2026

MONTHLY TOURIST ARRIVALS REPORT:

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

AUGUST

Introduction

The following document provides a synthesis of the most recent August 2026 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 30th August 2026, 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 recorded 1,535,122 international tourist arrivals during January–August 2026, compared with 1,566,523 arrivals during the corresponding period of 2025, representing a marginal decline of 2.0%. Tourism performance during the period was characterised by considerable month-to-month fluctuations. Arrivals recorded strong growth during January (+9.7%) and February (+16.2%), with February registering the highest monthly arrivals at 279,328. However, this positive momentum was interrupted by significant declines in March (-19.8%) and April (-22.3%). A recovery was observed in May, with arrivals increasing by 9.6%, although June again recorded a decline of 9.9%. Arrivals remained relatively close to the previous year's levels in July (-1.7%) and August (-3.3%). Overall, while the first eight months of 2026 recorded a marginal year-on-year contraction, the relatively small cumulative decline indicates resilience in Sri Lanka's tourism demand despite the significant volatility experienced during the year.

The key source markets for August included India, the United Kingdom, China, Germany and France. The sustained contribution from these key markets, together with signs of stabilisation in tourist arrivals during the latter months of the period, provides a basis for cautious optimism for the remainder of 2026. Continued efforts to strengthen market-specific promotions, improve connectivity and enhance the overall visitor experience will remain important to consolidate the recovery and support sustained growth in tourist arrivals.

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Table 1. Monthly tourist arrivals, August 2026

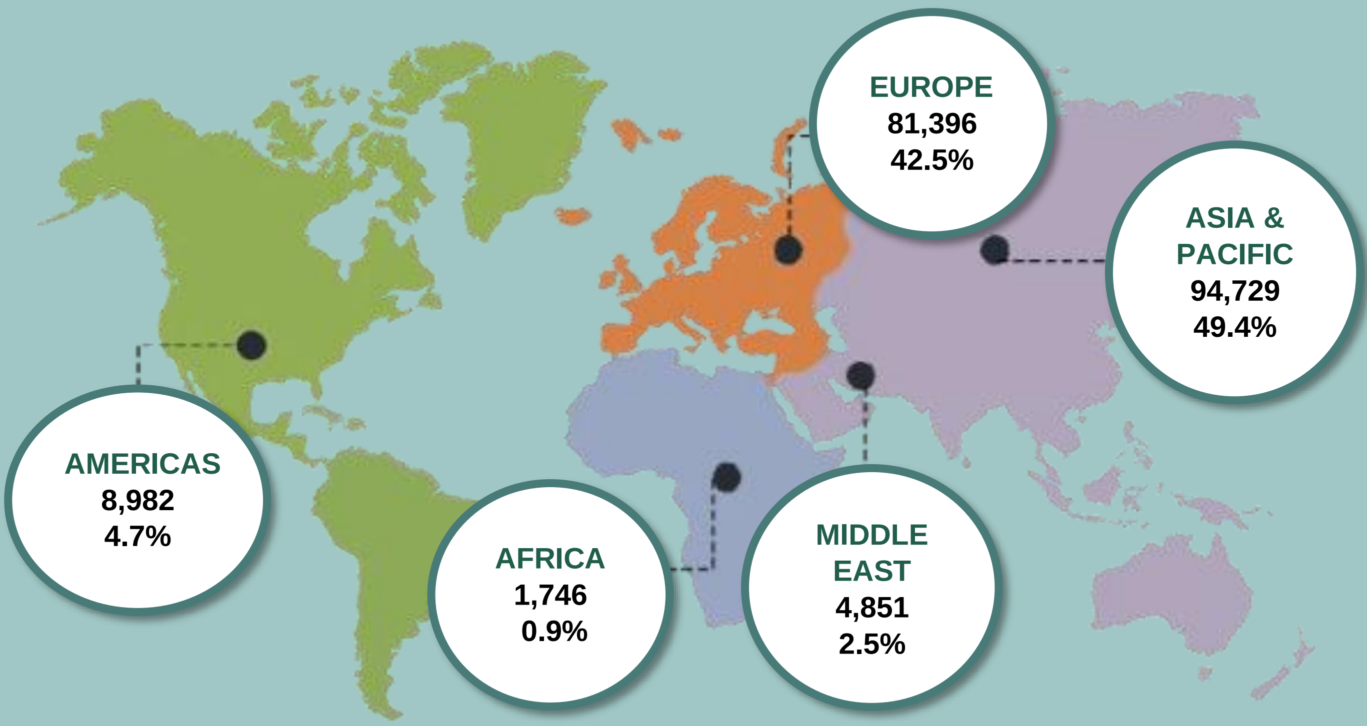
Month	2025	2026	% Change 2026/25
January	252,761	277,327	9.7
February	240,217	279,328	16.2
March	229,298	183,979	(19.8)
April	174,608	135,643	(22.3)
May	132,919	145,745	9.6
June	138,241	124,551	(9.9)
July	200,244	196,845	(1.7)
August	198,235	191,704	(3.3)
September	158,971		
October	165,193		
November	212,906		
December	258,928		
TOTAL	2,362,521	1,535,122	

Tourist Arrivals | August 2026

191,704

Tourist arrivals by region and percentage share August 2026

Map 1. Tourist arrivals by region and percentage share



In August 2026, Sri Lanka welcomed 191,704 tourists, with arrivals overwhelmingly concentrated mainly in two key regions: Asia & the Pacific and Europe. Asia & the Pacific led the market with 94,729 arrivals (49.4%), narrowly edging out Europe, which contributed 81,396 arrivals (42.5%), meaning these two regions collectively accounted for a staggering 91.9% of the total tourist inflow. In stark contrast, the remaining source markets played only a marginal role , the Americas brought in just 8,982 visitors (4.7%), followed by the Middle East with 4,851 (2.5%) and Africa with a mere 1,746 (0.9%). This highly skewed distribution highlights Sri Lanka's strong dual-pillar reliance on its immediate regional neighbors and traditional European long-haul markets. While this indicates robust brand appeal in these areas, the low representation from the Americas, Middle East, and Africa exposes significant untapped potential and a clear vulnerability to economic or geopolitical shocks affecting those dominant blocs. Therefore, diversifying promotional efforts to tap into the Americas, the Middle East, and Africa could be a prudent strategic move to diversify the markets.

Top primary markets and top potential markets

Top primary markets, August 2026

01 India
Arrivals: **47,253 / % Share: 24.6**

02 United Kingdom
Arrivals: **19,588 / % Share: 10.2**

03 China
Arrivals: **12,321 / % Share: 6.4**

04 Germany
Arrivals: **11,401 / % Share: 5.9**

05 France
Arrivals: **10,885 / % Share: 5.7**

06 Australia
Arrivals: **8,900 / % Share: 4.6**

07 Italy
Arrivals: **8,883 / % Share: 4.6**

08 Spain
Arrivals: **7,431 / % Share: 3.9**

09 Japan
Arrivals: **5,902 / % Share: 3.1**

10 Canada
Arrivals: **4,315 / % Share: 2.3**

11 Netherlands
Arrivals: **4,312 / % Share: 2.2**

12 United States
Arrivals: **4,167 / % Share: 2.2**

13 Israel
Arrivals: **3,755 / % Share: 2.0**

14 Bangladesh
Arrivals: **3,142 / % Share: 1.6**

15 Maldives
Arrivals: **3,017 / % Share: 1.6**

16 Malaysia
Arrivals: **2,850 / % Share: 1.5**

17 Pakistan
Arrivals: **2,659 / % Share: 1.4**

18 Switzerland
Arrivals: **1,840 / % Share: 1.0**

19 Belgium
Arrivals: **1,820 / % Share: 0.9**

20 Myanmar
Arrivals: **1,712 / % Share: 0.9**

Note: The top primary markets for Sri Lanka have been identified using visitor arrivals. The intention is to track these source markets on a go-forward basis to understand future performance of Sri Lanka's tourism economy.

Top potential markets, August 2026

21 Russia
Arrivals: **1,639 / % Share: 0.9**

22 Singapore
Arrivals: **1,322 / % Share: 0.7**

23 United Arab
Arrivals: **1,305 / % Share: 0.7**

24 Poland
Arrivals: **1,256 / % Share: 0.7**

25 New Zealand
Arrivals: **1,228 / % Share 0.6**

26 Austria
Arrivals: **1,201 / % Share: 0.6**

27 South Korea
Arrivals: **843 / % Share: 0.4**

28 Turkey
Arrivals: **789 / % Share: 0.4**

29 Saudi Arabia
Arrivals: **776 / % Share: 0.4**

30 Czech Republic
Arrivals: **740 / % Share: 0.4**

Note: The top potential markets for Sri Lanka have been identified using visitor arrivals data. The intention is to track these source markets on a go-forward basis to understand future performance of Sri Lanka's tourism economy.

Top ten source markets

August 2026

In August 2026, India reinforced its position as Sri Lanka's undisputed largest source market, contributing 47,253 arrivals, a modest 1.7% year-on-year increase and notably accounting for the only significant sea-borne traffic (2,553 arrivals), likely due to its geographical proximity. The United Kingdom remained a distant second with 19,588 arrivals, though it registered a slight contraction of 0.9%. Among European markets, performance was strikingly mixed: France posted healthy growth of 3.7% (10,885 arrivals), while Germany experienced a sharp decline of 8.8% (11,401 arrivals), and more concerning were the double-digit drops for Italy (–27.5%, to 8,883) and Spain (–16.0%, to 7,431), signaling possible competitiveness or preference shifts affecting Southern European travelers. China held steady with a marginal 0.2% uptick (12,321 arrivals), while Australia and Japan emerged as the clear bright spots, recording robust growth of 13.6% and 15.1% respectively, pointing to rising demand from the Asia-Pacific region. Canada rounded out the top ten with a negligible decline (–0.4%, to 4,315 arrivals). Overall, while India and the UK continue to anchor Sri Lanka's tourism inflows, the pronounced erosion in key European markets particularly Italy and Spain coupled with the encouraging surges from Australia and Japan, underscores the urgency of diversifying promotional strategies to stabilize traditional strongholds while aggressively nurturing high-growth emerging markets.

Chart 1. Top ten source markets to Sri Lanka, August 2026

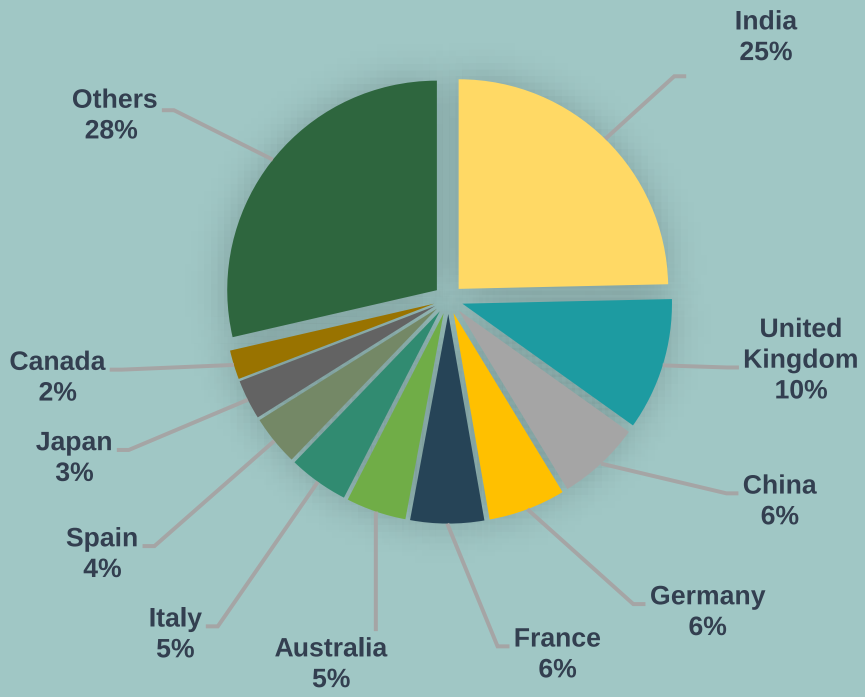
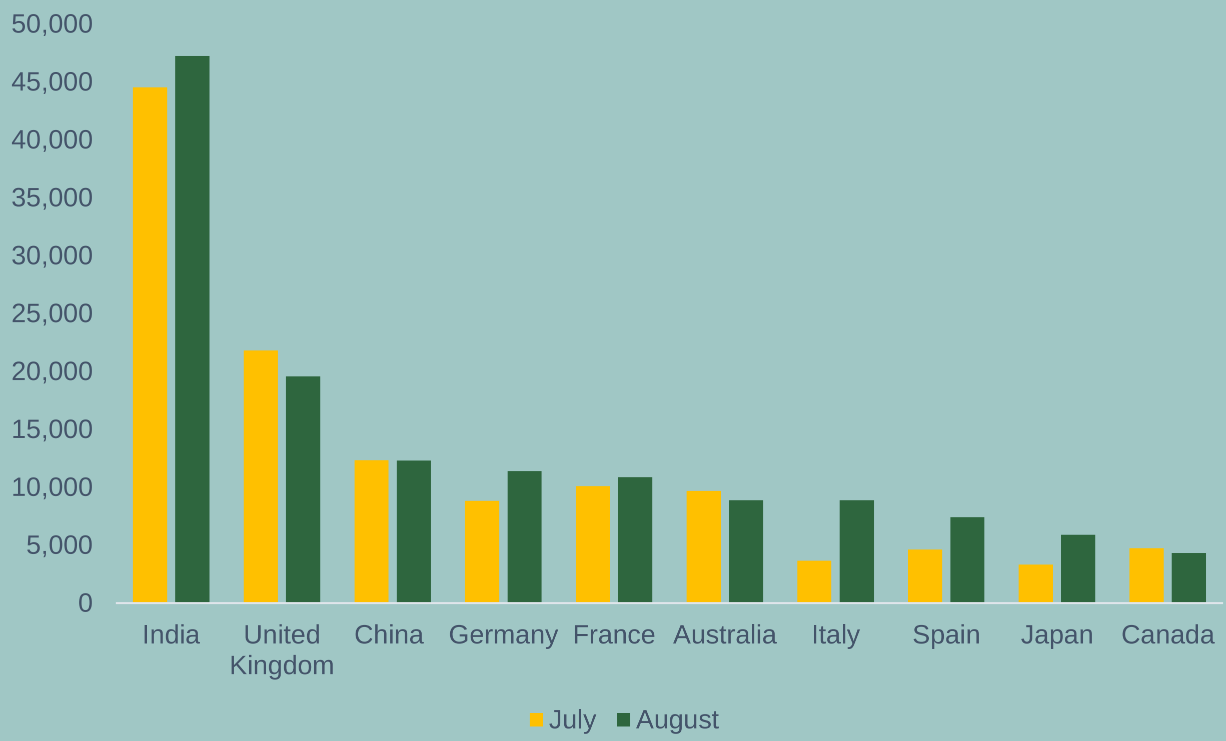


Table 2. Top ten source markets to Sri Lanka, August 2026

Rank	Country of Residence	Tourist arrivals (August 2026)			Tourist arrivals	
		By Air	By Sea	Total	August 2025	Percentage Change (2026/2025) August
1	India	44,700	2,553	47,253	46,473	1.7
2	United Kingdom	19,588	0	19,588	19,764	(0.9)
3	China	12,321	0	12,321	12,294	0.2
4	Germany	11,401	0	11,401	12,500	(8.8)
5	France	10,885	0	10,885	10,495	3.7
6	Australia	8,898	0	8,898	7,833	13.6
7	Italy	8,883	0	8,883	12,247	(27.5)
8	Spain	7,431	0	7,431	8,843	(16.0)
9	Japan	5,902	0	5,902	5,127	15.1
10	Canada	4,315	0	4,315	4,333	(0.4)

Chart 2: Comparison of arrivals from top ten markets to Sri Lanka, July / August – 2026



Top ten source markets

January to August 2026

Over the first eight months of 2026, Sri Lanka recorded a total of 1,535,122 tourist arrivals, reflecting a marginal year-on-year contraction of approximately 2.0% compared to 1,566,523 during the same period in 2025. While this overall dip is modest, the underlying cumulative data reveals a deeply polarized landscape, characterized by a few standout performers offsetting severe erosion in several traditionally strong European markets.

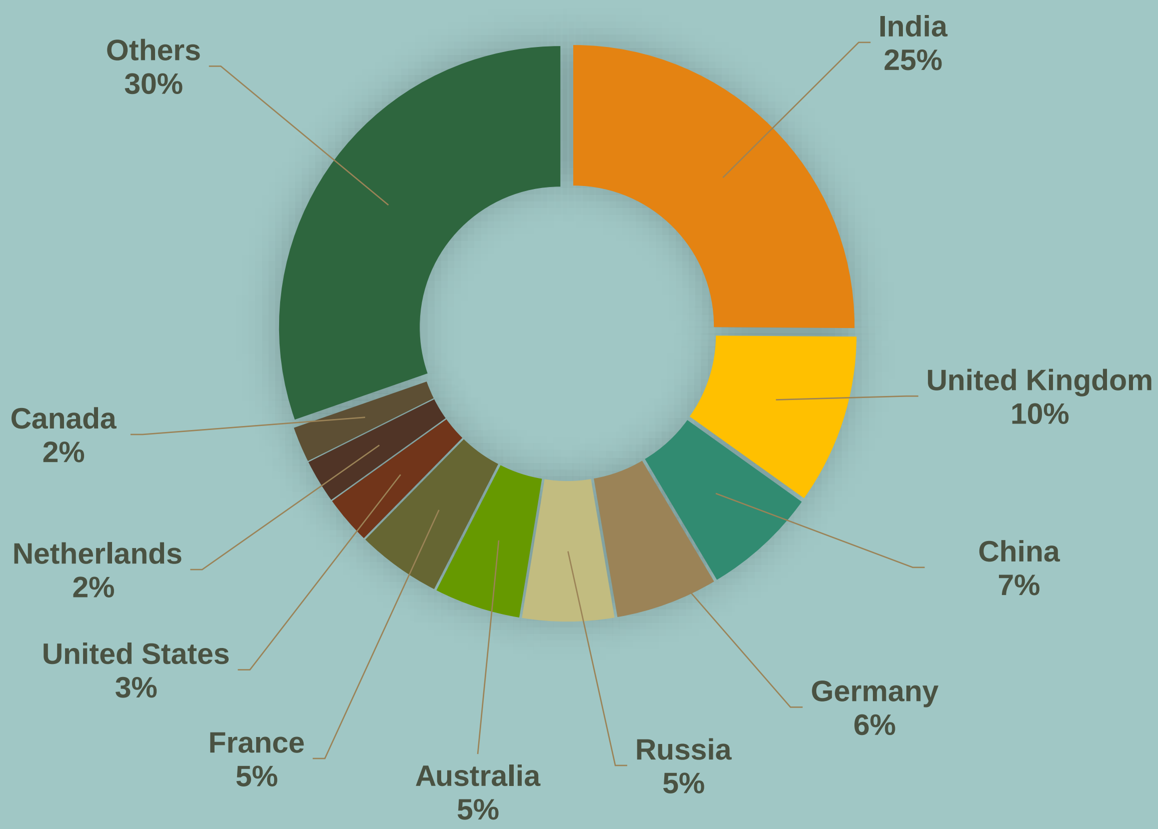
On the positive side, India reaffirmed its undisputed dominance with a commanding 385,483 arrivals, surging by an impressive 18.4% an absolute gain of nearly 60,000 visitors, which cushioned the broader downturn. China also posted robust growth of 10.7% (100,828 arrivals), alongside Australia’s healthy 11.4% increase (76,038 arrivals), underscoring the rising and resilient demand from the Asia-Pacific region. These three markets collectively contributed over 560,000 arrivals, making them vital pillars for Sri Lanka’s tourism recovery.

Conversely, the cumulative data exposes vulnerabilities, particularly among European source markets. The most alarming market is Russia, which plummeted by a staggering 32.0% to just 80,845 arrivals an absolute loss of over 38,000 visitors compared to the previous year, likely driven by persistent geopolitical tensions and reduced air connectivity and other factors. The Netherlands followed with a steep 19.6% decline, while France (-10.9%), Germany (-7.8%), and Canada (-7.5%) all registered significant contractions. Even the traditionally stable UK market slipped marginally by 0.8%, and the United States recorded a moderate drop of 4.7%.

Table 3. Top ten markets to Sri Lanka, January to August 2026

Rank	Country of Residence	Tourist Arrivals (Jan ~August 2026)	Tourist Arrivals (Jan ~August 2025)	Percentage Change Jan – August 2026/2025
1	India	385,483	325,595	18.4
2	United Kingdom	149,989	151,141	(0.8)
3	China	100,828	91,063	10.7
4	Germany	90,001	97,644	(7.8)
5	Russia	80,845	118,916	(32.0)
6	Australia	76,038	68,275	11.4
7	France	73,984	83,011	(10.9)
8	United States	42,510	44,605	(4.7)
9	Netherlands	38,404	47,777	(19.6)
10	Canada	31,381	33,911	(7.5)
11	Others	465,659	504,585	(7.7)
	Total	**1,535,122**	**1,566,523**	

Chart 3. Top ten source markets to Sri Lanka, January to August 2026



Tourist arrivals by purpose of visit
August 2026

The August 2026 purpose of visit profile indicates that Sri Lanka's international tourism demand remains predominantly leisure-driven, with Pleasure/Vacation accounting for 70.84% of visitors. Visiting Friends and Relatives (VFR) represented the second-largest segment at 14.09%, while MICE contributed a notable 8.01%. Business travel accounted for a further 2.50%, resulting in business-related travel, including MICE, representing 10.51% of total visitors. In contrast, specialised segments such as religious, education, health/Ayurvedic and sports tourism collectively accounted for only 1.62%. The findings demonstrate Sri Lanka's strong positioning as a leisure destination while highlighting significant potential for diversification into higher-value and specialised tourism segments. Strengthening MICE, wellness, sports, religious and education tourism could contribute to greater market diversification, higher tourist expenditure, longer stays and improved resilience of the tourism sector.

Chart 4: Purpose of visit, August 2026

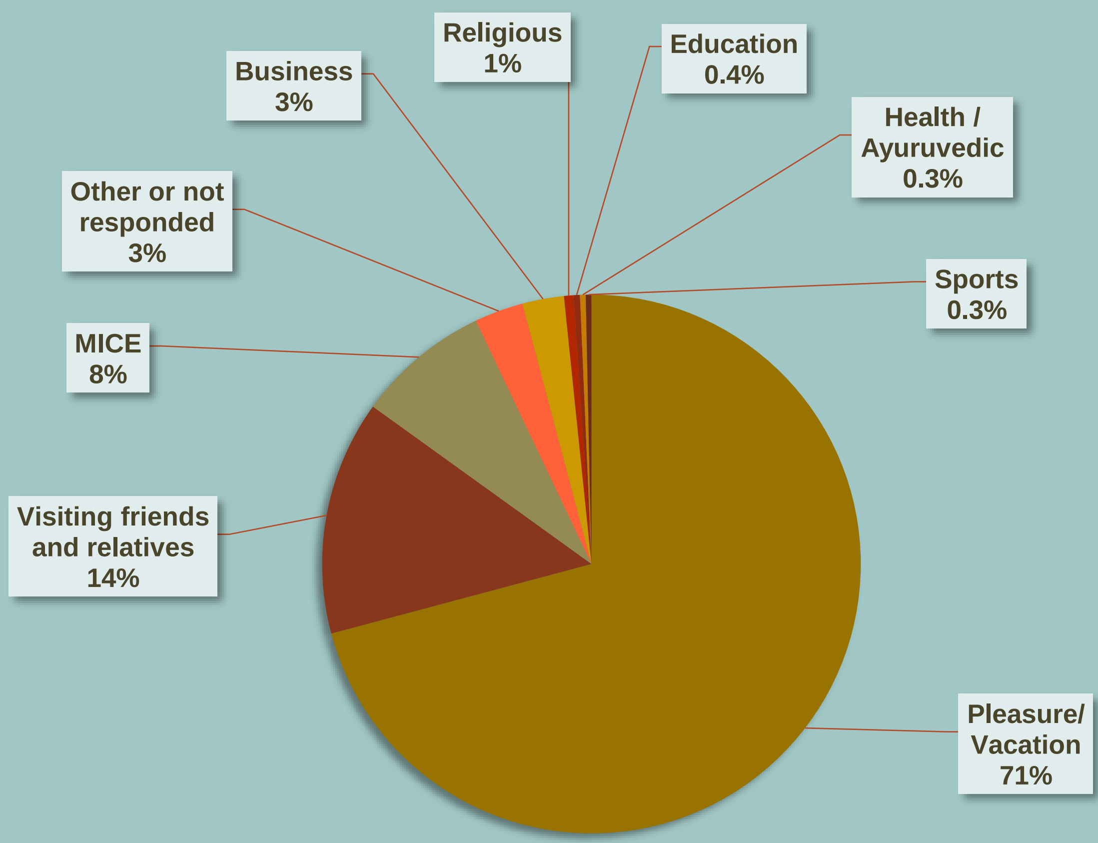
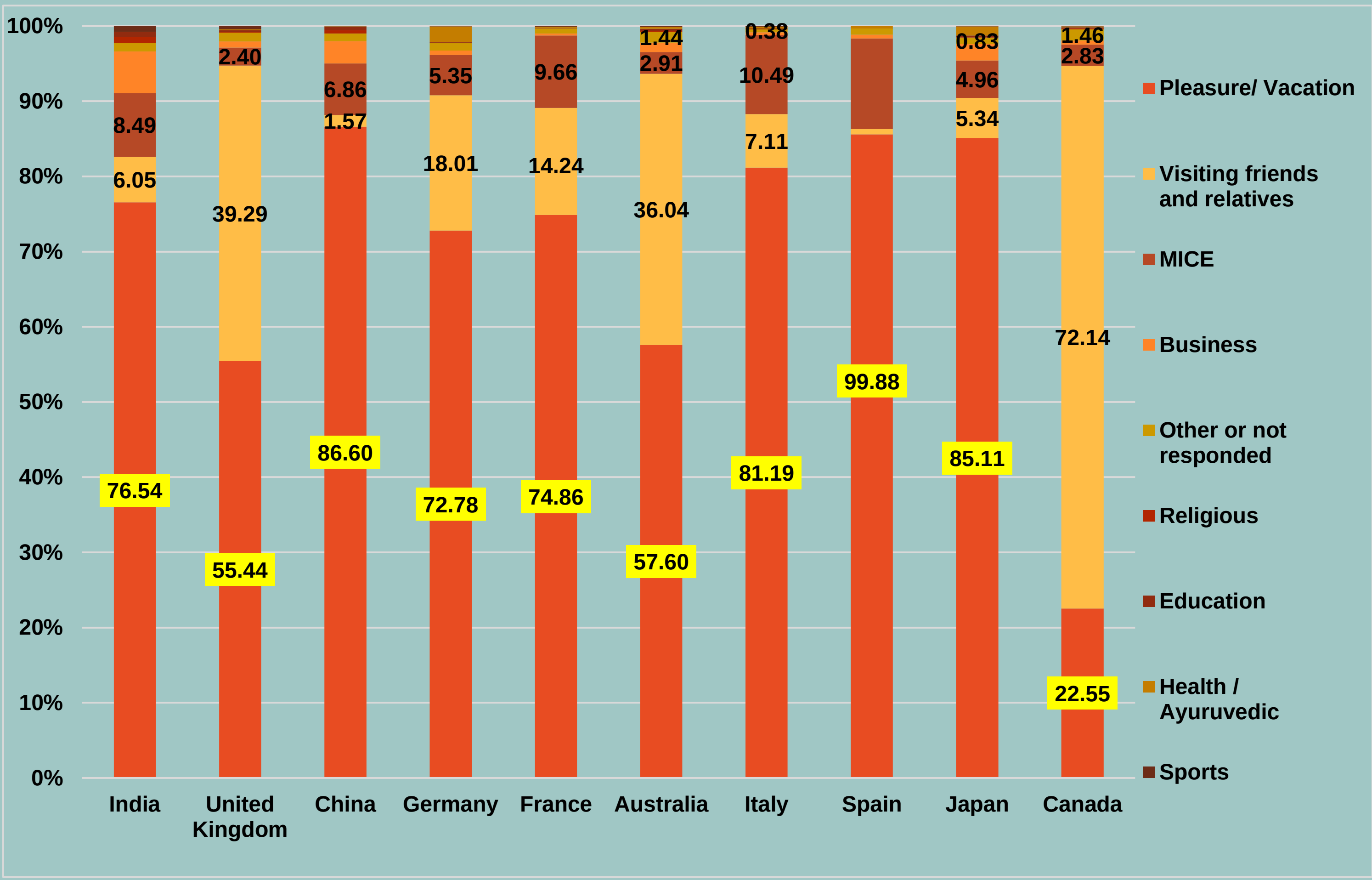


Chart 5: Purpose of visit vs main source markets



August data on purpose of visit indicate that pleasure/vacation was the dominant purpose of travel across most of Sri Lanka's major source markets, although the relative importance of visiting friends and relatives (VFR), MICE, and business travel varied considerably by market. China (86.60%), Spain (99.88%), Japan (85.11%), Italy (81.19%) and India (76.54%) recorded particularly high shares of tourists travelling for pleasure, suggesting strong leisure-oriented demand from these markets. France (74.86%) and Germany (72.78%) also showed predominantly holiday-driven travel patterns. In contrast, Canada (72.14%) and the UK (39.29%) recorded exceptionally high VFR shares, indicating the importance of diaspora and family-linked travel, with Canada showing the strongest VFR orientation among the markets analysed. Australia also had a substantial VFR component (36.04%), while Germany (18.01%) and France (14.24%) showed moderate VFR demand. MICE travel was most prominent among Spain (12.06%), Italy (10.49%), France (9.66%) and India (8.49%), pointing to opportunities to strengthen business events and higher-value visitor segments in these markets. India also recorded the highest share of business travel (5.54%), followed by China (2.95%), while health/Ayurvedic travel was relatively notable among Germany (2.11%) and Japan (1.22%). Overall, the findings suggest that Sri Lanka's international tourism demand remains strongly leisure-led, but market-specific motivations are clearly differentiated;

therefore, marketing and product development should adopt a source-market-specific approach, with leisure experiences prioritised for China, Spain, Japan, Italy and India, VFR-oriented strategies for Canada, the UK and Australia, and greater emphasis on MICE and business tourism in selected European and Asian markets.

Asia Pacific's Emerging Travellers: Implications and Opportunities for Sri Lanka

Asia Pacific is positioned to become the principal engine of global tourism expansion over the coming decade, with Euromonitor International projecting that the region will account for close to half of worldwide travel growth by 2030. Central to this trajectory is the rising influence of younger cohorts, particularly Generation Z, whose travel preferences, spending patterns and expectations diverge markedly from those of preceding generations. As this demographic's share of travel expenditure continues to grow, its behaviours offer an early indication of how tourism demand across the region, and by extension in Sri Lanka, is likely to evolve.

A defining feature of Generation Z's travel behaviour is a move away from the conventional model of a single, extended annual holiday towards more frequent, shorter and more flexible journeys. Euromonitor's Voice of the Consumer: Travel survey, conducted in February 2026 across 6,443 respondents in the Asia Pacific region, found that 11% of Gen Z travellers undertake day trips on a weekly basis, compared with 9% of Millennials and just 3% of Baby Boomers. This pattern suggests a structural shift in travel rhythm, with implications for how destinations design and time their offerings.

Notably, this shift is not primarily a function of constrained budgets. Although 25% of Gen Z travellers cite value for money as their foremost consideration when planning a trip, this cohort remains willing to commit spending to experiences it regards as meaningful and worthwhile. Rather than allocating discretionary spend to shopping and material goods, younger travellers are increasingly channelling expenditure towards experiential dimensions of travel, particularly gastronomy, culture, adventure, wellness, entertainment and genuine engagement with local communities. This reordering of priorities creates a clear opening for destinations and tourism enterprises to design products around these themes.

A related consequence of this behavioural shift is the erosion of traditional loyalty structures built around points, air miles and long-term accumulation. Where Millennials have tended to remain loyal to particular brands in pursuit of deferred rewards, Gen Z responds more strongly to immediate, experiential value. Tourism operators and destination managers must therefore reconsider how loyalty is earned and sustained, moving away from accumulation-based incentives towards models that reward engagement and experience in the moment.

Relevance to Sri Lanka

These regional trends carry direct implications for Sri Lanka's tourism strategy, and several present clear opportunities for the destination to capture a growing and increasingly influential segment of the market.

Sri Lanka's compact geography is particularly well suited to the shorter, more frequent travel patterns favoured by Gen Z. The relatively short distances between the island's cultural, coastal, hill country and wildlife attractions make it feasible to package multi-destination itineraries within short timeframes, aligning naturally with a traveller base inclined towards day trips and brief excursions rather than extended single-location stays. This positions Sri Lanka to market itself not only as a long-haul, extended-holiday destination but also as a base for frequent, varied, short- duration experiences, whether for regional visitors from South Asia or for longer-haul travellers structuring multi-country itineraries around a single stay.

The finding that Gen Z prioritises meaningful experience over material consumption aligns closely with areas in which Sri Lanka already holds comparative strength: its cultural heritage sites, culinary traditions, wellness and Ayurveda offerings, adventure tourism in the hill country and along the coast, and opportunities for authentic engagement with local communities. Rather than competing on price or shopping infrastructure, where the island is less positioned to lead regionally, Sri Lanka can differentiate itself by deepening and better packaging these experience-led offerings. This reinforces the direction already being taken through community-inclusive destination management initiatives, such as the work underway at Sigiriya, and suggests that similar models should be extended to other heritage and natural sites with strong experiential potential.

The declining relevance of conventional loyalty mechanisms also has a bearing on how Sri Lanka approaches repeat visitation and destination marketing. Rather than relying on accumulation-based loyalty schemes more suited to airline or hotel chain relationships, Sri Lanka's tourism promotion should emphasise the immediate, tangible value of each visit, distinctive experiences, memorable interactions, and content-worthy moments that Gen Z travellers are likely to share and revisit independently of any formal loyalty programme. Digital engagement, social sharing and destination storytelling are therefore likely to be more effective levers for building repeat interest among this cohort than traditional rewards structures.

For planning purposes, these findings suggest several priorities for the SLTDA and the broader tourism sector. Product development should increasingly favour modular, experience-based offerings, culinary trails, wellness circuits, community-based cultural programmes, adventure packages, that can be consumed individually or combined flexibly, rather than being packaged solely as extended, fixed-itinerary tours. Destination marketing should be recalibrated to speak directly to value-conscious but experience-driven younger travellers, foregrounding authenticity and cultural depth rather than price alone. Finally, infrastructure and access planning should account for a travel pattern characterised by shorter, more frequent visits, which has implications for domestic transport connectivity, visa and entry processes, and the ease with which short-stay, multi-stop itineraries can be undertaken within the island.

Given that Gen Z's current behaviour is likely to foreshadow broader shifts in Asia Pacific travel demand, including that of Generation Alpha as it enters the travel market, positioning Sri Lanka's tourism offering around these principles now would allow the destination to capture an increasing share of a rapidly growing and increasingly influential segment of regional travel expenditure.

References

Pacific Asia Travel Association (PATA). (2026). *Tourism in Focus: Insights for a Meaningful Pacific Asia Tourism Economy*. September 2026. Bangkok: PATA.

International tourist arrivals by country of residence

	August 2026 Tourist arrivals			Tourist arrivals August 2025	% change August (26/25)	Total tourist arrivals up to August 2026	Total tourist arrivals up to August 2025	% change up to August (26/25)
	By Air	By Sea	Total					
AMERICAS	**8,947**	**35**	**8,982**	**9,829**	**(8.6)**	**78,828**	**83,365**	**(5.4)**
North America	**8,514**	**35**	**8,549**	**9,376**	**(8.8)**	**74,694**	**79,224**	**(5.7)**
Canada	4,304	11	4,315	4,333	(0.4)	31,381	33,911	(7.5)
Mexico	67	0	67	73	(8.2)	803	708	13.4
United States	4,143	24	4,167	4,970	(16.2)	42,510	44,605	(4.7)
Caribbean & Central America	**91**	**0**	**91**	**98**	**(7.1)**	**768**	**674**	**13.9**
Costa Rica	05	0	05	06	(16.7)	73	78	(6.4)
Jamaica	4	0	04	05	(20.0)	51	31	64.5
Others	82	0	82	87	(5.7)	644	565	14.0
South America	**342**	**0**	**342**	**355**	**(3.7)**	**3,366**	**3,467**	**(2.9)**
Argentina	66	0	66	54	22.2	760	621	22.4
Brazil	102	0	102	134	(23.9)	1,136	1,311	(13.3)
Chile	34	0	34	39	(12.8)	408	451	(9.5)
Colombia	71	0	71	60	18.3	510	463	10.2
Others	69	0	69	68	1.5	552	621	(11.1)
AFRICA	**1,744**	**2**	**1,746**	**1,870**	**(6.6)**	**11,074**	**10,972**	**0.9**
North Africa	**394**	**0**	**394**	**530**	**(25.7)**	**2,461**	**2,399**	**2.6**
Morocco	136	0	136	132	3.0	726	759	(4.3)
Sudan	150	0	150	288	(47.9)	935	839	11.4
Others	108	0	108	110	(1.8)	800	801	(0.1)
Sub-Saharan Africa	**1,350**	**02**	**1,352**	**1,340**	**0.9**	**8,613**	**8,573**	**0.5**
Kenya	81	0	81	93	(12.9)	622	835	(25.5)
Mauritius	75	2	77	60	28.3	693	532	30.3
Nigeria	11	0	11	12	(8.3)	83	76	9.2
South Africa	340	0	340	460	(26.1)	3,116	3,218	(3.2)
Others	843	0	843	715	17.9	4,099	3,912	4.8

	August 2026			Tourist arrivals August 2025	% change August (26/25)	Total tourist arrivals up to August 2026	Total tourist arrivals up to August 2025	% change up to August (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	**92,172**	**2,557**	**94,729**	**89,574**	**5.8**	**737,296**	**661,453**	**11.5**
North East Asia	**19,078**	**0**	**19,078**	**18,262**	**4.5**	**136,591**	**123,968**	**10.2**
China	12,321	0	12,321	12,294	0.2	100,828	91,063	10.7
Japan	5,902	0	5,902	5,127	15.1	28,274	24,662	14.6
South Korea	843	0	843	808	4.3	7,322	8,111	(9.7)
Others	12	0	12	33	(63.6)	167	132	26.5
South East Asia	**8,527**	**0**	**8,527**	**6,159**	**38.4**	**52,242**	**43,819**	**19.2**
Cambodia	75	0	75	37	102.7	1,012	1,008	0.4
Indonesia	597	0	597	487	22.6	4,487	3,249	38.1
Malaysia	2,850	0	2,850	2,157	32.1	16,228	14,901	8.9
Myanmar	1,712	0	1,712	527	224.9	4,071	1,692	140.6
Philippines	573	0	573	678	(15.5)	4,747	4,458	6.5
Singapore	1,322	0	1,322	1,262	4.8	9,716	9,764	(0.5)
Thailand	650	0	650	682	(4.7)	6,067	5,808	4.5
Vietnam	698	0	698	308	126.6	5,497	2,681	105.0
Others	50	0	50	21	138.1	417	258	61.6
Oceania	**10,183**	**04**	**10,187**	**8,908**	**14.4**	**85,527**	**76,772**	**11.4**
Australia	8,898	2	8,900	7,833	13.6	76,038	68,275	11.4
New Zealand	1,226	2	1,228	1,044	17.6	9,104	8,211	10.9
Others	59	0	59	31	90.3	385	286	34.6
South Asia	**54,384**	**2,553**	**56,937**	**56,245**	**1.2**	**462,936**	**416,894**	**11.0**
Afghanistan	3	0	03	03		55	60	(8.3)
Bangladesh	3,142	0	3,142	4,074	(22.9)	28,832	40,485	(28.8)
Bhutan	42	0	42	44	(4.5)	433	417	3.8
India	44,700	2,553	47,253	46,473	1.7	385,483	325,595	18.4
Iran	132	0	132	485	(72.8)	1,419	6,614	(78.5)
Maldives	3,017	0	3,017	3,003	0.5	26,440	24,211	9.2
Nepal	689	0	689	583	18.2	4,444	3,677	20.9
Pakistan	2,659	0	2,659	1,580	68.3	15,830	15,835	
EUROPE	**81,392**	**04**	**81,396**	**93,467**	**(1.7)**	**685,968**	**788,780**	**(13.0)**
Northern Europe	**21,680**	**0**	**21,680**	**22,216**	**(2.4)**	**189,028**	**191,347**	**(1.2)**
Denmark	558	0	558	739	(24.5)	12,707	12,714	(0.1)
Finland	69	0	69	113	(38.9)	3,053	2,902	5.2
Norway	514	0	514	514	0	7,701	9,227	(16.5)
Sweden	286	0	286	341	(16.1)	8,025	8,125	(1.2)
United Kingdom	19,588	0	19,588	19,764	(0.9)	149,989	151,141	(0.8)
Others	665	0	665	745	(10.7)	7,553	7,238	4.4

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	August 2026			Tourist arrivals August 2025	% change Aug (26/25)	Total tourist arrivals up to Aug 2026	Total tourist arrivals up to Aug 2025	% change up to Aug (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
Western Europe	**31,600**	**0**	**31,600**	**34,767**	**(9.1)**	**249,394**	**279,318**	**(10.7)**
Austria	1,201	0	1,201	1,425	(15.7)	10,604	12,216	(13.2)
Belgium	1,820	0	1,820	2,047	(11.1)	13,749	15,322	(10.3)
France	10,885	0	10,885	10,495	3.7	73,984	83,011	(10.9)
Germany	11,401	0	11,401	12,500	(8.8)	90,001	97,644	(7.8)
Netherlands	4,312	0	4,312	6,082	(29.1)	38,404	47,777	(19.6)
Switzerland	1,840	0	1,840	2,067	(11.0)	21,980	22,639	(2.9)
Others	141	0	141	151	(6.6)	672	709	(5.2)
Central/Eastern Europe	**5,350**	**0**	**5,350**	**9,896**	**(45.9)**	**157,239**	**214,740**	**(26.8)**
Belarus	61	0	61	181	(66.3)	6,104	5,750	6.2
Czech Republic	740	0	740	874	(15.3)	10,988	12,837	(14.4)
Estonia	25	0	25	16	56.3	2,295	2,798	(18.0)
Hungary	250	0	250	239	4.6	3,768	4,356	(13.5)
Kazakhstan	77	0	77	60	28.3	3,963	7,848	(49.5)
Lithuania	132	0	132	117	12.8	2,966	4,923	(39.8)
Poland	1,256	0	1,256	3,404	(63.1)	25,913	32,952	(21.4)
Romania	216	0	216	397	(45.6)	3,248	4,035	(19.5)
Russia	1,639	0	1,639	3,446	(52.4)	80,845	118,916	(32.0)
Slovakia	212	0	212	346	(38.7)	3,938	4,796	(17.9)
Ukraine	245	0	245	272	(9.9)	5,205	5,788	(10.1)
Others	497	0	497	544	(8.6)	8,006	9,741	(17.8)
Southern/ Mediterranean Europe	**22,762**	**0**	**22,762**	**26,588**	**(14.4)**	**90,307**	**103,375**	**(12.6)**
Greece	644	0	644	844	(23.7)	2,787	2,815	(1.0)
Italy	8,883	0	8,883	12,247	(27.5)	29,469	36,690	(19.7)
Portugal	602	0	602	648	(7.1)	3,940	5,309	(25.8)
Spain	7,431	0	7,431	8,843	(16.0)	23,839	29,595	(19.4)
Turkey	789	0	789	606	30.2	6,233	5,662	10.1
Israel	3,755	0	3,755	2,403	56.3	18,235	15,417	18.3
Others	658	0	658	997	(34.0)	5,804	7,887	(26.4)
MIDDLE EAST	**4,851**	**0**	**4,851**	**3,495**	**38.8**	**21,956**	**21,953**	**0.01**
Bahrain	310	0	310	134	131.3	1,100	987	11.4
Egypt	323	0	323	274	17.9	2,273	2,861	(20.6)
Iraq	214	0	214	204	4.9	1,093	963	13.5
Jordan	253	0	253	191	32.5	1,592	1,922	(17.2)
Kuwait	361	0	361	232	55.6	1,064	1,387	(23.3)
Lebanon	296	0	296	240	23.3	1,842	2,249	(18.1)
Oman	674	0	674	388	73.7	3,272	1,904	71.8
Qatar	154	0	154	159	(3.1)	588	699	(15.9)
Saudi Arabia	776	0	776	690	12.5	3,850	4,313	(10.7)
United Arab Emirates	1,305	0	1,305	820	59.0	4,465	3,831	16.5
Others	185	0	185	163	13.5	817	837	(2.4)
TOTAL	**189,106**	**2,598**	**191,704**	**198,235**	**(3.3)**	**1,535,122**	**1,566,523**	**(2.0)**

Main last departure airports and airlines to Sri Lanka, August 2026

The August last port of departure data show that Sri Lanka's international air connectivity remains strongly concentrated around major regional transit hubs, particularly in the Middle East and South/Southeast Asia. Doha (10.07%), Dubai (9.66%) and Abu Dhabi (7.71%) together accounted for 27.44% of all recorded last departure ports, indicating that more than one-quarter of departing tourists travelled through these three Gulf hubs. This is particularly important from a tourism resilience perspective, as disruptions affecting Gulf aviation networks could have a significant impact on Sri Lanka's visitor flows. Indian gateways also feature prominently, with Chennai (7.14%), Mumbai (6.11%), Delhi (5.50%), Bangalore (4.19%) and Hyderabad (3.02%) collectively accounting for 25.96%, highlighting the importance of the Indian market and the strong air connectivity between India and Sri Lanka.

Beyond these two major clusters, Kuala Lumpur (4.48%), Istanbul (4.31%) and Singapore (3.87%) demonstrate Sri Lanka's connectivity with Southeast Asia and Turkey, while Bangkok (2.52%) and Hong Kong (2.09%) provide additional Asian connections. European and long-haul gateways have comparatively smaller individual shares, with London accounting for 3.02%, Frankfurt 1.32% and Melbourne 1.57%, while Narita represents 1.30% of departures.

The data reveal three important patterns. First, Sri Lanka is highly dependent on hub-based connectivity, rather than solely on direct point-to-point services. Second, the strong presence of Doha, Dubai and Abu Dhabi reinforces the strategic importance of Gulf aviation hubs for maintaining access to European, North American and other long-haul source markets. Third, the substantial contribution of Indian airports confirms the strategic importance of India as both a source market and a connectivity market. Therefore, Sri Lanka's tourism and aviation strategies should focus not only on increasing direct flights but also on protecting and expanding connectivity through key regional hubs, diversifying transit options, and strengthening direct air links to high-potential source markets.

Chart 6. Main last departure airports to Sri Lanka, August 2026

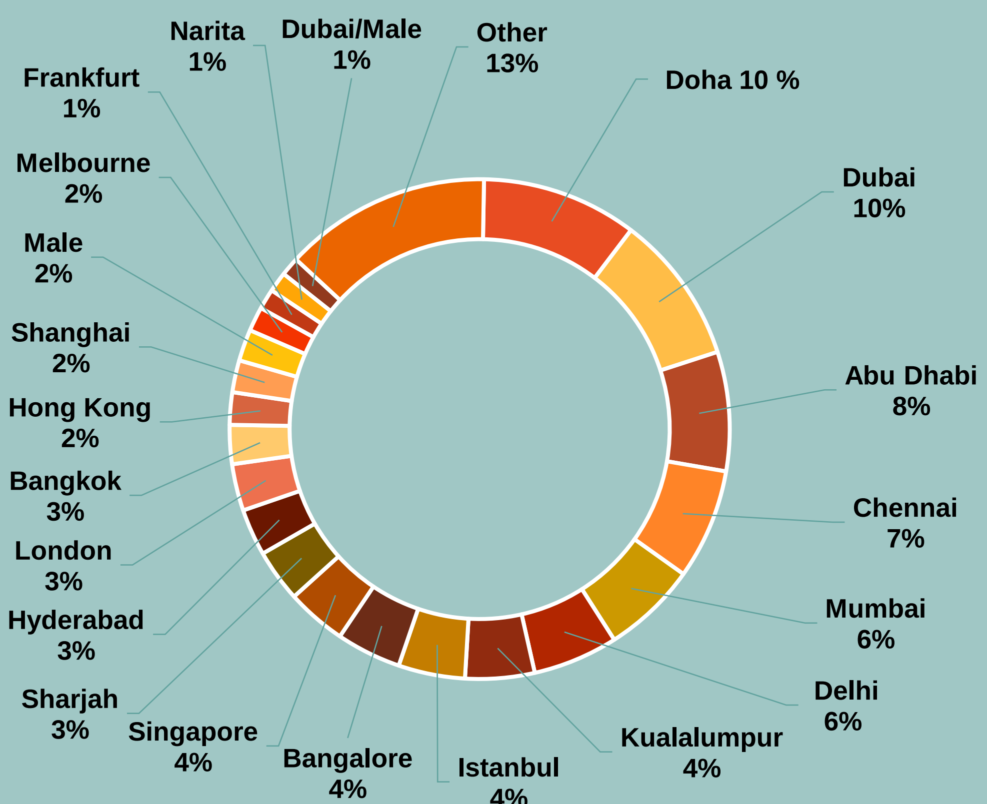
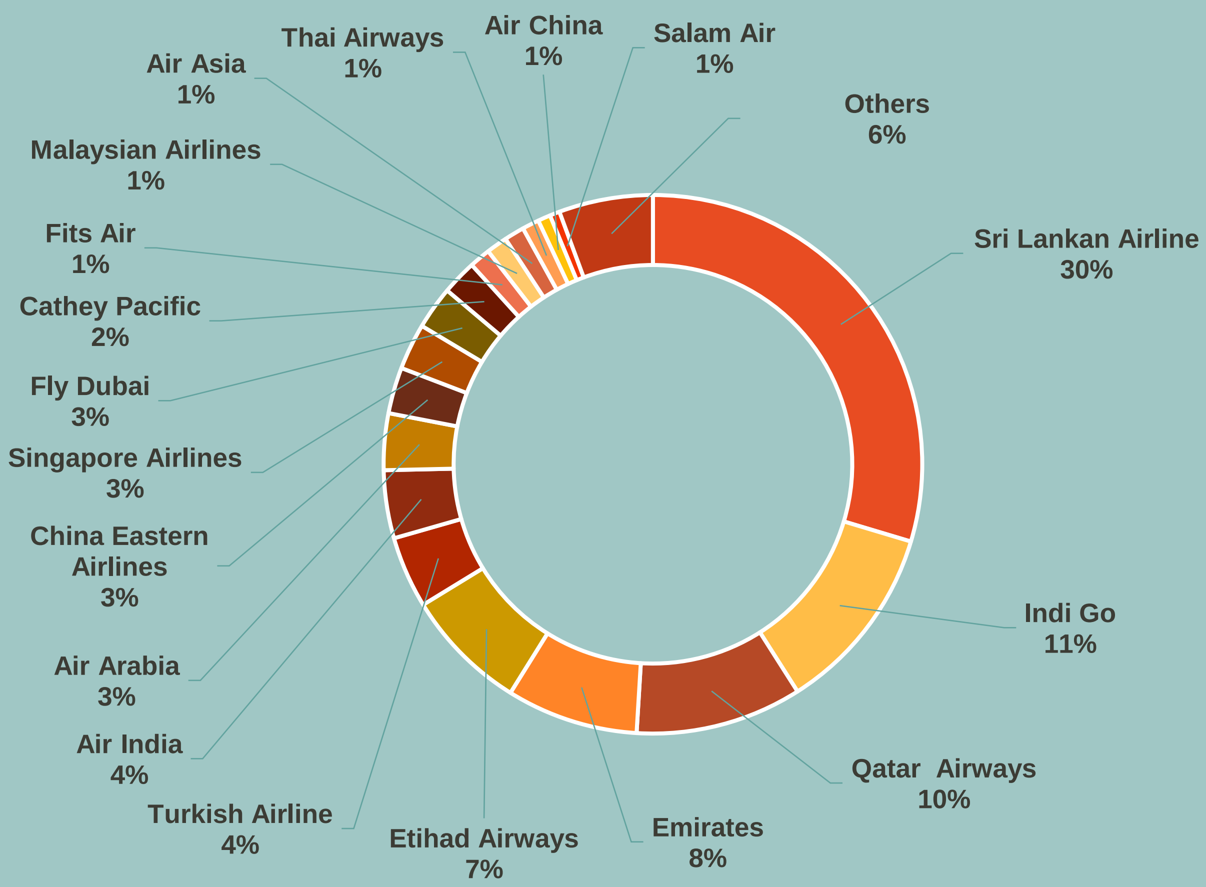


Chart 7. Main airlines to Sri Lanka, August 2026



The August airline data show that Sri Lanka's tourist arrivals were heavily supported by the national carrier and a relatively concentrated group of regional and international airlines. Sri Lankan Airlines was the leading carrier, accounting for 56,805 tourists or 29.63% of total arrivals, meaning almost one in three tourists arrived through the national carrier. This highlights the critical role of Sri Lankan Airlines in sustaining Sri Lanka's tourism connectivity and market access. IndiGo ranked second with 11.35%, reflecting the strong and growing importance of India as a source market and the extensive air connectivity between the two countries. The major Gulf carriers Qatar Airways (10%), Emirates (8%) and Etihad Airways (7%) collectively contributed 25.28% of arrivals, further demonstrating Sri Lanka's strong dependence on Middle Eastern hubs for connecting tourists from Europe, North America and other long-haul markets. However, the concentration of arrivals among these major airlines also represents a potential vulnerability, as disruptions affecting these carriers or their principal hub airports could have a considerable impact on tourist flows as experienced in the months following the Middle East conflict.

The data also indicate a diversified secondary network, with Turkish Airlines contributing 4.%, Air India 4.08%, Air Arabia 3.40%, China Eastern 2.77%, Singapore Airlines 2.77% and Cathay Pacific 2.09%. Together, the leading five airlines Sri Lankan Airlines, IndiGo, Qatar Airways, Emirates and Etihad accounted for approximately 66.26% of all tourist arrivals, indicating a relatively high level of concentration among key carriers.

Overall, the figures demonstrate that Sri Lanka's tourism performance is closely linked to the strength and resilience of its airline network.

The combination of a dominant national carrier, strong Indian connectivity and extensive Gulf-hub connectivity provides a solid foundation, but strengthening direct international routes and diversifying airline and hub dependence would improve the resilience of Sri Lanka's tourism sector.

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

August 2026

Table 5. Top ten markets vs. main last departure airports to Sri Lanka, August 2026

Country	Doha	Dubai	Abu Dhabi	Chennai	Mumbai	Delhi	Kualalumpur	Istanbul	Bangalore	Singapore	Sharjah	Hyderabad	London	Bangkok	Hong Kong	Shanghai	Male	Melbourne	Frankfurt	Narita	Dubai/Male	Others	Total
India	208	1,388	313	11,369	7,944	6,057	175	15	7,027	228	289	5,302	21	158	42	6	100	40	3	1	22	6,545	47,253
United Kingdom	3,761	3,198	2,160	721	640	574	474	407	206	253	492	75	4,924	197	101	11	136	59	27	16	267	889	19,588
China	44	112	22	18	19	18	1,276	10	4	220	10	7	3	430	2,175	3,163	310	5	1	13	62	4,399	12,321
Germany	2,863	1,930	1,269	96	556	377	156	996	83	74	493	20	95	110	10	21	64	10	1,678	1	231	272	11,405
France	2,606	1,036	1,863	191	528	698	206	1,016	143	66	78	96	56	108	30	15	78	8	64	4	131	1,864	10,885
Australia	73	111	57	115	45	150	1,171	24	30	2,749	23	20	35	120	150	22	91	2,632	5	3	11	1,263	8,900
Italy	1,081	1,738	1,218	24	225	536	71	1,717	45	27	1,345	10	69	46	13	7	116	4	50	1	175	365	8,883
Spain	2,121	908	1,848	58	81	163	104	1,245	11	26	311	7	33	45	10	7	140		61	0	128	124	7,431
Japan	7	18	8	53	62	407	462	5	54	696	3	8	17	567	595	216	38	2	5	2,401	9	269	5,902
Canada	746	355	449	228	59	86	152	40	37	318	27	18	236	99	357	36	20	5	287	9	19	732	4,315

The last departure port data for key source markets for August 2026 provides an indication of the key aviation gateways through which tourists from Sri Lanka's major source markets accessed the country. The data highlights significant differences in connectivity patterns across markets, with some markets relying primarily on direct services, while others are strongly dependent on Middle Eastern and Asian transit hubs.

India shows the strongest concentration of arrivals through Indian cities, with Chennai (11,369), Mumbai (7,944), Bangalore (7,027), Delhi (6,057) and Hyderabad (5,302) collectively accounting for approximately 79.8% of Indian arrivals. This is significantly different from European markets, where Gulf hubs dominate. It indicates that Sri Lanka's strong geographical proximity and extensive India–Sri Lanka air connectivity allow Indian tourists to access Sri Lanka largely through direct services rather than long-haul transit hubs. This also reinforces the importance of maintaining and expanding direct connectivity beyond the major Indian cities.

The dependence on Gulf aviation hubs is particularly pronounced among Spain, Italy, Germany, France and the UK. Doha, Dubai, Abu Dhabi and Sharjah together account for approximately 71.5% of Spanish, 62.6% of Italian, 59.5% of German, 52.5% of French and 50.4% of UK arrivals in the dataset. This demonstrates that the Gulf functions as a critical gateway connecting Sri Lanka with European source markets. Consequently, changes in capacity, fares, schedules or disruptions at Doha, Dubai and Abu Dhabi can have a disproportionate effect on Sri Lanka's European tourist flows.

The UK is particularly interesting because London itself accounts for 25.1% of UK arrivals, while Doha, Dubai and Abu Dhabi together account for 46.6%. This suggests a combination of direct/near-direct access and hub-based connectivity. The UK therefore has greater connectivity diversification than markets such as Spain or Germany, although the Gulf remains highly important.

China displays a distinctly Asian connectivity pattern. Shanghai (3,163), Hong Kong (2,175), Kuala Lumpur (1,276) and Bangkok (430) are important gateways, while only a very small proportion travels through the Gulf hubs. The four major Asian gateways together account for a substantial share of Chinese arrivals. This suggests that strengthening connectivity with Chinese cities as well as regional hubs such as Kuala Lumpur, Bangkok and Hong Kong could be important for the Chinese market.

Australia shows a different pattern again. Singapore (2,749), Melbourne (2,632) and Kuala Lumpur (1,171) are the major gateways. Asian connectivity accounts for almost half of Australian arrivals in the table, while Gulf hubs play a comparatively limited role. This highlights the strategic importance of maintaining strong connectivity with Singapore, Kuala Lumpur and Australian gateways, particularly Melbourne.

Japan is one of the most interesting markets. Narita accounts for 2,401 arrivals, while Dubai/Male contributes another 2,401, followed by Singapore (696), Hong Kong (595), Bangkok (567) and Kuala Lumpur (462). Therefore, Japanese tourists appear to access Sri Lanka through a combination of direct Japanese connectivity, Middle Eastern routes and Asian hubs. This diversification provides resilience but also indicates opportunities to strengthen direct Japan–Sri Lanka connectivity.

Canada has no dominant direct gateway in the table. Doha (746), Abu Dhabi (449), Hong Kong (357), Dubai (355) and Singapore (318) are among the major departure points. This indicates that Canadian tourism to Sri Lanka is largely dependent on connecting hubs, particularly in the Middle East and Asia. The Canadian market could therefore be particularly sensitive to changes in international connecting capacity and airfares.

The data highlights both the strength and vulnerability of Sri Lanka's current air-access model. While hub connectivity enables Sri Lanka to reach distant source markets that may not support direct services, excessive dependence on a limited number of transit hubs creates exposure to geopolitical, operational and capacity-related disruptions. A source-market-specific air connectivity strategy, combining direct-route development with diversification of transit hubs, would therefore strengthen the resilience and sustainability of Sri Lanka's tourism growth.

Table 6. Top ten markets vs. main airlines to Sri Lanka, August 2026

Country	Sri Lankan Airline	Indi Go	Qatar Airways	Emirates	Etihad Airways	Turkish Airline	Air India	Air Arabia	China Eastern Airlines	Singapore Airlines	Fly Dubai	Cathey Pacific	Fits Air	Malaysian Airlines	Air Asia	Thai Airways	Air China	Salam Air	Others	Total
India	39.34	38.34	0.34	1.53	0.41	0.02	8.96	0.61	0.01	0.16	0.86	0.09	1.17	0.05	0.08	0.05	0.01	0.14	7.80	100.00
United Kingdom	34.96	3.59	19.36	15.81	11.08	2.07	3.07	2.51	0.09	0.68	1.52	0.52	0.30	0.57	0.81	0.21	0.08	0.19	2.59	100.00
China	16.13	0.24	0.36	0.87	0.16	0.08	0.15	0.08	35.88	1.17	0.37	17.65	0.52	3.19	3.30	1.71	10.98	0.07	7.08	100.00
Germany	23.33	1.39	24.94	15.77	11.11	8.72	3.56	4.33	0.19	0.41	3.06	0.09	0.18	0.18	0.59	0.28	0.04	0.11	1.74	100.00
France	24.47	2.33	24.03	9.38	17.01	9.33	5.85	0.72	0.17	0.40	1.19	0.28	0.13	0.20	1.18	0.20	0.04	0.52	2.56	100.00
Australia	47.78	1.45	0.75	1.02	0.63	0.27	0.47	0.26	0.29	25.72	0.22	1.69	0.08	10.26	1.42	0.48	0.01	0.02	7.18	100.00
Italy	7.66	0.86	12.00	12.64	13.71	19.33	4.32	15.14	0.11	0.25	8.74	0.15	0.38	0.14	0.38	0.15	0.14	1.17	2.75	100.00
Spain	5.77	1.52	28.38	12.21	24.65	16.75	1.32	4.19	0.09	0.16	1.66	0.13	0.62	0.09	0.87	0.11	0.03	0.11	1.33	100.00
Japan	57.86	1.41	0.10	0.27	0.08	0.08	3.44	0.05	3.69	8.18	0.14	10.08	0.14	2.56	3.19	3.98	0.10	0.07	4.57	100.00
Canada	41.34	4.08	16.87	7.76	10.54	0.93	1.46	0.63	0.90	2.85	0.70	8.27	0.32	0.81	0.19	0.53	0.02	0.07	1.71	100.00

The airline distribution by country of residence indicates that Sri Lankan Airlines remains the leading carrier for several of Sri Lanka’s important source markets, although the level of dependence varies considerably across markets. The highest share of Sri Lankan Airlines is recorded among tourists from Japan (57.86%), followed by Australia (47.78%), Canada (41.34%), India (39.34%), and the United Kingdom (34.96%). This highlights the continued importance of the national carrier in supporting connectivity from key Asian and long-haul markets.

The Indian market demonstrates particularly strong competition between SriLankan Airlines and IndiGo, which account for 39.34% and 38.34% respectively. Together, these two airlines carry approximately 77.7% of tourists from India. Air India also contributes 8.96%. This indicates that the Indian market is strongly influenced by direct air connectivity and airline capacity, making the availability and frequency of flights an important factor in sustaining arrivals from Sri Lanka’s largest source market.

In contrast, the major European markets show a much more diversified airline pattern, with significant reliance on international hub carriers. In the United Kingdom, Sri Lankan Airlines accounts for 34.96%, followed by Qatar Airways at 19.36%, Emirates at 15.81% and Etihad Airways at 11.08%. Similarly, Germany records significant shares for Qatar Airways (24.94%), SriLankan Airlines (23.33%), Emirates (15.77%) and Etihad Airways (11.11%). France shows a similar pattern, with SriLankan Airlines (24.47%), Qatar Airways (24.03%) and Etihad Airways (17.01%) being the major carriers.

The Southern European markets, particularly Spain and Italy, are even more dependent on connecting airlines. For Spain, Qatar Airways has the largest share at 28.38%, followed by Etihad Airways at 24.65%, Turkish Airlines at 16.75% and Emirates at 12.21%. In Italy, Turkish Airlines accounts for 19.33%, while Air Arabia, Etihad Airways and Emirates account for 15.14%, 13.71% and 12.64%, respectively. The relatively fragmented distribution indicates that tourists from these markets access Sri Lanka through a range of international aviation hubs rather than relying predominantly on direct services.

China presents a distinctive airline profile. SriLankan Airlines accounts for only 16.13% of Chinese tourist arrivals, while China Eastern Airlines has the largest share at 35.88%, followed by Cathay Pacific at 17.65% and Air China at 10.98%. Together, these three airlines account for approximately 64.5% of the Chinese market. This suggests that the recovery and expansion of the Chinese market could be closely linked to strengthening connectivity through Chinese and regional Asian carriers.

The Japanese market demonstrates the strongest dependence on SriLankan Airlines, with 57.86% of tourists travelling on the national carrier. Cathay Pacific (10.08%) and Singapore Airlines (8.18%) are the next significant carriers. Similarly, the Australian market records a high SriLankan Airlines share of 47.78%, while Singapore Airlines accounts for 25.72% and Malaysia Airlines 10.26%. These patterns demonstrate the importance of both direct connectivity and established Asian aviation hubs for long-haul markets.

Overall, the data demonstrates that Sri Lanka's tourism demand is closely linked to the availability, frequency and resilience of international air connectivity. While SriLankan Airlines provides a strong connectivity base for several key markets, European and other long-haul markets rely substantially on carriers operating through Doha, Dubai, Abu Dhabi, Istanbul and other regional hubs. Therefore, disruptions affecting major transit hubs can potentially have a significant impact on tourist arrivals. From a tourism planning perspective, maintaining diversified airline connectivity, strengthening direct routes where commercially viable, and monitoring changes in airline market shares and capacity would be important for safeguarding and expanding Sri Lanka's international tourist arrivals.

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