



2026



MONTHLY TOURIST ARRIVALS REPORT:

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

APRIL



Introduction

The following document provides a synthesis of the most recent April 2026 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 30th April 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.





Table of Contents

Summary-----	1
Tourist arrivals by region and percentage share, April 2026-----	2
Top primary markets and top potential markets, April 2026-----	3
Top ten source markets, April 2026-----	5
Top ten Source markets, January to April 2026-----	8
Tourist arrivals by purpose of visit, April 2026-----	10
Year-on-Year Market Comparison (March–April 2025–2026) Amid Middle East Geopolitical Disruptions-----	12
International tourist arrivals by country of residence 2026-----	13
Main last departure airports and airlines to Sri Lanka, April 2026-----	16
Top ten markets versus main last departure airports and Main airlines to Sri Lanka April 2026-----	18



Summary

Tourist arrivals to Sri Lanka in 2026 began on a remarkably positive note, with January setting an all-time monthly record of 277,327 visitors a 9.72% year-on-year increase and 16.0% above 2018 levels, signaling strong recovery momentum and renewed global interest in Sri Lanka as a destination. February sustained this momentum with 279,328 arrivals, the highest monthly figure recorded so far, reflecting a robust 16.2% year-on-year growth and an 18.5% increase compared to 2018. These two months indicate strong demand and growing confidence in Sri Lanka as a preferred destination during the peak winter travel season.

However, the positive trajectory was disrupted in March 2026, where arrivals dropped sharply to 183,979 a decline of 19.8% compared to March 2025 and 21.2% against March 2018. This downturn is largely attributed to the ongoing geopolitical tensions in the Gulf and Middle East region, which have disrupted key transit routes and dampened travel sentiment.

Table 1. Monthly tourist arrivals, April 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		
June	138,241		
July	200,244		
August	198,235		
September	158,971		
October	165,193		
November	212,906		
December	258,928		
TOTAL	2,362,521	876,277	

April 2026 continued to reflect this pressure, recording only 135,643 arrivals a 22.3% drop from April 2025 and 24.8% below 2018 figures.

Cumulatively, total arrivals for the first four months stand at 876,277. While early-year performance was exceptional, sustaining growth will require mitigating the impact of external shocks and geopolitical instability on key source markets

The major source markets for the month of April included India, China, United Kingdom, Australia and Russian Federation.

While Sri Lanka's tourism sector demonstrated strong recovery potential in early 2026, sustaining growth will require greater resilience against external shocks. Strengthening route diversification, improving direct connectivity, and reducing dependence on disrupted transit hubs will be essential to stabilizing arrivals and ensuring long-term tourism growth momentum.



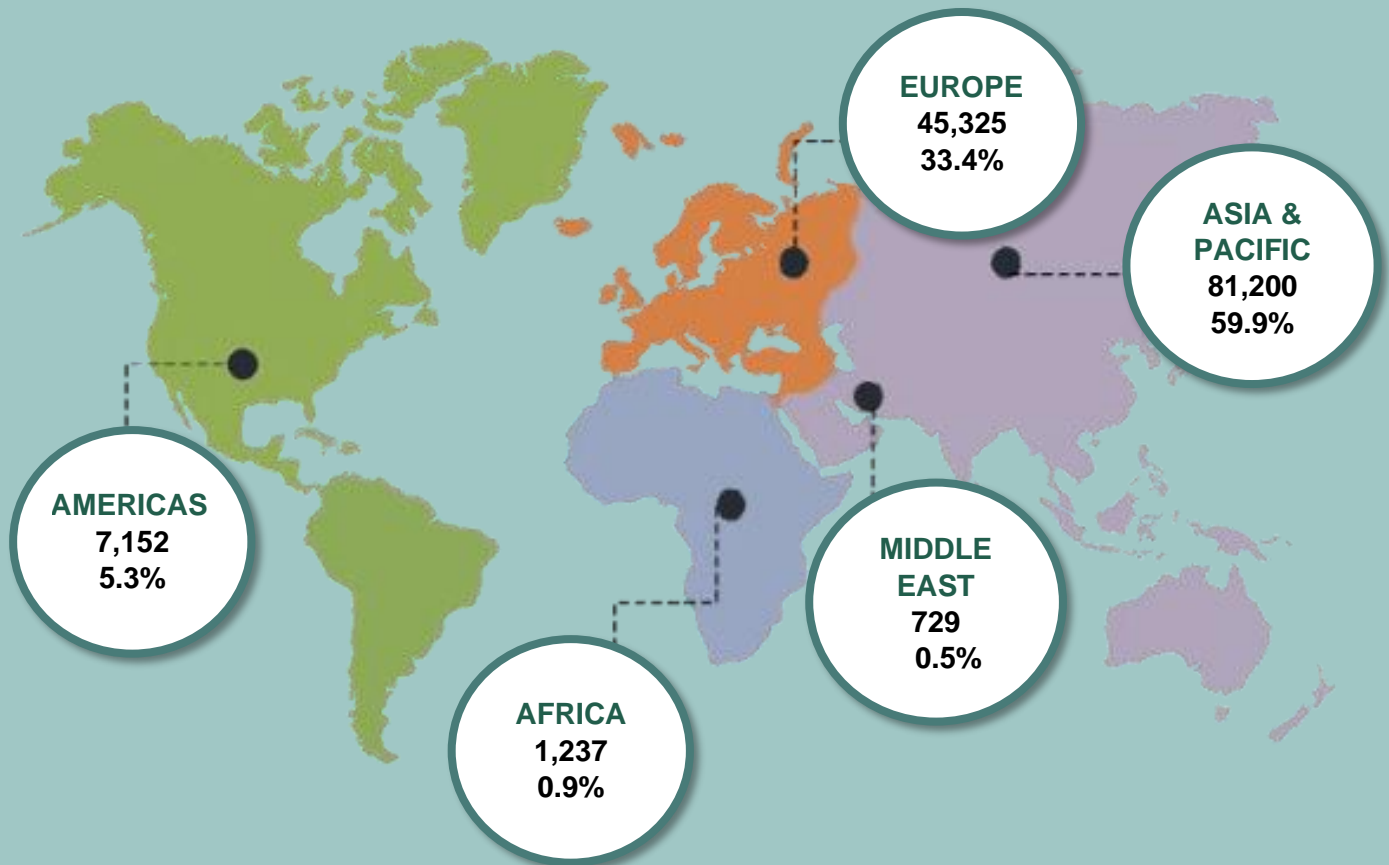
Tourist Arrivals | April 2026

135,643



Tourist arrivals by region and percentage share April 2026

Map 1. Tourist arrivals by region and percentage share



Sri Lanka's tourism market structure reflects a significant geographic concentration, with the Asia and Pacific region accounting for nearly 59.9% of total tourist arrivals. This dominance is largely driven by India's expanding outbound travel market, close regional proximity, improved air connectivity, and strong cultural and religious linkages with Sri Lanka. While this regional dependence supports steady visitor volumes and short-haul travel growth, it also increases vulnerability to regional political instability, economic slowdowns, and disruptions in aviation connectivity.

Europe, contributing approximately 33.4% of total arrivals, remains a critical long-haul market segment led by countries such as the UK, Germany, and France. However, European travel demand has become increasingly sensitive to global economic uncertainty, rising travel costs, and geopolitical tensions. Compared to April 2025, tourist arrivals from Europe recorded a notable decline of nearly 45%, likely influenced by the Gulf conflict, rising fuel prices, airline disruptions, and weakened consumer confidence. Sri Lanka's overall tourist arrivals also experienced a substantial downturn during this period.

In contrast, the Middle East and Africa contributed only around 0.5% and 0.9% respectively, highlighting Sri Lanka's limited market penetration in these regions and the need for greater source market diversification to improve resilience against external shocks.

Top primary markets and top potential markets

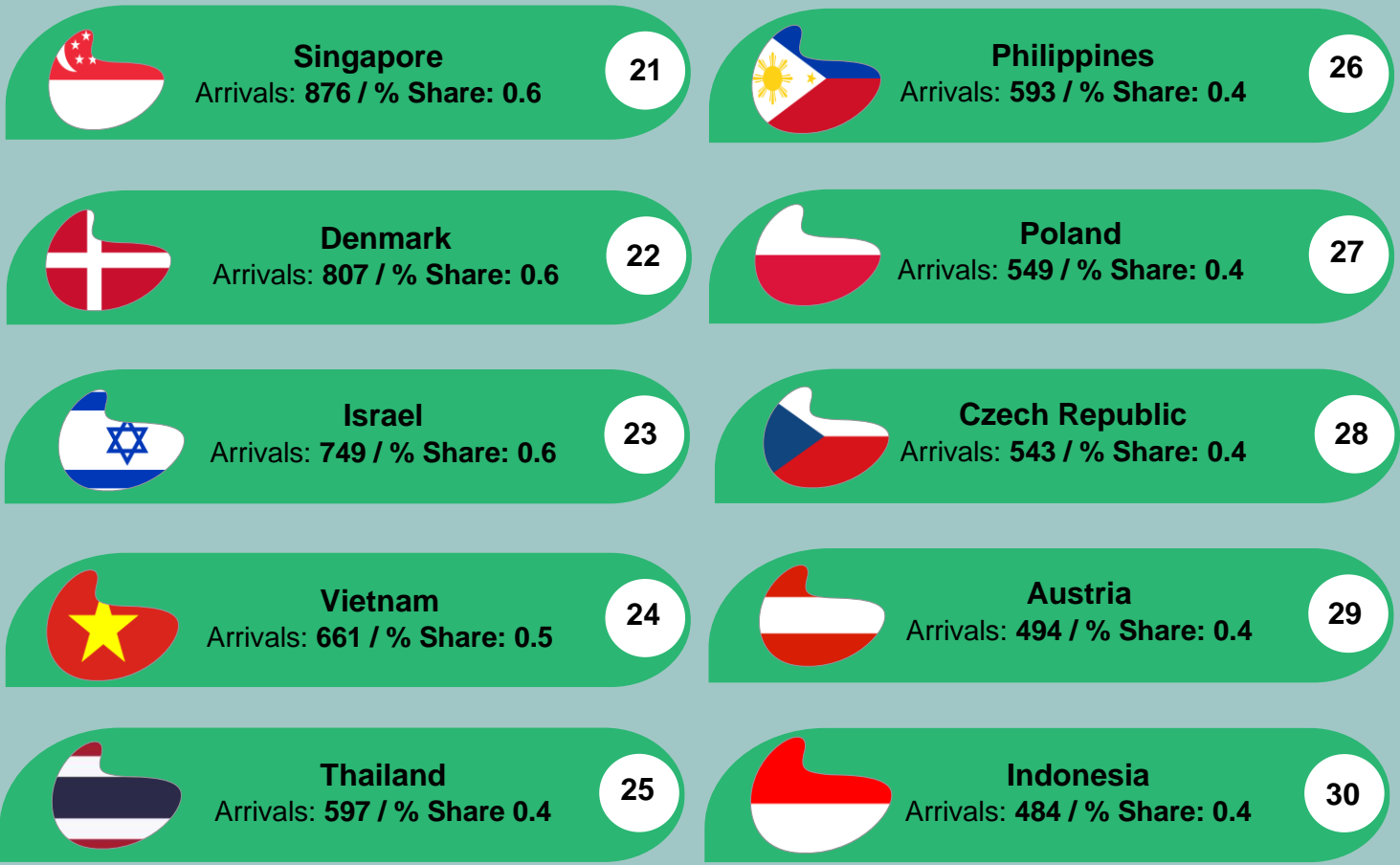
Top primary markets, April 2026



Note: The top primary markets for Sri Lanka have been identified using visitor arrivals. The previous methodology used to identify the markets was altered due to the current arrival trends in the source markets and the socio-economic factors in Sri Lanka. The intention is to track these source markets on a go-forward basis to understand future performance of Sri Lanka's tourism economy, including during the projected international tourism recovery period, 2022-2025.



Top potential markets, April 2026



Note: The top potential markets for Sri Lanka have been identified using visitor arrivals data. The previous methodology used to identify the markets was altered due to the current arrival trends in the source markets and the socio-economic factors in Sri Lanka. The intention is to track these source markets on a go-forward basis to understand future performance of Sri Lanka’s tourism economy, including during the projected international tourism recovery period, 2022-2025.





Top ten source markets

April 2026

A year-on-year comparison of tourist arrivals to Sri Lanka for the month of April reveals notable shifts in source market performance and an increasing concentration of risk. The data indicate that growth is becoming heavily dependent on a handful of nearby Asian markets, while long-haul Western markets traditionally important sources of resilient, high-spending travelers are contracting.

India continues to serve as Sri Lanka's most dominant and stable source market, with arrivals rising from 38,744 in April 2025 to 42,645 in April 2026. This growth underscores India's enduring advantages: geographic proximity, strong and affordable air connectivity, and robust regional demand driven by a growing middle class. India's consistent performance makes it the cornerstone of Sri Lanka's tourism recovery.

China also demonstrates strong growth momentum, increasing from 8,667 to 10,544 arrivals over the same period. This rebound signals that Chinese outbound travel to Sri Lanka is recovering, likely supported by the restoration of travel confidence, eased visa policies, and improved flight links. If sustained, China could emerge as a second major anchor market in Asia.

In sharp contrast, several key European markets recorded significant declines. The United Kingdom fell from 17,348 to 10,425 arrivals; Germany dropped even more steeply from 11,654 to just 5,518; and France also saw substantial reductions. These contractions point to weakened long-haul demand, possibly driven by persistent inflation, rising travel costs, geopolitical tensions in the Gulf region affecting air routes, and shifts in European consumer spending priorities. The declines are particularly concerning for Sri Lanka's tourism sector because European travelers typically have longer stays and higher daily expenditures than many regional visitors.

Other markets show mixed or declining performance. Australia, Russia, the United States, and Bangladesh all recorded fewer arrivals in April 2026 compared to the previous year. Russia and Germany experienced especially steep contractions, which may reflect the combined impact of the ongoing conflict, airspace closures, and currency volatility. Japan, by contrast, posted slight growth, indicating a selective recovery within East Asia, though from a relatively modest base.

Taken together, the overall pattern points to a growing regional concentration risk. Sri Lanka's tourism is becoming increasingly reliant on Asian markets particularly India and, to a lesser extent, China while long-haul Western source markets are losing ground. This narrowing of the source market base creates vulnerability: any economic downturn, travel disruption, or policy shift in India or China could have an outsized impact on Sri Lanka's total arrivals. To build a more resilient tourism portfolio, it is required to arrest the decline in European markets, diversify into other high-potential regions such as the Middle East and the Americas, and avoid over-dependence on a single geographic cluster.



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

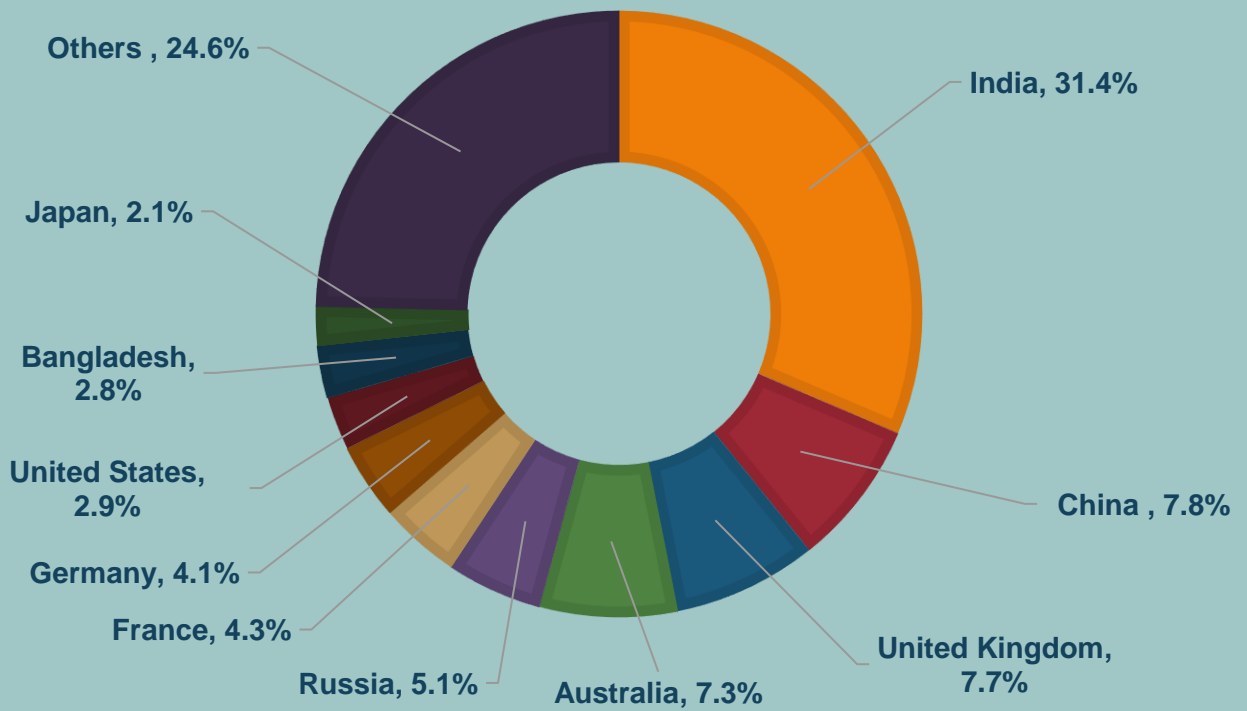


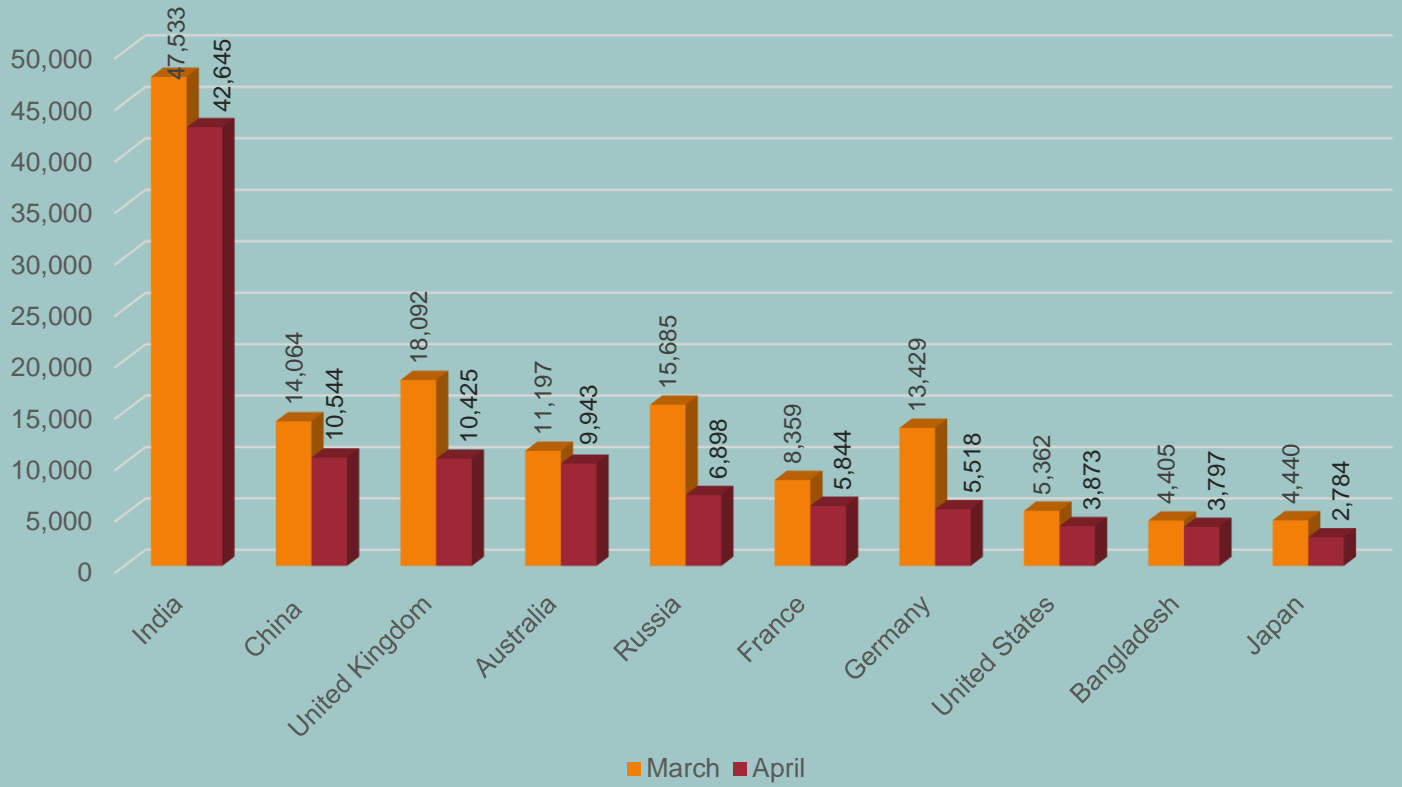
Table 2. Top ten source markets to Sri Lanka, April 2026

Rank	Country of Residence	Tourist arrivals (April 2026)			Tourist arrivals (April 2025)
		By Air	By Sea	Total	
1	India	41,960	685	42,645	38,744
2	China	10,538	6	10,544	8,667
3	United Kingdom	10,118	307	10,425	17,348
4	Australia	9,616	327	9,943	10,744
5	Russian Federation	6,890	8	6,898	13,525
6	France	5,827	17	5,844	8,276
7	Germany	5,052	466	5,518	11,654
8	United States	2,847	1,026	3,873	4,202
9	Bangladesh	3,796	1	3,797	5,428
10	Japan	2,777	7	2,784	2,374





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





Top ten source markets

January to April 2026

Total arrivals for the first four months from the top source markets of 2026 stood at 876,277, a decline of 20,607 (-2.3%) compared to 896,884 in the same period of 2025. This marginal overall drop masks significant variation among individual source markets, with some countries showing strong growth while others experienced sharp contractions.

India retains its top rank, with arrivals increasing from 157,059 to 189,918, a gain of 32,859 (+20.9%). India now accounts for 21.7% of all arrivals. This growth reinforces India's role as Sri Lanka's most stable and rapidly expanding source market, driven by proximity, affordable air connectivity, and rising outbound travel from Indian middle-class segments.

The UK remains the second-largest market, with a modest increase from 87,053 to 88,845 (+2.1%). While still a key long-haul source, the near-flat growth suggests market saturation, cost-of-living pressures, or intensified competition from other sun-and-beach destinations. Its share of total arrivals has remained relatively stable at around 10%.

Russia experienced a dramatic drop from 107,093 to 72,816, a loss of 34,277 arrivals (-32.0%). This is the largest absolute decline among all listed markets. The contraction likely reflects the compounding effects of the ongoing Ukraine conflict, airspace closures, currency depreciation, reduced flight availability, and sanctions limiting travel financing.

Germany saw a slight decline from 61,855 to 59,289 (-4.1%), while France dropped more noticeably from 51,642 to 44,946 (-13.0%). Both are traditional European long-haul markets, and their contraction echoes the broader weakening of Western European demand observed in the April-only data. Germany's decline is relatively contained, but France's double-digit drop is concerning.

China rose from 48,180 to 58,791, an increase of 10,611 (+22.0%), the second-highest growth rate after India. This confirms that Chinese outbound tourism to Sri Lanka is rebounding, likely supported by restored flight capacity, relaxed visa policies, and pent-up demand. China now ranks fifth, and its share has increased from 5.4% to 6.7%. Australia increased from 38,097 to 42,312 (+11.1%), placing it seventh. This steady growth reflects strong niche appeal for Australian travelers seeking nature, wildlife, and beach holidays, supported by reasonable flight connections.

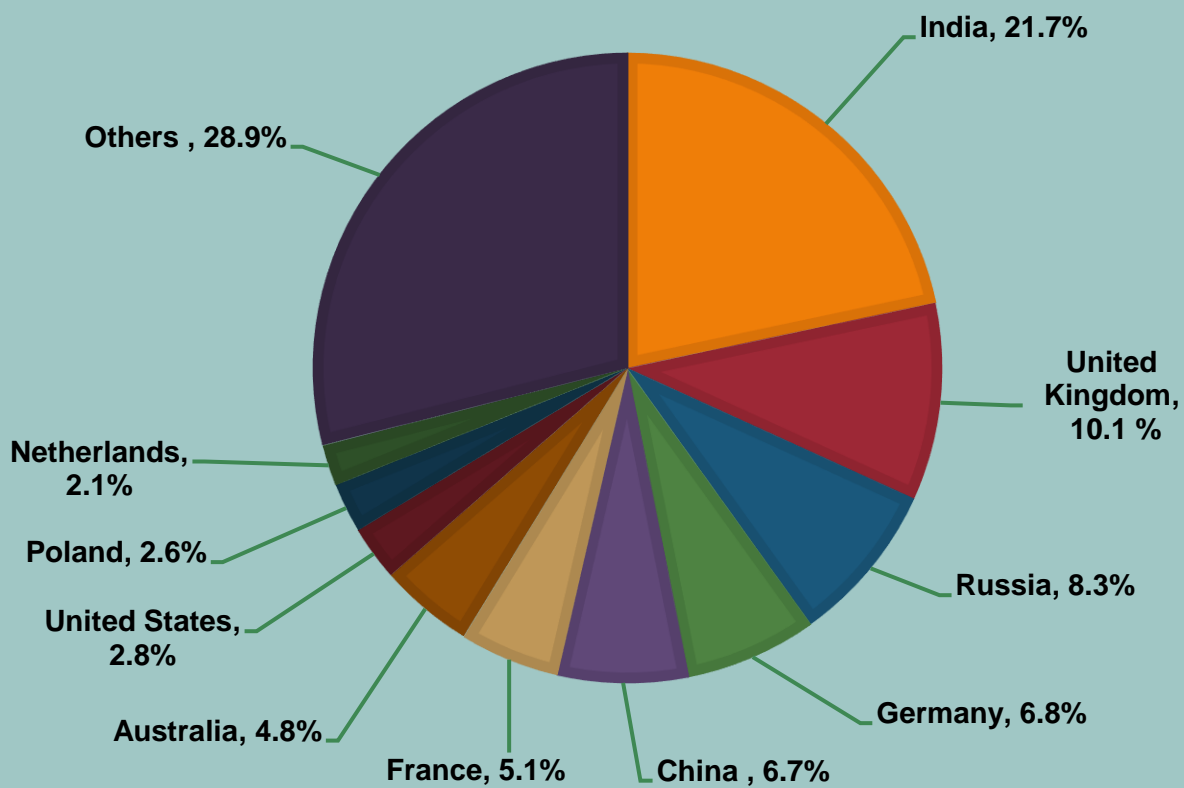
Poland saw a small drop from 25,384 to 24,836 (-2.2%). Despite the decline, Poland remains a notable emerging European source, benefiting from charter flights and price-sensitive package tours. The US fell from 23,863 to 22,489 (-5.8%). While a small dip, the US market's high-value profile (long stays, premium spending) means even modest volume losses have revenue implications. The Netherlands dropped from 21,387 to 18,440 (-13.8%), consistent with the broader European downturn. Dutch travelers, historically attracted to Sri Lanka's cultural and eco-tourism offerings, appear to be reducing demand likely due to the current geopolitical issues in the Gulf region.



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

Rank	Country of Residence	Tourist Arrivals (Jan ~April 2026)	Tourist Arrivals (Jan ~April 2025)
1	India	189,918	157,059
2	United Kingdom	88,845	87,053
3	Russian Federation	72,816	107,093
4	Germany	59,289	61,855
5	China	58,791	48,180
6	France	44,946	51,642
7	Australia	42,312	38,097
8	United States	24,836	25,384
9	Poland	22,489	23,863
10	Netherlands	18,440	21,387
11	Others	253,595	275,271
Total		876,277	896,884

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



Tourist arrivals by purpose of visit

April 2026

The purpose-of-visit of tourists for April reveals a heavily leisure-driven tourism market, with Pleasure/Vacation accounting for the overwhelming majority of arrivals at 61%. This dominant share confirms Sri Lanka's positioning as a sun-and-beach, nature, and cultural holiday destination, appealing to travelers seeking relaxation and sightseeing rather than business or specialized travel.

MICE (Meetings, Incentives, Conferences, Exhibitions) contributes 7%, indicating a modest but meaningful segment of group business travel. This is followed by Business at 3%, which, when combined with MICE, gives a total of 10% for work-related travel, a respectable share for a long-haul destination not traditionally known as a corporate hub.

Education accounts for only 1%, reflecting Sri Lanka's limited role as a study destination for international students. Ayurvedic and Health/Ayurvedic each stand at 0.4% together 0.8% – suggesting that while wellness tourism is a niche product, it remains underdeveloped relative to regional competitors like India or Thailand. Similarly, Religious (0.4%) and Sports (0.4%) are negligible, though the latter may spike during specific events or surf seasons not captured in a single month. Official travel is practically non-existent at 0.001%.

The heavy reliance on Pleasure/Vacation (61%) makes Sri Lanka's tourism revenue vulnerable to seasonal fluctuations, price sensitivity, and external shocks affecting discretionary leisure travel. Overall, the April data underscores a leisure-centric market that would benefit from deliberate diversification into higher-yield segments such as MICE, wellness, and specialized interest tourism.

Chart 4: Purpose of visit, April 2026

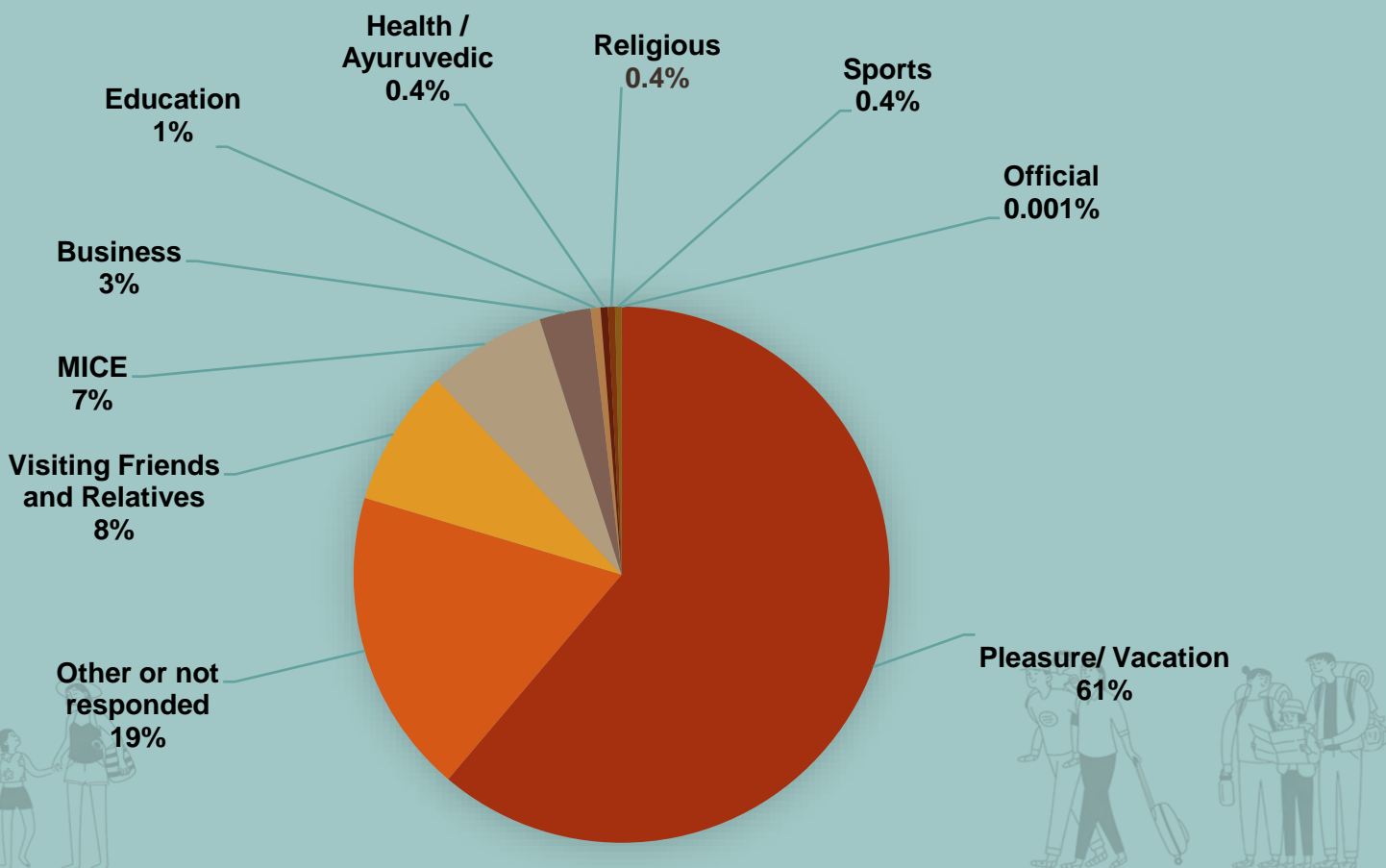
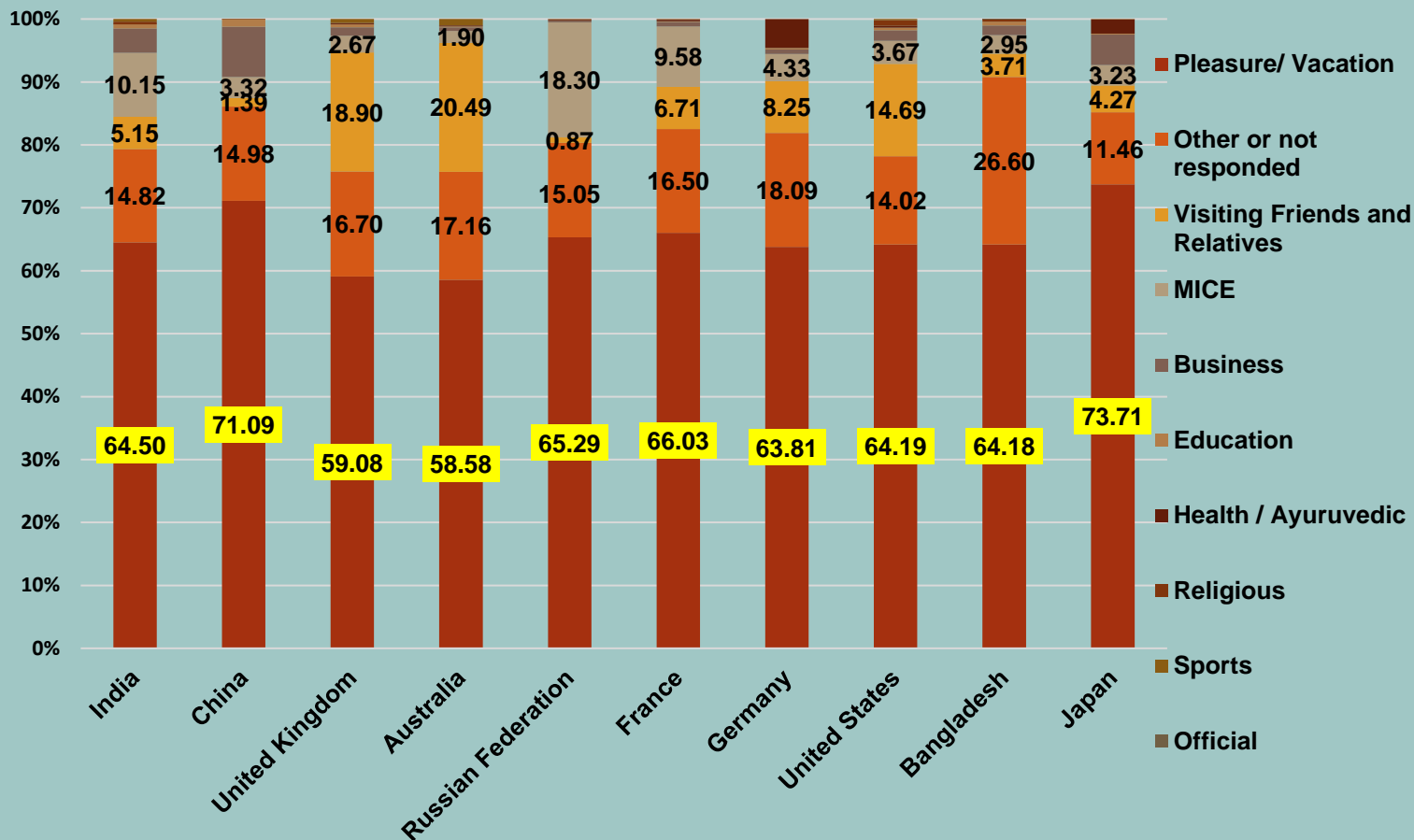




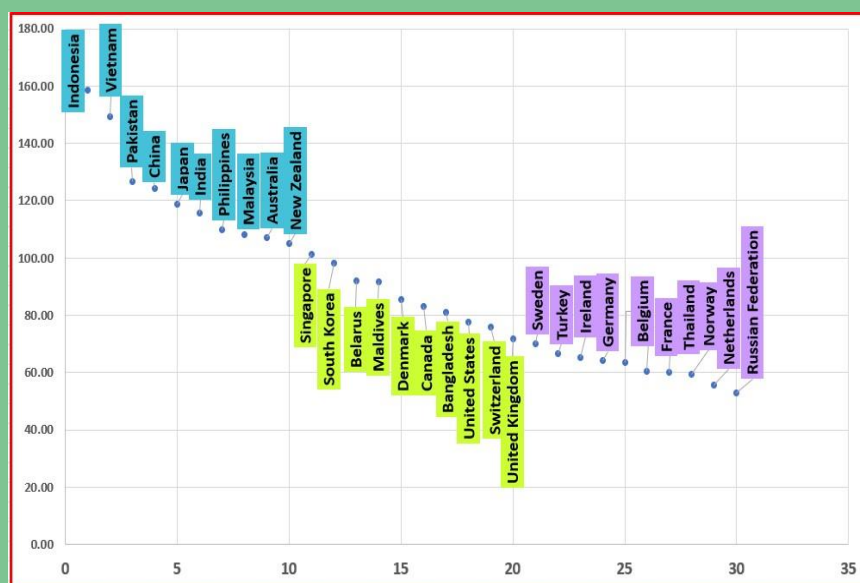
Chart 5: Purpose of visit vs main source markets



Analysis of Purpose of visits of tourist by key source markets reveals that “Pleasure/Vacation” remains the dominant purpose for visiting Sri Lanka in every country, ranging from 58.6% (Australia) to 73.7% (Japan). However, significant variations emerge beneath this. China and Japan show the highest vacation shares (71% and 74%), while the UK and Australia have recorded higher proportions of tourist for “Visiting Friends and Relatives” (18.9% and 20.5% respectively), reflecting strong diaspora or family links. Russia stands out with the largest MICE share (18.3%), far exceeding others, suggesting a concentrated business events flow from that market. India also has a notable MICE presence (10.2%) and the highest Business share among South Asian neighbors. Germany is unique for “Health / Ayurvedic” (4.6%), indicating targeted wellness potential. China leads in pure “Business” travel (8.0%), while Western markets show negligible business interest. Religious and Sports purposes remain marginal across all source markets. Sri Lanka’s tourism is heavily leisure-driven, but differentiated strategies could tap into VFR for the UK/Australia, MICE for Russia and India, health for Germany, and business for China.



Year-on-Year Market Comparison (March–April 2025–2026) Amid Middle East Geopolitical Disruptions



Country	Number of Arrival (March–April-2026)	Arrival increase comparison ratio (2026 vs 2025)
Indonesia	1,203	158.5
Vietnam	1,631	149.4
Pakistan	2,398	126.7
China	24,608	124.4
Japan	7,224	118.8
India	90,178	115.7
Philippines	1,265	110.0
Malaysia	4,052	108.3
Australia	21,140	107.0
New Zealand	2,520	105.0
Singapore	2,275	101.2
South Korea	1,518	98.1
Belarus	1,560	92.1
Maldives	4,073	91.6
Denmark	2,235	85.5
Canada	6,199	83.1
Bangladesh	8,202	80.9
United States	9,235	77.7
Switzerland	4,539	75.9
United Kingdom	28,517	71.7
Sweden	1,361	70.2
Turkey	1,014	66.5
Ireland	1,430	65.2
Germany	18,947	64.1
Belgium	2,054	63.6
France	14,203	60.3
Thailand	1,276	60.1
Norway	1,095	59.6
Netherlands	5,187	55.7
Russian Federation	22,583	52.9
Total	293,722	

Tourist Arrivals from source markets for March–April 2026 shows a total of 293,722 arrivals, but with a highly uneven performance across regions, indicating a clear post–Middle East crisis restructuring of travel flows. An analysis of arrival growth comparison ratios from March to April 2025 and 2026, reveals a strong growth cluster in South and Southeast Asia, with Indonesia (158.5%), Vietnam (149.4%), Pakistan (126.7%), China (124.4%), Japan (118.8%), India (115.7%), and the Philippines (110.0%) all showing significant year-on-year increases. This suggests a regional substitution effect, where shorter-haul and relatively less disrupted air corridors gained preference during the crisis period.

In contrast, long-haul and traditionally high-value European and North American markets show broad contraction. Key markets such as the United Kingdom (71.7%), Germany (64.1%), France (60.3%), Netherlands (55.7%), and Russia (52.9%) demonstrate sharp declines, alongside the United States (77.7%) and Canada (83.1%). This pattern indicates that geopolitical instability and aviation route disruptions in the broader Middle East region likely increased travel costs, reduced connectivity, and weakened traveler confidence in long-haul tourism to Sri Lanka during this period.

The data reflects a clear geographic rebalancing of Sri Lanka's tourism demand structure. Asia-Pacific markets acted as the stabilizing force, while Western markets contracted significantly, reshaping the overall growth profile despite resilient total arrivals. Building on these insights several key recommendations can be highlighted.

- 1. Diversify source markets toward resilient Asian segments**
Strengthen marketing in high-growth markets such as India, China, Southeast Asia, and the Middle East-adjacent Asian corridors, as they show stronger recovery and less sensitivity to geopolitical disruptions.
- 2. Reduce dependence on long-haul Western markets**
Europe and North America show declining trends; thus, Sri Lanka should reposition these as premium-yield markets rather than volume drivers, focusing on niche tourism (wellness, heritage, luxury).
- 3. Improve air connectivity resilience**
Strengthen airline partnerships and transit diversification beyond Middle Eastern hubs to reduce vulnerability to regional geopolitical disruptions.
- 4. Regional tourism integration within South Asia**
Promote multi-destination circuits (Sri Lanka–India–Maldives–Nepal) to capture intra-regional travel growth trends.

International tourist arrivals by country of residence

	April 2026			Tourist arrivals April 2025	% change April (26/25)	Total tourist arrivals up to April 2026	Total tourist arrivals up to April 2025	% change up to April (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
AMERICAS	5,959	1,193	7,152	8,079	(11.5)	44,032	44,683	(1.5)
North America	5,528	1,185	6,713	7,547	(11.1)	41,562	42,291	(1.7)
Canada	2,585	139	2,724	3,238	(15.9)	16,241	16,465	(1.4)
Mexico	96	20	116	107	8.4	485	442	9.7
United States	2,847	1,026	3,873	4,202	(7.8)	24,836	25,384	(2.2)
Caribbean & Central America	71	2	73	64	14.1	395	321	23.1
Costa Rica	08	0	08	09	(11.1)	38	46	(17.4)
Jamaica	06	0	06	02	200.0	19	12	58.3
Others	57	02	59	53	11.3	338	263	28.5
South America	360	6	366	468	(21.8)	2,075	2,071	0.2
Argentina	75	0	75	62	21.0	487	406	20.0
Brazil	113	02	115	178	(35.4)	715	802	(10.8)
Chile	35	0	35	61	(42.6)	271	269	0.7
Colombia	70	03	73	62	17.7	292	235	24.3
Others	67	01	68	105	(35.2)	310	359	(13.6)
AFRICA	1,222	15	1,237	1,302	(5.0)	5,032	5,140	(2.1)
North Africa	237	0	237	277	(14.4)	794	999	(20.5)
Morocco	71	0	71	95	(25.3)	267	344	(22.4)
Sudan	66	0	66	102	(35.3)	241	250	(3.6)
Others	100	0	100	80	25.0	286	405	(29.4)
Sub-Saharan Africa	985	15	1000	1,025	(2.4)	4,238	4,141	2.3
Kenya	58	01	59	79	(25.3)	269	279	(3.6)
Mauritius	73	0	73	82	(11.0)	401	298	34.6
Nigeria	07	0	07	04	75.0	40	28	42.9
South Africa	326	12	338	370	(8.6)	1,613	1,797	(10.2)
Others	521	02	523	490	6.7	1,915	1,739	10.1



Monthly Tourist Arrivals Report April 2026

	April 2026			Tourist arrivals April 2025	% change April (26/25)	Total tourist arrivals up to April 2026	Total tourist arrivals up to April 2025	% change up to April (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	79,863	1,337	81,200	78,878	2.9	377,011	329,087	14.6
North East Asia	13,804	14	13,818	11,641	18.7	77,826	65,647	18.6
China	10,538	06	10,544	8,667	21.7	58,791	48,180	22.0
Japan	2,777	07	2,784	2,374	17.3	14,359	12,240	17.3
South Korea	470	01	471	584	(19.3)	4,596	5,167	(11.1)
Others	19	0	19	16	18.8	80	60	33.3
South East Asia	5,270	32	5,302	6,292	(15.7)	26,916	21,585	24.7
Cambodia	217	03	220	551	(60.1)	701	834	(15.9)
Indonesia	481	03	484	446	8.5	2,470	1,554	58.9
Malaysia	1,541	09	1,550	1,486	4.3	7,940	7,282	9.0
Myanmar	266	0	266	166	60.2	1,791	439	308.0
Philippines	588	05	593	565	5.0	2,197	1,955	12.4
Singapore	873	03	876	1,060	(17.4)	4,783	4,321	10.7
Thailand	594	03	597	1,220	(51.1)	3,227	3,467	(6.9)
Vietnam	659	02	661	778	(15.0)	3,612	1,602	125.5
Others	51	04	55	20	175.0	195	131	48.9
Oceania	10,886	363	11,249	12,249	(8.2)	47,106	42,409	11.1
Australia	9,616	327	9,943	10,744	(7.5)	42,312	38,097	11.1
New Zealand	1,242	36	1,278	1,434	(10.9)	4,598	4,137	11.1
Others	28	0	28	71	(60.6)	196	175	12.0
South Asia	49,903	928	50,831	48,696	4.4	225,163	199,446	12.9
Afghanistan	08	0	08	21	(61.9)	13	44	(70.5)
Bangladesh	3,796	01	3,797	5,428	(30.0)	14,876	20,029	(25.7)
Bhutan	42	01	43	72	(40.3)	267	225	18.7
India	41,960	685	42,645	38,744	10.1	189,918	157,059	20.9
Iran	47	239	286	232	23.3	1,022	5,428	(81.2)
Maldives	2,455	0	2,455	2,516	(2.4)	10,775	10,290	4.7
Nepal	355	02	357	527	(32.3)	2,278	1,897	20.1
Pakistan	1,240	0	1,240	1,156	7.3	6,014	4,474	34.4
EUROPE	44,308	1,017	45,325	83,730	(45.9)	445,110	509,136	(12.6)
Northern Europe	12,359	352	12,711	21,455	(40.8)	115,772	112,960	2.5
Denmark	806	01	807	1,316	(38.7)	8,734	8,150	7.2
Finland	131	0	131	236	(44.5)	2,547	2,286	11.4
Norway	329	20	349	878	(60.3)	4,520	4,903	(7.8)
Sweden	458	07	465	696	(33.2)	6,421	6,181	3.9
United Kingdom	10,118	307	10,425	17,348	(39.9)	88,845	87,053	2.1
Others	517	17	534	981	(45.6)	4,705	4,387	7.2



Monthly Tourist Arrivals Report April 2026

	April 2025			Tourist arrivals April 2025	% change April (26/25)	Total tourist arrivals up to April 2026	Total tourist arrivals up to April 2025	% change up to April (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
Western Europe	17,602	601	18,203	30,496	(40.3)	149,404	162,804	(8.2)
Austria	468	26	494	1,087	(54.6)	7,283	7,975	(8.7)
Belgium	1,189	05	1,194	1,623	(26.4)	6,204	6,965	(10.9)
France	5,827	17	5,844	8,276	(29.4)	44,946	51,642	(13.0)
Germany	5,052	466	5,518	11,654	(52.7)	59,289	61,855	(4.1)
Netherlands	2,736	24	2,760	4,476	(38.3)	18,440	21,387	(13.8)
Switzerland	2,298	55	2,353	3,241	(27.4)	12,853	12,569	2.3
Others	32	08	40	139	(71.2)	389	411	(5.4)
Central/Eastern Europe	10,093	25	10,118	20,358	(50.3)	137,601	183,399	(25.0)
Belarus	357	0	357	436	(18.1)	5,789	5,198	11.4
Czech Republic	543	0	543	1,227	(55.7)	8,555	9,617	(11.0)
Estonia	118	0	118	108	9.3	2,173	2,714	(19.9)
Hungary	232	02	234	421	(44.4)	3,093	3,593	(13.9)
Kazakhstan	73	0	73	121	(39.7)	3,652	7,407	(50.7)
Lithuania	147	0	147	178	(17.4)	2,504	4,434	(43.5)
Poland	541	08	549	2,098	(73.8)	22,489	23,863	(5.8)
Romania	356	01	357	456	(21.7)	2,569	2,998	(14.3)
Russia	6,890	08	6,898	13,525	(49.0)	72,816	107,093	(32.0)
Slovakia	252	02	254	627	(59.5)	3,167	3,785	(16.3)
Ukraine	210	02	212	411	(48.4)	4,308	4,789	(10.0)
Others	374	02	376	750	(49.9)	6,486	7,908	(18.0)
Southern/Mediterranean Europe	4,254	39	4,293	11,421	(62.4)	42,333	49,973	(15.3)
Greece	166	0	166	423	(60.8)	1,732	1,563	10.8
Italy	1,269	11	1,280	3,633	(64.8)	14,076	16,050	(12.3)
Portugal	339	02	341	763	(55.3)	2,429	3,127	(22.3)
Spain	958	19	977	3,144	(68.9)	8,588	10,916	(21.3)
Turkey	433	0	433	533	(18.8)	3,174	3,405	(6.8)
Israel	746	03	749	1,821	(58.9)	8,247	9,579	(13.9)
Others	343	04	347	1,104	(68.6)	4,087	5,333	(23.4)
MIDDLE EAST	727	2	729	2,619	(72.2)	5,092	8,838	(42.4)
Bahrain	09	0	09	77	(88.3)	177	337	(47.5)
Egypt	126	0	126	434	(71.0)	729	1,536	(52.5)
Iraq	30	0	30	89	(66.3)	232	392	(40.8)
Jordan	55	0	55	210	(73.8)	523	1,014	(48.4)
Kuwait	14	0	14	132	(89.4)	419	640	(34.5)
Lebanon	109	0	109	353	(69.1)	668	1,329	(49.7)
Oman	67	0	67	183	(63.4)	483	576	(16.1)
Qatar	13	0	13	107	(87.9)	110	225	(51.1)
Saudi Arabia	97	0	97	416	(76.7)	927	1,462	(36.6)
United Arab Emirates	168	02	170	502	(66.1)	600	1,029	(41.7)
Others	39	0	39	116	(66.4)	224	298	(24.8)
TOTAL	132,079	3,564	135,643	174,608	(22.3)	876,277	896,884	(2.3)



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

Analysis of last departure ports for tourists arriving in Sri Lanka in April, confirms a heavy reliance on regional and transit hubs. Indian airports dominate: Chennai (12,416 arrivals), Mumbai (10,772), Delhi (10,588), and Bengaluru (9,451) together account for nearly 32% of all arrivals. This reinforces the centrality of India as a short-haul, high-frequency source market, likely driven by cultural ties, affordability, and convenience.

Beyond India, Kuala Lumpur (7,145) and Singapore (6,601) act as major Southeast Asian connection points, funneling tourists from East Asia, Australia, and beyond. The presence of Istanbul (6,744) and Dubai (6,154) highlights the role of Middle Eastern hubs in connecting European and long-haul travelers. Notably, Moscow (5,787) appears as a significant single port, reflecting the Russian market's prominence.

Velana (Malé, 4,640) and London (4,429) show steady flows, while Chinese ports are smaller (Shanghai 3,682, Hong Kong 3,617). Australian ports (Melbourne 2,721, Sydney 1,603) and Zurich (2,386) add long-haul diversity.

Sri Lanka's tourist traffic in April 2026 depicts significant headwinds from the ongoing Middle East conflict, given its heavy reliance on connectivity via Middle Eastern hubs like Dubai. Tourist numbers would likely decline compared to a no-conflict baseline, with the sharpest drop from European and other long-haul source markets. Indian arrivals might hold up relatively well, but not enough to offset losses. Sri Lanka would need to aggressively promote alternative routing via Southeast Asia, while working with Indian carriers to add capacity.

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

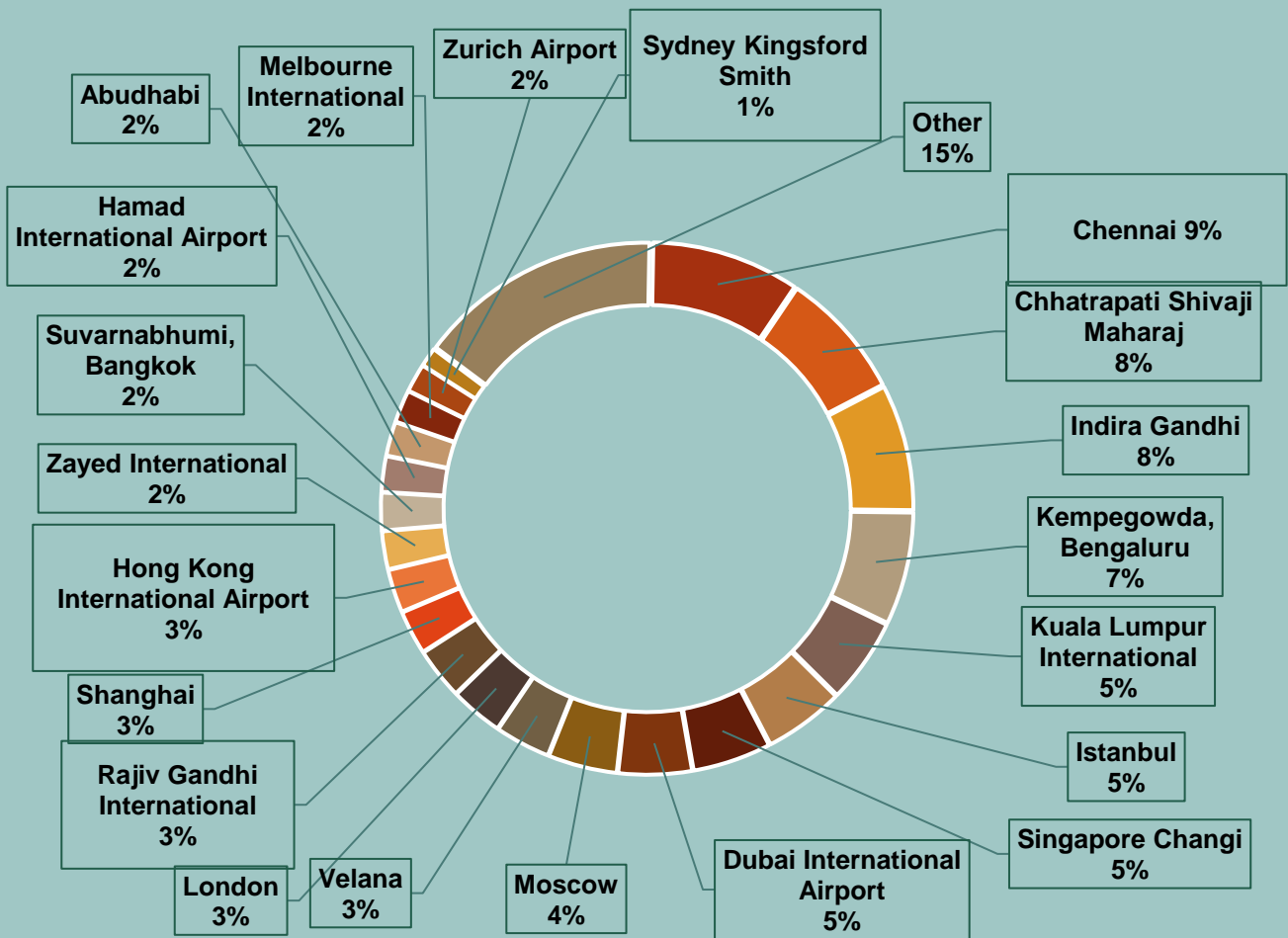
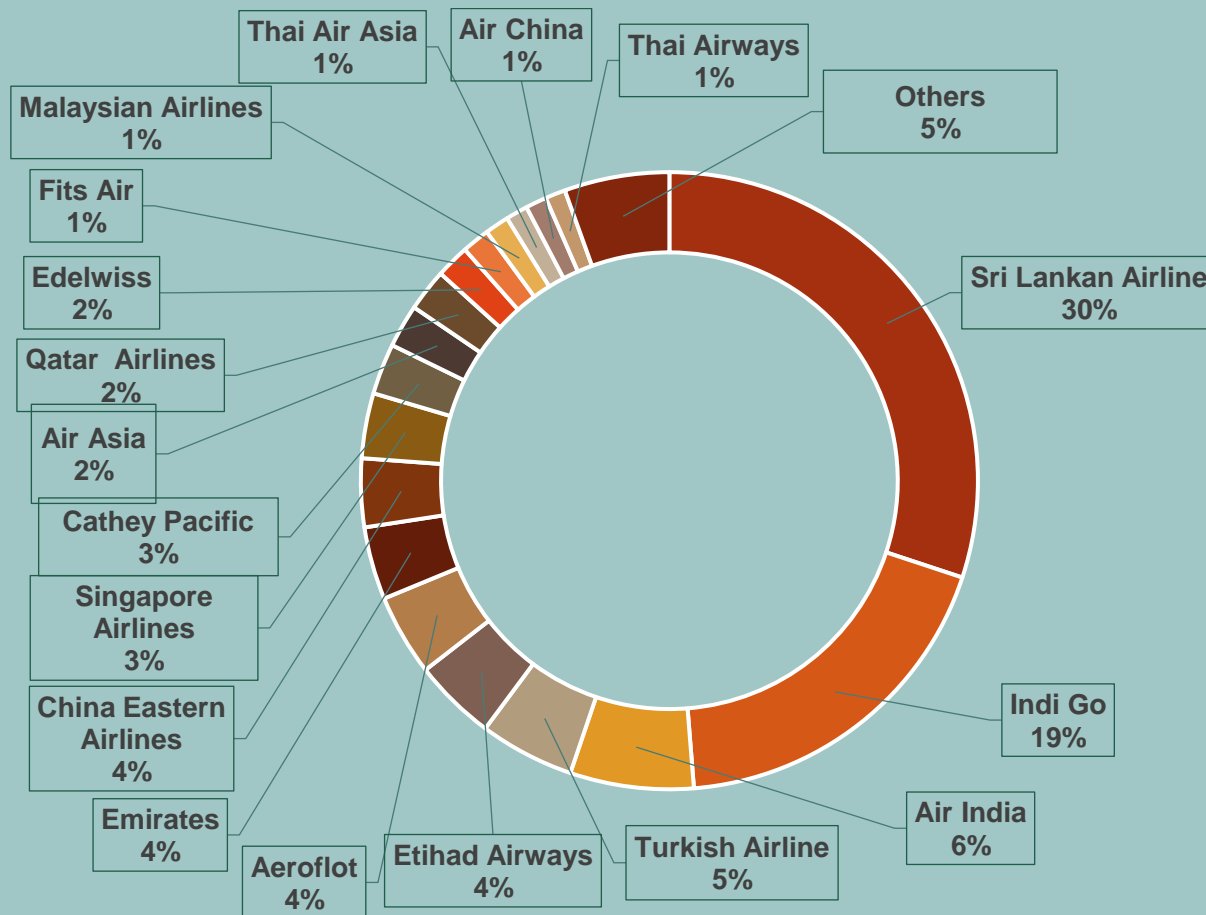


Chart 7. Main airlines to Sri Lanka, April 2026



The data shows a high concentration of tourist arrivals through a few key airlines, with the top three Sri Lankan Airlines (30.08%), IndiGo (18.65%), and Air India (6.47%) collectively accounting for over 55% of total arrivals. This reinforces the importance of the Indian market and short-haul regional connectivity. IndiGo's significant share further suggests the growing role of low-cost carriers in driving volume tourism.

The presence of Middle Eastern hub carriers such as Etihad, Emirates, and Qatar Airways (combined ~10%). Is notable after the resumption of operations disrupted by the conflict in the Gulf region. These airlines function primarily as transit connectors for long-haul markets, especially Europe. Sri Lanka lacks sufficient direct long-haul connectivity and depends on hub-based routing. Any disruption in these regions such as geopolitical tensions can directly impact arrivals.

Asian carriers (Singapore Airlines, Cathay Pacific, AirAsia, Malaysian Airlines, Thai carriers, and Chinese airlines) collectively contribute a moderate share, indicating diversified but still secondary connectivity through East and Southeast Asia. Meanwhile, the relatively small share of European carriers (e.g., Edelweiss) suggests limited direct access from Europe, constraining high-value long-haul tourism.

Overall, the structure reveals a connectivity-driven tourism model, heavily reliant on regional traffic and transit hubs, making Sri Lanka vulnerable to external shocks but well-positioned to grow if direct long-haul routes are expanded.

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

April 2026

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

Country	Chennai International	Chhatrapati Shivaji Maharaj	Indira Gandhi	Kempegowda, Bengaluru	Kuala Lumpur International	Singapore Changi	Istanbul	Dubai International	Moses Point Airport	Velana	Rajiv Gandhi International	Shanghai	Hong Kong International Airport	Zayed International	Suvarnabhumi Bangkok	Hamad	Abudhabi	Melbourne International	Zurich Airport	London/Heathrow	Sydney Kingsford Smith	Others	Total
India	10,288	7,895	6,037	8,306	220	156	14	790	2	280	4,063	4	44	157	144	438	129	36	3	9	18	3,612	42,645
China	31	18	43	35	948	274	5	71	3	228	5	3,216	1,504	14	347	16	13	3	1	2	2	3,765	10,544
United Kingdom	274	601	495	152	561	276	564	698	0	189	38	51	159	494	174	722	417	65	54	1,869	50	2,522	10,425
Australia	108	43	221	104	1,271	3,213	6	54	0	86	13	26	270	15	253	15	16	2,347	1	12	1,314	555	9,943
Russian Federation	46	60	55	31	79	15	74	129	5,690	136	1	76	15	162	47	32	115	1	2	1	1	130	6,898
France	77	137	732	50	199	72	1,269	586	0	73	2	12	27	388	84	326	288	6	124	29	3	1,360	5,844
Germany	63	418	309	101	239	68	938	454	1	122	13	31	17	310	137	248	290	4	320	23	8	1,404	5,518
United States	153	167	197	182	138	306	265	88	0	79	79	25	382	100	133	91	105	5	13	22	5	1,338	3,873
Bangladesh	664	32	681	9	77	17	8	50	0	717	29	0	2	12	85	33	11	0	0	2	4	1,364	3,797
Japan	61	18	137	73	281	264	8	1	0	42	2	89	255	2	455	0	1	5	0	2	2	1,086	2,784

The analysis of tourists' last departure airports highlights significant shifts in international travel patterns to Sri Lanka following disruptions in the Middle East aviation corridor. Traditionally, transit hubs such as Doha and Dubai played a dominant role in connecting long-haul travellers to Sri Lanka. However, the current pattern indicates a gradual diversification of routing options and increased reliance on regional Asian hubs.

For Indian tourists, Chennai, Bengaluru, and Mumbai continue to dominate due to geographical proximity, strong air connectivity, and the growing importance of India as Sri Lanka's largest source market. Chennai also functions as a major transit point for Bangladeshi travellers, reflecting South India's role as a regional aviation gateway.

Tourists from East Asia and the Pacific are increasingly routing through Asian hubs such as Singapore, Bangkok, Hong Kong, and Shanghai. Australians are using Singapore and Melbourne, while Japanese tourists mainly depart through Bangkok. American tourists are increasingly dependent on Singapore and Hong Kong connections.

European tourists show changing transit behaviour, with French and German travellers increasingly using Turkish hubs instead of Middle Eastern airports. This suggests that ongoing geopolitical instability and flight disruptions in the Middle East have reshaped airline routing strategies and traveller preferences, reducing the relative importance of Gulf transit hubs in accessing Sri Lanka.



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

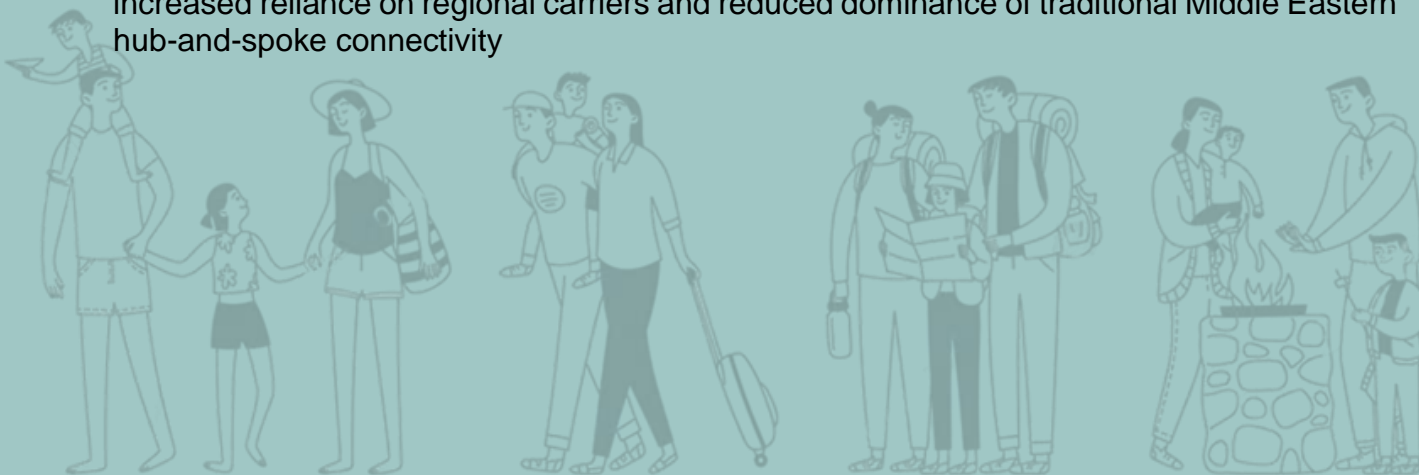
Country	Sri Lankan Airline	Indigo	Air India	Turkish Airline	Etihad Airways	Aeroflot	Emirates	China Eastern Airlines	Singapore Airline	Cathey Pacific	Air Asia	Qatar Airlines	Edelwiss	Fits Air	Malaysian Airline	Thai Air Asia	Air China	Thai Airways	Others	Total
India	33.20	49.51	11.02	0.03	0.50	0.00	1.39	0.01	0.13	0.10	0.09	1.06	0.01	0.07	0.03	0.07	0.01	0.08	2.71	100.00
China	11.37	0.56	0.33	0.05	0.23	0.03	0.42	40.34	1.96	14.26	3.80	0.15	0.01	1.55	1.91	2.32	13.34	1.73	5.64	100.00
United Kingdom	47.41	5.10	5.52	5.41	8.72	0.00	6.19	0.53	1.36	1.52	3.18	6.93	0.52	0.43	0.98	1.37	0.08	0.35	4.42	100.00
Australia	51.05	1.42	0.68	0.06	0.31	0.00	0.45	0.38	24.88	2.72	2.91	0.15	0.01	0.08	8.02	0.30	0.03	2.08	4.47	100.00
Russian Federation	2.59	1.51	0.91	1.07	3.80	82.49	1.32	1.23	0.07	0.22	0.67	0.48	0.03	0.80	0.01	0.71	0.23	0.12	1.74	100.00
France	27.69	2.57	11.58	21.71	11.55	0.00	9.87	0.29	0.33	0.46	2.22	5.61	2.12	0.70	0.15	1.27	0.10	0.39	1.37	100.00
Germany	25.52	3.23	7.63	17.00	10.86	0.02	8.12	0.69	0.56	0.31	2.68	4.60	5.80	0.74	0.33	1.34	0.02	0.62	9.95	100.00
United States	19.03	9.50	4.49	6.84	5.29	0.00	2.19	0.77	6.43	9.86	1.78	2.40	0.34	0.31	0.57	1.58	0.23	1.08	27.29	100.00
Bangladesh	31.26	20.54	16.12	0.21	0.53	0.00	0.87	0.03	0.18	0.05	0.08	0.92	0.00	27.57	0.11	0.05	0.03	0.50	0.95	100.00
Japan	54.99	3.41	1.62	0.29	0.11	0.00	0.00	3.23	4.71	9.16	6.97	0.00	0.00	0.32	1.44	2.91	0.29	9.99	0.57	100.00

An analysis of airline usage among key source markets reveals clear shifts in connectivity patterns and evolving aviation preferences influencing inbound tourism to Sri Lanka. Indian tourists predominantly rely on IndiGo along with Sri Lankan Airlines, reflecting strong regional low-cost connectivity and high-frequency short-haul operations that make India the most accessible and price-sensitive source market. IndiGo and Air India collectively account for 60.53% of inbound tourist arrivals from India. Chinese tourists primarily use China Eastern Airlines, indicating the continued importance of state-linked and flagship carriers in long-haul travel decisions from China. Russian arrivals are largely facilitated through Aeroflot, showing reliance on direct national carrier connectivity amid limited alternative routing options.

For traditional long-haul Western markets including the United Kingdom, France, Germany, and Australia Sri Lankan Airlines remains a key carrier, highlighting its continued role as a strategic bridge between Colombo and major global hubs. Similarly, travellers from Bangladesh and Japan also depend significantly on Sri Lankan Airlines, reflecting its regional dominance in South and East Asian connectivity.

A notable structural shift is observed when compared to the pre-conflict period: the relative importance of Middle Eastern transit carriers such as Qatar Airways and Etihad Airways has declined. This suggests a redistribution of passenger flows towards South and Southeast Asian hubs, likely influenced by geopolitical instability, changing route efficiencies, and evolving airline network strategies.

Overall, the data indicates a gradual diversification of access routes to Sri Lanka, with increased reliance on regional carriers and reduced dominance of traditional Middle Eastern hub-and-spoke connectivity.





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