



2026



MONTHLY TOURIST ARRIVALS REPORT:

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

February



Introduction

The following document provides a synthesis of the most recent February 2026 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 28th February 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

February 2026 recorded a remarkable 279,328 tourist arrivals, marking the highest monthly figure in the dataset and surpassing even the peak season months of pre-pandemic years. This represents a substantial 16.2% increase compared to February 2025 (240,217 arrivals) and an 18.5% rise over February 2018 (235,618 arrivals). Far from merely reflecting a recovery trend, these figures indicate a robust and accelerated growth trajectory for Sri Lanka’s tourism sector.

Similarly, January 2026 saw 277,327 arrivals, which is a 9.7% increase over January 2025 (252,761) and a 16.0% increase compared to January 2018 (238,924). Combined, the first two months of 2026 account for 556,655 arrivals, which already represents nearly a quarter of the total arrivals for the entire year of 2025 (2,362,521). If this momentum is sustained, 2026 is on track to be a record-breaking

year for Sri Lankan tourism, potentially surpassing the annual totals of both 2018 and 2025 by a significant margin, provided global conditions remain favorable. Several factors are likely driving this strong performance. Enhanced air connectivity particularly from India, the Middle East, Russia, and key European markets has improved accessibility for international tourists. The global tourism rebound in 2025 also continues to benefit Sri Lanka, as travelers increasingly seek destinations offering natural landscapes, cultural heritage, and outdoor experiences.

Key source markets such as India, the United Kingdom, Russia, Germany, and China have played a critical role in the surge of arrivals. However, ongoing global conflicts and geopolitical uncertainties could pose challenges and potentially impact the sustained growth of tourism in the country.

Table 1. Monthly tourist arrivals, February 2026

Month	2025	2026	% Change 2026/25
January	252,761	277,327	9.7
February	240,217	279,328	16.2
March	229,298		
April	174,608		
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	556,655	



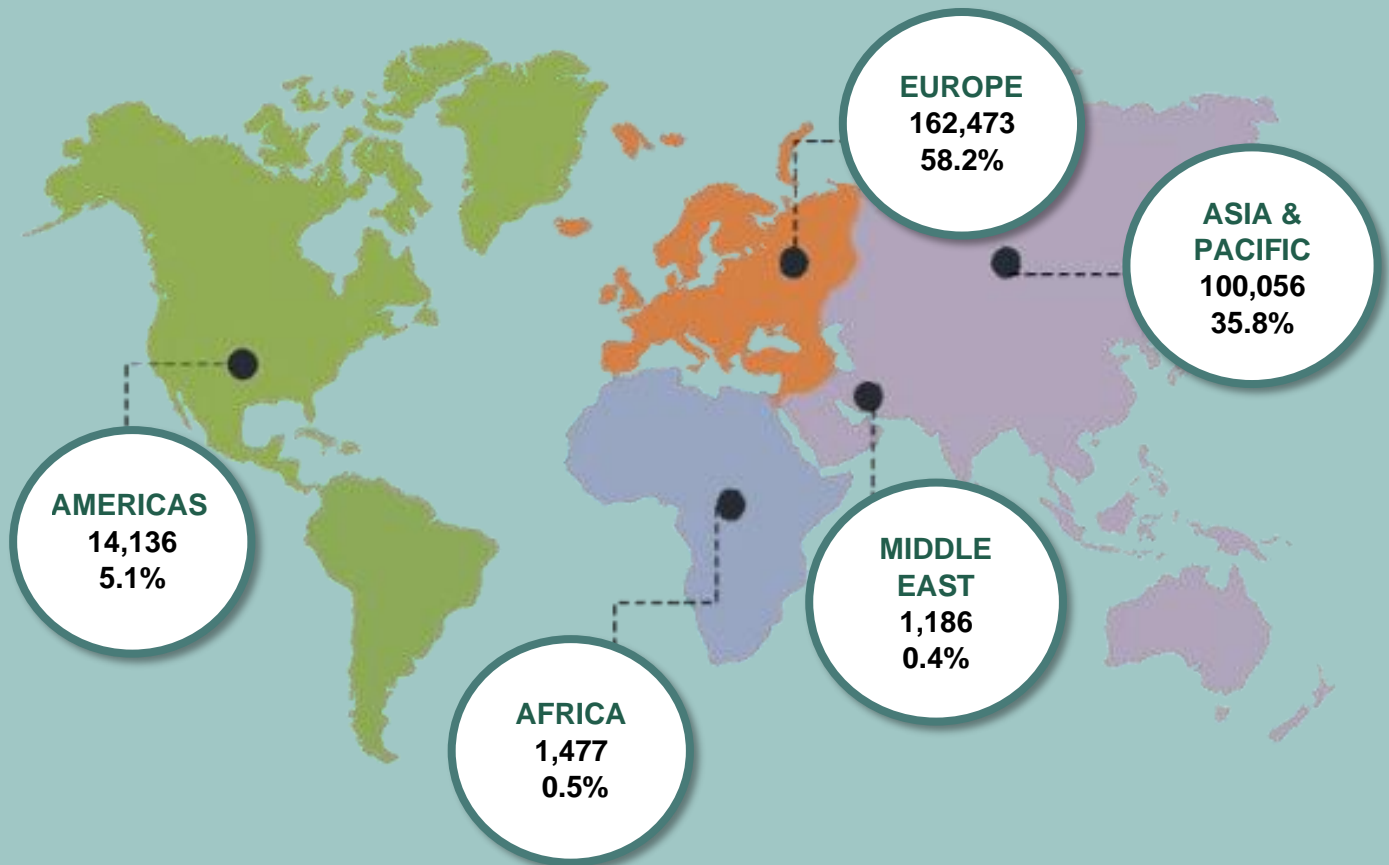
Tourist Arrivals | February 2026

279,328



Tourist arrivals by region and percentage share February 2026

Map 1. Tourist arrivals by region and percentage share



The regional breakdown of tourist arrivals provides a macro level view of Sri Lanka's positioning in the global travel market.

Europe remains the undisputed leading source region, contributing 162,473 tourists, which represents a 58.2% of the total market share. This dominance reflects Sri Lanka's longstanding appeal to European travelers, who are drawn to the island's tropical climate, cultural heritage, and reputation as a value for money long haul destination. The high volume of arrivals from this region also suggests strong connectivity via major European hubs and effective marketing by tour operators in countries like the United Kingdom, Germany, and France. For Sri Lanka, maintaining this European stronghold is essential, as it provides a stable and high yield tourist base. However, the reliance on a single region for nearly 60% of arrivals also exposes the sector to external shocks, such as economic downturns in the Eurozone or shifts in travel patterns caused by geopolitical events.

The Asia and the Pacific region follow as the second-largest source market, accounting for 100,056 arrivals and a substantial 35.8% share. This figure is particularly significant as it represents the combined impact of Sri Lanka's regional neighbors and the broader Asia-Pacific travel market. The strong performance of this region is largely driven by the Indian and Chinese markets, the key contributors from this region. Proximity of these markets, coupled with increasing air connectivity and growing middle-class outbound travel, positions Asia and the Pacific as the region with the highest growth potential.



Strategically, Sri Lanka should view this region not just as a complement to Europe, but as a future co-anchor for sustainable tourism growth.

The Americas, contributing 14,136 arrivals (5.06%), represent a smaller but important niche market. While the share is modest, the absolute number (primarily from the United States) is significant and often associated with higher spending tourists, including those arriving by sea. This segment offers opportunities for growth, particularly through targeted marketing highlighting Sri Lanka's unique wildlife, luxury offerings, and adventure tourism.

In stark contrast, the regions of Africa (0.53%) and the Middle East (0.42%) contribute minimally to overall arrivals, together accounting for less than 1% of the total. These figures point to significant untapped potential, particularly from the Middle East, given the geographical proximity and increasing flight connectivity through Gulf hubs. The current low share suggests either a lack of targeted marketing, visa accessibility issues, or a mismatch between Sri Lanka's tourism product and the preferences of travelers from these regions.

The challenge and opportunity for Sri Lanka lie in nurturing these core regions while strategically developing the underperforming markets of the Middle East and the Americas. By diversifying its regional portfolio, Sri Lanka can build a more resilient tourism sector, less vulnerable to fluctuations in any single part of the world.





Top primary markets and top potential markets

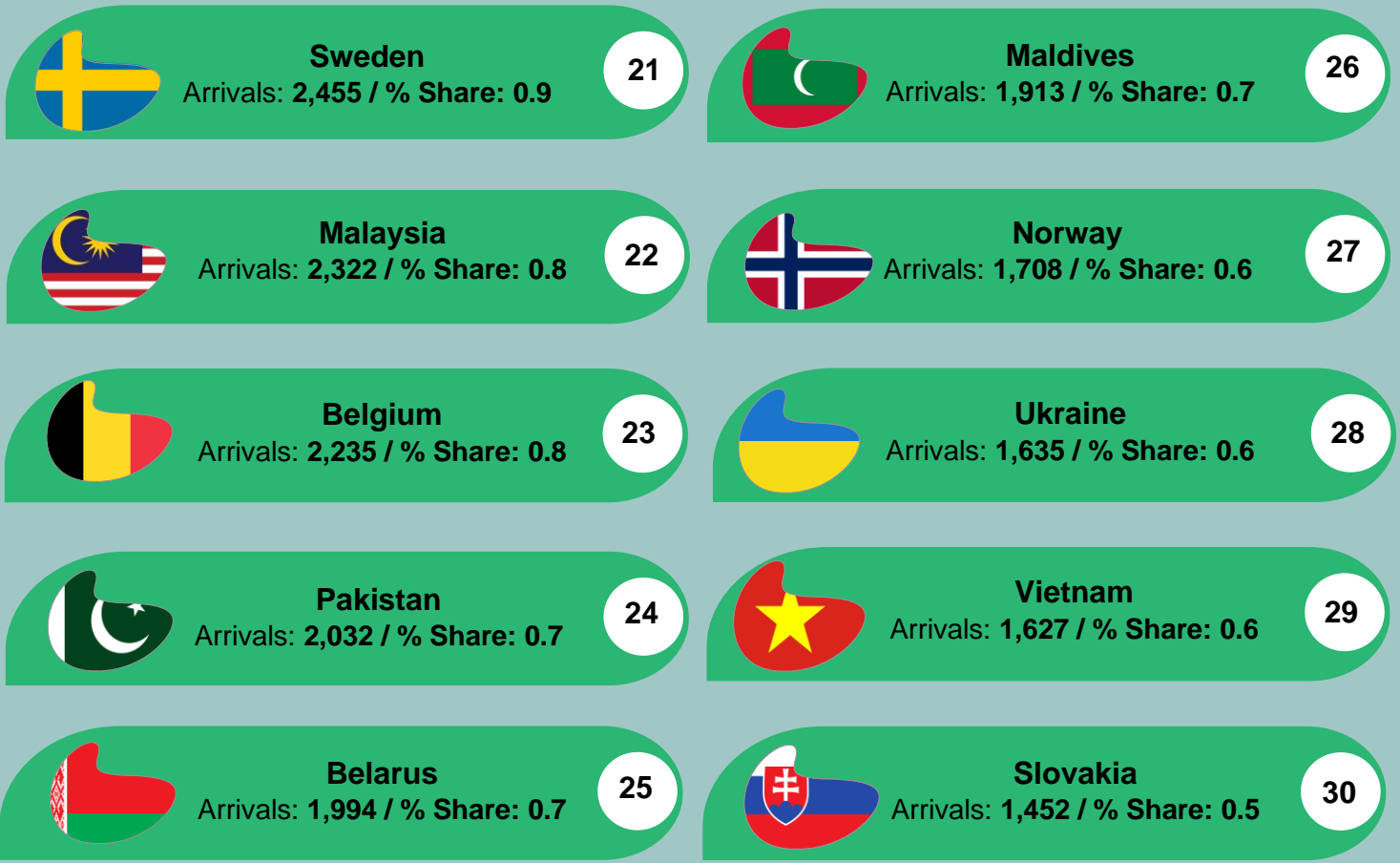
Top primary markets, February 2026



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, February 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

February 2026

While the total arrivals increased from 240,217 in 2024 to 279,328 in 2025 in the month of February (a healthy 16.3% growth), the individual market performances reveal a landscape of stark winners and one significant loser. The numbers, highlight explosive growth from Asian giants and traditional European markets, contrasted sharply by a major contraction from Russia.

The most compelling narrative in this analysis is the ascendancy of Asia. India has not only retained its position as the largest source market but has accelerated its growth, with arrivals jumping from 35,728 to 47,679. The 33% year-on-year increase underscores the immense value of this immediate neighbor and the effectiveness of strong air connectivity. Even more remarkable is the performance of China. With arrivals nearly doubling from 11,690 to 20,180, China now boasts a staggering 73% growth rate the highest among all listed markets. This rise propels China into the fifth position and signals a powerful resurgence of outbound travel from this economic powerhouse.

The European picture is now one of sharp contrast. On one hand, core Western European markets have displayed phenomenal strength. Germany leads this charge with a remarkable 31% growth, moving 4,333 additional visitors. The United Kingdom, while showing a slightly lower percentage increase (21%), delivered the second-highest absolute growth, adding over 5,000 tourists. Even Poland, an emerging market, demonstrated strong momentum with a 23% increase. These figures suggest a robust recovery in consumer confidence and travel demand from these regions.

Conversely, the Russian market has experienced a dramatic downturn. The decline of 24% (a drop from 30,295 to 23,099) completely reframes the previous narrative of steady growth. This sharp decline is the most significant negative trend in the entire dataset and is likely attributable to a complex interplay of factors, including ongoing geopolitical tensions, currency fluctuations, reduced flight availability, or shifting destination preferences among Russian travelers. This volatility highlights the risk of over-reliance on markets susceptible to external shocks.

Furthermore, the data on mode of travel highlights specific niche segments. The United Kingdom (3,238 sea arrivals) and the United States (1,354 sea arrivals) remain the key source markets for sea travelers, likely driven by the luxury cruise sector. Similarly, Australia's significant sea arrival numbers (1,005) point to a distinct traveler demographic. These segments, while smaller in volume, often represent high spending tourists and warrant dedicated marketing strategies.

Sri Lanka's tourism recovery is being propelled by the extraordinary twin engines of the Indian and Chinese markets. The robust performance of Germany, the UK, and the US further solidifies this positive trajectory. However, the sharp decline from Russia serves as a potent reminder of the sector's vulnerability to geopolitical and economic forces.



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

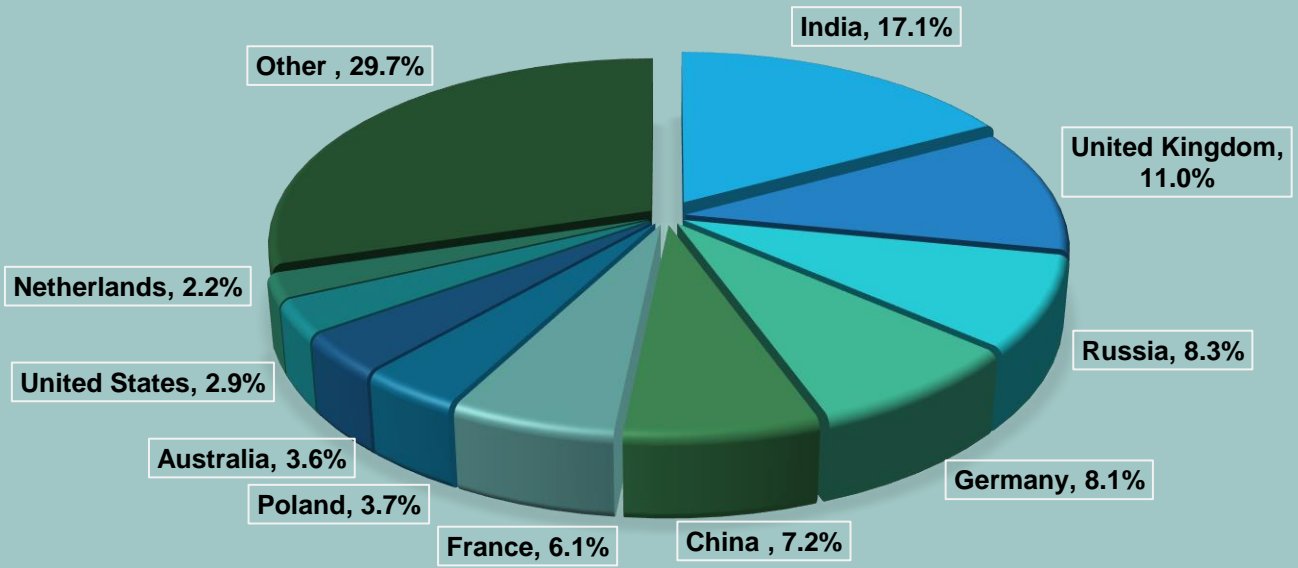


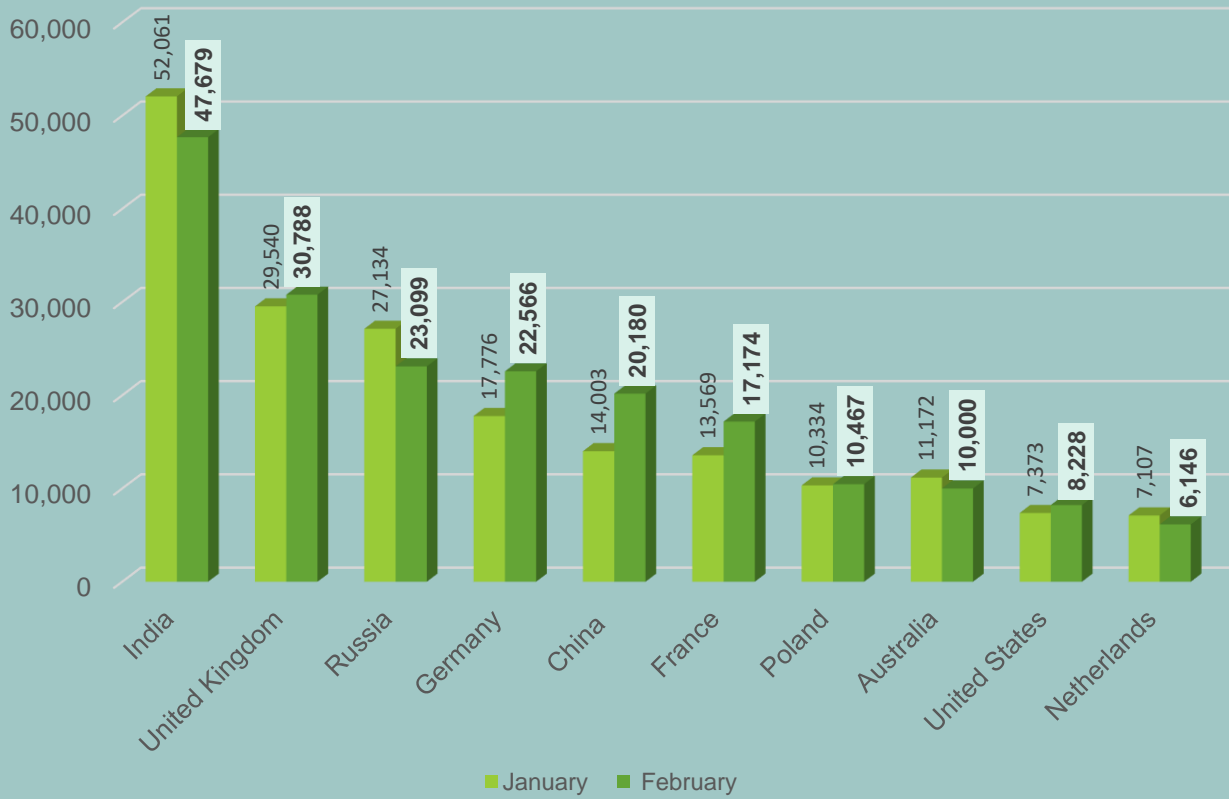
Table 2. Top ten source markets to Sri Lanka, February 2026

Rank	Country of Residence	Tourist arrivals (February 2026)			Tourist arrivals (February 2026)
		By Air	By Sea	Total	
1	India	47,652	27	47,679	35,728
2	United Kingdom	27,550	3,238	30,788	25,528
3	Russia	23,047	52	23,099	30,295
4	Germany	20,410	2,156	22,566	17,233
5	China	20,131	49	20,180	11,690
6	France	17,148	26	17,174	15,469
7	Poland	10,433	34	10,467	8,519
8	Australia	8,995	1,005	10,000	8,778
9	United States	6,874	1,354	8,228	6,439
10	Netherlands	6,060	86	6,146	5,589





Chart 2: Comparison of arrivals from top ten markets to Sri Lanka, Jan / Feb - 2026





Top ten source markets

January to February 2026

During the period January to February 2026, Sri Lanka recorded a total of 556,655 tourist arrivals, compared with 492,978 arrivals during the same period in 2025, reflecting a growth of approximately 12.9%. India remained the largest source market, contributing 99,740 visitors, followed by the United Kingdom (60,328) and the Russian Federation (50,233). Most of the top markets showed positive growth compared to the previous year, particularly India, the United Kingdom, Germany, China, and Poland.

indicating strengthening demand from both regional and European markets. However, arrivals from the Russian Federation declined compared to the same period in 2025. Overall, the performance during the first two months of 2026 demonstrates steady growth and continued recovery in Sri Lanka's tourism sector, supported by strong demand from key international markets.

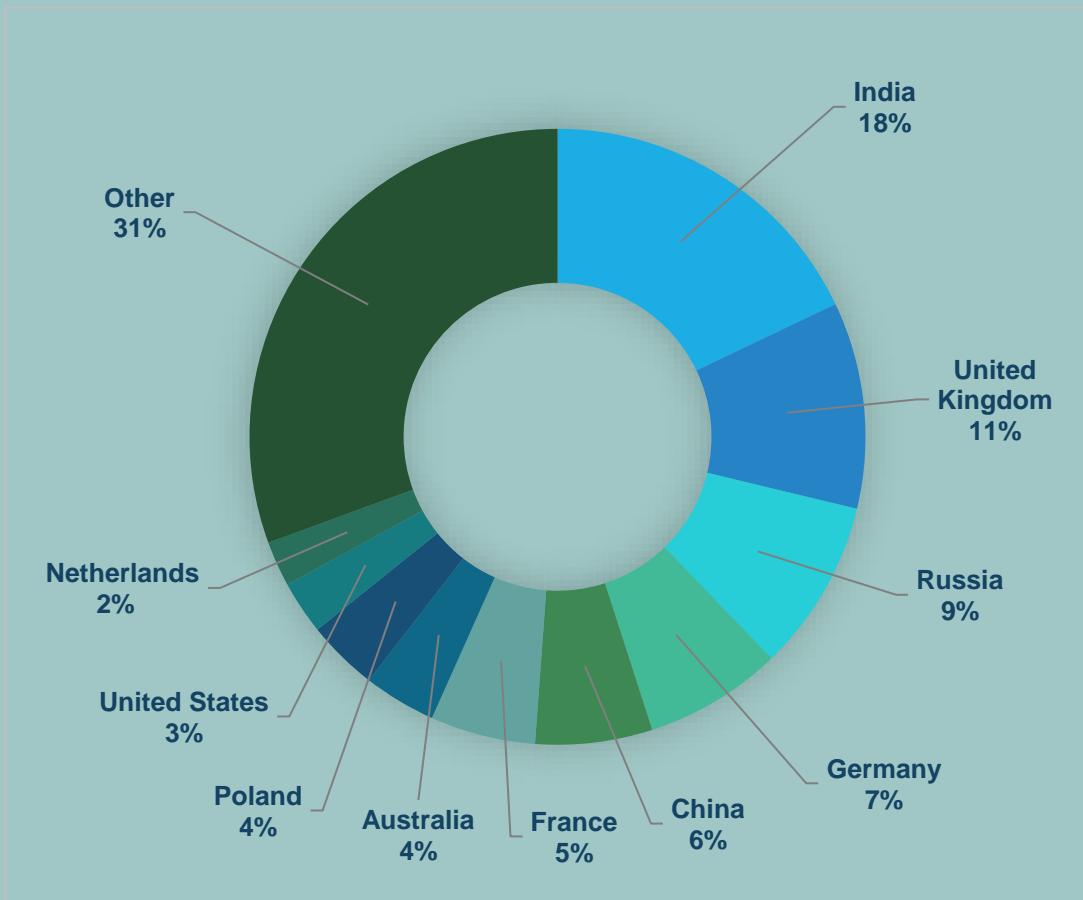




Table 3. Top ten markets to Sri Lanka, January to February 2026

Rank	Country of Residence	Tourist Arrivals (Jan ~Feb 2026)	Tourist Arrivals Jan ~Feb 2025)
1	India	99,740	79,103
2	United Kingdom	60,328	47,258
3	Russian Federation	50,233	64,391
4	Germany	40,342	32,283
5	China	34,183	28,399
6	France	30,743	28,088
7	Australia	21,172	18,341
8	Poland	20,801	16,104
9	United States	15,601	13,506
10	Netherlands	13,253	12,073
11	Others	170,259	153,432
Total		556,655	492,978

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



Tourist arrivals by purpose of visit

February 2026

A comprehensive analysis of tourist arrivals to Sri Lanka for the month of February reveals a market overwhelmingly driven by leisure travel. The data clearly establishes that the core of Sri Lanka's tourism industry is the Pleasure/Vacation segment, which brought in 167,739 visitors and accounts for a dominant 60.1% of the total market share. This figure underscores the country's strong appeal as a destination for relaxation and exploration, suggesting that its natural and cultural assets are its primary draw. For policymakers and industry stakeholders, this reinforces the need to continuously invest in and protect the core tourism products that cater to this mass market, from beaches and wildlife to heritage sites, to ensure sustained growth.

Beyond the dominant leisure market, several smaller, specialized niches contribute to the overall tourism landscape, each with unique characteristics and potential. The MICE (Meetings, Incentives, Conferences, and Exhibitions) sector stands out as the largest niche, with 19,474 arrivals (6.9%), indicating a healthy and valuable high-yield market centered around business events. The Visiting Friends and Relatives (VFR) segment, accounting for 11,886 arrivals (4.3%), provides a stable flow of visitors connected to the Sri Lankan diaspora. Pure Business travelers, at 5,931 arrivals (2.12%), signal ongoing commercial ties and economic activity. Finally, a collection of purpose-driven segments Health/Ayurvedic, Sports, Education, and Religious together account for a small fraction of the market at just 1.46%. While currently small, these segments, particularly Health and Religious tourism, represent areas of potential growth that align with Sri Lanka's unique cultural and natural endowments, offering opportunities for diversification beyond the core leisure market.

Chart 4: Purpose of visit, February 2026

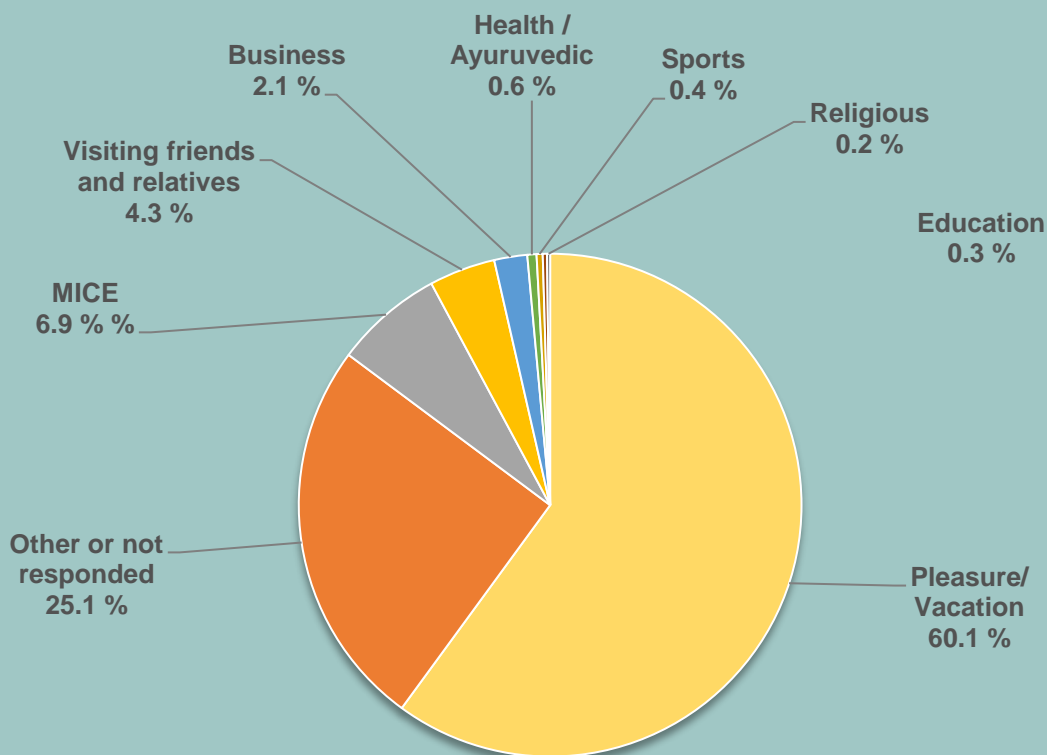
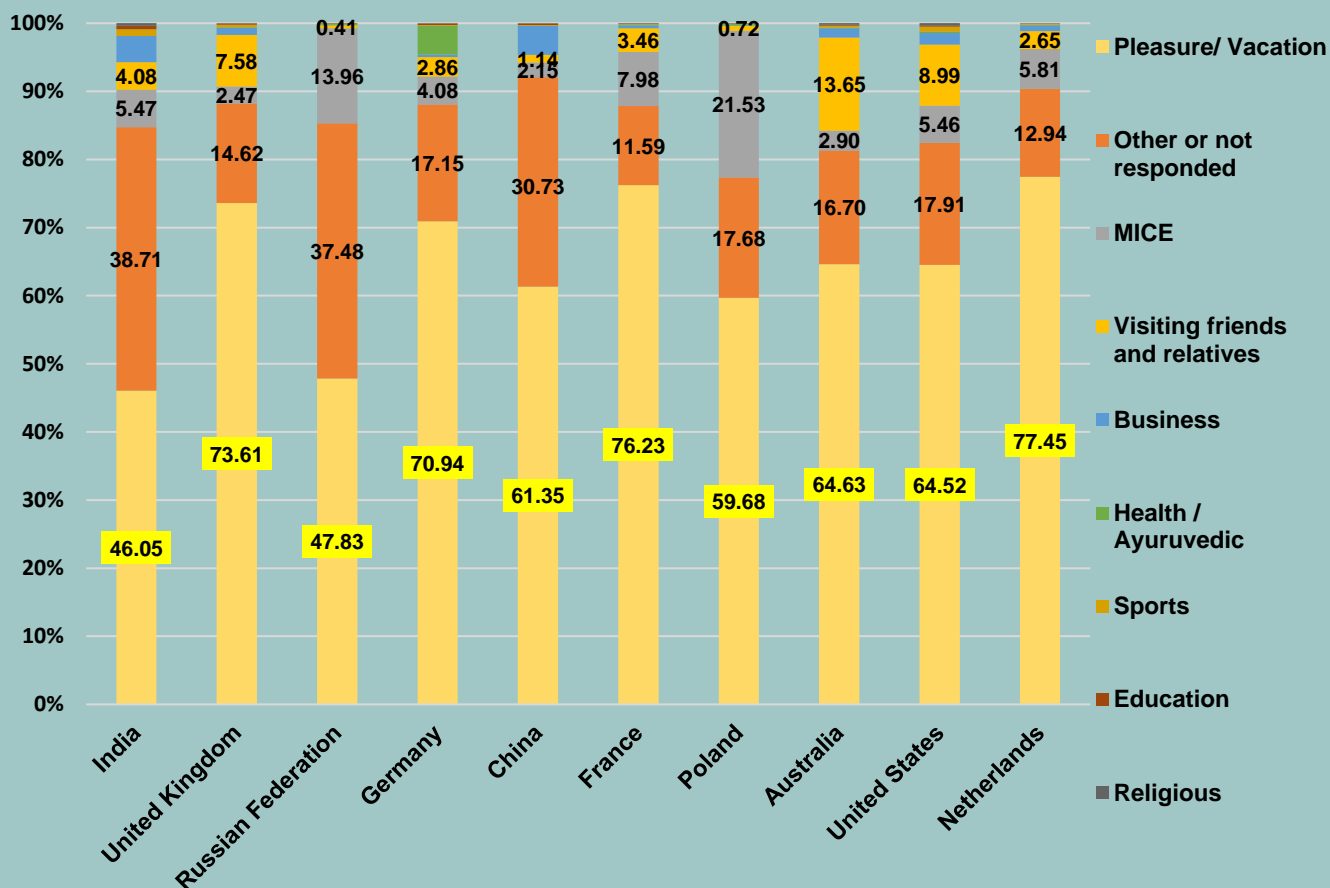


Chart 5: Purpose of visit vs main source markets



The data on tourist arrivals to Sri Lanka in February shows clear differences in travel motivations across key source markets, revealing important market-specific patterns that can inform tourism planning and marketing strategies.

Pleasure or vacation remains the dominant purpose of travel for most long-haul European markets. Visitors from the Netherlands (77.45%), France (76.23%), the United Kingdom (73.61%), and Germany (70.94%) show particularly strong leisure motivations. These markets are clearly driven by holiday experiences such as beach tourism, cultural attractions, and nature-based activities. Similarly, China (61.35%), Australia (64.63%), and the United States (64.52%) also demonstrate a strong leisure orientation. This indicates that Sri Lanka's international image in these markets is strongly associated with holiday and recreation experiences, suggesting that continued promotion of leisure products such as coastal tourism, heritage sites, wildlife parks, and wellness tourism remains important for sustaining arrivals from these countries.

In contrast, the Indian market displays a more diversified travel pattern. Only 46.05% of Indian visitors reported traveling for pleasure, which is significantly lower than other major markets. Additionally, India records relatively higher shares for business travel (3.83%) and visiting friends and relatives (4.08%) compared with many European markets. This suggests that regional connectivity, cultural ties, and business linkages play an important role in driving arrivals from India.

Business and MICE-related travel appears to be concentrated in a few specific markets. China (4.23%) and India (3.83%) show comparatively higher levels of business travel, reflecting growing economic engagement and corporate connections. Meanwhile, Poland stands out with a very high share of MICE travel (21.53%), far exceeding other markets.



Russia (13.96%) and France (7.98%) also show noticeable MICE participation. These figures indicate that conference tourism and group travel could be particularly important in selected European and Eastern European markets, suggesting potential opportunities for expanding meetings, conferences, and incentive tourism segments.

Visiting friends and relatives (VFR) is another notable travel motivation in several long-haul markets. Australia records the highest share (13.65%), followed by the United States (8.99%) and the United Kingdom (7.58%). This pattern likely reflects diaspora connections and historical migration links. The presence of these social ties indicates that repeat travel and longer stays may be more common among visitors from these countries, highlighting the importance of diaspora engagement as a driver of tourism demand.

Special-interest travel segments appear relatively small but still noteworthy. Germany records the highest share of health or Ayurvedic tourism (4.25%), suggesting that wellness tourism products have particular appeal in this market. Sports, education, and religious travel remain minimal across most markets, each generally accounting for less than 1% of total travel motivations. While these segments are small in scale, they may still represent niche opportunities for targeted tourism development.

Overall, the data illustrates that while leisure tourism dominates arrivals to Sri Lanka, the composition of travel motivations varies significantly by source market. European markets are strongly leisure oriented, regional markets such as India show more diverse travel purposes, and diaspora linked markets like Australia and the United States demonstrate higher levels of visiting friends and relatives. Understanding these differences can help tourism planners tailor marketing strategies, product development, and visitor experiences to better match the motivations of each source market.



Maximizing Domestic Value Retention in Sri Lanka's Tourism Sector

Tourism remains a cornerstone of Sri Lanka's economy, generating USD 3.2 billion in receipts in 2025 and ranking as one of the country's top sources of foreign exchange. As international arrivals recover and diversify, the sector faces a strategic challenge that extends beyond attracting more visitors: capturing a larger share of tourism expenditure within the domestic economy.

A recent rapid assessment by SLTDA highlights that approximately USD 1 billion in tourism related expenditures currently flow out of Sri Lanka. These outflows occur through international supply chains, imported inputs, offshore bookings, and informal or unreported transactions. Key sectors affected include accommodation, inbound tour operators, and wellness & spa services, with wellness and spa businesses experiencing the highest relative leakage (over 50%).

As per the study findings, procurement-related losses, particularly from imported food, beverages, linens, and branded wellness products represent the largest single contributor to value leakage, totaling USD 803.2 million annually. Many of the factors driving financial leakages are embedded in upstream supply chains, foreign ownership structures, and payment systems. In this context, these leakages are largely structural rather than the responsibility of individual operators. Effectively addressing them requires systemic interventions such as upgrading suppliers and promoting targeted import substitution rather than placing the full burden on individual businesses.

An analysis of tourism expenditure across various distribution and procurement structures indicates that the largest absolute expenditure flows are linked to international intermediation and offshore-retained components of travel packages, amounting to approximately USD 519.6 million. Accommodation-related operating structures account for about USD 349.1 million, while wellness and spa services, although representing a smaller share of overall turnover, demonstrate the highest relative outflow rate at over 50.8%. These patterns largely reflect the structure of global value chains, procurement systems, and payment mechanisms, rather than the retained margins or operational efficiency of individual businesses.

Many of the factors driving leakages originate within upstream supply chains, foreign ownership arrangements, and international payment flows. In this context, leakages should be understood primarily as structural characteristics of the tourism economy, rather than the result of individual business practices. Addressing them will therefore require system-level interventions, including supplier upgrading and targeted import substitution, rather than placing responsibility solely on tourism operators.

Informality also remains a measurable constraint on domestic value retention. Informal operations, unreported transactions, and untaxed flows are conservatively estimated to account for approximately USD 84.8 million annually, limiting the extent to which tourism revenue circulates within the formal domestic economy.

Efforts to reduce leakages will require carefully targeted interventions, as not all product categories generate the same return on investment. Substituting low-margin items, such as basic fruits and vegetables, may yield limited benefits. In contrast, higher-value goods and services including specialty food products, packaging materials, spa consumables, sanitation supplies, and certified

Linens offer stronger potential for local substitution. Strengthening domestic supply chains in these areas could substantially reduce procurement-related leakages over time and increase the share of tourism expenditure retained within the national economy.



It is also important to recognize that not all forms of leakage represent structural weaknesses. Profit repatriation by foreign-owned hotels and commissions paid to international Online Travel Agencies (OTAs) are integral components of the modern tourism economy. These actors provide market access, international visibility, and investment capital that Sri Lanka may find difficult to generate independently. The policy objective should therefore not be to eliminate such flows, but to balance them through policies that enhance domestic value retention, including stronger local supply chains, improved compliance frameworks, and the strategic promotion of higher-yield tourism segments.

In addition to domestic fiscal erosion, stakeholders report instances where bookings and payments are processed offshore or through financial platforms not connected to Sri Lanka's banking system, even when services are physically delivered in the country. In such cases, profits may be retained or settled abroad, generating external outflows alongside lost tax revenues.

Informal operations, untaxed flows, and undeclared revenues are estimated at around USD 84.8 million per year, with some stakeholders suggesting actual figures could be substantially higher.

The study identifies five interrelated opportunity areas to strengthen domestic value capture:

1. **Boost Formalization and Enforcement** – Simplifying licensing, reducing compliance costs, incentivizing voluntary registration, and linking formal registration with national marketing channels can help bring SMEs into the regulated system while ensuring fair competition.
2. **Strengthen Local Value Chains** – Focusing on high-return product categories, supporting SME financing, and facilitating quality upgrades and year-round supply continuity, particularly in agriculture can reduce dependence on imports and retain more expenditure domestically.
3. **Enhance Digital Payments and Licensing Infrastructure** – Expanding low-cost mobile payment acceptance, integrating licensing and tax systems, and ensuring online travel agency compliance with local operator listings can improve transparency and minimize offshore outflows.
4. **Promote Stakeholder Sustainability through Certified Ayurveda** - Introducing clinically validated national certification standards, linking sustainability with licensing, and promoting inclusive employment pathways can position Sri Lanka as a leader in responsible and high-value wellness tourism.
5. **Improve Marketing, Coordination, and Capacity** – Building destination branding around certified Ayurveda, leveraging sentiment analysis for campaign refinement, and aligning promotional strategies with formalization objectives can amplify domestic retention and support SMEs in accessing international markets.

The proposed stepwise approach emphasizes first removing regulatory and cost barriers to formalisation, then gradually introducing incentives, enforcement, and local procurement.

measures. Early implementation of these measures is expected to deliver tangible wins in formalisation and procurement substitution, while laying the groundwork for long-term sustainable tourism positioning.

Strengthening domestic value retention is critical for ensuring that tourism continues to benefit Sri Lanka's economy broadly. By formalizing operations, enhancing local supply chains, and optimizing digital, regulatory, and marketing systems, the country can reduce leakage, increase public revenues, and reinforce the competitiveness of its tourism sector in global markets.

International tourist arrivals by country of residence

	February 2026			Tourist arrivals Feb 2025	% change Feb (26/25)	Total tourist arrivals up to Feb 2026	Total tourist arrivals up to Feb 2025	% change up to Feb (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
AMERICAS	12,181	1,955	14,136	11,661	21.2	27,415	23,887	14.8
North America	11,471	1,895	13,366	11,107	20.3	25,898	22,714	14.0
Canada	4,492	502	4,994	4,550	9.8	10,042	9,008	11.5
Mexico	105	39	144	118	22.0	255	200	27.5
United States	6,874	1,354	8,228	6,439	27.8	15,601	13,506	15.5
Caribbean & Central America	91	34	125	87	43.7	250	156	60.3
Costa Rica	07	0	07	13	(46.2)	23	22	4.5
Jamaica	05	03	08	05	60.0	11	08	37.5
Others	79	31	110	69	59.4	216	126	71.4
South America	619	26	645	467	38.1	1,267	1,017	24.6
Argentina	127	02	129	79	63.3	317	243	30.5
Brazil	221	17	238	177	34.5	432	411	5.1
Chile	96	04	100	77	29.9	182	122	49.2
Colombia	85	0	85	44	93.2	160	89	79.8
Others	90	03	93	90	3.3	176	152	15.8
AFRICA	1,351	126	1,477	1,209	22.2	2,898	2,454	18.1
North Africa	158	0	158	322	(50.9)	425	545	(22.0)
Morocco	52	0	52	102	(49.0)	144	184	(21.7)
Sudan	49	0	49	53	(7.5)	145	125	16.0
Others	57	0	57	167	(65.9)	136	236	(42.4)
Sub-Saharan Africa	1,193	126	1,319	887	48.7	2,473	1,909	29.5
Kenya	95	0	95	55	72.7	178	97	83.5
Mauritius	126	04	130	90	44.4	231	139	66.2
Nigeria	17	01	18	04	-	30	18	66.7
South Africa	438	118	556	393	41.5	934	758	23.2
Others	517	03	520	345	50.7	1,100	897	22.6

Monthly Tourist Arrivals Report February 2026

	February 2026			Tourist arrivals Feb 2025	% change Feb (26/25)	Total tourist arrivals up to Feb 2026	Total tourist arrivals up to Feb 2025	% change up to Feb (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	98,829	1,227	100,056	76,830	30.2	201,000	167,984	19.7
North East Asia	25,539	67	25,606	16,692	53.4	44,442	38,209	16.3
China	20,131	49	20,180	11,690	72.6	34,183	28,399	20.4
Japan	4,223	16	4,239	3,527	20.2	7,135	6,158	15.9
South Korea	1,178	02	1,180	1,471	(19.8)	1,180	3,620	(67.4)
Others	07	0	07	04	75.0	46	32	43.8
South East Asia	8,302	33	8,335	4,561	82.7	14,105	9,494	48.6
Cambodia	143	0	143	132	8.3	314	158	98.7
Indonesia	694	01	695	515	35.0	1,267	795	59.4
Malaysia	2,311	11	2,322	1,415	64.1	3,888	3,540	9.8
Myanmar	473	0	473	82	-	1,178	179	-
Philippines	502	09	511	381	34.1	932	805	15.8
Singapore	1,361	09	1,370	1,024	33.8	2,508	2,072	21.0
Thailand	1,146	03	1,149	719	59.8	1,951	1,344	45.2
Vietnam	1,627	0	1,627	253	-	1,981	510	-
Others	45	0	45	40	12.5	86	91	(5.5)
Oceania	9,920	1,099	11,019	9,549	15.4	23,357	20,150	15.9
Australia	8,995	1,005	10,000	8,778	13.9	21,172	18,341	15.4
New Zealand	881	94	975	741	31.6	2,078	1,738	19.6
Others	44	0	44	30	46.7	107	71	50.7
South Asia	55,068	28	55,096	46,028	19.7	119,096	100,131	18.9
Afghanistan	04	0	04	15	(73.3)	04	21	(81.0)
Bangladesh	2,571	01	2,572	5,262	(51.1)	6,674	9,888	(32.5)
Bhutan	65	0	65	39	66.7	176	131	34.4
India	47,652	27	47,679	35,728	33.4	99,740	79,103	26.1
Iran	260	0	260	615	(57.7)	634	1,501	(57.8)
Maldives	1,913	0	1,913	2,843	(32.7)	6,702	5,842	14.7
Nepal	571	0	571	374	52.7	1,550	1,063	45.8
Pakistan	2,032	0	2,032	1,152	76.4	3,616	2,582	40.0
EUROPE	156,346	6,127	162,473	148,174	9.7	321,644	294,221	9.3
Northern Europe	37,240	3,409	40,649	33,543	21.2	80,627	63,847	26.3
Denmark	3,096	31	3,127	2,713	15.3	6,499	5,535	17.4
Finland	915	02	917	790	16.1	2,097	1,598	31.2
Norway	1,679	29	1,708	1,400	22.0	3,425	3,065	11.7
Sweden	2,438	17	2,455	2,007	22.3	5,060	4,242	19.3
United Kingdom	27,550	3,238	30,788	25,528	20.6	60,328	47,258	27.7
Others	1,562	92	1,654	1,105	49.7	3,218	2,149	49.7



	February 2025			Tourist arrivals Feb 2025	% change Feb (26/25)	Total tourist arrivals up to Feb 2026	Total tourist arrivals up to Feb 2025	% change up to Feb (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
Western Europe	53,024	2,454	55,478	46,301	19.8	102,903	88,092	16.8
Austria	3,025	49	3,074	2,640	16.4	5,885	5,132	14.7
Belgium	2,220	15	2,235	1,994	12.1	4,150	3,733	11.2
France	17,148	26	17,174	15,469	11.0	30,743	28,088	9.5
Germany	20,410	2,156	22,566	17,233	30.9	40,342	32,283	25.0
Netherlands	6,060	86	6,146	5,589	10.0	13,253	12,073	9.8
Switzerland	4,049	119	4,168	3,266	27.6	8,314	6,588	26.2
Others	112	03	115	110	4.5	216	195	10.8
Central/Eastern Europe	50,387	137	50,524	55,222	(8.5)	105,615	115,069	(8.2)
Belarus	1,991	03	1,994	1,455	37.0	4,229	3,505	20.7
Czech Republic	3,997	02	3,999	3,370	18.7	7,264	6,124	18.6
Estonia	875	0	875	934	(6.3)	1,749	1,849	(5.4)
Hungary	1,175	16	1,191	1,089	9.4	2,544	2,477	2.7
Kazakhstan	1,369	0	1,369	2,463	(44.4)	3,430	5,478	(37.4)
Lithuania	1,062	01	1,063	1,354	(21.5)	1,986	2,993	(33.6)
Poland	10,433	34	10,467	8,519	22.9	20,801	16,104	29.2
Romania	1,059	07	1,066	894	19.2	1,942	1,782	9.0
Russia	23,047	52	23,099	30,295	(23.8)	50,233	64,391	(22.0)
Slovakia	1,452	0	1,452	1,209	20.1	2,590	2,326	11.3
Ukraine	1,616	19	1,635	1,387	17.9	3,713	3,259	13.9
Others	2,311	03	2,314	2,253	2.7	5,134	4,781	7.4
Southern/Mediterranean Europe	15,695	127	15,822	13,108	20.7	32,499	27,213	19.4
Greece	797	03	800	395	102.5	1,431	810	76.7
Italy	5,233	19	5,252	4,115	27.6	11,092	8,893	24.7
Portugal	932	20	952	699	36.2	1,693	1,488	13.8
Spain	3,134	40	3,174	2,528	25.6	6,182	5,224	18.3
Turkey	729	11	740	728	1.6	2,160	1,880	14.9
Israel	3,165	08	3,173	2,959	7.2	6,628	5,689	16.5
Others	1,705	26	1,731	1,684	2.8	3,313	3,229	2.6
MIDDLE EAST	1,185	01	1,186	2,343	(49.4)	3,698	4,432	(16.6)
Bahrain	36	0	36	49	(26.5)	158	208	(24.0)
Egypt	201	0	201	469	(57.1)	489	826	(40.8)
Iraq	103	0	103	114	(9.6)	194	245	(20.8)
Jordan	113	0	113	297	(62.0)	393	475	(17.3)
Kuwait	69	0	69	297	(76.8)	388	378	2.6
Lebanon	201	0	201	357	(43.7)	398	502	(20.7)
Oman	69	0	69	212	(67.5)	340	368	(7.6)
Qatar	29	0	29	46	(37.0)	90	79	13.9
Saudi Arabia	185	0	185	358	(48.3)	721	845	(14.7)
United Arab Emirates	125	01	126	171	(26.3)	368	362	1.7
Others	54	0	54	66	(18.2)	159	144	10.4
TOTAL	269,892	9,436	279,328	240,217	16.3	556,655	492,978	12.9



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

The most striking feature of the data on last departure ports is the overwhelming dominance of Middle Eastern cities as the primary last departure points for tourists visiting Sri Lanka. Dubai leads by a significant margin, serving as the last departure port for 34,816 arrivals (12.46% of the total) . This is followed by Doha with 30,966 arrivals (11.09%) and Abu Dhabi with 18,950 arrivals (6.78%) . Collectively, these three Gulf hubs alone account for nearly one-third (30.33%) of all tourist arrivals.

This indicates that the national carriers of these states (Emirates, Qatar Airways, and Etihad Airways) are the primary conduits for long-haul tourism into Sri Lanka. Their extensive global networks funnel passengers from Europe, the Americas, and other parts of Asia through their respective hubs and onto Colombo. The figures underscore the critical importance of maintaining strong bilateral air service agreements and commercial relationships with these airlines to ensure sustained tourist inflow.

However, this reliance also presents a potential vulnerability. A significant concentration of traffic through a limited number of hub airports means that any operational disruptions, geopolitical tensions, or capacity constraints affecting these hubs could significantly interrupt passenger flows to Sri Lanka. Therefore, while these airlines play a vital role in facilitating connectivity, diversifying air access and strengthening direct or alternative routing options would help reduce potential risks associated with overdependence on a few transit hubs.

Further, the data clearly highlights India's position as a critical regional source market, but with a unique multi-city profile. Four Indian cities appear in the top ten last departure ports: Chennai (4th, 17,243 arrivals), Mumbai (5th, 13,442), Bangalore (7th, 10,426) , and Delhi (9th, 10,286). Combined, these four cities contribute 51,397 arrivals, which represents 18.4% of the total market. When adding other Indian ports like Hyderabad, the Indian subcontinent's share grows even further.

This multi-city presence indicates that demand for travel to Sri Lanka is not concentrated in a single metropolis but is spread across the southern, western, and northern regions of India. The high numbers from South Indian cities like Chennai and Bangalore are expected due to geographical proximity and frequent, short-haul flights. However, the significant figures from Mumbai and Delhi also point to a strong market in western and northern India, driven by both leisure and VFR (Visiting Friends and Relatives) travel. This suggests that marketing and connectivity efforts must remain broad-based across India to capture this diverse demand.

Southeast Asian cities also emerge as important, though secondary, transit points. Kuala Lumpur (6th, 11,576 arrivals) and Singapore (11th, 10,203 arrivals) are significant hubs, together accounting for 7.8% of arrivals. This points to the role of airlines like AirAsia and Singapore Airlines in connecting Sri Lanka with markets in Southeast Asia, East Asia, and Australasia. The presence of Bangkok (15th, 5,868) and Hong Kong (16th, 4,796) further reinforces the pattern of utilizing regional Southeast Asian hubs for connectivity.

The presence of London (12th, 8,539), Istanbul (10th, 10,284), and Moscow (14th, 6,007) provides a glimpse into these long-haul markets. Istanbul's position is particularly interesting, acting as a bridge between Europe and Asia and highlighting the role of Turkish Airlines as a key carrier.



Furthermore, the entry "Dubai/Male" (21st, 3,337) suggests a combined routing, possibly indicating passengers whose journey originated in Dubai with a stop in Male, or vice versa, before finally flying to Sri Lanka. This highlights the complex multi-stop itineraries common in regional travel, particularly involving the Maldives, a close neighbour and competing tourism destination.

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

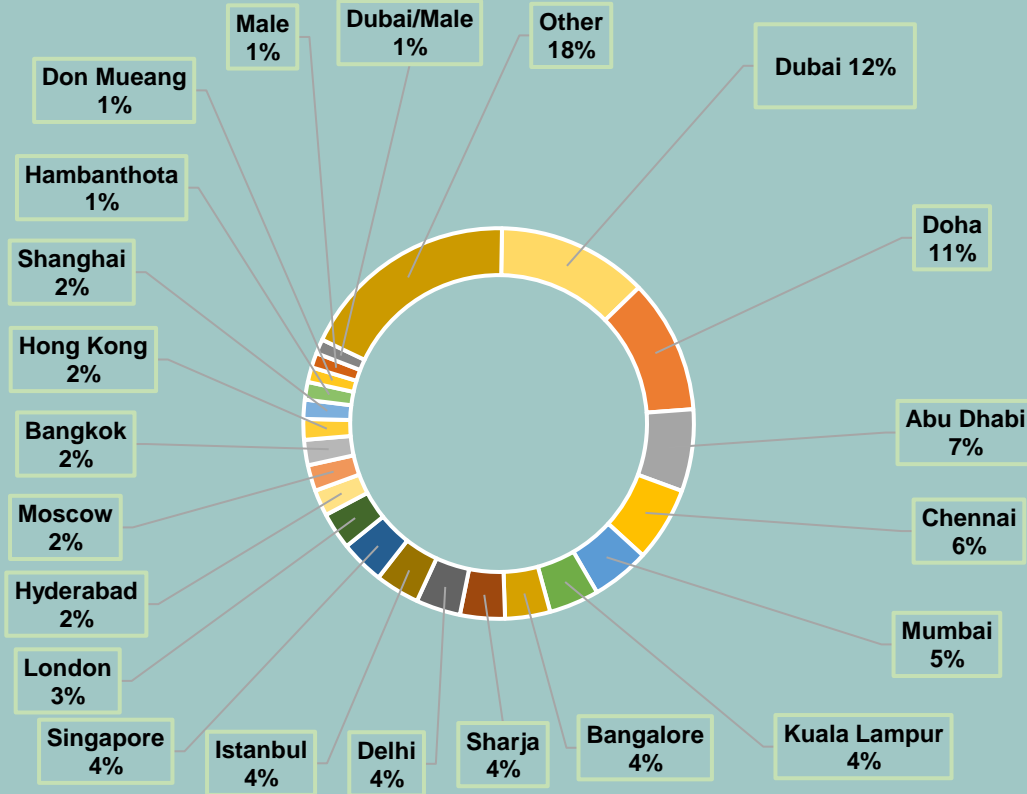
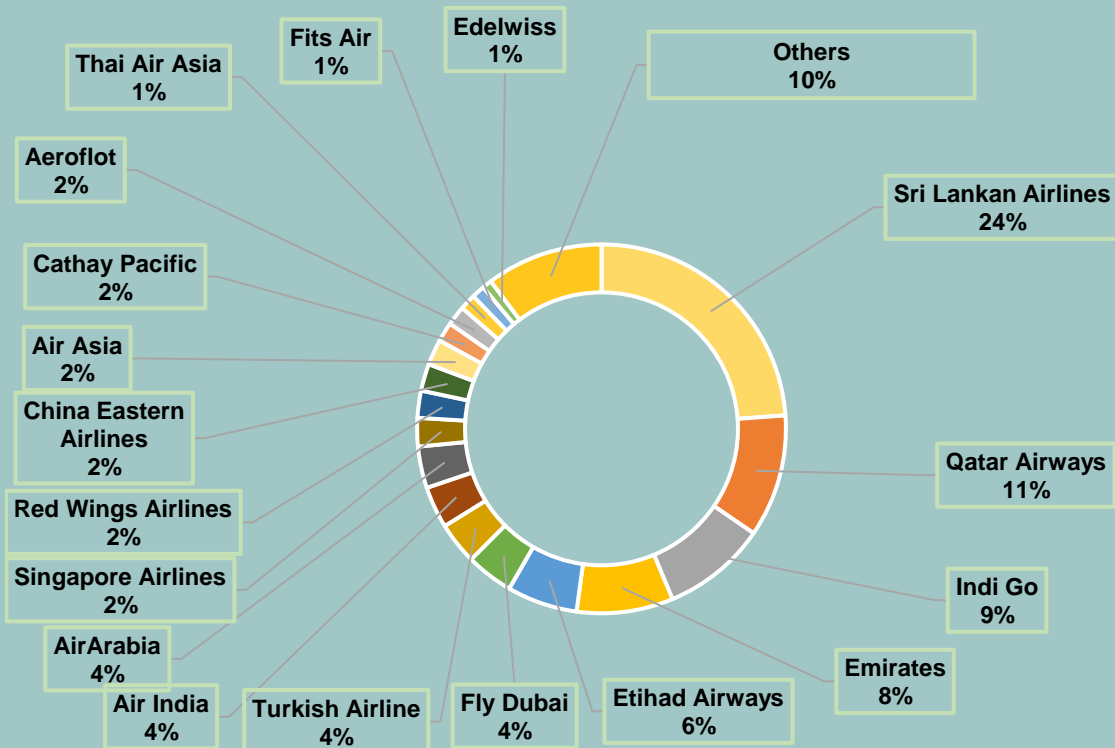


Chart 7. Main airlines to Sri Lanka, February 2026





The data on Airlines used by tourists to travel to Sri Lanka establishes Sri Lankan Airlines as the market leader, transporting 66,583 passengers, which accounts for nearly a quarter (23.84%) of all tourist arrivals. This dominant position is a positive indicator of the national carrier's central role in the country's tourism ecosystem. It suggests that the airline's route network, flight frequencies, and branding remain effective at funneling visitors directly to the destination. For a researcher, this figure serves as a benchmark for the airline's performance and its critical importance to the tourism sector's resilience. Any significant disruption to the national carrier's operations would have an immediate and substantial impact on overall arrival numbers.

When viewed collectively, the Middle Eastern carriers Qatar Airways (2nd, 10.74%), Emirates (4th, 8.45%), Etihad Airways (5th, 6.18%), and Fly Dubai (6th, 4.15%) form a formidable bloc. Together, these four airlines account for 29.52% of the market, which is even larger than the share held by Sri Lankan Airlines alone. This finding corroborates the insights from the "last departure port" analysis, confirming that the Gulf hubs are the primary conduits for long-haul tourism into Sri Lanka. The combined market share of these carriers gives them significant influence over airfare pricing and connectivity options for tourists originating from Europe, the Americas, and beyond. This indicates a strategic dependency that Sri Lanka must manage through strong bilateral relations and competitive route incentives.

A key insight from the data is the remarkable performance of Indian low-cost carrier Indigo, which secured the third position with 25,540 arrivals (9.14%). This makes it the single largest foreign airline by market share and the second-largest carrier overall when considering individual airlines. Indigo's success highlights the immense volume of point-to-point traffic between India and Sri Lanka, driven by geographical proximity, strong cultural ties, and a large diaspora. Its performance, alongside Air India (8th, 3.65%), demonstrates that the Indian market is not only large but also highly responsive to high-frequency, affordable, and convenient flight options. For tourism planners, this underscores the need to facilitate visa processes and marketing campaigns that cater to this price-sensitive but high-volume market segment.

Beyond the top carriers, the data reveals a highly diversified airline landscape that connects Sri Lanka to various regional and specialized markets. Air Arabia (9th, 3.64%) from Sharjah and Air Asia (13th, 2.25%) from Kuala Lumpur represent the growing influence of low-cost carriers in connecting Sri Lanka with the Middle East and Southeast Asia respectively. Their presence, alongside Singapore Airlines (10th, 2.49%), provides a mix of budget and full-service options for travelers from these regions.

The presence of Red Wings Airlines (11th, 2.37%) and Aeroflot (15th, 1.71%) points to a significant flow of tourists from the Russian Federation. This is a crucial observation, as it indicates a specific market segment that relies heavily on these carriers which includes charter operations. Similarly, China Eastern Airlines (12th, 2.37%) highlights the connectivity with the Chinese market, though its share is modest compared to other regions.

The appearance of Edelweiss Air (18th, 0.83%), a Swiss leisure airline, is a small but telling indicator of direct holiday charter traffic from specific European source markets, catering to tourists seeking package holidays.

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

February 2026

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

Country	Dubai	Doha	Abu Dhabi	Chennai	Mumbai	Kuala Lumpur	Bangalore	Sharja	Delhi	Istanbul	Singapore	London	Hyderabad	Moscow	Bangkok	Hong Kong	Shanghai	Don Mueang	Male	Other	Total
India	1,134	191	183	13,681	8,129	306	8,218	183	5,755	13	375	24	5,237	0	528	40	7	53	67	3,555	47,679
United Kingdom	4,347	6,753	2,328	830	793	624	365	65	466	326	645	7,275	114	0	338	172	33	263	239	4,812	30,788
Russian Federation	3,054	338	2,826	141	58	383	105	3,179	53	87	51	6	35	5,907	121	26	126	189	171	6,243	23,099
Germany	4,582	4,180	2,153	240	788	418	246	491	493	1,504	183	95	41	7	245	33	16	172	183	6,496	22,566
China	205	45	63	27	14	2,419	24	21	80	8	1,218	26	4	1	1,379	3,071	3,812	671	512	6,580	20,180
France	3,496	2,916	1,819	162	486	343	167	167	1,082	1,955	220	157	28	0	161	36	23	150	72	3,734	17,174
Poland	1,937	1,457	581	36	152	68	54	2,385	66	323	33	25	2	1	19	4	0	37	67	3,220	10,467
Australia	144	76	65	168	81	833	67	17	205	7	3,705	34	44	0	248	137	5	51	35	4,078	10,000
United States	683	1,289	650	491	478	243	295	24	251	163	518	90	273	1	212	287	64	92	117	2,007	8,228
Netherlands	1,197	1,769	656	61	878	195	81	15	207	302	81	35	11	0	93	17	3	74	33	438	6,146

Crosstabulation of last departure airports by key source markets helps to move beyond simple counts to reveal the specific connectivity patterns and transit hubs that service each major tourist generating country.

The data for India confirms its position as Sri Lanka's largest source market and reveals a distinct travel pattern: a heavy reliance on direct, short-haul connectivity. Unlike long-haul markets that channel through major hubs, Indian tourists depart primarily from Indian cities. The numbers show a multi-city dispersal of demand. Chennai serves as the dominant last departure point, handling 13,681 Indian tourists, followed by Mumbai (8,129), Bangalore (8,218), and Delhi (5,755). This validates the earlier finding that Indigo and Air India's extensive networks from these cities are critical. Interestingly, there is a notable but smaller flow of Indian tourists transiting through Middle Eastern hubs like Dubai (1,134) and Doha (191). These are likely either Indian nationals residing in the Gulf or premium travelers choosing full-service connections. The negligible traffic via Southeast Asian ports reinforces that for Indians, Sri Lanka is a destination best reached directly, and any marketing strategy must prioritize frequency and affordability on these direct routes.

The United Kingdom exhibits a different model that defines long-haul travel to Sri Lanka. While a direct connection exists (the data shows 7252 passengers listing London as their last port). Instead, the majority of British tourists arrive via the Middle Eastern hubs. Doha leads with 6,753 passengers, followed closely by Dubai (4,347) and Abu Dhabi (2,328). Collectively, these three Gulf hubs account for over 13,400 British arrivals, nearly three times the volume of the direct London flights. This illustrates the role of Qatar Airways, Emirates, and Etihad in capturing the UK leisure market. This indicates that the UK market is highly sensitive to connectivity and pricing offered by Gulf carriers.

The data for the Russian Federation (23,099 arrivals) presents a unique travel pattern, reflecting geopolitical and aviation dynamics. Two dominant corridors are immediately apparent. First, there is a massive flow through the Middle East, particularly the UAE. Dubai serves as the last departure point for 3,054 Russians, and 3179 Sharjah. This points to the role of Fly Dubai and Air Arabia in connecting Russian tourists to Sri Lanka, likely through well-established leisure charter or low-cost connections. Second, and most strikingly, there is a direct corridor from Moscow, with 5907 Russians listing it as their last departure port. This indicates the presence of significant direct flight operations, likely by Aeroflot and Red Wings Airlines. The combination of direct flights and Gulf carrier connections gives the Russian market resilience and multiple access points.

The patterns for Germany (22,566 arrivals) and France (17,174 arrivals) are remarkably similar to that of the UK, reinforcing the dominance of Middle Eastern carriers in serving Western European source markets. For Germany, the top three last departure points are Dubai (4,582), Doha (4,180), and Abu Dhabi (2,153), which together account for nearly 11,000 arrivals. Direct connectivity via Frankfurt or Munich appears minimal. Similarly, for France, the Gulf ports of Dubai (3,496), Doha (2,916), and Abu Dhabi (1,819) handles over 8,200 passengers. Therefore, cooperative marketing efforts with Qatar Airways, Emirates, and Etihad are not just beneficial but essential for penetrating these markets effectively.

The travel patterns for China (20,180 arrivals) and Australia (10,000 arrivals) introduce a different geographic dynamic, highlighting the importance of Southeast and East Asian hubs. For China, while the Middle East still plays a role (Dubai 205, Doha 456), the dominant gateways are in Asia. Kuala Lumpur serves 2,419 Chinese tourists, Singapore handles 1,218, and Hong Kong processes 3,071. Most significantly, Shanghai itself is a major last departure point with 3,812 passengers, indicating the presence of direct connections, likely via China Eastern Airlines. This pattern suggests that Chinese tourists are utilizing a mix of direct flights and regional hubs like Hong Kong and Singapore to reach Sri Lanka.

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

Country	Sri Lankan Airlines	Qatar Airways	Indi Go	Emirates	Etihad Airways	Fly Dubai	Turkish Airline	Air India	Air Arabia	Singapore Airlines	Red Wings Airlines	China Eastern Airlines	Air Asia	Cathey Pacific	Aeroflot	Thai Air Asia	Fits Air	Edelwiss	Other	Total
India	44.04	0.30	39.71	1.18	0.31	0.46	0.03	11.36	0.38	0.29	0.00	0.03	0.20	0.07	0.00	0.11	0.53	0.00	1.00	100.00
United Kingdom	32.51	21.58	3.53	13.33	7.64	0.81	1.06	2.17	0.21	1.19	0.00	0.12	1.28	0.56	0.00	0.95	0.35	0.06	12.66	100.00
Russian Federation	2.69	1.39	1.12	3.85	7.09	7.94	0.38	0.19	13.74	0.12	28.07	0.58	1.21	0.11	20.49	0.91	1.70	0.01	8.41	100.00
Germany	19.02	18.29	2.18	18.27	9.30	3.51	6.66	3.32	2.18	0.59	0.00	0.15	1.28	0.15	0.03	0.82	0.59	1.90	11.75	100.00
China	12.97	0.22	0.19	0.86	0.26	0.22	0.04	0.38	0.10	4.94	0.00	29.13	6.47	15.22	0.00	3.80	1.67	0.00	23.53	100.00
France	23.27	15.88	1.99	17.17	10.52	4.20	11.38	6.20	0.97	0.62	0.01	0.16	1.51	0.21	0.00	1.02	0.44	0.69	3.78	100.00
Poland	3.88	13.36	0.88	5.08	5.02	14.19	3.09	0.65	22.79	0.19	0.00	0.00	0.51	0.04	0.01	0.40	0.41	0.64	28.88	100.00
Australia	44.60	0.70	1.73	1.15	0.59	0.32	0.07	0.88	0.17	27.56	0.00	0.07	2.74	1.37	0.00	0.57	0.47	0.02	16.99	100.00
United States	21.24	15.44	9.46	6.68	7.81	1.37	1.98	4.24	0.29	4.57	0.00	0.91	1.63	3.49	0.01	1.39	0.51	0.11	18.86	100.00
Netherlands	6.85	28.93	14.95	19.10	10.72	1.89	4.91	3.29	0.24	0.83	0.00	0.05	2.49	0.28	0.00	1.45	0.41	0.29	3.32	100.00



An analysis of the relationship between tourist source markets and their choice of airline for travel to Sri Lanka reveals useful insights. The data for India reveals a market driven overwhelmingly by point-to-point, low-cost connectivity. Indigo is the dominant player, capturing a staggering 39.71% of the Indian tourist market. This is complemented by Air India at 11.36% , bringing the total share of Indian carriers to over 51%. Sri Lankan Airlines also performs exceptionally well in this market, securing 44.04% , which represents a near-duopoly with Indigo. The combined share of these three carriers (Indigo, Air India, and Sri Lankan Airlines) accounts for over 95% of all Indian tourists.

The United Kingdom presents a classic long-haul market pattern, characterized by a heavy reliance on Middle Eastern hubs. Qatar Airways leads with 21.58% , followed closely by Emirates at 13.33% and Etihad Airways at 7.64% . Collectively, these three Gulf carriers account for over 42% of the UK market. When adding Fly Dubai (0.81%), the Gulf presence approaches 43%.

Sri Lankan Airlines performs respectably in its traditional long-haul market, capturing 32.51% of UK tourists. However, this is less than the combined Gulf carrier share, indicating intense competition. Turkish Airlines also captures a notable 1.06% , acting as an alternative bridge.

The Russian Federation exhibits the most unique and concentrated airline preference pattern of all markets. Red Wings Airlines leads with an extraordinary 28.07% share, closely followed by Aeroflot at 20.49% . Together, these two Russian carriers account for nearly half (48.56%) of all Russian tourists to Sri Lanka. This confirms the presence of strong direct air links, likely including charter operations.

The UAE-based low-cost carriers also play a vital role. Air Arabia captures 13.74% , and Fly Dubai holds 7.94% , indicating a significant flow of Russian tourists connecting through Sharjah and Dubai. The combined share of these two carriers (21.68%) is nearly as large as the share held by the Russian carriers. In contrast, the major Gulf full-service carriers have a minimal presence (Qatar 1.39%, Emirates 3.85%), and Sri Lankan Airlines captures only 2.69% . This bifurcated pattern between direct Russian flights and UAE-based low-cost carriers is unique and demands a dual-track strategy of maintaining bilateral air agreements with Russia and fostering partnerships with UAE LCCs.

The patterns for Germany and France mirror that of the UK, reinforcing the dominance of Middle Eastern carriers in serving Western Europe. For Germany, the top three carriers are Sri Lankan Airlines (19.02%), Qatar Airways (18.29%), and Emirates (18.27%). While Sri Lankan performs strongly, the combined share of Qatar and Emirates alone (36.56%) exceeds it. When adding Etihad (9.30%) and Fly Dubai (3.51%), the Gulf carrier share approaches 50%. Turkish Airlines also captures a notable 6.66% , acting as an alternative hub.

For France, Sri Lankan Airlines leads with 23.27% , followed by Emirates at 17.17% and Qatar Airways at 15.88% . The combined Gulf carrier share (Emirates, Qatar, Etihad at 10.52%, and Fly Dubai at 4.20%) totals nearly 48%, once again outstripping the national carrier. Turkish Airlines also performs well here with 11.38% . The data clearly indicates that for German and French leisure tourists, the journey to Sri Lanka is most often mediated by a Gulf or Turkish hub.

The China market presents a distinct pattern driven by Chinese carriers and Southeast Asian hubs. China Eastern Airlines is the dominant player, capturing an impressive 29.13% of the market, indicating strong direct connectivity from cities like Shanghai. Cathay Pacific follows with 15.22% , highlighting the role of Hong Kong as a key transit hub for Chinese

travelers. Sri Lankan Airlines holds a significant 12.97% share, suggesting it successfully competes for a segment of this market. Southeast Asian carriers also play a crucial role: Air Asia (from Kuala Lumpur) captures 6.47% , and Singapore Airlines holds 4.94% . In contrast to European markets, the Middle Eastern carriers have a negligible presence in the Chinese market. This pattern suggests that marketing to China requires a focus on partnerships with China Eastern, Cathay Pacific, and Southeast Asian carriers, rather than the Gulf airlines.

Sri Lankan Airlines also performs exceptionally well, capturing 44.60% of Australian tourists, indicating a strong preference for the national carrier's direct services. Singapore Airlines holds a 27.5%, while the Middle Eastern carriers have a very limited presence (Emirates 1.15%, Qatar 0.70%).

Air Arabia appears to be the most popular airline among tourists from Poland, likely due to its competitive fares and convenient connections through its Middle Eastern hubs. For visitors from the United States, Sri Lankan Airlines is the most commonly used carrier, reflecting the airline's connectivity through partner networks and long-haul routes that link North America to Colombo via key transit points. Meanwhile, tourists from the Netherlands show a preference for Qatar Airways, which offers extensive global connections through its hub in Doha and provides efficient one-stop access to Sri Lanka.





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