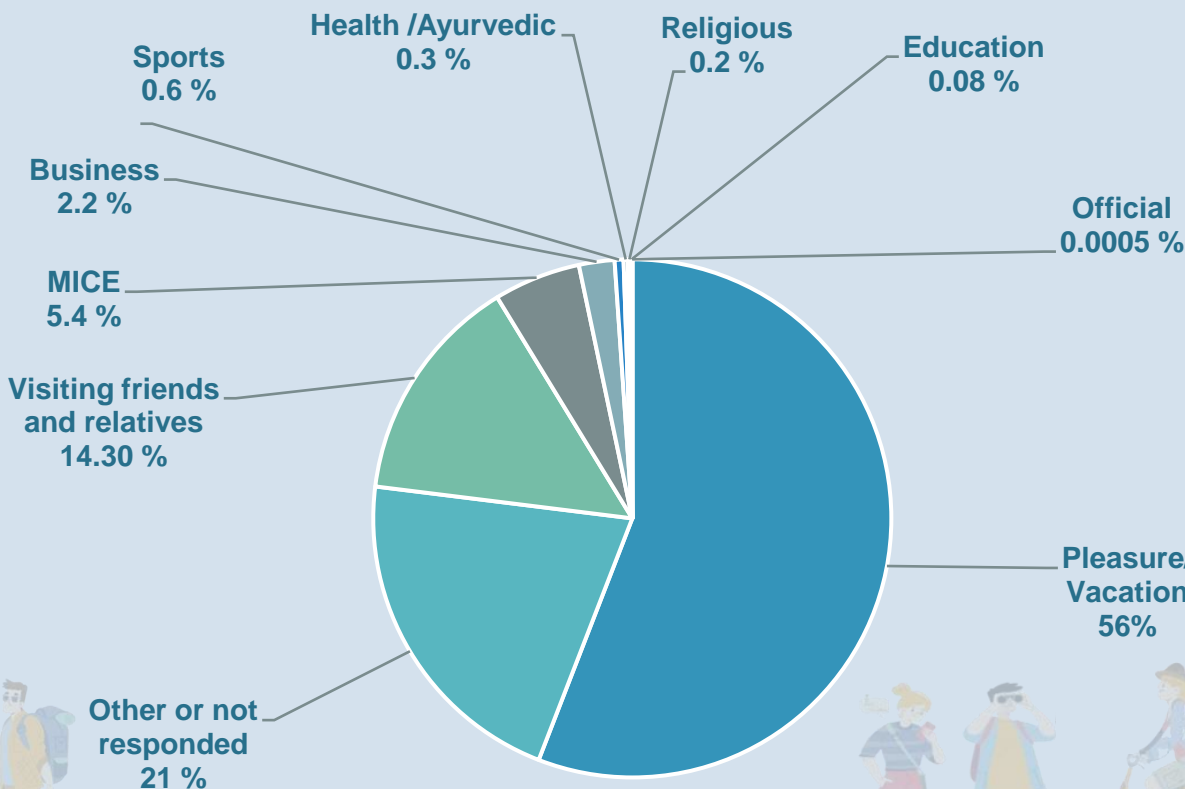
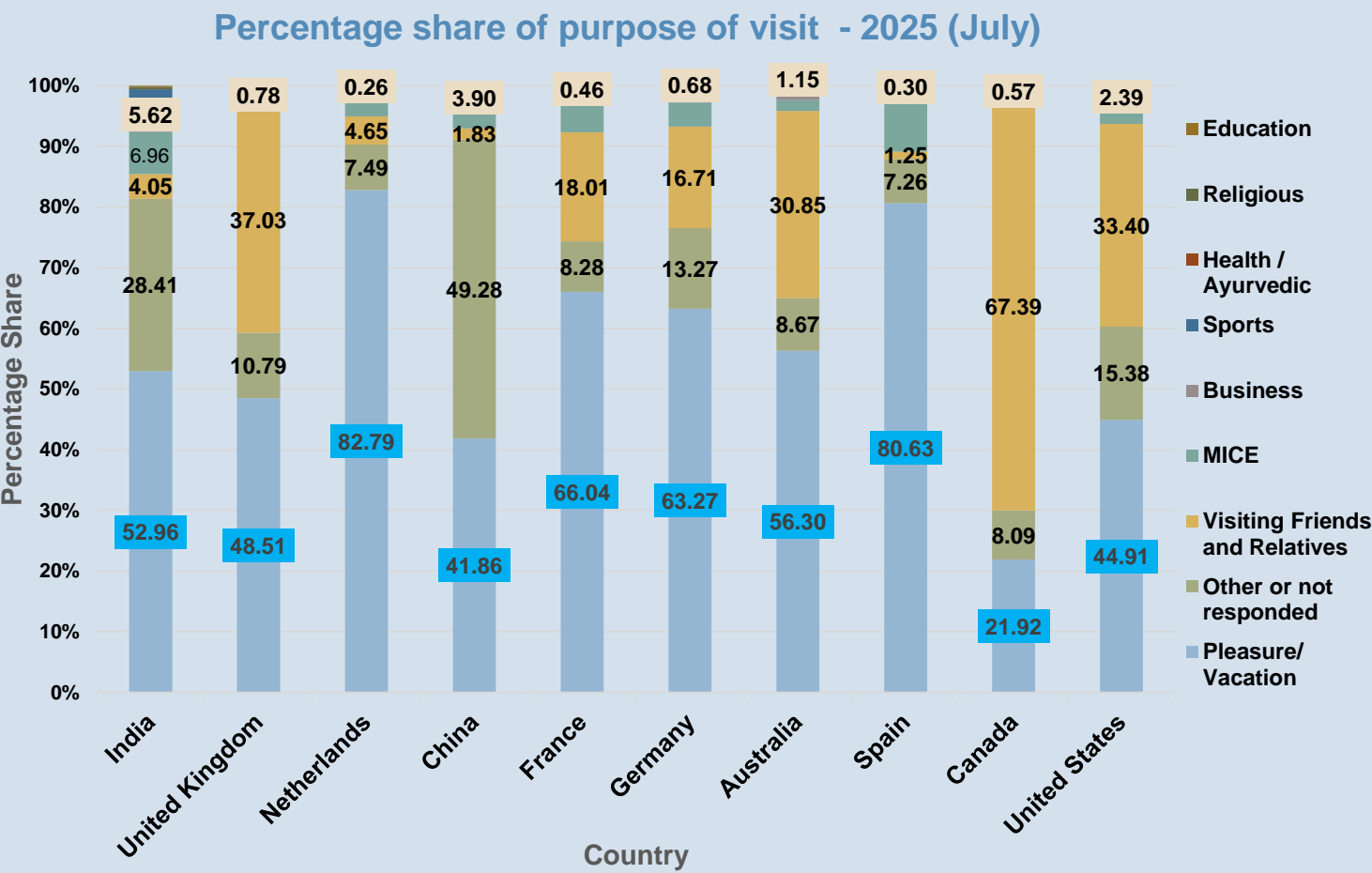




Chart 5: Purpose of visit vs main source markets



Analysis of visitor purpose by origin country reveals distinct travel patterns and motivations among Sri Lanka's international tourists. European markets demonstrate the strongest leisure orientation, with travelers from the Netherlands leading at 82.79%, followed by Spain (80.63%), France (66.04%), and Germany (63.27%). This trend confirms Sri Lanka's established reputation among Europeans as an attractive destination for beach holidays, cultural exploration, and nature-based experiences. However, markets like Canada (21.92%) and China (41.86%) exhibit considerably lower leisure percentages, suggesting these visitors have different primary motivations.

The visiting friends and relatives (VFR) segment shows particularly strong representation with Canada recording the highest share at 67.39%, followed by the United Kingdom (37.03%), United States (33.40%), and Australia (30.85%). This pattern clearly illustrates how Sri Lankan diaspora communities continue to drive significant tourism volumes from these markets.



Business related travel segments show moderate but encouraging levels, with MICE tourism registering notable shares from Spain (10.47%), India (6.96%), and France (6.85%). India demonstrates the strongest business travel component at 5.62%, suggesting opportunities for corporate tourism development. Wellness tourism, while generally modest, shows promising traction among German visitors (2.03%), aligning with their established preference for health focused travel. Religious tourism maintains limited but measurable presence, particularly from India (0.39%) and Canada (0.31%), while educational and official travel remain minimal across all markets.

Tailored marketing, product diversification, and enhanced visitor engagement based on these insights can help maximize the value of each source market.





Behind the Wonder: Challenges Facing Elephants and the Tourism Industry in Sri Lanka

Sri Lanka's majestic elephants have long captured the imagination of visitors from around the world, serving as both the crown jewel of the island's tourism industry and a symbol of its rich natural heritage. However, beneath the surface of wildlife safaris and elephant encounters lies a deepening crisis that threatens not only these magnificent creatures but also the sustainable future of Sri Lankan tourism.

The Tourism Draw: Elephants as Economic Assets

Elephants have been integral to Sri Lanka's tourism appeal for decades. The island nation, home to approximately 7,000 Asian elephants, offers visitors unique opportunities to witness these giants in their natural habitat across renowned national parks such as Yala, Udawalawe, Minneriya, and Wilpattu. Wildlife tourism, with elephants as a primary attraction, represents a significant component of Sri Lanka's tourism revenue, drawing thousands of international visitors annually who seek authentic wildlife experiences.

The Escalating Death Crisis

Behind this tourism success story, however, lies an alarming reality that threatens the very foundation of elephant based tourism. Sri Lanka is experiencing unprecedented elephant mortality rates that have reached crisis proportions in recent years.

The statistics paint a sobering picture with staggering number of deaths recorded each year. The trend appears to be continuing into 2025, with reports indicating the grave side of this phenomenon.

These deaths are not merely numbers but represent a systematic decimation of Sri Lanka's elephant population. What makes this crisis particularly acute is that roughly half of these deaths are directly attributable to human actions, including illegal electric fencing, shooting, poisoning, and train strikes as railway lines bisect traditional elephant corridors.

The Tourism Industry's Dilemma

This escalating elephant mortality crisis presents a paradoxical challenge for Sri Lanka's tourism industry. While tourists continue to flock to the island seeking elephant encounters, the very attractions they come to see are disappearing at an alarming rate. The loss of iconic tuskless elephants, the large male elephants with prominent tusks that are particularly popular with tourists has been especially devastating for wildlife viewing experiences.

The tourism industry finds itself in a difficult position, profiting from elephant attractions while the species faces potential local extinction. Some tourism operators have begun advocating for more sustainable practices and supporting conservation initiatives, recognizing that their long term business viability depends on healthy elephant populations.



Economic Implications and Future Outlook

The economic implications of the elephant crisis extend far beyond conservation concerns. The potential collapse of elephant populations could severely impact Sri Lanka's tourism industry, which relies heavily on wildlife attractions to differentiate itself in the competitive South Asian tourism market.

Tourism revenue generated from elephant related activities supports thousands of jobs in rural areas, from safari guides and park rangers to hotel staff and local artisans. The loss of this economic engine would devastate communities that have few alternative income sources, potentially creating even greater pressure on natural resources.

The Path Forward: Balancing Conservation and Tourism

Addressing Sri Lanka's elephant crisis requires a fundamental shift in how the relationship between elephants, tourism, and local communities is managed. This includes,

Strengthening Legal Protections: Enforcing existing wildlife protection laws more effectively and implementing stricter penalties for elephant killing, while simultaneously addressing the root causes that drive people to harm elephants.

Expanding Compensation and Support Systems: Developing more comprehensive and accessible compensation schemes for crop damage, combined with support for alternative agricultural practices that are less attractive to elephants.

Tourism Revenue Sharing: Establishing mechanisms to ensure that a greater proportion of tourism revenue flows directly to local communities affected by human elephant conflict, creating economic incentives for conservation.

Education and Awareness: Promoting greater awareness among both local communities and tourists about the importance of elephant conservation and the actions needed to ensure coexistence.

The story of elephants and tourism in Sri Lanka stands at a critical crossroads. The choices made in the coming years will determine whether these magnificent creatures continue to enchant visitors and support local livelihoods, or whether they become merely a memory in a land that once celebrated them as gentle giants. The escalating elephant deaths serve as a stark warning that without immediate, comprehensive action, one of Sri Lanka's greatest tourism assets may be lost forever, taking with it not only a keystone species but also the sustainable tourism future that depends on their survival.

Success in addressing this crisis will require unprecedented cooperation between government agencies, tourism operators, conservation organizations, and local communities. Only through such collaborative efforts can Sri Lanka hope to preserve its elephants while maintaining a thriving, sustainable tourism industry that benefits both wildlife and people. The time for action is now, as each passing day brings the irreversible loss of these irreplaceable giants and the tourism dreams they inspire.



International tourist arrivals by country of residence

	July 2025			Tourist arrivals July 2024	% change July (25/24)	Total tourist arrivals up to July 2025	Total tourist arrivals up to July 2024	% change up to July (25/24)
	Tourist arrivals							
	By Air	By Sea	Total					
AMERICAS	11,168	14	11,182	10,219	9.4	73,536	68,924	6.7
North America	10,716	12	10,728	9,827	9.2	69,848	65,319	6.9
Canada	5,455	07	5,462	4,821	13.3	29,578	27,044	9.4
Mexico	44	0	44	44	-	635	596	6.5
United States	5,217	05	5,222	4,962	5.2	39,635	37,679	5.2
Caribbean & Central America	72	0	72	77	(6.5)	576	607	(5.1)
Costa Rica	08	0	08	03	166.7	72	60	20.0
Jamaica	07	0	07	07	-	26	69	(62.3)
Others	57	0	57	67	(14.9)	478	478	-
South America	380	02	382	315	21.3	3,112	2,998	3.8
Argentina	45	0	45	50	(10.0)	567	587	(3.4)
Brazil	123	01	124	134	(7.5)	1,177	1,197	(1.7)
Chile	79	0	79	36	119.4	412	357	15.4
Colombia	69	0	69	51	35.3	403	416	(3.1)
Others	64	01	65	44	47.7	553	441	25.4
AFRICA	1,253	0	1,253	1,286	(2.6)	9,102	7,637	19.2
North Africa	298	0	298	342	(12.9)	1,869	1,845	1.3
Morocco	91	0	91	87	4.6	627	557	12.6
Sudan	121	0	121	122	(0.8)	551	488	12.9
Others	86	0	86	133	(35.3)	691	800	(13.6)
Sub-Saharan Africa	955	0	955	944	1.2	7,233	5,792	24.9
Kenya	84	0	84	128	(34.4)	742	433	71.4
Mauritius	81	0	81	33	145.5	472	286	65.0
Nigeria	10	0	10	09	11.1	64	34	88.2
South Africa	419	0	419	333	25.8	2,758	2,581	6.9
Others	361	0	361	441	(18.1)	3,197	2,458	30.1



Monthly Tourist Arrivals Report July 2025

	July 2025			Tourist arrivals July 2024	% change July (25/24)	Total tourist arrivals up to July 2025	Total tourist arrivals up to July 2024	% change up to July (25/24)
	Tourist arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	79,913	359	80,272	81,025	(0.9)	571,879	478,536	19.5
North East Asia	16,996	02	16,998	16,906	0.5	105,706	103,317	2.3
China	12,982	0	12,982	13,685	(5.1)	78,769	82,449	(4.5)
Japan	3,074	02	3,076	2,202	39.7	19,535	14,632	33.5
South Korea	932	0	932	1,009	(7.6)	7,303	6,164	18.5
Others	08	0	08	10	(20.0)	99	72	37.5
South East Asia	5,226	2	5,228	4,222	23.8	37,660	30,314	24.2
Cambodia	46	0	46	24	91.7	971	932	4.2
Indonesia	361	0	361	275	31.3	2,762	1,814	52.3
Malaysia	1,711	01	1,712	1,596	7.3	12,744	10,528	21.0
Myanmar	392	0	392	194	102.1	1,165	836	39.4
Philippines	608	0	608	500	21.6	3,780	3,114	21.4
Singapore	1,296	01	1,297	853	52.1	8,502	6,741	26.1
Thailand	506	0	506	483	4.8	5,126	4,413	16.2
Vietnam	266	0	266	279	(4.7)	2,373	1,781	33.2
Others	40	0	40	18	122.2	237	155	52.9
Oceania	10,248	01	10,249	8,407	21.9	67,864	54,288	25.0
Australia	9,116	01	9,117	7,371	23.7	60,442	48,117	25.6
New Zealand	1,106	0	1,106	1,017	8.8	7,167	5,981	19.8
Others	26	0	26	19	36.8	255	190	34.2
South Asia	47,443	354	47,797	51,490	(7.2)	360,649	290,617	24.1
Afghanistan	01	0	01	15	(93.3)	57	102	(44.1)
Bangladesh	3,274	0	3,274	4,607	(28.9)	36,411	20,239	79.9
Bhutan	44	0	44	29	51.7	373	408	(8.6)
India	36,774	354	37,128	41,173	(9.8)	279,122	225,641	23.7
Iran	151	0	151	339	(55.5)	6,129	6,559	(6.6)
Maldives	4,755	0	4,755	3,097	53.5	21,208	26,900	(21.2)
Nepal	442	0	442	382	15.7	3,094	2,590	19.5
Pakistan	2,002	0	2,002	1,848	8.3	14,255	8,178	74.3
EUROPE	103,311	38	103,349	90,793	13.7	695,313	625,001	11.2
Northern Europe	29,685	12	29,697	26,338	12.8	169,131	143,386	18.0
Denmark	2,508	01	2,509	2,147	16.9	11,975	10,292	16.4
Finland	150	0	150	94	59.6	2,789	2,488	12.1
Norway	1,979	03	1,982	1,800	10.1	8,713	7,767	12.2
Sweden	686	03	689	716	(3.8)	7,784	7,254	7.3
United Kingdom	23,470	05	23,475	20,837	12.7	131,377	110,189	19.2
Others	892	0	892	744	19.9	6,493	5,396	20.3



	July 2025			Tourist arrivals July 2024	% change July (25/24)	Total tourist arrivals up to July 2025	Total tourist arrivals up to July 2024	% change up to July (25/24)
	Tourist arrivals							
	By Air	By Sea	Total					
Western Europe	48,595	24	48,619	41,791	16.3	244,551	209,909	16.5
Austria	1,846	0	1,846	1,722	7.2	10,791	10,173	6.1
Belgium	4,510	01	4,511	3,435	31.3	13,275	10,225	29.8
France	11,042	17	11,059	9,405	17.6	72,516	58,745	23.4
Germany	10,563	05	10,568	10,618	(0.5)	85,144	80,688	5.5
Netherlands	15,555	01	15,556	11,431	36.1	41,695	30,897	34.9
Switzerland	4,990	0	4,990	5,089	(1.9)	20,572	18,643	10.3
Others	89	0	89	91	(2.2)	558	538	3.7
Central/Eastern Europe	9,940	02	9,942	10,056	(1.1)	204,844	208,507	(1.8)
Belarus	137	0	137	203	(32.5)	5,569	7,216	(22.8)
Czech Republic	1,367	0	1,367	1,133	20.7	11,963	13,576	(11.9)
Estonia	21	0	21	24	(12.5)	2,782	2,799	(0.6)
Hungary	265	0	265	210	26.2	4,117	4,125	(0.2)
Kazakhstan	78	0	78	168	(53.6)	7,788	8,779	(11.3)
Lithuania	144	0	144	174	(17.2)	4,806	4,552	5.6
Poland	3,467	02	3,469	2,257	53.7	29,548	26,153	13.0
Romania	231	0	231	264	(12.5)	3,638	3,689	(1.4)
Russia	3,158	0	3,158	4,578	(31.0)	115,470	118,682	(2.7)
Slovakia	320	0	320	292	9.6	4,450	4,277	4.0
Ukraine	279	0	279	214	30.4	5,516	4,645	18.8
Others	473	0	473	539	(12.2)	9,197	10,014	(8.2)
Southern/Mediterranean Europe	15,091	0	15,091	12,608	19.7	76,787	63,199	21.5
Greece	162	0	162	119	36.1	1,971	1,473	33.8
Italy	4,886	0	4,886	3,630	34.6	24,443	17,858	36.9
Portugal	578	0	578	351	64.7	4,661	3,287	41.8
Spain	5,912	0	5,912	4,224	40.0	20,752	16,586	25.1
Turkey	660	0	660	403	63.8	5,056	4,032	25.4
Israel	1,966	0	1,966	2,962	(33.6)	13,014	14,125	(7.9)
Others	927	0	927	919	0.9	6,890	5,838	18.0
MIDDLE EAST	4,188	0	4,188	4,487	(6.7)	18,458	17,961	2.8
Bahrain	232	0	232	162	43.2	853	744	14.7
Egypt	328	0	328	326	0.6	2,587	2,343	10.4
Iraq	114	0	114	119	(4.2)	759	520	46.0
Jordan	262	0	262	275	(4.7)	1,731	1,602	8.1
Kuwait	219	0	219	198	10.6	1,155	1,243	(7.1)
Lebanon	248	0	248	283	(12.4)	2,009	2,168	(7.3)
Oman	518	0	518	685	(24.4)	1,516	1,651	(8.2)
Qatar	159	0	159	156	1.9	540	476	13.4
Saudi Arabia	1,068	0	1,068	1,276	(16.3)	3,623	3,990	(9.2)
United Arab Emirates	862	0	862	836	3.1	3,011	2,552	18.0
Others	178	0	178	171	4.1	674	672	0.3
TOTAL	199,833	411	200,244	187,810	6.6	1,368,288	1,198,059	14.2



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

Analysis of departure airports for tourists to Sri Lanka in July reveals the strategic importance of major international aviation hubs in facilitating connectivity to the island nation. Middle Eastern airports emerge as the primary gateways, with Dubai leading at 14.50%, followed by Doha at 12.70% and Abu Dhabi at 8.78%. Combined, these three hubs handle more than one third of all tourist departures, demonstrating the pivotal role of Gulf carriers, Emirates, Qatar Airways, and Etihad in linking Sri Lanka to global markets across Europe, North America, and Africa.

Indian airports represent the second largest departure cluster, collectively managing over 22% of outbound traffic. Chennai tops the Indian gateways at 7.53%, with Delhi (4.67%), Mumbai (4.40%), Bangalore (3.38%), and Hyderabad (2.04%) following as significant departure points. This pattern confirms India's dual role as both a primary tourist source and a crucial transit corridor for travelers from other countries accessing Sri Lanka.

Asian regional hubs demonstrate moderate but meaningful connectivity levels, with Singapore accounting for 3.85% and Kuala Lumpur for 3.61% of departures. Additional Asian gateways including Bangkok (1.87%), Shanghai (1.73%), and Hong Kong (1.64%) illustrate Sri Lanka's growing integration with broader Asian travel networks and the region's increasing significance in tourism flows.

European connectivity appears more limited, with London representing 2.97% of departures, while Frankfurt (1.22%) and Paris (1.07%) show smaller shares. These relatively modest figures suggest that European tourists continue to rely heavily on Middle Eastern transit hubs rather than direct European connections. Additional noteworthy departure points include Istanbul (3.38%) and Sharjah (3.88%), further reinforcing the dominance of Middle Eastern aviation infrastructure. Long haul destinations like Melbourne (1.40%) and Narita (0.77%) likely reflect diaspora connections and specialized tourism segments from Australia and Japan.

These findings suggest Sri Lanka should prioritize strengthening partnerships with Middle Eastern and Indian airlines while simultaneously pursuing expanded direct flight connectivity to reduce transit dependency. Developing regional tourism circuits through Southeast Asian hubs like Singapore and Kuala Lumpur, combined with continued investment in aviation infrastructure and route expansion, could significantly improve tourist accessibility and drive sector growth. Sri Lankan Airlines emerges as the dominant force in July's tourist arrivals, commanding over a quarter (25.43%) of all traffic with 50,916 passengers. This underscores its critical role as the national carrier in facilitating tourism. Gulf based airlines collectively form the second largest bloc, contributing 40.6% of arrivals through Emirates (12.32%), Qatar Airways (12.21%), Etihad Airways (7.84%), Fly Dubai (4.41%), and Air Arabia (3.82%). Their strong performance highlights Sri Lanka's heavy reliance on Middle Eastern transit hubs for tourist connectivity.

Regional airlines also play significant roles, particularly in key source markets. Indian carriers IndiGo (9.97%) and Air India (4.80%) together account for 14.77% of arrivals, reflecting robust tourist flows from India. East Asian connectivity is served by China Eastern Airlines (2.53%), Singapore Airlines (2.17%), and Air China (0.68%), though their collective share (5.38%) suggests room for growth in these markets. European and long haul traffic is facilitated by Turkish Airlines (3.38%) and Cathay Pacific (1.64%), while niche players like Flynair (1.19%) and AirAsia (1.73%) cater to specialized segments.



This dependency pattern where 65% of tourists arrive via Sri Lankan Airlines or Gulf carriers presents both stability risks and diversification opportunities. The minimal presence of European and American airlines indicates potential to develop direct long haul routes and reduce reliance on transit hubs for Western markets.

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

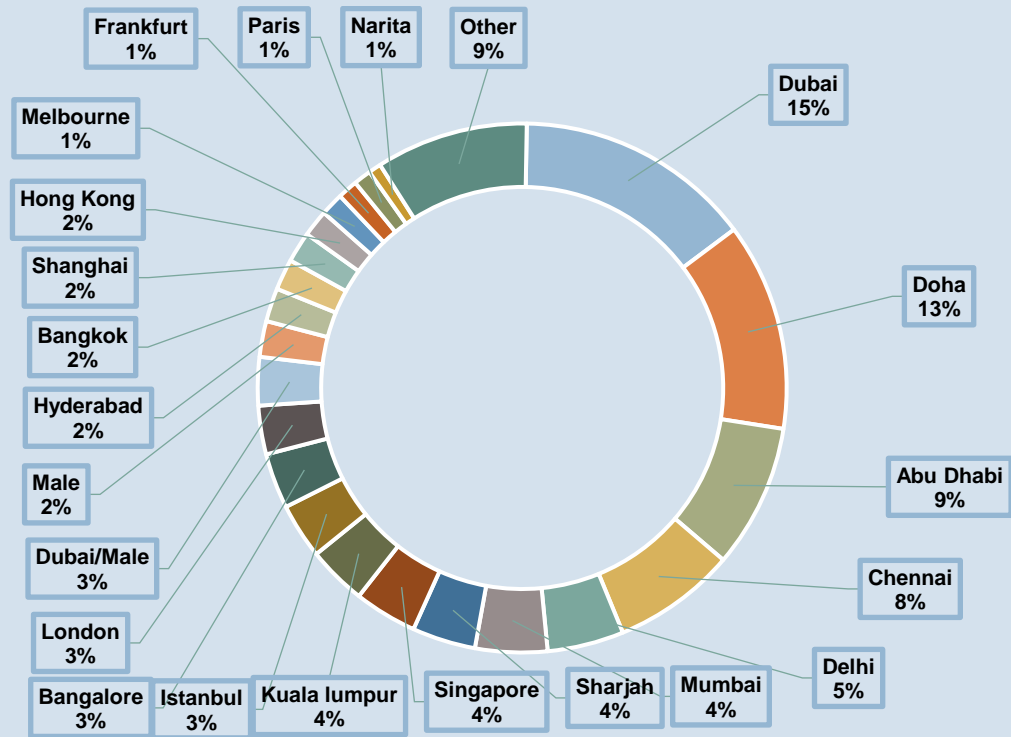
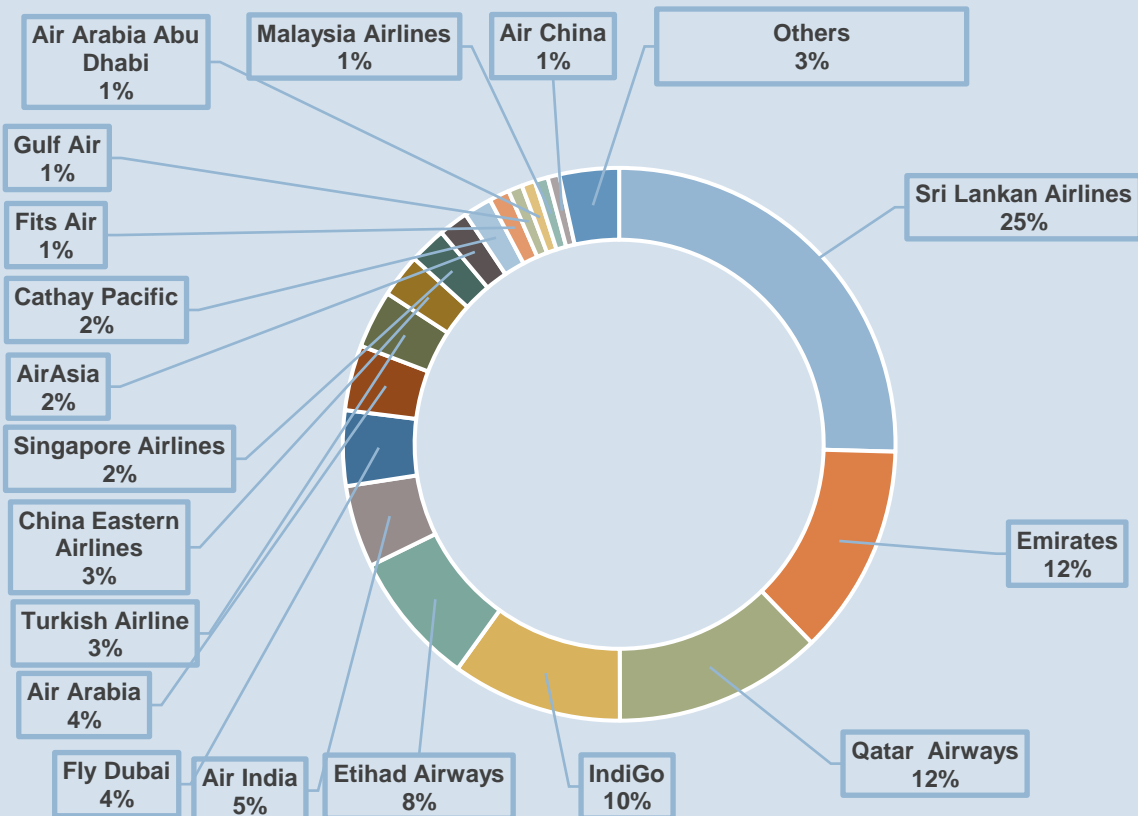


Chart 7. Main airlines to Sri Lanka, July 2025





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

An analysis of airline preferences by source market reveals that Sri Lankan Airlines maintains strong market leadership in traditional Commonwealth and regional markets, securing dominant positions in Australia (54.49%), Canada (41.82%), and India (36.23%). Gulf carriers have achieved collective dominance across European markets, controlling approximately 70% of passenger traffic from the UK, Netherlands, and Germany. Qatar Airways demonstrates particular strength in the Spanish market with 28.64% share. However, the UK market presents a unique competitive landscape where market share is relatively balanced among three major carriers: Sri Lankan Airlines (26.49%), Emirates (21.99%), and Qatar Airways (22.26%).

Chinese travelers show strong preference for domestic carriers, with China Eastern commanding 33.15% and Air China holding 10.08% of the market. In addition, Sri Lankan Airlines (15.93%) and Cathay Pacific (15.11%) are the other key airlines used by Chinese tourists. Meanwhile, Australian passengers predominantly choose Sri Lankan Airlines (54.49%) alongside Singapore Airlines (23.25%) as their preferred carriers.

The United States market exhibits significant fragmentation, with no single carrier achieving clear dominance. Qatar Airways leads with 20.51%, closely followed by Sri Lankan Airlines at 20.20%, while Emirates captures 8.66% and IndiGo secures 10.90%, creating a highly competitive environment across multiple carriers.

These patterns reveal distinct regional preferences and strategic dependencies. European travelers demonstrate overwhelming reliance on Gulf hub connectivity for reaching Sri Lanka, while other markets favour either direct services (such as Sri Lanka's routes to Australia and Canada) or regional low-cost carriers (like IndiGo's strong Indian market presence).

Sri Lanka's tourism connectivity relies heavily on regional transit hubs, with clear geographic patterns emerging. For European travelers (UK, Netherlands, Germany, France, Spain), Gulf airports dominate as transit points: Dubai, Doha, and Abu Dhabi collectively account for 52-66%, underscoring their role as critical gateways for long haul traffic. Conversely, Indian tourists arrive primarily via direct flights from domestic airports, with Chennai (33%), Bangalore (15%), Delhi (12%), Mumbai (13%), and Hyderabad (10%) together representing 83% of departures demonstrating minimal reliance on intermediate hubs. Australians depend significantly on Southeast Asian connections, with Singapore (33%) and Melbourne (27%) as primary departure points, while Chinese tourists depart overwhelmingly from Shanghai (23%) and Hong Kong (15%). The U.S. market shows fragmented routing, using Singapore (12%), Hong Kong (4%), and Gulf hubs (Dubai 9%, Doha 21%, Abu Dhabi 12%). Secondary hubs like Istanbul serve niche roles for French (12%) and Dutch (6.2%) travelers, and London functions primarily for UK originating tourists (20% direct).

This hub centric model reveals strategic dependencies: Gulf airports anchor European/North American connectivity, Southeast Asian hubs (Singapore, Bangkok) facilitate Asia Pacific traffic, and direct flights dominate short haul markets (India). Opportunities exist to diversify routes particularly direct European connections.



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

Country	Dubai	Doha	Abu Dhabi	Chennai	Delhi	Mumbai	Sharja	Singapore	Kuala Lumpur	Istanbul	Bangalore	London	Dubai/Male	Male	Hyderabad	Bangkok	Shanghai	Hong Kong	Melbourne	Others	Total
India	1,239	309	329	12,312	4,348	4,679	150	263	337	5	5,538	24	71	143	3,771	378	8	31	113	3,080	37,128
United Kingdom	4,865	5,282	2,079	516	600	644	262	351	467	749	153	4,692	863	125	49	192	12	104	50	1,420	23,475
Netherlands	5,522	3,469	1,322	44	947	1,500	256	52	158	970	186	58	428	54	21	63	11	7	2	486	15,556
China	93	26	30	23	33	24	108	485	1,178	6	12	10	73	368	3	804	3,027	1,961	5	4,713	12,982
France	1,284	2,301	1,868	193	654	476	236	112	229	1,335	159	54	283	30	10	62	12	20	4	1,737	11,059
Germany	2,251	2,797	1,674	110	335	287	178	88	181	534	74	55	417	44	10	75	16	20	1	1,421	10,568
Australia	168	67	80	88	119	39	28	3,024	1,031	7	43	51	27	50	15	218	9	169	2,453	1,431	9,117
Spain	498	1,837	1,579	21	121	82	320	35	68	636	22	142	174	139	2	28	8	5	1	194	5,912
Canada	618	684	912	232	209	80	19	194	92	26	31	417	35	22	14	47	9	409	7	1,405	5,462
United States	470	1,087	621	375	143	135	30	614	152	82	222	149	52	66	137	165	47	229	2	444	5,222

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

Country	Sri Lankan Airlines	Emirates	Qatar Airways	Indi Go	Etihad Airways	Air India	Fly Dubai	Air Arabia	Turkish Airline	China Eastern Airlines	Singapore Airlines	Air Asia	Cathay Pacific	Fits Air	Gulf Air	Air Arabia Abu Dhabi	Malaysia Airlines	Air China	Other	Total
India	36.23	1.57	0.53	43.23	0.33	14.05	0.60	0.40	0.01	0.02	0.15	0.15	0.08	0.44	0.07	0.26	0.08	0.01	1.77	100.00
United Kingdom	26.49	21.99	22.26	2.96	8.41	2.99	2.34	1.11	3.19	0.06	0.44	1.31	0.44	0.35	3.74	0.29	0.26	0.06	1.30	100.00
Netherlands	13.46	28.79	21.89	2.81	8.34	4.99	9.57	1.63	6.24	0.09	0.15	0.81	0.04	0.26	0.15	0.09	0.11	0.00	0.57	100.00
China	15.93	0.74	0.19	0.28	0.18	0.31	0.30	0.11	0.05	33.15	2.42	4.58	15.11	1.26	0.05	0.05	2.10	10.08	13.13	100.00
France	20.60	11.96	20.40	2.99	16.76	5.60	2.29	2.13	12.07	0.11	0.35	1.39	0.18	0.38	1.11	0.10	0.24	0.05	1.27	100.00
Germany	16.64	20.08	26.17	1.44	15.71	2.73	5.14	1.68	5.05	0.15	0.15	1.20	0.19	0.35	1.35	0.08	0.14	0.08	1.67	100.00
Australia	54.49	1.61	0.69	0.89	0.81	0.52	0.26	0.30	0.08	0.11	23.25	4.56	1.85	0.24	0.07	0.04	5.29	0.00	4.94	100.00
Spain	10.28	9.10	28.64	1.01	26.07	1.71	1.96	5.41	10.76	0.14	0.19	0.95	0.08	1.34	0.07	0.52	0.07	0.00	1.71	100.00
Canada	41.82	10.14	12.16	3.46	16.61	2.47	0.86	0.35	0.48	0.18	1.14	0.71	7.49	0.60	0.13	0.04	0.27	0.04	1.06	100.00
United States	20.20	8.66	20.51	10.90	11.68	3.06	1.23	0.57	1.57	0.96	9.17	1.76	4.39	0.57	0.23	0.17	0.31	0.10	3.96	100.00





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