2026

MONTHLY TOURIST ARRIVALS REPORT:

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

January

Introduction

The following document provides a synthesis of the most recent January 2026 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st January 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

January 2026 recorded 277,327 tourist arrivals, compared to 252,761 arrivals in January 2025, reflecting a year-on-year growth of 9.7%. This represents an increase of nearly 25,000 additional tourists within a single month, signalling a strong and confident start to the year. Such growth is particularly noteworthy given that January is already part of Sri Lanka's peak season; achieving close to double digit growth on an already high base indicates strengthening demand rather than a mere statistical rebound.

The 9.7% increase substantially exceeds the projected global tourism growth rate of 3-4% for 2026 (UN Tourism, 2026), suggesting that Sri Lanka is currently outperforming broader international trends. If this momentum is sustained across the coming months, the country is well-positioned to surpass monthly benchmarks.

In a global context, international tourism performed solidly in 2025, with worldwide arrivals growing by approximately 4%. According to UN Tourism, an estimated 1.52 billion international tourists were recorded globally, representing nearly 60 million more travellers than in 2024. Most destinations posted positive results, reflecting continued recovery and stabilisation following recent global disruptions. Sri Lanka's overall 2025 performance aligns with this global upward trajectory, demonstrating that the country is benefiting from the broader revival in international travel demand. However, the January 2026 growth rate of 9.7% clearly outpaces the global average growth recorded in 2025, indicating that Sri Lanka may be capturing market share or benefiting disproportionately from recovering source markets.

The recovery of Sri Lanka's tourism sector in 2025 could be linked to multiple factors. A resurgence in key source markets, including Europe, the Middle East, and India, could be contributing to higher arrivals, aided by enhanced air connectivity. Additionally, relative political and economic stability could be helping to rebuild traveler confidence.

Looking ahead, international tourism is projected to grow by 3% to 4% in 2026 compared to 2025(UN Tourism, 2026). This forecast assumes several favourable conditions: continued recovery in Asia and the Pacific, stable and supportive global economic conditions, a gradual decline in tourism related inflation, and the absence of escalating geopolitical conflicts. Within this global outlook, Sri Lanka's current growth trajectory places it in a strong competitive position.

If the recovery of Asia Pacific markets continues particularly key source markets for Sri Lanka, the country stands to benefit significantly from increased regional mobility and improved air connectivity. Nevertheless, sustaining this growth will require careful strategic management.

Table 1. Monthly tourist arrivals, January 2026

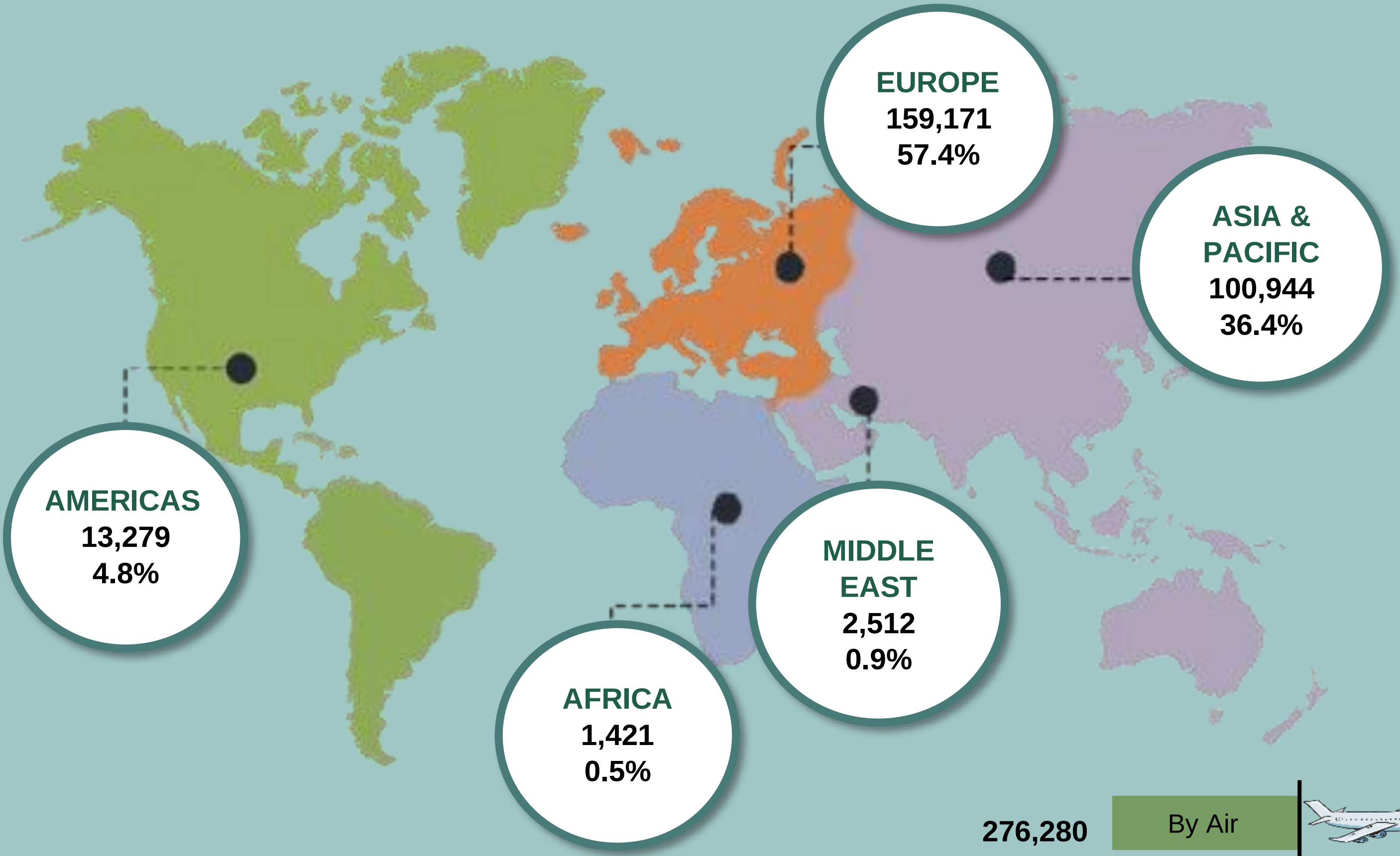
Month	2025	2026	% Change 2025/24
January	252,761	**277,327**	**9.7**
February	240,217	-	-
March	229,298	-	-
April	174,608	-	-
May	132,919	-	-
June	138,241	-	-
July	200,244	-	-
August	198,235	-	-
September	158,971	-	-
October	165,193	-	-
November	212,906	-	-
December	258,928	-	-
TOTAL	**2,362,521**	**277,327**	

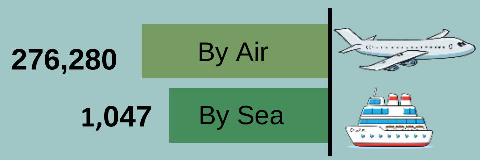
Tourist Arrivals | January 2026

277,327

Tourist arrivals by region and percentage share January 2026

Map 1. Tourist arrivals by region and percentage share





Sri Lanka's tourist arrival data for January 2026 indicates a concentration of visitors from select global regions, with a total of 277,327 international arrivals. Europe emerged as the leading source market, accounting for 159,171 tourists, or 57.4% of all arrivals. This strong European presence highlights the island nation's appeal to travelers from the region, likely supported by favourable winter tourism patterns and established travel links. The Asia & Pacific region ranked second, contributing 100,944 arrivals, representing 36.4% of the total. Together, these two regions make up 93.8% of all international visitors, underscoring Sri Lanka's significant reliance on European and Asian markets. The Americas contributed 13,279 tourists (4.8%), while the Middle East and Africa recorded smaller shares, with 2,512 (0.9%) and 1,421 (0.5%) arrivals, respectively.

Top primary markets and top potential markets

Top primary markets, January 2026

Rank	Market	Arrivals	% Share
01	India	52,061	18.8
02	United Kingdom	29,540	10.7
03	Russia	27,134	9.8
04	Germany	17,776	6.4
05	China	14,003	5.0
06	France	13,569	4.9
07	Australia	11,172	4.0
08	Poland	10,334	3.7
09	United States	7,373	2.7
10	Netherlands	7,107	2.6
11	Italy	5,840	2.1
12	Canada	5,048	1.8
13	Maldives	4,789	1.7
14	Switzerland	4,146	1.5
15	Bangladesh	4,102	1.5
16	Israel	3,455	1.2
17	Denmark	3,372	1.2
18	Czech Republic	3,265	1.2
19	Spain	3,008	1.1
20	Japan	2,896	1.0

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

Top potential markets, January 2026

21. **Austria** — Arrivals: **2,811 / % Share: 1.0**
22. **Sweden** — Arrivals: **2,605 / % Share: 0.9**
23. **Belarus** — Arrivals: **2,235 / % Share: 0.8**
24. **Ukraine** — Arrivals: **2,078 / % Share: 0.7**
25. **Kazakhstan** — Arrivals: **2,061 / % Share: 0.7**
26. **Belgium** — Arrivals: **1,915 / % Share: 0.7**
27. **South Korea** — Arrivals: **1,898 / % Share: 0.7**
28. **Norway** — Arrivals: **1,717 / % Share: 0.6**
29. **Pakistan** — Arrivals: **1,584 / % Share: 0.6**
30. **Malaysia** — Arrivals: **1,566 / % Share: 0.6**

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

Top ten source markets

January 2026

Based on the tourist arrival data for Sri Lanka in January 2026, the overall performance from key source markets has been robust, showing strong year-on-year growth compared to January 2025.

India continues to be the dominant source market by a significant margin, contributing over 27% of the total arrivals among the top ten countries. With 52,061 arrivals in January 2026 compared to 43,375 in the previous year, India recorded an impressive 20% growth. Nearly all Indian tourists arrived by air, highlighting the strength of air connectivity and the advantage of geographical proximity. This market remains a cornerstone for Sri Lanka's tourism industry and offers further potential for growth through enhanced flight frequencies and regional promotional campaigns.

Several Western and European markets exhibited remarkable growth. The United Kingdom recorded a substantial increase of 35.9%, rising from 21,730 to 29,540 arrivals, reaffirming its position as the second largest source market. Poland emerged as the fastest growing market among the top ten, with a 36.2% surge in arrivals, increasing from 7,585 to 10,334. Australia and the Netherlands also posted healthy gains of 16.8% and 9.6% respectively. These trends suggest that Sri Lanka's destination appeal is resonating well in these regions, and there is scope to further deepen engagement through targeted campaigns and partnerships.

However, not all markets performed positively. The Russian Federation, despite being the third largest source market, witnessed a sharp decline of 20.4%, with arrivals dropping from 34,096 to 27,134. Similarly, China recorded a 16.2% fall, from 16,709 to 14,003. These declines are concerning and warrant immediate attention. Possible reasons could include reduced flight connectivity, visa challenges, economic pressures, or increased competition from other destinations.

Sri Lanka's tourism sector is experiencing healthy growth driven by strong performances from India, the United Kingdom, and emerging markets like Poland. However, the significant downturns in the Russian and Chinese markets highlight vulnerabilities in the recovery process.

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

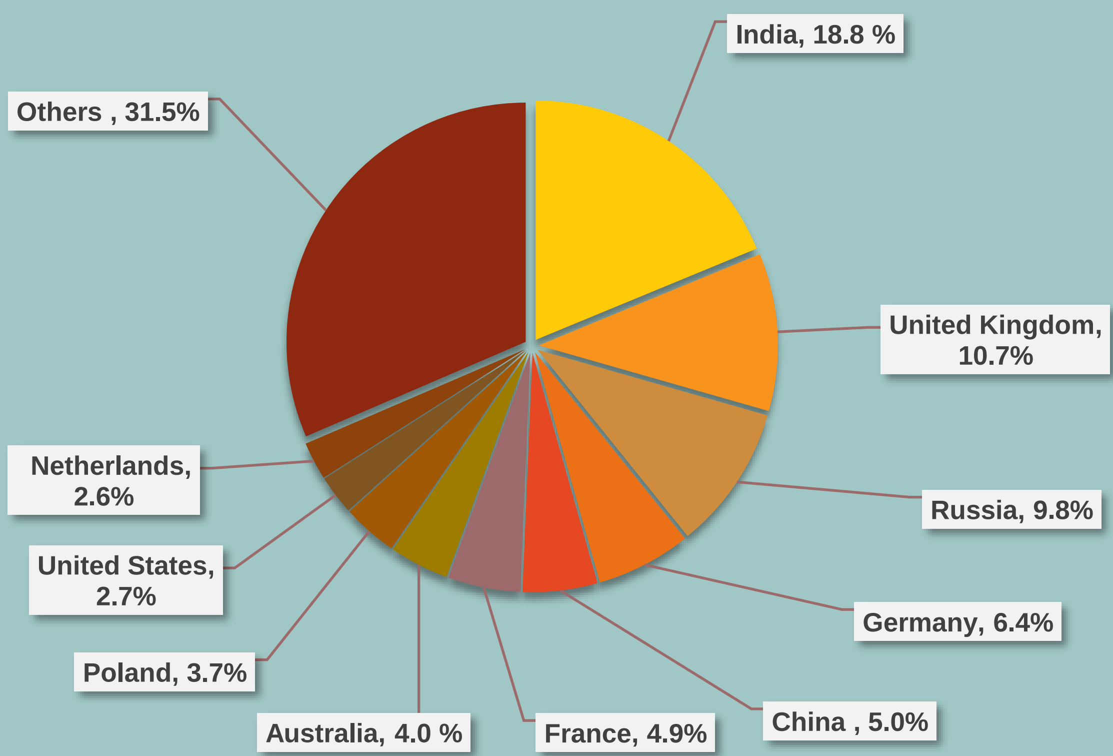
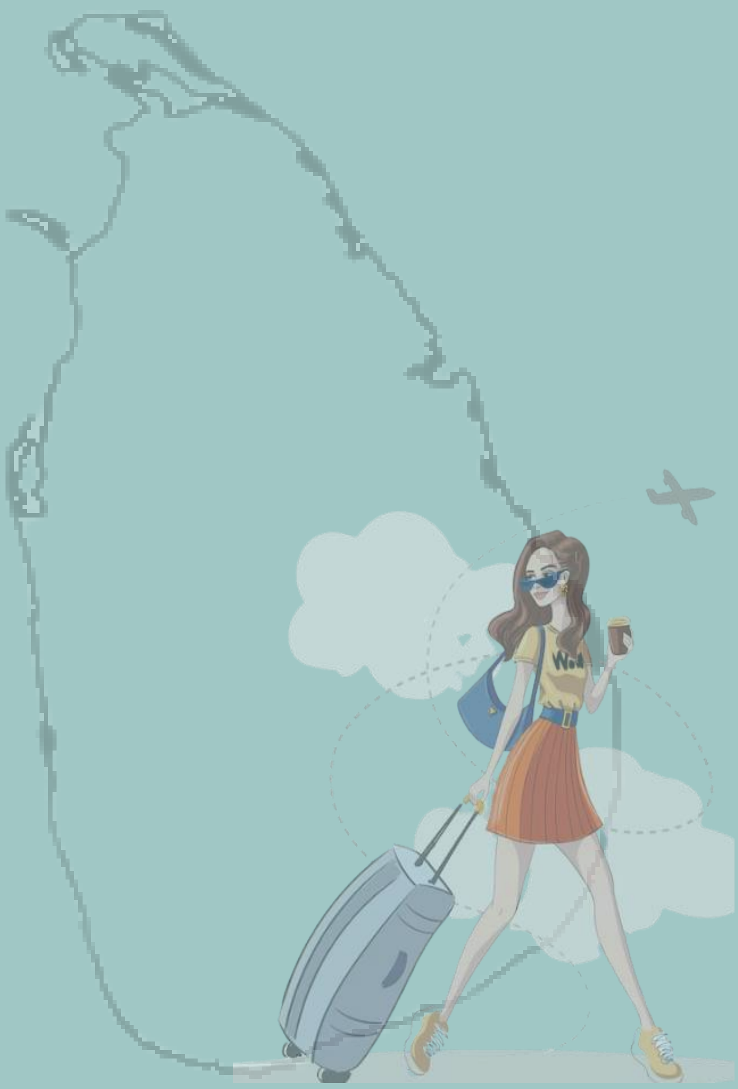


Table 2. Top ten source markets to Sri Lanka, January 2026

Rank	Country of Residence	Tourist arrivals (January 2026)			Tourist arrivals (January 2025)
		By Air	By Sea	Total	
1	India	52,058	3	52,061	43,375
2	United Kingdom	29,258	282	29,540	21,730
3	Russian Federation	27,126	8	27,134	34,096
4	Germany	17,753	23	17,776	15,050
5	China	14,001	2	14,003	16,709
6	France	13,561	8	13,569	12,619
7	Australia	11,122	50	11,172	9,563
8	Poland	10,332	2	10,334	7,585
9	United States	6,906	467	7,373	7,067
10	Netherlands	7,099	8	7,107	6,484



Tourist arrivals by purpose of visit
January 2026

An analysis of arrival patterns by travel motivation highlights Sri Lanka's strong positioning as a diverse and multifaceted destination capable of catering to a wide range of visitor interests. Leisure and holiday travel dominated the market, accounting for 69.2% of total arrivals. This confirms Sri Lanka's well-established reputation as a premier vacation destination, attracting visitors seeking rich cultural heritage, scenic beaches, wildlife experiences, and adventure-based activities.

Meetings, Incentives, Conferences, and Events (MICE) tourism ranked as the second largest segment at 9.2%, reflecting the country's growing competitiveness in the business events arena. This segment offers strong high-yield potential, as MICE travelers typically generate higher per capita spending and help support tourism during off-peak periods.

Visiting Friends and Relatives (VFR) travel represented 6.5% of arrivals, underscoring the continued engagement of the Sri Lankan diaspora and the country's global community ties. VFR tourism often leads to longer stays, broader regional spending distribution, and deeper cultural interaction.

Business travel accounted for 2.4%, indicating sustained commercial and trade linkages. Meanwhile, health and Ayurvedic tourism contributed 0.8%, signaling opportunities within the wellness and traditional medicine sector. Religious tourism (0.3%), sports tourism (0.2%), and education-related travel (0.3%) remain emerging niche markets with potential for targeted development and strategic promotion.

Overall, the distribution of travel purposes demonstrates Sri Lanka's capacity to attract multiple market segments simultaneously. While leisure tourism continues to form the core of arrivals, the strong MICE presence and the growth of specialized segments point to a progressively maturing and more resilient tourism industry. Strengthening niche areas particularly wellness, sports, and education tourism offers strategic opportunities for sustainable expansion, improved seasonality management, and enhanced competitive positioning within the regional tourism landscape.

Chart 4: Purpose of visit, January 2026

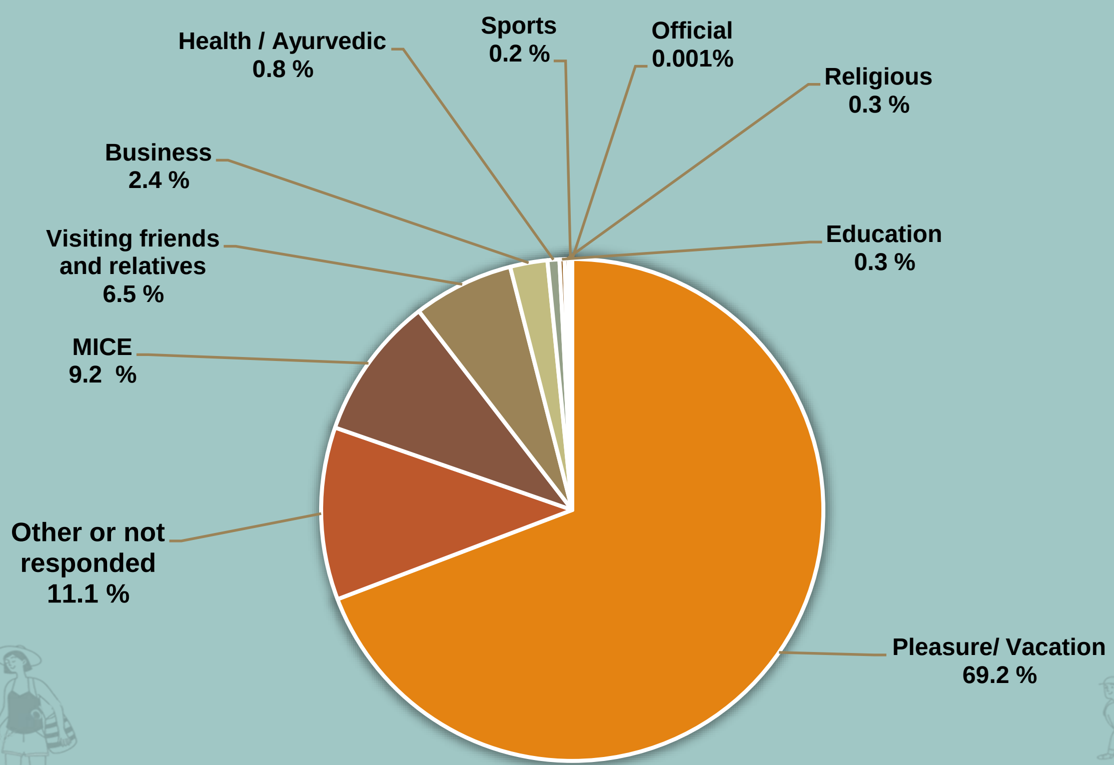
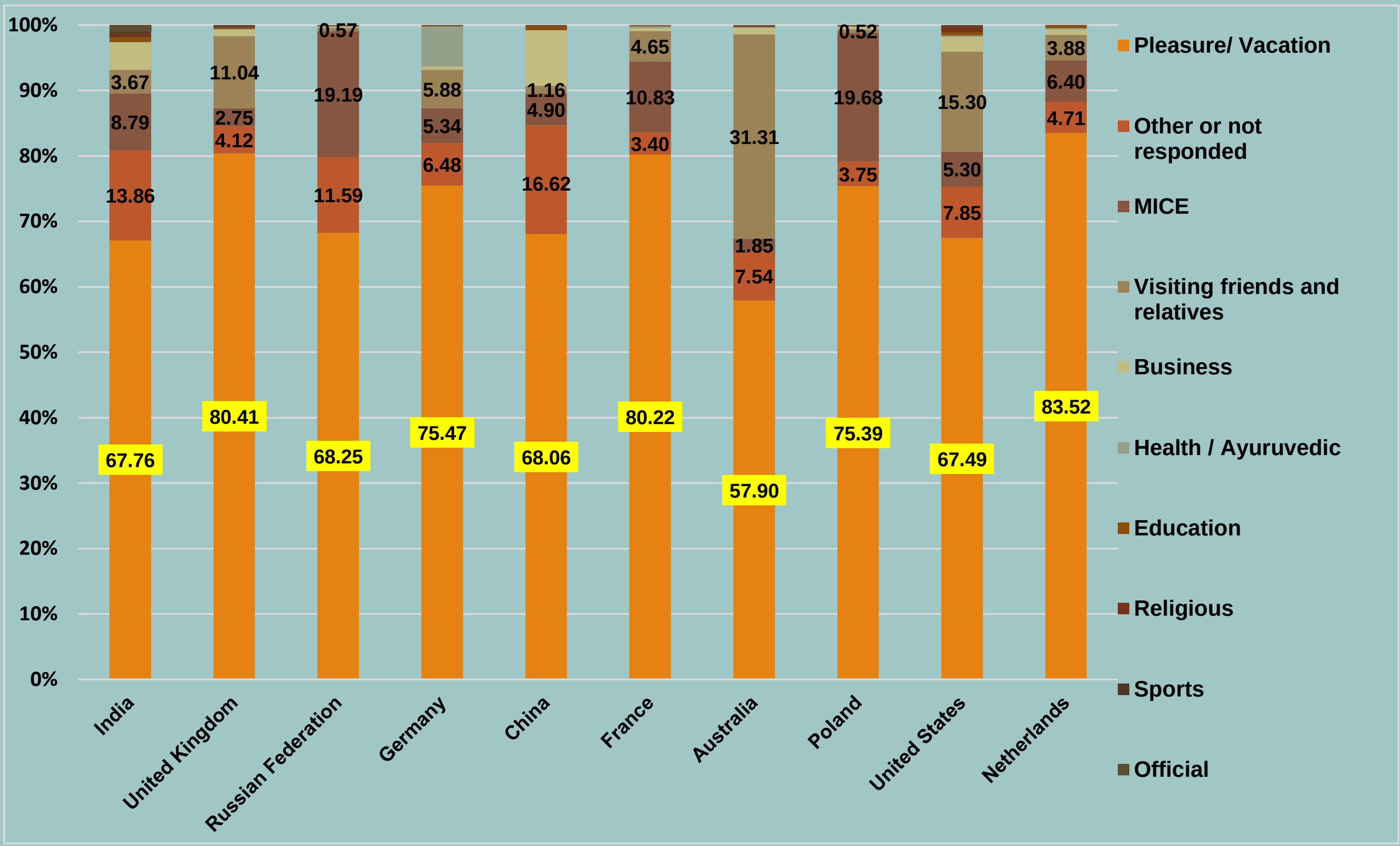


Chart 5: Purpose of visit vs main source markets



An analysis of tourist arrivals by their purpose of visit reveals that "Pleasure/Vacation" is overwhelmingly the primary driver for tourism to Sri Lanka across almost all countries, accounting for the majority of arrivals. Tourists from the Netherlands lead this segment at 83.52%, followed closely by the United Kingdom at 80.41% and France at 80.22%, confirming Sri Lanka's strong position as a premier long-haul leisure destination. Germany, Poland, and India also show very strong vacation numbers at 75.47%, 75.39%, and 67.76% respectively, making this segment the undeniable backbone of Sri Lankan tourism.

Beyond the dominant leisure market, the data reveals distinct niche segments and specializations based on the country of origin. The "Visiting Friends and Relatives" (VFR) category is a prime example, with Australia being a clear outlier at 31.31%, a figure significantly higher than any other nation and pointing to a large Sri Lankan diaspora or strong familial connections. The United States at 15.30% and the United Kingdom at 11.04% also show substantial VFR traffic, likely driven by their own diaspora communities, which represents a resilient form of travel less sensitive to economic shifts.

Another key niche is the MICE (Meetings, Incentives, Conferences, Exhibitions) segment, where Poland at 19.68% and the Russian Federation at 19.19% stand out as the primary markets. This suggests strong business ties or successful marketing of Sri Lanka for corporate events in these countries, with France at 10.83% and India at 8.79% also contributing significantly to this high yield sector. In contrast, pure "Business" travel is led by China at 8.47%, likely reflecting ongoing commercial activities and investments, followed by India at 4.27% as a major regional trading partner.

Further specialization is visible in the "Health / Ayurvedic" category, where Germany at 6.15% is a dramatic standout, indicating a deep-rooted and established interest in wellness tourism that Sri

Lanka can capitalize on. Meanwhile, "Religious" tourism, while small overall, sees the highest percentages from the United States at 0.83% and India at 0.69%, likely corresponding to Buddhist pilgrimage sites. Finally, the "Official" visits category is negligible across all countries, which is typical for general tourist arrival statistics.

Based on these insights, several strategic recommendations emerge. First, targeted marketing is essential; campaigns in the Netherlands, UK, and France should focus on leisure and sightseeing, while messaging in Australia and the US could be tailored to heritage and family travel. In Poland and Russia, the focus should be on maintaining relationships with corporate travel organizers, and in Germany, promoting wellness retreats could yield high returns. Second, this data can guide product development, such as creating services for multi-generational VFR families or world class facilities for the MICE market. Crucially, while these niche markets offer significant growth potential, the "Pleasure/Vacation" segment remains the foundation, requiring continuous investment in maintaining the quality of beaches, heritage sites, and natural attractions to keep the core markets engaged.

Asia Pacific's new tourism model: Contextual implication for Sri Lanka

The Asia Pacific tourism sector is entering a transformative phase, characterized by a growing propensity among travellers to venture beyond established urban and landmark destinations into rural, community-based locales. This shift documented in the research studies represents not just a trend in itinerary preferences but a structural change in how tourism growth can be understood and nurtured across the region.

Evidence of Shift: Travel Trends and Behavioural Dynamics

This behaviour reflects a deeper value shift among travellers:

- Prioritisation of authentic, local experiences over iconic "must-see" attractions.
- Desire for community immersion and cultural connection.
- Search for meaningful, personalised travel narratives rather than standardized sightseeing.

This evolution in traveller psychology challenges traditional destination development models and calls for a more nuanced understanding of demand drivers. As reported, over 90% of travelers in the region are now exploring less traditional destinations, signaling a departure from urban-centric tourism models. This trend reflects an evolution in traveler mindset from passive sightseeing to active participation in the cultural and social fabric of the host community. This shift represents a valuable lens to examine the interplay between visitor expectations and local tourism offerings.

Economic and Social Impacts

The decentralization of tourist flows has substantial implications for local economies. Smaller towns and rural communities, historically bypassed by mainstream tourism, are experiencing increased economic opportunities. Micro-entrepreneurs, artisans, and local service providers benefit directly from the influx of visitors, fostering inclusive growth and community resilience.

From a policy perspective, this creates an imperative to support infrastructure development, local capacity-building, and regulatory frameworks that ensure equitable benefit distribution while preserving cultural and natural heritage.

The Role of Digital Platforms

Digital platforms, are key facilitators in this new era of tourism. By providing visibility to previously overlooked destinations, these platforms enable travelers to discover and access remote locations with ease. The key dynamics include;

- Discoverability: Digital listings for unique stays increase visibility for emerging locations.
- Micro-entrepreneurship: Local hosts can monetize community assets directly, redistributing tourism revenue.
- Market reach: Wider geographic reach to source markets that might otherwise have overlooked these destinations.

This digital mediation not only empowers local hosts but also contributes to a more diversified tourism economy, mitigating risks associated with over tourism in popular centers.

Sustainability and Destination Management

From a sustainability lens, the dispersal of travellers beyond overcrowded hubs could mitigate over tourism pressures a persistent challenge in Asia Pacific's popular destinations. By promoting rural viability and managing visitor flows more evenly across regions, this shift aligns with sustainability principles such as:

- Reduced environmental strain on over-visited sites.
- Preservation of local culture through community-driven experiences.
- Strengthened economic resilience in smaller towns and villages.

These outcomes support long-term destination sustainability, moving beyond short-term visitor growth metrics.

Contextualizing to Sri Lanka

Tourism in Sri Lanka also, however, remains heavily concentrated in a few iconic sites, such as Sigiriya, Yala and other key destinations. This concentration has led to over tourism, environmental stress, unequal economic benefits, underutilization of rural destinations, and limited opportunities for community-led growth. Fragile heritage and ecological sites face increasing pressure, while local communities in secondary destinations are often excluded from tourism's economic benefits.

The Asia Pacific findings provide a strategic response framework for South Asia and Sri lanka. Decentralizing tourism growth and promoting off-the-beaten-track destinations can help disperse visitor flows and alleviate pressure on iconic sites. Community-based and experiential tourism can generate inclusive economic opportunities, particularly for women and youth, while leveraging digital platforms enables rural hosts to reach wider markets and showcase authentic experiences. Integrating sustainability principles ensures tourism development aligns with environmental preservation and long-term viability.

To operationalise these strategies in Sri Lanka, several key actions are recommended. National rural tourism strategies should identify and develop secondary and tertiary destinations with growth potential. Digital capacity-building programs are needed to train rural hosts in online marketing, booking systems, and sustainable hospitality practices. Investments in infrastructure, transport, and visitor facilities will improve accessibility and experience quality. Visitor dispersal policies and carrying capacity monitoring can help manage environmental and social impacts. Finally, encouraging community participation through micro enterprises and local entrepreneurship will ensure equitable benefits across regions.

If implemented effectively, these strategies can achieve multiple outcomes: reducing pressure on popular destinations, fostering balanced regional economic growth, increasing rural employment, enhancing community resilience, and improving visitor satisfaction through authentic experiences. Additionally, sustainable practices will safeguard cultural heritage and natural resources. By applying the insights from Asia Pacific's off-the-beaten-track tourism trends, Sri Lanka has the opportunity to enter a new era of inclusive, decentralised, and sustainable tourism that creates value for both travellers and host communities alike.

References

PATA & Aribnb, 2026, Beyond the Beaten Track- Unlocking Tourism Growth Across Asia Pacific, Bangkok.

International tourist arrivals by country of residence

	January 2026 Tourist arrivals			Tourist arrivals January 2025	% change January (26/24)
	By Air	By Sea	Total		
AMERICAS	**12,706**	**573**	**13,279**	**12,226**	**8.6**
North America	**11,971**	**561**	**12,532**	**11,607**	**8.0**
Canada	4,960	88	5,048	4,458	13.2
Mexico	105	06	111	82	35.4
United States	6,906	467	7,373	7,067	4.3
Caribbean & Central America	**125**	**0**	**125**	**69**	**81.2**
Costa Rica	16	0	16	09	77.8
Jamaica	03	0	03	03	0.0
Others	106	0	106	57	86.0
South America	**610**	**12**	**622**	**550**	**13.1**
Argentina	184	04	188	164	14.6
Brazil	186	08	194	234	(17.1)
Chile	82	0	82	45	82.2
Colombia	75	0	75	45	66.7
Others	83	0	83	62	33.9
AFRICA	**1,417**	**04**	**1,421**	**1,245**	**14.1**
North Africa	**267**	**0**	**267**	**223**	**19.7**
Morocco	92	0	92	82	12.2
Sudan	96	0	96	72	33.3
Others	79	0	79	69	14.5
Sub-Saharan Africa	**1,150**	**04**	**1,154**	**1,022**	**12.9**
Kenya	82	01	83	42	97.6
Mauritius	101	0	101	49	106.1
Nigeria	12	0	12	14	(14.3)
South Africa	375	03	378	365	3.6
Others	580	0	580	552	5.1

	January 2026			Tourist arrivals January 2025	% change January (26/25)
	Tourist arrivals				
	By Air	By Sea	Total		
ASIA & PACIFIC	**100,883**	**61**	**100,944**	**91,154**	**10.7**
North East Asia	**18,833**	**03**	**18,836**	**21,517**	**(12.5)**
China	14,001	02	14,003	16,709	(16.2)
Japan	2,895	01	2,896	2,631	10.1
South Korea	1,898	0	1,898	2,149	(11.7)
Others	39	0	39	28	39.3
South East Asia	**5,767**	**03**	**5,770**	**4,933**	**17.0**
Cambodia	171	0	171	26	-
Indonesia	572	0	572	280	104.3
Malaysia	1,566	0	1,566	2,125	(26.3)
Myanmar	705	0	705	97	-
Philippines	421	0	421	424	(0.7)
Singapore	1,136	02	1,138	1,048	8.6
Thailand	801	01	802	625	28.3
Vietnam	354	0	354	257	37.7
Others	41	0	41	51	(19.6)
Oceania	**12,286**	**52**	**12,338**	**10,601**	**16.4**
Australia	11,122	50	11,172	9,563	16.8
New Zealand	1,101	02	1,103	997	10.6
Others	63	0	63	41	53.7
South Asia	**63,997**	**03**	**64,000**	**54,103**	**18.3**
Afghanistan	0	0	0	06	-
Bangladesh	4,102	0	4,102	4,626	(11.3)
Bhutan	111	0	111	92	20.7
India	52,058	03	52,061	43,375	20.0
Iran	374	0	374	886	(57.8)
Maldives	4,789	0	4,789	2,999	59.7
Nepal	979	0	979	689	42.1
Pakistan	1,584	0	1,584	1,430	10.8
EUROPE	**158,762**	**409**	**159,171**	**146,047**	**9.0**
Northern Europe	**39,674**	**304**	**39,978**	**30,304**	**31.9**
Denmark	3,371	01	3,372	2,822	19.5
Finland	1,180	0	1,180	808	46.0
Norway	1,711	06	1,717	1,665	3.1
Sweden	2,602	03	2,605	2,235	16.6
United Kingdom	29,258	282	29,540	21,730	35.9
Others	1,552	12	1,564	1,044	49.8

	January 2026			Tourist arrivals January 2025	% change January (26/25)
	Tourist arrivals				
	By Air	By Sea	Total		
Western Europe	**47,376**	**49**	**47,425**	**41,791**	**13.5**
Austria	2,809	02	2,811	2,492	12.8
Belgium	1,913	02	1,915	1,739	10.1
France	13,561	08	13,569	12,619	7.5
Germany	17,753	23	17,776	15,050	18.1
Netherlands	7,099	08	7,107	6,484	9.6
Switzerland	4,140	06	4,146	3,322	24.8
Others	101	0	101	85	18.8
Central/Eastern Europe	**55,074**	**17**	**55,091**	**59,847**	**(7.9)**
Belarus	2,235	0	2,235	2,050	9.0
Czech Republic	3,265	0	3,265	2,754	18.6
Estonia	874	0	874	915	(4.5)
Hungary	1,350	03	1,353	1,388	(2.5)
Kazakhstan	2,061	0	2,061	3,015	(31.6)
Lithuania	922	01	923	1,639	(43.7)
Poland	10,332	02	10,334	7,585	36.2
Romania	873	03	876	888	(1.4)
Russia	27,126	08	27,134	34,096	(20.4)
Slovakia	1,138	0	1,138	1,117	1.9
Ukraine	2,078	0	2,078	1,872	11.0
Others	2,820	0	2,820	2,528	11.6
Southern/ Mediterranean Europe	**16,638**	**39**	**16,677**	**14,105**	**18.2**
Greece	631	0	631	415	52.0
Italy	5,813	27	5,840	4,778	22.2
Portugal	741	0	741	789	(6.1)
Spain	3,003	05	3,008	2,696	11.6
Turkey	1,416	04	1,420	1,152	23.3
Israel	3,455	0	3,455	2,730	26.6
Others	1,579	03	1,582	1,545	2.4
MIDDLE EAST	**2,512**	**0**	**2,512**	**2,089**	**20.2**
Bahrain	122	0	122	159	(23.3)
Egypt	288	0	288	357	(19.3)
Iraq	91	0	91	131	(30.5)
Jordan	280	0	280	178	57.3
Kuwait	319	0	319	174	83.3
Lebanon	197	0	197	145	35.9
Oman	271	0	271	156	73.7
Qatar	61	0	61	33	84.8
Saudi Arabia	536	0	536	487	10.1
United Arab Emirates	242	0	242	191	26.7
Others	105	0	105	78	34.6
TOTAL	**276,280**	**1,047**	**277,327**	**252,761**	**9.7**

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

Tourist arrivals to Sri Lanka in January by their last port of departure provides a revealing look at the connectivity and transit patterns feeding the island's tourism industry. The most immediate and dominant finding is the overwhelming role of the Gulf region as the primary aerial crossroads for Sri Lanka tourism. The combined arrivals from Dubai (34,762 / 12.53%), Doha (28,778 / 10.38%), Abu Dhabi (19,638 / 7.08%), and Sharjah (11,281 / 4.07%) total approximately 94,459 arrivals, accounting for over 34% of all tourist traffic. This dominance is not because these cities are the origin points for these tourists, but because they function as the world's busiest long haul transit hubs, with passengers from Europe, the Americas, and the Middle East connecting through major Gulf carriers like Emirates, Qatar Airways, Etihad, and Air Arabia to reach Colombo.

Equally significant is the strength of the immediate neighborhood, with the Indian subcontinent featuring prominently in the data. The five Indian metros in the top 15 Chennai (18,359 / 6.62%), Mumbai (13,340 / 4.81%), Delhi (12,524 / 4.52%), Bangalore (10,750 / 3.88%), and Hyderabad (6,396 / 2.31%) combine for roughly 61,369 arrivals, or about 22.1% of the total. This highlights India's role as Sri Lanka's most vital regional source market, driven by short flight times, cultural connectivity, and affordability. The particularly high ranking of South Indian cities like Chennai and Bangalore reflects the closer geographic and cultural ties with that region.

Beyond the Gulf and India, several other regional hubs demonstrate significant traffic flows. Southeast Asian gateways such as Kuala Lumpur (9,721 / 3.51%), Singapore (8,244 / 2.97%), Bangkok (4,807 / 1.73%), and Don Mueang (3,017 / 1.09%) collectively account for over 25,000 arrivals, serving the dual purpose of bringing in tourists from the ASEAN region itself while also acting as connecting points for travelers from East Asia and Australasia. Meanwhile, long-haul European gateways maintain a notable presence despite competition from Gulf carriers, with London (8,837 / 3.19%) remaining the top single European departure point reflecting the strong UK market, Moscow (6,460 / 2.33%) showing robust numbers aligned with high MICE and leisure traffic from Russia, and Frankfurt (3,103 / 1.12%) and Paris (2,969 / 1.07%) representing traditional Western European markets.

The data also reveals interesting niche patterns and secondary markets. East Asian traffic is represented by Shanghai (4,550 / 1.64%) and Hong Kong (4,469 / 1.61%), indicating a steady flow from the Chinese market tied to business and leisure travel. Notably, Male (4,584 / 1.65%) and the combined Dubai/Male (4,627 / 1.67%) codes suggest a significant two-center travel pattern, where tourists, likely European or Russian, combine a beach holiday in the Maldives with a cultural and heritage tour in Sri Lanka.

Based on these insights, several strategic recommendations emerge. First, given the dominance of Gulf hubs, maintaining strong bilateral air service agreements and fostering good relations with Emirates, Qatar Airways, and Etihad is critical for sustaining tourist inflows from Europe and the Americas. Second, with five Indian cities in the top 15, the tourism industry must continue to cater specifically to the Indian traveler through direct flight maintenance, targeted marketing in key cities, and products catering to Indian preferences such as cuisine and wedding destinations. Third, niche route development presents opportunities, including enhancing Russian-language support at the airport and in resorts to cater to the Russian market, and developing joint promotional packages with the Maldives tourism industry to capitalize on the "Two Islands, One Holiday" concept. Lastly, while Gulf hubs are strong, the presence of London, Frankfurt, and Paris in the list suggests that maintaining some direct long haul routes remains valuable for attracting premium travelers who prefer non-stop options.

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

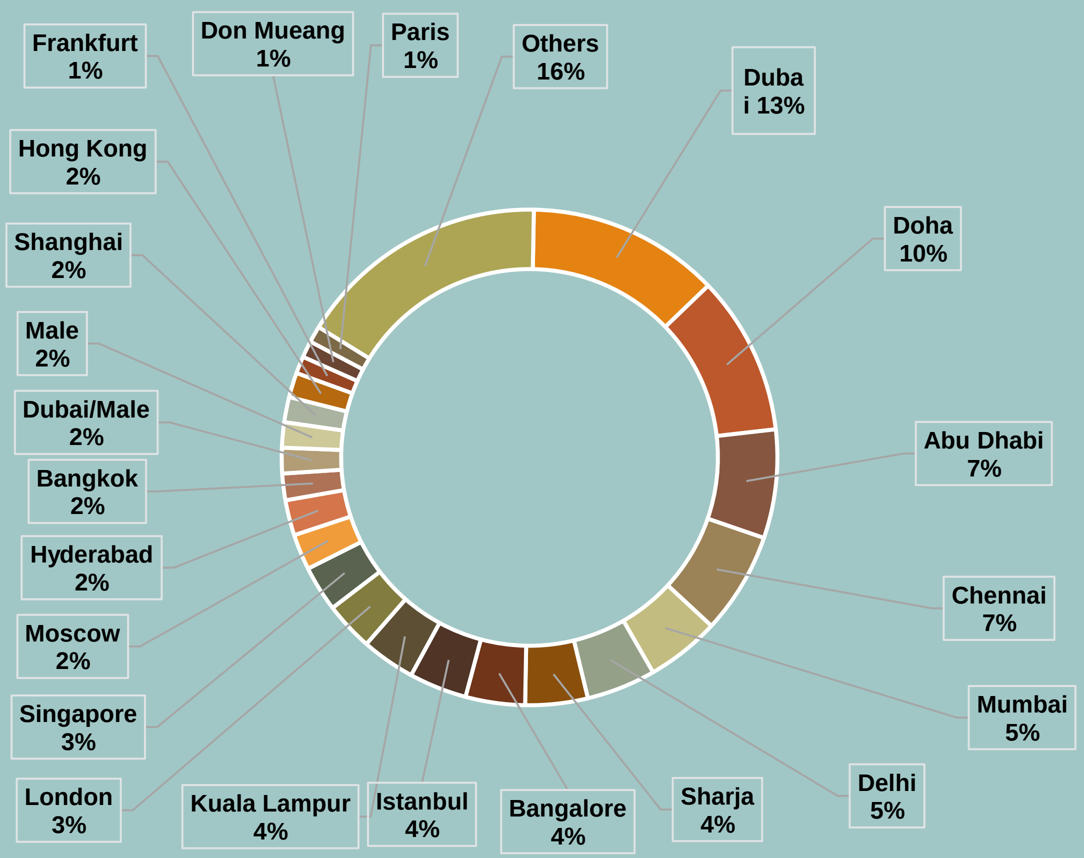
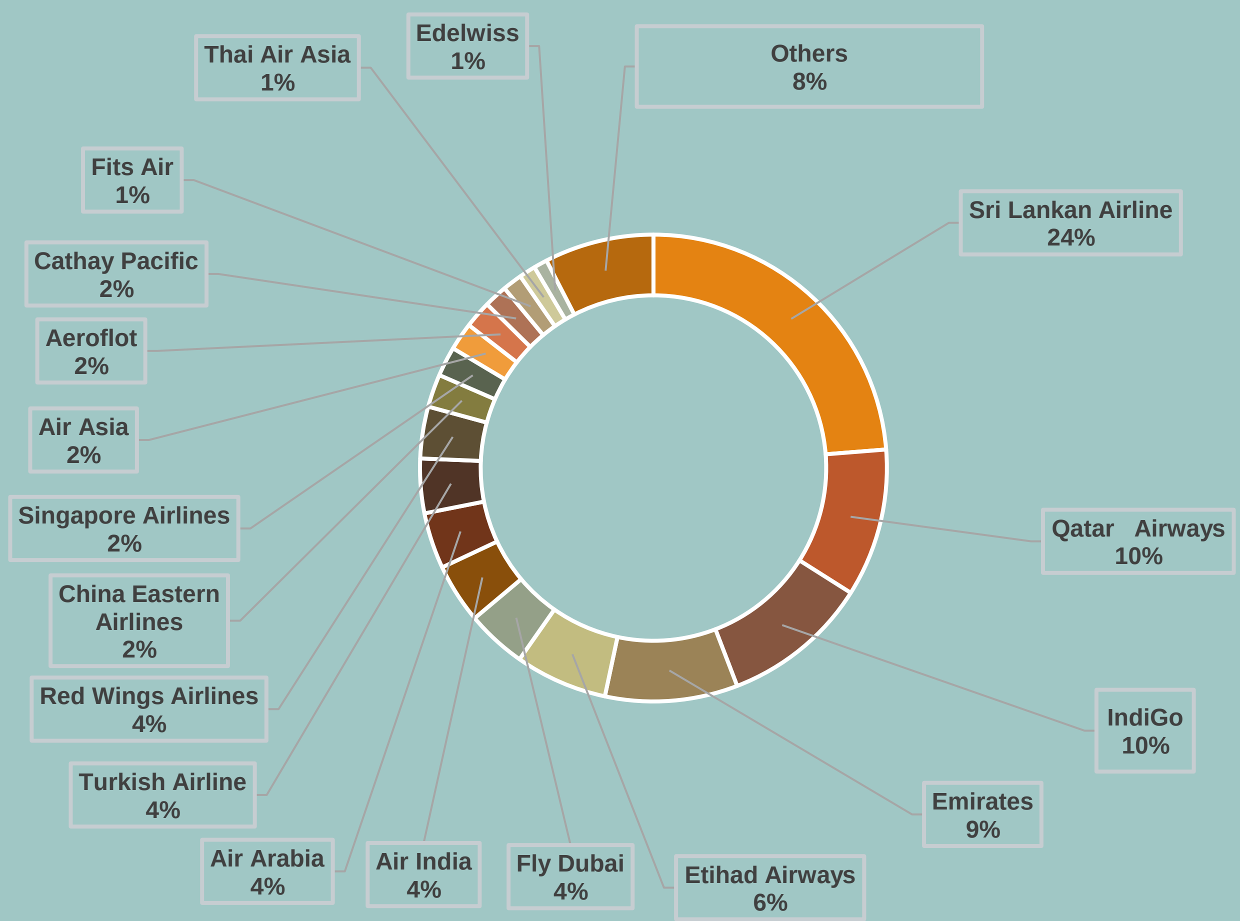


Chart 7. Main airlines to Sri Lanka, January 2026



The data detailing tourist arrivals to Sri Lanka in January by the airlines they traveled on provides a clear picture of the competitive landscape and the strategic partnerships that facilitate tourism inflows. The most immediate finding is the commanding market share held by the national carrier, Sri Lankan Airlines, which leads by a significant margin with 65,821 arrivals, accounting for nearly a quarter of all traffic at 23.73%. This dominance reflects the airline's extensive network, its role as a primary carrier for both leisure and VFR (Visiting Friends and Relatives) traffic, and the loyalty of its passenger base. It also underscores the airline's critical importance to the nation's tourism infrastructure and economy.

Behind the national carrier, a prominent competition can be seen among the major Gulf carriers, which collectively form the second pillar of Sri Lanka's air connectivity. Qatar Airways (28,408 / 10.24%), Emirates (25,444 / 9.17%), Etihad Airways (17,710 / 6.39%), Fly Dubai (11,527 / 4.16%), and Air Arabia (10,769 / 3.88%) together bring in a staggering total of approximately 93,858 passengers, representing about 33.8% of all arrivals. This aligns perfectly with the previous analysis of departure ports, confirming that these airlines are the primary vehicles transporting the huge volume of transit passengers through the Gulf hubs (Doha, Dubai, Abu Dhabi, and Sharjah) from Europe, the Middle East, and the Americas.

Equally significant is the strength of the Indian low-cost and full-service carriers, which dominate the short-haul routes from the subcontinent. Indigo (28,249 / 10.19%) stands out as the third-largest airline overall, just a fraction behind Qatar Airways, highlighting the immense volume of price-sensitive, high-frequency traffic from India. Alongside **Air India (11,439 / 4.12%)** , these two carriers alone account for nearly 40,000 arrivals, or about 14.3% of the total. This reinforces the critical importance of the Indian market and the need for affordable and frequent connectivity from multiple Indian cities.

The data also reveals significant contributions from specialized and long-haul markets. **Turkish Airlines (10,447 / 3.77%)** serves as a key bridge, bringing traffic from Europe and its extensive network beyond via its Istanbul hub. The Russian market is prominently represented by **Red Wings Airlines (9,942 / 3.58%)** and **Aeroflot (5,232 / 1.89%)** , together contributing over 15,000 arrivals. This substantial figure confirms Russia as a major source market, likely driven by the MICE and leisure segments noted in previous analyses, and may also reflect the current geopolitical landscape affecting Russian travel patterns.

Further diversifying the airline mix are carriers from East Asia and Southeast Asia. China Eastern Airlines (6,326 / 2.28%) leads the Chinese contingent, reflecting ongoing business and leisure ties. Singapore Airlines (5,693 / 2.05%) and the combined low-cost carriers Air Asia (5,311 / 1.92%) and Thai Air Asia (3,174 / 1.14%) cater to the ASEAN region and beyond. The presence of Cathay Pacific (4,469 / 1.61%) , primarily serving the Hong Kong route, and the niche Swiss carrier Edelweiss (2,616 / 0.94%) , which caters to the premium European leisure market, adds further depth.

Based on these insights, several strategic recommendations emerge. First, the dominant position of Sri Lankan Airlines must be leveraged and protected, as it is a national asset for tourism promotion. Second, the reliance on Gulf carriers necessitates maintaining strong commercial and diplomatic relationships to ensure continued high passenger volumes. Third, the remarkable performance of Indigo highlights the need to facilitate and encourage further expansion of Indian low-cost carrier operations into Sri Lanka. Fourth, the strong showing of Russian airlines suggests that targeted marketing and ground services in the Russian language could enhance the tourist experience. Finally, the diversity of the airline mix, from Swiss premium carriers to Southeast Asian low-cost leaders, indicates that Sri Lanka successfully attracts a wide spectrum of travelers, from budget backpackers to luxury seekers, and should continue to support this varied ecosystem.

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

January 2026

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

Country	Dubai	Doha	Abu Dhabi	Chennai	Mumbai	Delhi	Sharja	Bangalore	Istanbul	Kuala Lampur	London	Singapore	Moscow	Hyderabad	Bangkok	Dubai / Male	Male	Shanghai	Hong Kong	Others	Total
India	842	129	206	14,547	8,970	8,167	88	8,491	17	283	21	268	1	5,597	567	39	107	9	54	3,658	52,061
United Kingdom	4,721	7,206	2,960	595	803	599	137	296	397	663	7,648	387	0	177	270	364	259	33	116	1,909	29,540
Russian Federation	2,641	354	2,859	114	62	88	3,323	125	123	402	9	41	6,220	56	188	252	168	550	63	9,496	27,134
Germany	4,154	3,363	2,202	191	427	354	423	165	1,078	361	66	146	4	44	194	657	152	15	45	3,735	17,776
China	130	32	40	55	14	16	25	101	5	1,350	5	541	2	5	558	34	148	3,288	1,885	5,769	14,003
France	3,288	2,092	1,139	180	170	753	91	119	1,535	222	87	99	0	8	118	439	81	16	20	3,112	13,569
Australia	274	126	56	303	144	166	23	134	28	1,464	52	3,902	1	74	368	28	56	66	406	3,501	11,172
Poland	2,216	1,048	661	42	232	50	2,125	52	199	82	25	13	30	14	18	159	76	6	16	3,270	10,334
United States	618	1,236	600	571	474	282	35	394	250	200	107	357	0	196	186	54	121	39	509	1,144	7,373
Netherlands	1,788	1,742	883	60	814	379	17	79	361	228	18	63	0	17	85	172	41	6	13	341	7,107

The cross tabulation of last departure airports against the top source markets provides a fascinating and granular view of how different nationalities utilize global aviation hubs to reach Sri Lanka. This data moves beyond simple volume to reveal the unique travel behaviors, transit preferences, and strategic connectivity requirements of each key market. The most striking overall observation is that Gulf airports. Dubai, Doha, and Abu Dhabi are the indispensable global connectors, but their importance varies dramatically by nationality. For instance, while these three hubs collectively handle a massive portion of traffic, they are absolutely paramount for Europeans, whereas Indians overwhelmingly prefer direct flights from their own metros.

The behaviour of Indian tourists is defined by geographic adjacency and the strength of direct air connectivity. Of the 52,061 Indian arrivals, a staggering 40,175 traveled via just five Indian airports: Chennai (14,547), Mumbai (8,970), Delhi (8,167), Bangalore (8,491), and Hyderabad (3,658). Chennai's position as the single most important departure point for any nationality in the entire dataset underscores the deep cultural and economic ties between South India and Sri Lanka. The Gulf hubs play a relatively minor role for Indians, with Dubai (842), Doha (129), and Abu Dhabi (206) combined accounting for a small fraction of traffic, confirming that Indians prefer nonstop, short haul flights.

The UK market, with 29,540 arrivals, displays a more distributed and balanced use of connecting hubs, reflecting its status as a long-haul market with multiple options. While a direct flight from London (7,648) is the single most popular choice, a significant portion of British travelers connect via the Gulf. Doha (7,206) is the second most important departure point, followed closely by Dubai (4,721). This suggests that British travelers are highly price and schedule sensitive, willing to trade the convenience of a direct flight for the extensive network and competitive pricing of Gulf carriers. Interestingly, there is also a notable flow via Indian hubs like Chennai (595) and Mumbai (803), likely representing British citizens of Indian origin (the VFR market noted earlier) connecting through to Sri Lanka.

The Russian market (27,134 arrivals) exhibits a highly concentrated and unique pattern, heavily dominated by direct flights from Moscow and other distinct corridors. The Gulf region is paramount, with Sharjah (3,323), Abu Dhabi (2,859) and Dubai (2,641) capturing the vast majority.

Germany (17,776 arrivals) shows a classic European long-haul distribution heavily reliant on Gulf hubs. Doha (3,363), Dubai (4,154), and Abu Dhabi (2,202) are the primary departure points, together accounting for over 9,700 arrivals. This suggests that most German tourists utilize connecting flights via the Middle East. The presence of Istanbul as an emerging port for this market is also notable. This connectivity is the enabler for the strong "Health/Ayurvedic" niche identified, as wellness tourists require reliable and comfortable access.

The Chinese market (14,003 arrivals) presents a very different picture, dominated by East Asian hubs. Shanghai (3,288) and Hong Kong (1,885) are the primary departure points, followed by Kuala Lumpur (1,350) and Bangkok (558). This indicates that Chinese tourists either fly directly from major mainland cities or connect through regional Southeast Asian hubs rather than the Middle East. The relatively low numbers from Gulf airports confirm that Chinese traffic follows a different aviation geography, relying on carriers like China Eastern and Cathay Pacific.

France (13,569 arrivals) Shows a heavy reliance on Gulf hubs, with Dubai (3,288) and Doha (2,092) leading, and a significant direct component from Istanbul (1,535). Australia (11,172 arrivals): Displays a fascinating split between Singapore (3,902) and Kualalampur (1,464) Poland (10,334 arrivals): Exhibits a unique profile heavily tilted towards Dubai (2,216) and Sharja (2,125). Tourists from USA show a heavy preference to tourist in Doha (1,236) while tourists from Netherland uses Dubai (1,788) and Doha (1,742) as their last departure airports.

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

Country	Sri Lankan Airline	Qatar Airways	Indi Go	Emirates	Etihad Airways	Fly Dubai	Air India	Air Arabia	Turkish Airline	Red Wings Airlines	China Eastern Airlines	Singapore Airlines	Air Asia	Aeroflot	Cathay Pacific	Fits Air	Thai Air Asia	Edelwiss	Others	Total
India	41.67	0.20	41.77	0.76	0.33	0.26	13.62	0.18	0.03	0.00	0.01	0.19	0.12	0.00	0.10	0.15	0.11	0.00	0.50	100.00
United Kingdom	33.52	24.37	3.17	15.77	9.94	1.13	2.95	0.46	1.34	0.00	0.13	0.80	1.59	0.00	0.39	0.29	0.91	0.13	3.10	100.00
Russian Federation	2.21	1.29	1.08	3.53	5.61	5.10	0.32	12.25	0.45	35.62	2.06	0.10	1.14	18.77	0.23	1.68	1.06	0.02	7.48	100.00
Germany	21.39	18.78	1.89	21.46	12.07	4.84	2.63	2.38	6.06	0.01	0.11	0.56	1.44	0.02	0.25	0.55	1.17	1.97	2.42	100.00
China	10.62	0.22	0.94	0.57	0.19	0.29	0.11	0.18	0.04	0.00	35.71	3.45	5.90	0.01	13.46	1.12	2.36	0.01	24.82	100.00
France	22.86	15.26	1.72	20.35	8.32	6.72	5.30	0.69	11.31	0.00	0.10	0.50	1.27	0.00	0.15	0.44	1.17	0.56	3.28	100.00
Australia	47.57	1.14	2.56	2.01	0.49	0.27	0.90	0.21	0.25	0.00	0.62	24.27	7.30	0.01	3.63	0.26	0.79	0.03	7.70	100.00
Poland	4.00	9.86	0.91	6.84	5.83	15.71	0.49	20.59	1.93	0.00	0.03	0.07	0.63	0.29	0.15	0.67	0.60	3.39	28.02	100.00
United States	23.17	16.79	12.30	6.56	8.06	1.71	4.37	0.50	3.39	0.00	0.53	3.70	1.27	0.00	6.90	0.60	1.52	0.18	8.45	100.00
Netherlands	5.74	24.67	12.19	24.53	12.40	2.57	5.04	0.23	5.08	0.00	0.10	0.49	2.41	0.00	0.18	0.58	1.80	0.45	1.56	100.00

An analysis of tourists from key source markets by the airlines they travelled reveals key insights about source markets. The dominance of Sri Lankan Airlines is particularly evident in the near region market of India, where it carries a substantial share of visitors, underscoring its role as the preferred carrier for short-haul travel due to direct flight availability and frequency. This regional strength contrasts with the airline's more limited share in long-haul European markets, where travelers tend to distribute their preference across multiple carriers.

For long-haul European source markets such as the United Kingdom, Germany, France, and Poland, travel patterns show significant reliance on Middle Eastern airlines like Qatar Airways and Emirates. These Gulf carriers serve as critical connectors, offering travelers from Europe flexible one-stop options via their hubs in Doha and Dubai. The data suggests that while European tourists generate substantial volume for Sri Lanka, they are less loyal to any single airline and instead prioritize connectivity and schedule convenience offered by the major Gulf network carriers.

Niche market dynamics are also apparent in the data. Russian tourists, despite geopolitical complexities, maintain significant travel volumes to Sri Lanka, likely relying on a mix of Russian carriers and Middle Eastern airlines that continue to serve this corridor. Similarly, Chinese tourists demonstrate a preference for home-country carriers and regional Asian hubs, with airlines like China Eastern and Cathay Pacific facilitating access via Shanghai and Hong Kong respectively. Australian visitors show a more diversified pattern, utilizing Sri Lankan Airlines alongside Southeast Asian carriers such as Singapore Airlines and AirAsia, highlighting the role of regional hubs in connecting Oceania to the Indian subcontinent.

From a strategic perspective, these insights present clear opportunities for route development and airline partnerships. Strengthening Sri Lankan Airlines' presence in key European cities where it currently has modest share could help capture more long-haul traffic. Fostering interline agreements with low-cost carriers in price-sensitive Asian markets could improve affordability and accessibility. Additionally, improving connectivity with secondary cities in China and Australia through codeshare arrangements could help diversify arrivals and reduce over-reliance on a few primary gateways. This analysis ultimately underscores the need for a tailored aviation and tourism strategy that aligns airline capacity with the evolving preferences and behaviors of source markets, ensuring sustainable growth in tourist arrivals to Sri Lanka.

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