2026

MONTHLY TOURIST ARRIVALS REPORT:

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

JULY

Introduction

The following document provides a synthesis of the most recent July 2026 international visitor arrivals data sourced from the Department of Immigration & Emigration. The data is current as of 31st July 2026, and subject to change. The data provides an overview of month on month and annual changes in visitor arrivals to Sri Lanka from international source markets. The data is meant to provide an overview of how travel and tourism is performing to Sri Lanka.

This report is developed by the Research & International Relations Division at Sri Lanka Tourism Development Authority (SLTDA). Questions, comments and feedback are welcome and will support the future amendment and enhancement of the report to ensure it meets the data and insights needs of Sri Lanka's Government and industry stakeholders.

Table of Contents

Summary

Tourist arrivals during January to July 2026 demonstrate a highly volatile performance, characterised by a strong start followed by a significant contraction associated with geopolitical disruptions in the Middle East. Arrivals reached 277,327 in January and 279,328 in February, registering year-on-year growth of 9.7% and 16.2%, respectively, indicating strong underlying demand for Sri Lanka. However, the escalation of the Middle East conflict from late February resulted in considerable disruption to international air connectivity and traveller confidence. Consequently, arrivals declined by 19.8% in March and 22.3% in April compared with the corresponding months of 2025. Although a 9.6% recovery was recorded in May, arrivals again declined by 9.9% in June, before partially stabilising in July with 196,845 arrivals, only 1.7% below the corresponding month of 2025. Cumulatively, Sri Lanka recorded 1.34 million arrivals during January to July 2026, approximately 1.8% below the corresponding period of 2025.

The relatively limited cumulative decline masks the substantial volatility experienced during the year and indicates that one of the key challenges has been the Middle East conflict to tourism flows rather than a fundamental weakening of Sri Lanka's destination appeal. The July recovery provides a cautiously positive indication that, with the gradual restoration of air connectivity and traveller confidence, the tourism sector may regain its growth momentum.

The key source markets for July included India, the United Kingdom, the Netherlands, China, and France.

According to the UN Tourism, the outlook for tourism for the remainder of 2026 remains cautiously positive, but subject to increasing external risks. While global tourism is expected to maintain growth, geopolitical tensions, rising airfares, higher fuel costs, and constrained airline capacity could moderate the pace of international arrivals. Travellers are also likely to favour shorter-haul and more cost-effective destinations, increasing competition among tourism markets.

Table 1. Monthly tourist arrivals, July

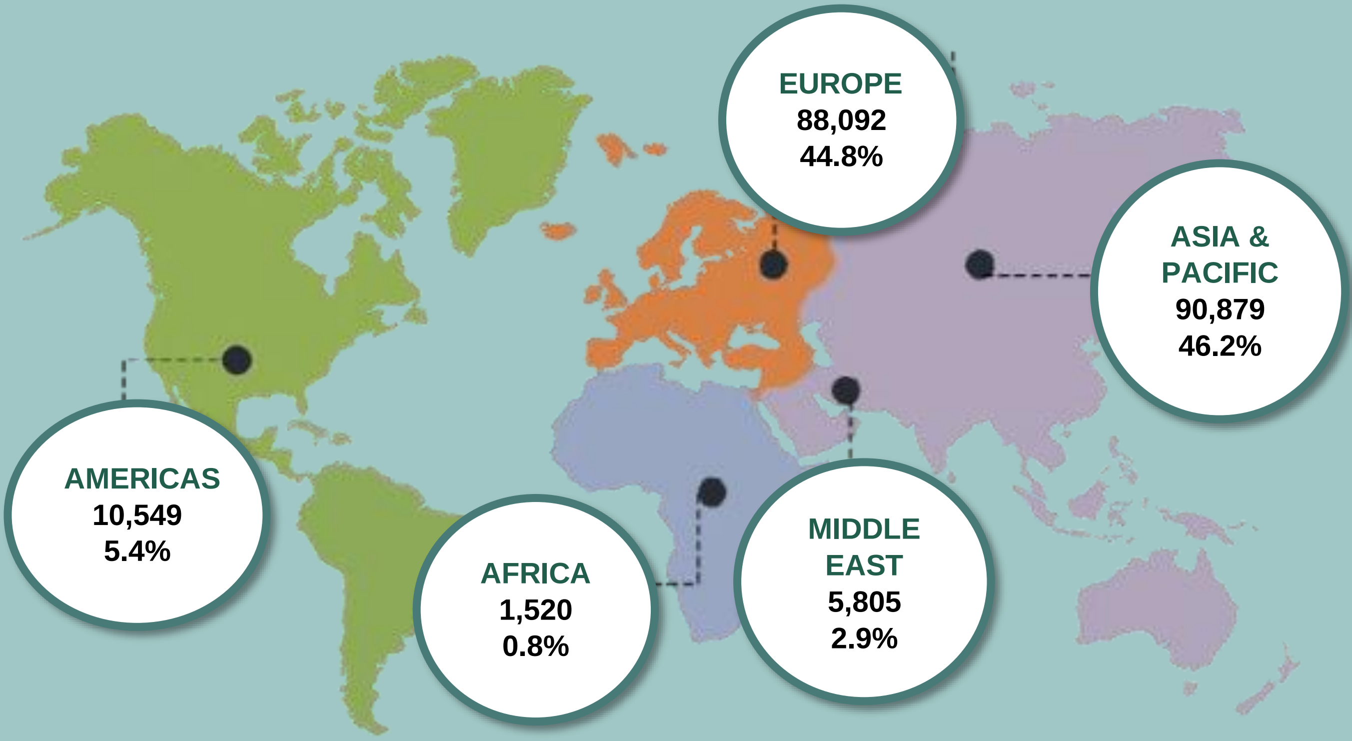
Month	2025	2026	% Change 2026/25
January	252,761	277,327	9.7
February	240,217	279,328	16.2
March	229,298	183,979	(19.8)
April	174,608	135,643	(22.3)
May	132,919	145,745	9.6
June	138,241	124,551	(9.9)
July	200,244	196,845	(1.7)
August	198,235		
September	158,971		
October	165,193		
November	212,906		
December	258,928		
TOTAL	2,362,521	1,343,418	

Tourist Arrivals | July 2026

196,845

Tourist arrivals by region and percentage share July 2026

Map 1. Tourist arrivals by region and percentage share



Sri Lanka's tourism market continues to exhibit a pronounced degree of geographic concentration, with the Asia-Pacific region accounting for 46.2% of total tourist arrivals. This regional dominance has been driven primarily by rising arrival volumes from India, China, Bangladesh, the Maldives and Pakistan. While such concentration has sustained healthy visitor numbers and supported growth in short-haul travel, it simultaneously exposes the country to heightened vulnerability arising from regional political instability, economic headwinds, and disruptions to aviation networks.

Europe remained the second-largest source region for Sri Lanka’s tourism industry, accounting for 44.8% of total tourist arrivals and continuing to represent a critical long-haul market. The region’s contribution was driven primarily by key markets including the United Kingdom, Germany, the Netherlands, and France. However, demand from European markets remains increasingly influenced by global economic uncertainty, elevated travel costs, and geopolitical developments, which may affect travel decisions and destination competitiveness.

Despite these challenges, arrivals from European markets increased by approximately 52,971 compared with June 2026. This notable increase in July, in part, be attributed to the cessation of the conflict in the Gulf region during the period, which potentially improved traveller confidence and connectivity through key transit hubs and contributed to the recovery of European visitor flows to Sri Lanka.

The Middle East and Africa remained relatively small source regions, accounting for approximately 2.9% and 0.8% of total arrivals, respectively. Their limited contribution highlights the comparatively low level of market penetration achieved by Sri Lanka in these regions. At the same time, the relatively low shares indicate significant potential for targeted market development and diversification. Expanding Sri Lanka’s presence across emerging and underrepresented source markets could strengthen the resilience of the tourism sector, reduce dependence on a limited number of markets, and mitigate the impact of future economic, geopolitical, or other external shocks.

Top primary markets and top potential markets

Top primary markets, July 2026

India
Arrivals: **44,547/ % Share: 22.6**
01

United Kingdom
Arrivals: **21,834 / % Share: 11.1**
02

Netherlands
Arrivals: **12,493 / % Share: 6.3**
03

China
Arrivals: **12,336 / % Share: 6.3**
04

France
Arrivals: **10,102 / % Share: 5.1**
05

Australia
Arrivals: **9,702 / % Share: 4.9**
06

Germany
Arrivals: **8,838 / % Share: 4.5**
07

Maldives
Arrivals: **5,757 / % Share: 2.9**
08

United States
Arrivals: **5,376 / % Share: 2.7**
09

Canada
Arrivals: **4,753 / % Share: 2.4**
10

Spain
Arrivals: **4,640 / % Share: 2.4**
11

Switzerland
Arrivals: **4,481 / % Share: 2.3**
12

Belgium
Arrivals: **4,196 / % Share: 2.1**
13

Italy
Arrivals: **3,672 / % Share: 1.7**
14

Bangladesh
Arrivals: **3,382 / % Share: 1.7**
15

Israel
Arrivals: **3,356 / % Share: 1.7**
16

Japan
Arrivals: **3,331 / % Share: 1.2**
17

Pakistan
Arrivals: **3,125 / % Share: 1.2**
18

Denmark
Arrivals: **2,297 / % Share: 0.9**
19

Russia
Arrivals: **1,857 / % Share: 0.7**
20

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, July 2026

Malaysia
Arrivals: **1,803 / % Share: 0.7** **21**

Austria
Arrivals: **1,398 / % Share: 0.7** **22**

New Zealand
Arrivals: **1,393 / % Share: 0.7** **23**

Norway
Arrivals: **1,354 / % Share: 0.7** **24**

Saudi Arabia
Arrivals: **1,317 / % Share 0.7** **25**

Oman
Arrivals: **1,288 / % Share: 0.6** **26**

United Arab
Arrivals: **1,206 / % Share: 0.6** **27**

Poland
Arrivals: **1,201 / % Share: 0.6** **28**

Czech Republic
Arrivals: **1,114 / % Share: 0.5** **29**

South Korea
Arrivals: **1,033 / % Share: 0.5** **30**

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

July 2026

Sri Lanka's top source markets for July 2026 reveals a mixed performance, with some markets showing robust growth while others experience significant declines. India firmly maintains its position as the dominant source market, not only ranking first but also recording the highest total tourist arrivals at 44,547. This figure represents a substantial 20.0% increase compared to July 2025, indicating a strong and growing appetite for Sri Lankan travel among Indian tourists. The Maldives also posted a remarkable growth rate of 21.1%, the highest among the top ten, suggesting a strengthening regional travel corridor.

Conversely, the data shows a generally downward trend among several key European markets. The United Kingdom, Netherlands, France, and Germany all witnessed year-on-year decreases in tourist arrivals, with the Netherlands and Germany experiencing particularly sharp drops of -19.7% and -16.4%, respectively. This could be attributed to various factors such as economic pressures, currency fluctuations, or shifting travel preferences in these regions. While China and the USA showed more modest changes, with a -5.0% decline and a 2.9% increase respectively, the overall picture for long-haul Western markets appears to be one of contraction in this period.

The resilience of the Australian market, which grew by 6.4%, probably due to the diaspora connections offers a slight counterbalance to the European declines, but the overall performance in July 2026 seems heavily reliant on the strong showing from the Indian subcontinent to offset the losses from traditional Western European source markets.

The data points to a shifting landscape for Sri Lankan tourism. While the country is successfully attracting more visitors from its immediate region, particularly India and the Maldives, it faces challenges in sustaining numbers from its established long-haul European markets. This analysis underscores the need for targeted marketing strategies to revitalize interest in these declining markets while continuing to capitalize on the strong growth from the Asian region.

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

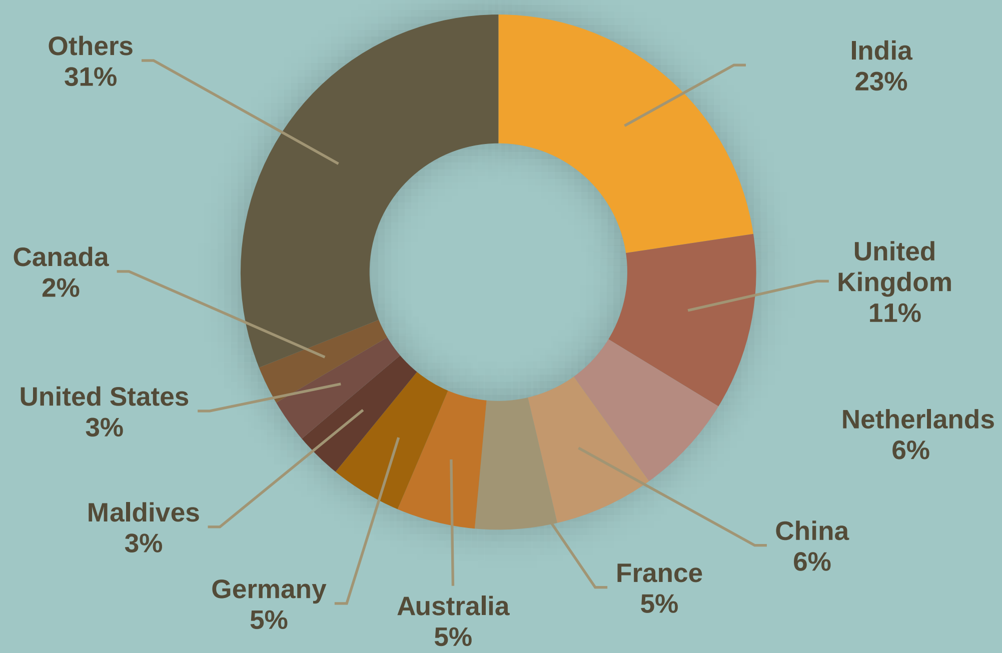
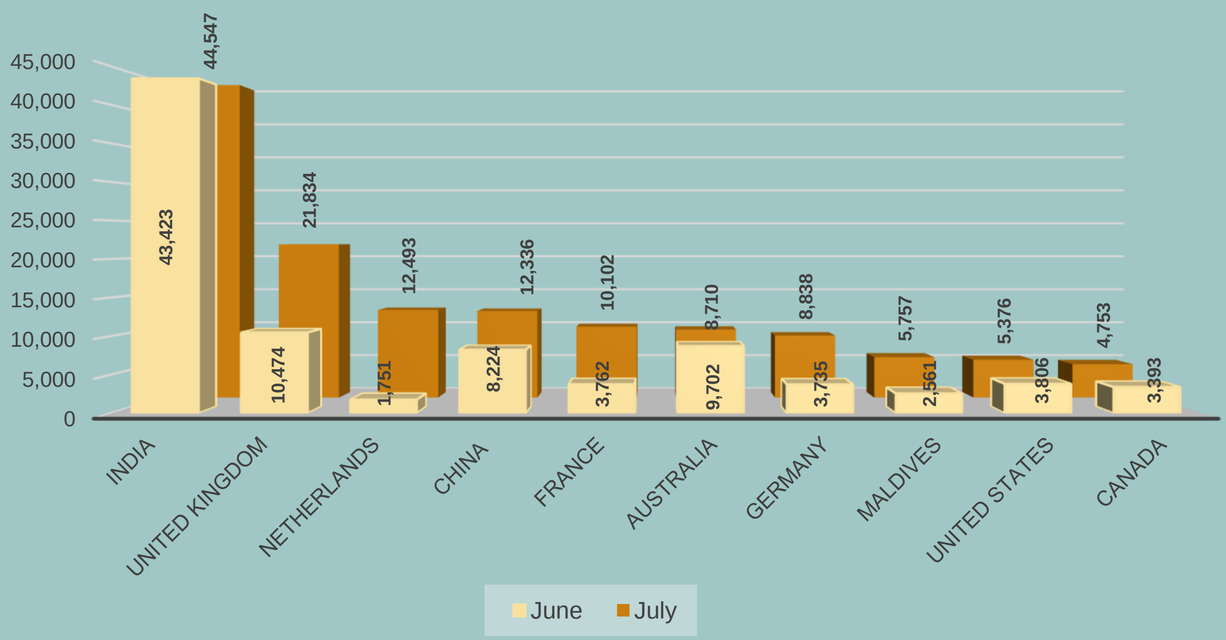


Table 2. Top ten source markets to Sri Lanka, July 2026

Rank	Country of Residence	Tourist arrivals (July 2026)			Tourist arrivals	
		By Air	By Sea	Total	July 2025	Percentage Change (2026/2025) July
1	India	43,896	651	44,547	37,128	20.0
2	United Kingdom	21,834	0	21,834	23,475	(7.0)
3	Netherlands	12,489	4	12,493	15,556	(19.7)
4	China	12,336	0	12,336	12,982	(5.0)
5	France	10,085	17	10,102	11,059	(8.7)
6	Australia	9,699	3	9,702	9,117	6.4
7	Germany	8,831	7	8,838	10,568	(16.4)
8	Maldives	5,757	0	5,757	4,755	21.1
9	United States	5,368	8	5,376	5,222	2.9
10	Canada	4,749	4	4,753	5,462	(13.0)

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



Top ten source markets

January to July 2026

Over the first seven months of 2026, Sri Lanka’s tourism sector experienced a marginal overall contraction, with total arrivals declining by 1.8% year-on-year to 1,343,418. While this aggregate dip appears modest, it masks a deeply polarized performance among the nation’s top source markets, characterized by extraordinary growth in specific Asian regions and stark contractions across most European and North American segments.

India unequivocally remains the cornerstone of Sri Lanka’s inbound tourism, solidifying its dominance with an exceptional 21.2% increase, bringing in over 338,000 visitors. This surge adds more than 59,000 additional Indian tourists compared to the previous year, effectively acting as the primary buffer preventing a steeper overall decline. Complementing India's success, China and Australia also delivered impressive double-digit growth of 12.4% and 11.1%, respectively, indicating a revitalized travel appetite from these key Asia-Pacific markets and a successful diversification of Sri Lanka's regional appeal.

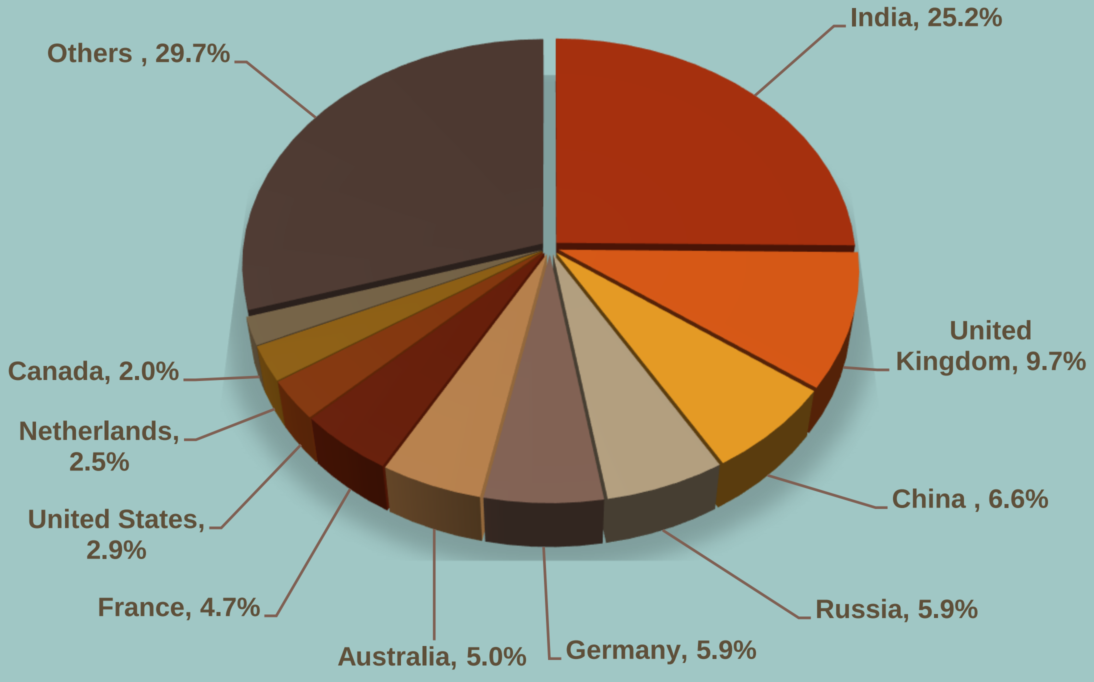
Conversely, the European landscape presents a concerning picture, with nearly every major Western European market recording losses. The most severe downturn is observed in the Russian market, which plummeted by a dramatic 31.4%, shedding over 36,000 arrivals a plunge likely influenced by persistent geopolitical tensions and economic constraints affecting Russian outbound travel. The Netherlands and France followed with significant double-digit declines of -18.2% and -13.0%, while Germany and Canada posted more moderate but still notable contractions of -7.7% and -8.5%, respectively. In contrast, the United Kingdom and the United States remained relatively stable, with the UK showing a negligible decline of -0.7% and the US a slight dip of -3.3%, suggesting these traditional markets are holding steady despite broader European volatility.

To pivot the annual growth trajectory back into positive territory, strategic efforts must be directed towards reinvigorating demand in the declining European markets and investigating the root causes behind the slump in secondary global markets, all while aggressively capitalizing on the robust momentum generated by the Indian and Chinese traveler segments.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~July 2026)	Tourist Arrivals (Jan ~July 2025)	Percentage Change Jan – July 2026/2025
1	India	338,230	279,122	21.2
2	United Kingdom	130,401	131,377	(0.7)
3	China	88,507	78,769	12.4
4	Russia	79,206	115,470	(31.4)
5	Germany	78,596	85,144	(7.7)
6	Australia	67,138	60,442	11.1
7	France	63,099	72,516	(13.0)
8	United States	38,343	39,635	(3.3)
9	Netherlands	34,092	41,695	(18.2)
10	Canada	27,066	29,578	(8.5)
11	Others	398,740	434,540	(8.2)
	Total	**1,343,418**	**1,368,288**	**(1.8)**

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



Tourist arrivals by purpose of visit
July 2026

An examination of Sri Lanka's July 2026 tourist arrival statistics reveals a destination profile that remains heavily oriented toward leisure travel. The pleasure and vacation segment alone accounts for a commanding 68.17% share of arrivals, and when combined with the visiting friends and relatives category (15.65%), these two groups together constitute over 83% of total visitors. This concentration signals a high degree of dependency on a single travel archetype, leaving the sector exposed to shifts in global travel patterns and seasonal volatility.

While such a volume driven approach continues to generate substantial visitor footfall, it simultaneously conceals a notable underperformance in higher yield market niches. The MICE segment, at 7.51%, exceeds pure business travel (2.23%) yet still falls short of the potential suggested by existing infrastructure. More striking still is the negligible share captured by specialised categories: sports and education tourism each register just 0.38%, while health and Ayurveda tourism stands at 0.24% and religious tourism at 0.23%. Sri lanka's strong traditions and Buddhist heritage represent significant untapped potential.

Chart 4: Purpose of visit, July 2026

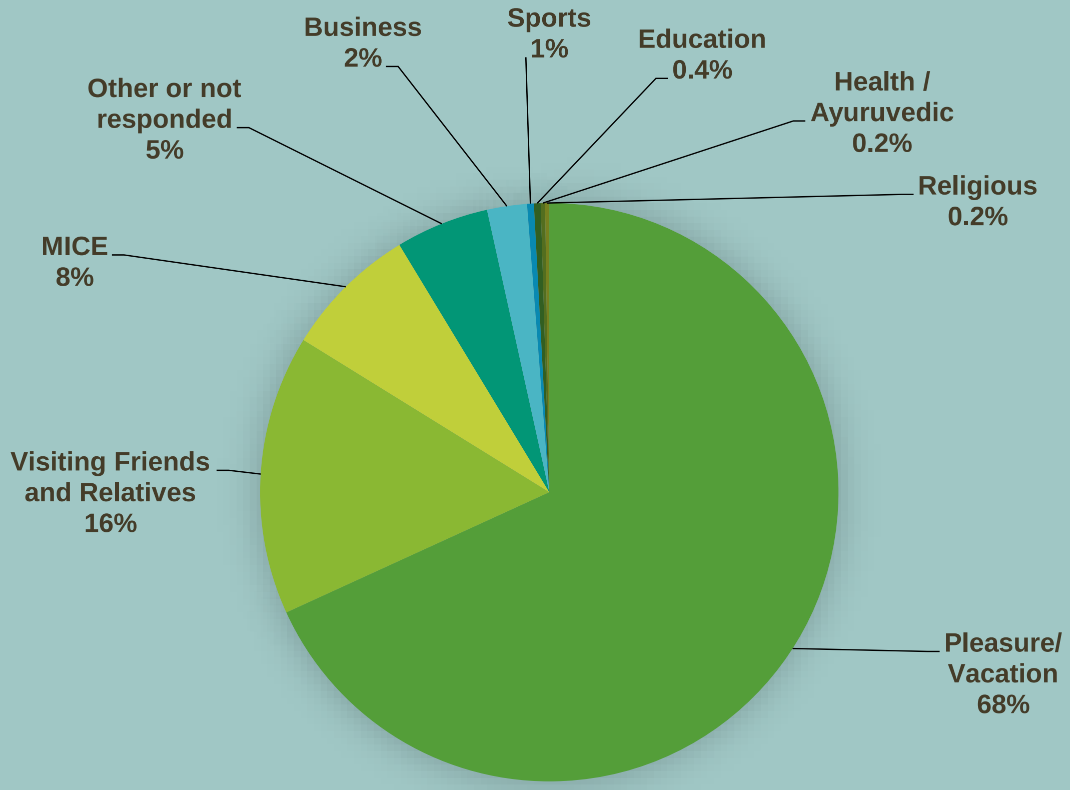
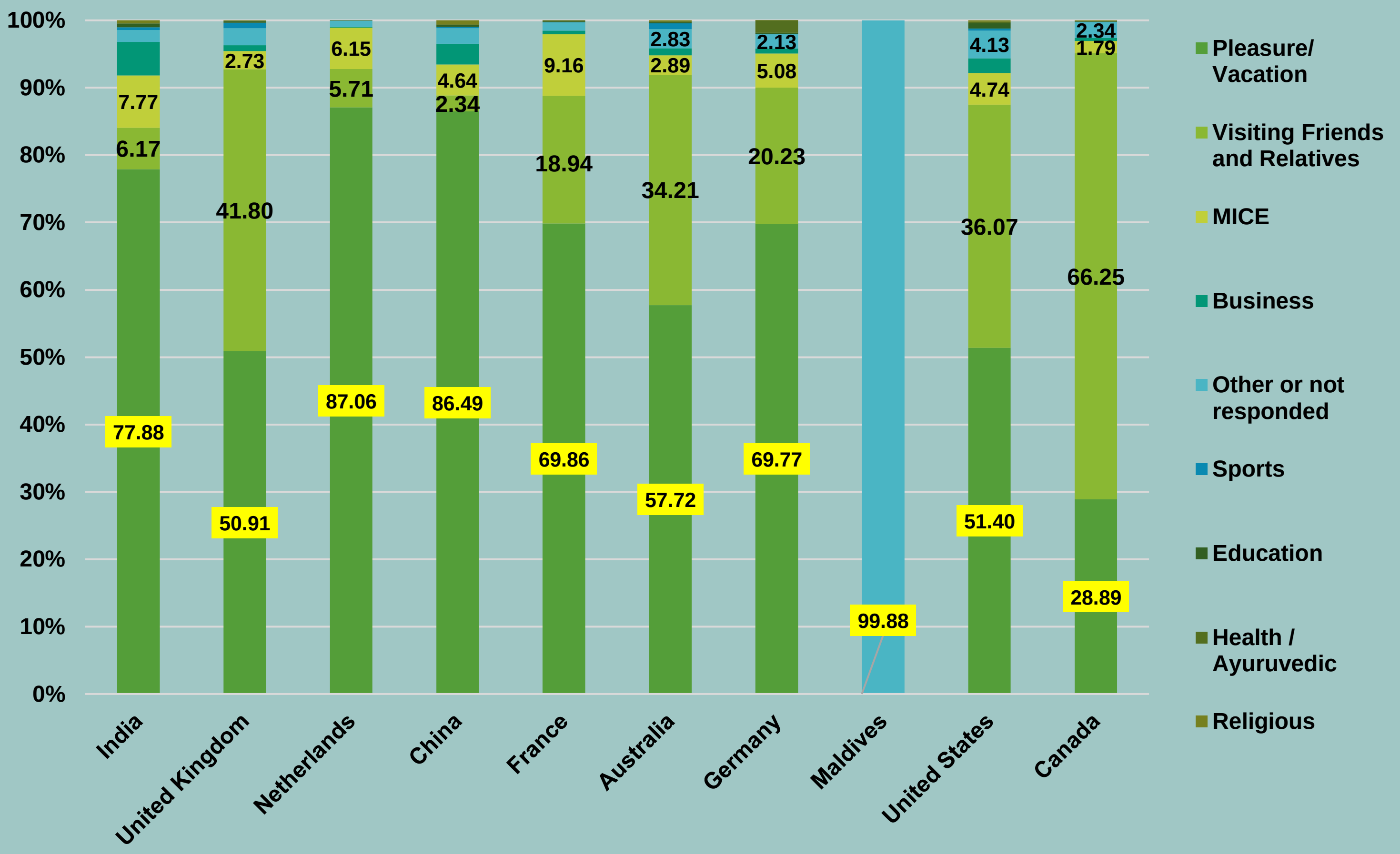


Chart 5: Purpose of visit vs main source markets



Among the Western long-haul source markets with substantial Sri Lankan expatriate communities Canada (66.25%), the United Kingdom (41.80%), the United States (36.07%), and Australia (34.21%) a pronounced reliance on the visiting friends and relatives segment is evident. This dynamic correspondingly compresses the pleasure and vacation share for these markets to comparatively modest levels (28.89% for Canada, 50.91% for the UK, 51.40% for the US, and 57.72% for Australia), suggesting that a considerable proportion of these visitors are likely staying with family members. Such arrangements would typically translate into lower formal hotel expenditure, but potentially longer durations of stay and a deeper dispersal into rural or non-coastal areas. By contrast, the Netherlands (87.06%) and China (86.49%) stand out as leisure feeders, with vacation travel serving as the overwhelming motivator. This pattern indicates that these source markets are composed predominantly of first-time or package-tour visitors with limited diaspora ties, exhibiting greater concentration in coastal resort zones and correspondingly heavier dependence on formal hospitality infrastructure.

Turning to higher-yield segments, India emerges as the most diversified and commercially significant feeder market, registering both the highest business travel share (4.98%) and a robust MICE presence (7.77%) a reflection of the deep bilateral trade relations and corporate connectivity. Notably, however, France leads the MICE category among European sources (9.16%). Within specialised niches, Germany registers a distinctly outsized share of health and Ayurvedic tourism (1.82%), more than eight times that of India and the UK, reinforcing the well-established brand equity of Sri Lankan wellness tourism within the German-speaking market and signalling an opportunity that could be further leveraged through targeted wellness packages. Meanwhile, China exhibits a modest uptick in religious tourism (0.61%), likely connected to Buddhist pilgrimage circuits.

Taken together, the data illustrates that Sri Lanka's tourism portfolio is markedly fragmented along geographic lines. This fragmentation calls for a differentiated policy response one that cultivates pure-leisure markets such as the Netherlands and China through better accessibility and incentives, expands MICE and business infrastructure to capitalise on Indian and French corporate flows, and develops specialized wellness itineraries tailored specifically to the German demographic.

Japan's Changing Outbound Travel Market: Opportunities and Challenges for Sri Lanka

Japan remains a key long-haul market for Sri Lanka, though Japanese outbound travel patterns are shifting due to demographic change, a weaker yen, higher travel costs, and changing preferences among younger travellers. While Japanese overseas travel grew 13.3% in 2025 to 14.7 million, it still sits at only 73.4% of 2019's peak, showing incomplete recovery. Travel is increasingly concentrated in nearby Asia-Pacific destinations (nearly 70% of trips), reflecting demand for affordable, accessible, and comfortable options, a share that has grown over 10 percentage points in a decade(PATA & JTB, 2026).

Against this backdrop, Sri Lanka received 38,153 Japanese visitors in 2025 and 22,372 in the first seven months of 2026. While these numbers show a meaningful visitor flow, they need to be evaluated in light of Sri Lanka's recovery pace and its competitiveness against other Asian destinations like Thailand and Vietnam.

The changing Japanese traveller

Recent travel research suggests that Japanese tourists are becoming increasingly concerned with food, safety, affordability, comfort and freedom of choice. Food has emerged as the most frequently cited reason for choosing a destination, particularly for destinations such as Korea, Hong Kong and Vietnam. Safety was the second most frequently cited motivation. This is especially significant among younger Japanese travellers, who have had relatively limited international travel experience because of the disruption caused by the pandemic.

Economic considerations are also becoming increasingly important. The depreciation of the Japanese yen and rising prices have made travel affordability a major consideration. The perception that a destination offers relatively low prices is particularly important in the case of Vietnam, which has simultaneously experienced strong growth in Japanese visitor numbers.

Another emerging characteristic is the desire for peace of mind. Japanese Gen Z travellers, in particular, increasingly seek to avoid unexpected difficulties and stressful situations while travelling. Research indicates that 26.1% of respondents wanted to avoid unexpected events as much as possible, compared with 22.7% who viewed unexpected events as part of the attraction of travel. This suggests that younger Japanese travellers may value destinations that provide safety, reliability, convenience and predictability alongside unique experiences(PATA & JTB, 2026).

At the same time, this does not mean that Japanese travellers are abandoning the search for new experiences. Their leading travel preferences include eating delicious local food (56.5%), escaping everyday life and feeling refreshed (50.0%), spending time with family and friends (41.1%), and experiencing unfamiliar scenery and foreign cultures (39.6%). The meaning of an "extraordinary" travel experience, however, appears to be changing. For younger travellers, it may increasingly involve experiencing an alternative version of everyday life such as local cafés, streets, food and neighbourhoods rather than seeking highly adventurous experiences(PATA & JTB, 2026).

Who are the Japanese tourists visiting Sri Lanka?

The profile of Japanese visitors to Sri Lanka provides encouraging evidence that the destination already possesses many of the characteristics sought by contemporary Japanese travellers.

Japanese visitors to Sri Lanka are predominantly individual travellers, with holidays and leisure representing the main purpose of travel. MICE, business, visiting friends and relatives (VFR), and wellness constitute other important purposes. Female travellers account for approximately 51% of Japanese arrivals, suggesting a relatively balanced gender profile.

The average duration of stay is approximately 5.3 days. Expenditure patterns reveal an important distinction between independent and package travellers. Non-package tourists spend approximately USD 166.43, while package tourists record substantially higher expenditure of approximately USD 261.49. This difference highlights the potential value of developing appropriately designed packages rather than relying solely on general destination promotion.

The activities undertaken by Japanese tourists also demonstrate a strong alignment with Sri Lanka's existing tourism assets. Beach experiences, sightseeing and hiking/trekking are among their leading activities. Similarly, Colombo, Sigiriya and the Temple of the Tooth are among the principal attractions visited.

This combination is significant because Sri Lanka can offer Japanese travellers several experiences within a relatively compact geographical area: cultural heritage, Buddhist sites, nature, scenic landscapes, hiking, beaches, food and wellness.

The opportunity for Sri Lanka

Sri Lanka's greatest opportunity is therefore not simply to increase the number of Japanese visitors but to better align its tourism products with the changing expectations of the Japanese market.

The country's cultural and Buddhist heritage is particularly relevant. Destinations such as Sigiriya and the Temple of the Tooth provide the cultural authenticity and historical depth sought by Japanese travellers. These could be complemented with carefully designed itineraries incorporating local cuisine, tea experiences, nature, hiking and wellness.

Food tourism represents an especially underutilised opportunity. Since food is becoming one of the strongest motivations for Japanese outbound travel, Sri Lanka could develop dedicated culinary experiences around Sri Lankan cuisine, tea, spices, seafood and traditional cooking. Importantly, these experiences should be presented in ways that provide Japanese visitors with both authenticity and confidence regarding quality, hygiene and service.

Wellness and Ayurveda represent another significant opportunity. The Japanese desire for relaxation, refreshment and peace of mind provides a natural connection with Sri Lanka's Ayurveda, meditation and wellness products. Rather than marketing these products simply as traditional treatments, Sri Lanka could position them within broader wellness and slow-travel experiences combining nature, healthy food, culture and relaxation.

There is also scope to develop products for younger Japanese travellers around "everyday extraordinary" experiences. Local cafés, markets, train journeys, village experiences, tea-country landscapes, street food and neighbourhood exploration can be presented as authentic experiences that are different from everyday life in Japan without being excessively adventurous or uncomfortable.

The challenge of accessibility, affordability and reassurance

Despite these opportunities, Sri Lanka faces several challenges.

First is accessibility and connectivity. Sri Lanka must remain competitive with destinations in Northeast and Southeast Asia that offer relatively short travel times and extensive air connectivity from Japan. The distance between Japan and Sri Lanka means that the destination needs to provide sufficient value to justify the additional travel time and cost.

Second is affordability. The depreciation of the yen makes destination pricing increasingly important. Sri Lanka therefore needs to communicate its value proposition clearly rather than competing solely on low prices. The objective should be to provide high-value experiences at competitive prices.

Third is the issue of peace of mind. Japanese travellers increasingly want destinations where they can travel confidently and with minimal uncertainty. Reliable transportation, clear tourist information, cleanliness, safety, predictable service standards and Japanese-language assistance can therefore become important competitive advantages.

The relatively higher expenditure of package tourists also suggests that partnerships with Japanese tour operators could be strengthened. Carefully designed packages combining culture, food, wellness, nature and beaches could increase both visitor expenditure and length of stay.

A strategic direction for Sri Lanka

The Japanese market should therefore be approached through segmentation rather than mass marketing. Sri Lanka could target different groups with different propositions: cultural and Buddhist tourism for heritage-oriented travellers; wellness and Ayurveda for travellers seeking relaxation; nature and hiking for experience-oriented visitors; culinary tourism for food-focused travellers; and carefully designed independent and flexible itineraries for younger travellers.

The emerging emphasis on flexibility is particularly relevant. Japanese travellers increasingly value the ability to adapt their travel experience according to changing interests while retaining safety and convenience. By combining cultural authenticity with safety, convenience, flexibility, food, wellness and value for money, Sri Lanka can strengthen its position in Japan's recovering outbound tourism market and attract a higher-value and more diverse segment of Japanese visitors.

References

Pacific Asia Travel Association (PATA) & JTB Tourism Research & Consulting Co. (2026). *Japan's Outbound Travel Market: A Still Lucrative Market for Today's Marketers?* Tourism in Focus: Insights for a Meaningful Pacific Asia Tourism Economy, August 2026.

International tourist arrivals by country of residence

	July 2026 Tourist arrivals			Tourist arrivals July 2025	% change July (26/25)	Total tourist arrivals up to July 2026	Total tourist arrivals up to July 2025	% change up to July (26/25)
	By Air	By Sea	Total					
AMERICAS	**10,537**	**12**	**10,549**	**11,182**	**(5.7)**	**69,846**	**73,536**	**(5.0)**
North America	**10,177**	**12**	**10,189**	**10,728**	**(5.0)**	**66,145**	**69,848**	**(5.3)**
Canada	4,749	04	4,753	5,462	(13.0)	27,066	29,578	(8.5)
Mexico	60	0	60	44	36.4	736	635	15.9
United States	5,368	08	5,376	5,222	2.9	38,343	39,635	(3.3)
Caribbean & Central America	**86**	**0**	**86**	**72**	**19.4**	**677**	**576**	**17.5**
Costa Rica	08	0	08	08	0.0	68	72	(5.6)
Jamaica	14	0	14	07	100.0	47	26	80.8
Others	64	0	64	57	12.3	562	478	17.6
South America	**274**	**0**	**274**	**382**	**(28.3)**	**3,024**	**3,112**	**(2.8)**
Argentina	41	0	41	45	(8.9)	694	567	22.4
Brazil	97	0	97	124	(21.8)	1,034	1,177	(12.1)
Chile	33	0	33	79	(58.2)	374	412	(9.2)
Colombia	52	0	52	69	(24.6)	439	403	8.9
Others	51	0	51	65	(21.5)	483	553	(12.7)
AFRICA	**1,520**	**0**	**1,520**	**1,253**	**21.3**	**9,328**	**9,102**	**2.5**
North Africa	**526**	**0**	**526**	**298**	**76.5**	**2,067**	**1,869**	**10.3**
Morocco	114	0	114	91	25.3	590	627	(5.9)
Sudan	251	0	251	121	107.4	785	551	42.5
Others	161	0	161	86	87.2	692	691	0.1
Sub-Saharan Africa	**994**	**0**	**994**	**955**	**4.1**	**7,261**	**7,233**	**0.4**
Kenya	97	0	97	84	15.5	541	742	(27.1)
Mauritius	99	0	99	81	22.2	616	472	30.5
Nigeria	09	0	09	10	(10.0)	72	64	12.5
South Africa	391	0	391	419	(6.7)	2,776	2,758	0.7
Others	398	0	398	361	10.2	3,256	3,197	1.8

	July 2026			Tourist arrivals July 2025	% change July (26/25)	Total tourist arrivals up to July 2026	Total tourist arrivals up to July 2025	% change up to July (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	**90,216**	**663**	**90,879**	**80,272**	**13.2**	**642,567**	**571,879**	**12.4**
North East Asia	**16,740**	**01**	**16,741**	**16,998**	**(1.5)**	**117,513**	**105,706**	**11.2**
China	12,336	0	12,336	12,982	(5.0)	88,507	78,769	12.4
Japan	3,330	01	3,331	3,076	8.3	22,372	19,535	14.5
South Korea	1,033	0	1,033	932	10.8	6,479	7,303	(11.3)
Others	41	0	41	08	412.5	155	99	56.6
South East Asia	**5,407**	**05**	**5,412**	**5,228**	**3.5**	**43,715**	**37,660**	**16.1**
Cambodia	55	0	55	46	19.6	937	971	(3.5)
Indonesia	465	0	465	361	28.8	3,890	2,762	40.8
Malaysia	1,800	03	1,803	1,712	5.3	13,378	12,744	5.0
Myanmar	179	0	179	392	(54.3)	2,359	1,165	102.5
Philippines	648	0	648	608	6.6	4,174	3,780	10.4
Singapore	936	02	938	1,297	(27.7)	8,394	8,502	(1.3)
Thailand	830	0	830	506	64.0	5,417	5,126	5.7
Vietnam	443	0	443	266	66.5	4,799	2,373	102.2
Others	51	0	51	40	27.5	367	237	54.9
Oceania	**11,138**	**04**	**11,142**	**10,249**	**8.7**	**75,340**	**67,864**	**11.0**
Australia	9,699	03	9,702	9,117	6.4	67,138	60,442	11.1
New Zealand	1,392	01	1,393	1,106	25.9	7,876	7,167	9.9
Others	47	0	47	26	80.8	326	255	27.8
South Asia	**56,931**	**653**	**57,584**	**47,797**	**20.5**	**405,999**	**360,649**	**12.6**
Afghanistan	10	0	10	01	900.0	52	57	(8.8)
Bangladesh	3,382	0	3,382	3,274	3.3	25,690	36,411	(29.4)
Bhutan	46	0	46	44	4.5	391	373	4.8
India	43,896	651	44,547	37,128	20.0	338,230	279,122	21.2
Iran	109	0	109	151	(27.8)	1,287	6,129	(79.0)
Maldives	5,757	0	5,757	4,755	21.1	23,423	21,208	10.4
Nepal	606	02	608	442	37.6	3,755	3,094	21.4
Pakistan	3,125	0	3,125	2,002	56.1	13,171	14,255	(7.6)
EUROPE	**88,047**	**45**	**88,092**	**103,349**	**(14.8)**	**604,572**	**695,313**	**(13.1)**
Northern Europe	**27,080**	**08**	**27,088**	**29,697**	**(8.8)**	**167,348**	**169,131**	**(1.1)**
Denmark	2,297	0	2,297	2,509	(8.4)	12,149	11,975	1.5
Finland	122	0	122	150	(18.7)	2,984	2,789	7.0
Norway	1,350	04	1,354	1,982	(31.7)	7,187	8,713	(17.5)
Sweden	552	03	555	689	(19.4)	7,739	7,784	(0.6)
United Kingdom	21,834	0	21,834	23,475	(7.0)	130,401	131,377	(0.7)
Others	925	01	926	892	3.8	6,888	6,493	6.1

	July 2025			Tourist arrivals July 2025	% change July (26/25)	Total tourist arrivals up to July 2026	Total tourist arrivals up to July 2025	% change up to July (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
Western Europe	**41,566**	**35**	**41,601**	**48,619**	**(14.4)**	**217,790**	**244,551**	**(10.9)**
Austria	1,395	03	1,398	1,846	(24.3)	9,403	10,791	(12.9)
Belgium	4,196	0	4,196	4,511	(7.0)	11,929	13,275	(10.1)
France	10,085	17	10,102	11,059	(8.7)	63,099	72,516	(13.0)
Germany	8,831	07	8,838	10,568	(16.4)	78,596	85,144	(7.7)
Netherlands	12,489	04	12,493	15,556	(19.7)	34,092	41,695	(18.2)
Switzerland	4,477	04	4,481	4,990	(10.2)	20,140	20,572	(2.1)
Others	93	0	93	89	4.5	531	558	(4.8)
Central/Eastern Europe	**5,919**	**02**	**5,921**	**9,942**	**(40.4)**	**151,889**	**204,844**	**(25.9)**
Belarus	98	0	98	137	(28.5)	6,043	5,569	8.5
Czech Republic	1,114	0	1,114	1,367	(18.5)	10,248	11,963	(14.3)
Estonia	22	0	22	21	4.8	2,270	2,782	(18.4)
Hungary	200	0	200	265	(24.5)	3,518	4,117	(14.5)
Kazakhstan	97	0	97	78	24.4	3,886	7,788	(50.1)
Lithuania	161	0	161	144	11.8	2,834	4,806	(41.0)
Poland	1,201	0	1,201	3,469	(65.4)	24,657	29,548	(16.6)
Romania	184	0	184	231	(20.3)	3,032	3,638	(16.7)
Russia	1,856	01	1,857	3,158	(41.2)	79,206	115,470	(31.4)
Slovakia	304	0	304	320	(5.0)	3,726	4,450	(16.3)
Ukraine	265	0	265	279	(5.0)	4,960	5,516	(10.1)
Others	417	0	418	473	(11.6)	7,509	9,197	(18.4)
Southern/ Mediterranean Europe	**13,482**	**0**	**13,482**	**15,091**	**(10.7)**	**67,545**	**76,787**	**(12.0)**
Greece	174	0	174	162	7.4	2,143	1,971	8.7
Italy	3,672	0	3,672	4,886	(24.8)	20,586	24,443	(15.8)
Portugal	373	0	373	578	(35.5)	3,338	4,661	(28.4)
Spain	4,640	0	4,640	5,912	(21.5)	16,408	20,752	(20.9)
Turkey	675	0	675	660	2.3	5,444	5,056	7.7
Israel	3,356	0	3,356	1,966	70.7	14,480	13,014	11.3
Others	592	0	592	927	(36.1)	5,146	6,890	(25.3)
MIDDLE EAST	**5,772**	**33**	**5,805**	**4,188**	**38.6**	**17,105**	**18,458**	**(7.3)**
Bahrain	363	0	363	232	56.5	790	853	(7.4)
Egypt	324	0	324	328	(1.2)	1,950	2,587	(24.6)
Iraq	262	0	262	114	129.8	879	759	15.8
Jordan	258	0	258	262	(1.5)	1,339	1,731	(22.6)
Kuwait	134	0	134	219	(38.8)	703	1,155	(39.1)
Lebanon	298	0	298	248	20.2	1,546	2,009	(23.0)
Oman	1,288	0	1,288	518	148.6	2,598	1,516	71.4
Qatar	161	0	161	159	1.3	434	540	(19.6)
Saudi Arabia	1,317	0	1,317	1,068	23.3	3,074	3,623	(15.2)
United Arab Emirates	1,173	33	1,206	862	39.9	3,160	3,011	4.9
Others	194	0	194	178	9.0	632	674	(6.2)
TOTAL	**196,092**	**753**	**196,845**	**200,244**	**(1.7)**	**1,343,418**	**1,368,288**	**(1.8)**

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

Analysis of last-departure-port data for July 2026 reveals a striking and consequential geographic pattern: Sri Lanka's international connectivity is overwhelmingly channelled through a trio of Middle Eastern super-connectors. Dubai (11.14%), Doha (10.56%), and Abu Dhabi (7.42%), together with Sharjah (2.91%), collectively account for over 32% of all tourist arrivals a striking concentration that positions Gulf carriers (Emirates, Qatar Airways, Etihad, and Air Arabia) as the principal gatekeepers of Sri Lankan tourism. This reliance carries a dual character: it affords seamless one-stop connectivity from virtually every European and North American city, yet simultaneously renders the destination's arrival volumes highly sensitive to shifts in Gulf airline capacity, fare competition, and geopolitical developments in the Middle East. This underscores the need for Sri Lanka's aviation policymakers to actively pursue alternative direct routes in order to mitigate this structural vulnerability.

Equally prominent is the Indian subcontinental corridor, which serves as the second major inflow, with Chennai (7.34%), Delhi (6.08%), Mumbai (5.91%), Bangalore (3.96%), and Hyderabad (3.31%) jointly contributing over 26% of departures. This concentration reflects a deeply embedded regional travel ecosystem, in which Sri Lanka functions almost as a domestic extension for South Asian business travellers, medical tourists, and pilgrimage visitors. The prominence of Chennai as the single largest Indian port is particularly vital, underscoring the intense cultural and commercial cross traffic with Tamil Nadu, and suggesting that the short-haul, high-frequency air bridge between the two countries constitutes the lifeblood of daily tourist volume one that requires sustained low-cost carrier capacity and streamlined visa procedures to preserve and expand.

Perhaps the most analytically revealing paradox lies in the direct European departure figures: London (3.19%), Frankfurt (1.36%), and Paris (1.11%) collectively account for barely 5.66%, a figure that sits in marked contrast to the substantial European visitor shares .This discrepancy strongly suggests that European travellers are not flying to Sri Lanka directly; rather, they are predominantly routed through the Gulf hubs. For destination marketing purposes, this implies that Sri Lanka's promotional strategy in Europe should shift toward closer co-marketing collaboration with Gulf carriers, packaging stopover incentives and transit-friendly itineraries designed to intercept European travellers during the connection-browsing stage.

The visible presence of Southeast and East Asian hubs Kuala Lumpur (4.31%), Singapore (3.76%), Bangkok (1.81%), Hong Kong (2.24%), and Shanghai (2.10%), collectively accounting for roughly 14% points to a secondary but meaningful layer of connectivity, largely serving Chinese and ASEAN feeder markets.

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

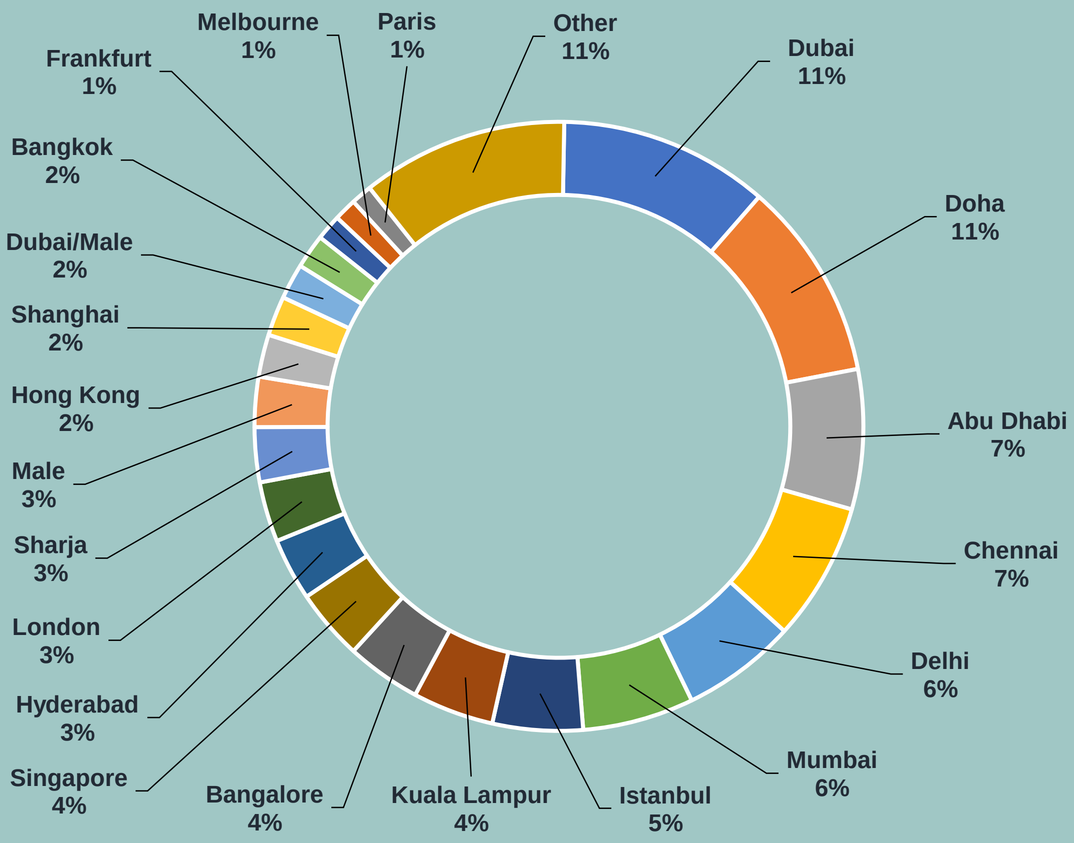
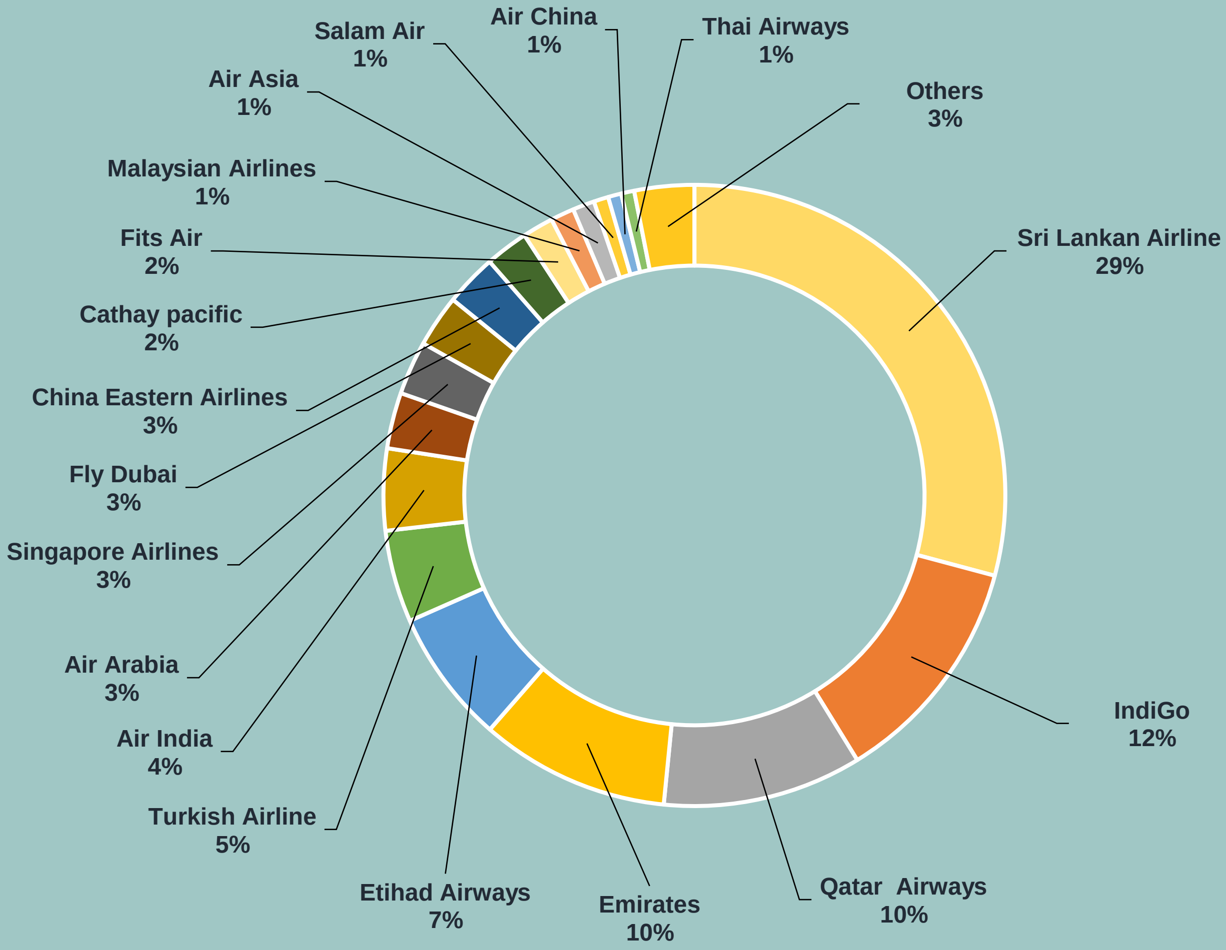


Chart 7. Main airlines to Sri Lanka, July 2026



Analysis of the airlines for July 2026 reveals a highly concentrated aviation landscape, with the national flag carrier, Sri Lankan Airlines, dominating the market by transporting 57,401 visitors representing 29.16% of all arrivals, This positions the national carrier not merely as one transport option among many, but as the structural backbone of the entire inbound tourism ecosystem. Such a commanding share likely reflects the airline's strategic advantage in regional connecting hubs. At the same time, this concentration exposes the sector to considerable vulnerability, as operational disruptions, fleet reductions, or industrial action affecting the national carrier would have an immediate and substantial impact on nearly one-third of all tourist arrivals.

Beneath this national leader lies a clear duopoly of Gulf mega-connectors and Indian low-cost carriers, which together constitute the second and third pillars of Sri Lanka's air connectivity. The combined contribution of Qatar Airways (10.35%), Emirates (9.85%), and Etihad Airways (6.97%), together with Air Arabia (2.91%), Fly Dubai (2.71%), and Salam Air (0.76%), accounts for a substantial 33.5% of all arrivals reaffirming that the Middle East remains the indispensable gateway for long-haul European, American, and Australian tourists. The near parity between Qatar Airways and Emirates, differing by just 0.5 percentage points, indicates intense competition for the European premium leisure segment, where even marginal shifts in fare structures or baggage policies could materially alter market shares. Meanwhile, the Indian aviation presence is overwhelmingly led by IndiGo (12.06%) the single largest non-national carrier followed by Air India (4.25%) collectively channeling 16.3% of visitors from the subcontinent.

The Asian connectivity segment, while present through Singapore Airlines (2.79%), China Eastern (2.71%), Cathay Pacific (2.24%), and Malaysia Airlines (1.23%), remains comparatively fragmented and modest in scale; China Eastern and Air China (0.69%) together account for just 3.4% of arrivals. Accordingly, a balanced aviation strategy focused on diversifying airline partnerships, expanding direct routes, and improving air access resilience will be essential for supporting future tourism growth.

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

July 2026

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

Country	Dubai	Doha	Abu Dhabi	Chennai	Delhi	Mumbai	Istanbul	Kuala Lampur	Bangalore	Singapore	Hyderabad	London	Sharja	Male	Hong Kong	Shanghai	Dubai/Male	Bangkok	Frankfurt	Melbourne	Paris	Others	Total
India	1,590	365	417	11,902	5,914	6,659	8	210	6,390	217	5,957	12	659	244	43	3	43	116	0	11	1	3,786	44,547
United Kingdom	3,391	3,832	2,523	548	968	643	1,015	491	232	313	53	5,275	512	181	144	35	384	183	32	35	20	1,024	21,834
Netherlands	2,640	2,263	1,375	37	1,115	1,542	1,893	143	146	37	9	101	172	85	13	17	127	63	578		41	96	12,493
China	167	21	31	35	10	25	11	1,280	3	216	6	2	26	292	2,394	3,066	63	460	1	5	3	4,219	12,336
France	763	2,331	1,565	240	778	543	1,212	240	106	90	28	66	186	80	37	15	85	59	59	3	1,299	317	10,102
Australia	144	91	77	121	66	50	19	1,497	24	3,268	28	48	19	123	290	20	14	202	18	2,111	26	1,446	9,702
Germany	1,692	2,277	738	91	320	429	782	165	120	77	8	70	393	60	29	27	221	69	1,034	8	54	174	8,838
Maldives	597	5	4	17	6	1	5	164	52	13	1	7	4	2,333	2	3	1,891	91	0	1	1	559	5,757
United States	290	878	742	392	190	178	189	213	261	511	229	68	24	58	421	74	24	168	18	6	50	392	5,376
Canada	475	567	698	185	135	48	16	147	39	265	17	247	12	28	432	51	21	155	556	5	390	264	4,753

This cross-tabulation of departure ports by source market provides a granular, view of Sri Lanka's aviation geography, revealing that the island's tourism connectivity is not a single unified network but rather a series of distinct, source-specific corridors shaped by many factors. The Indian market, which contributes the largest absolute volume at 44,547 arrivals, demonstrates a deeply regionalized footprint, with Chennai (11,902) Mumbai (6,659), Bangalore (6,390) Delhi (5,914), and Hyderabad (5,957) emerging as the primary departure port confirming that Sri Lanka functions almost as an extension of India's domestic air network for business travellers, medical tourists, and short haul leisure seekers.

For the tourists from United Kingdom (21,834 arrivals), London emerges as the clear primary gateway with concurrent presence of elevated flows via Dubai and Doha. This confirms that even for direct-route markets, Gulf connectors continue to serve as essential competitive alternatives. Similarly, Australia displays a different pattern, with Singapore (3,268) Melbourne (2,111) and Kuala Lampur (1,497) functioning as key departure points. Tourists from Canada (4,753) and the United States (5,376), by contrast, show markedly fragmented departure profile concentrated overwhelmingly in Gulf hubs.

The major European long-haul markets, the Netherlands, France, and Germany present a somewhat more interesting picture, in which home-country hubs such as Paris and Frankfurt do register meaningfully, though the Gulf triumvirate of Dubai, Doha, and Abu Dhabi continues to command the largest share. Germany shows a notable Frankfurt outflow (approximately 1,034). For the Chinese tourist, Shanghai (3,066) and Hong Kong (2,394) stand out as the key departure points.

Overall, the departure port analysis highlights that Sri Lanka's international tourism connectivity is shaped by a combination of geographical proximity, airline network structures, transit hub accessibility, and source-market travel behaviour. While regional markets such as India rely heavily on direct short-haul connectivity, long-haul markets demonstrate a strong dependence on global aviation hubs, particularly those in the Gulf region.

The dominance of Dubai, Doha, and Abu Dhabi across multiple key markets underscores the strategic importance of maintaining strong partnerships with major international carriers and ensuring competitive air access. At the same time, the variation in departure patterns across source markets indicates the need for market-specific aviation strategies rather than a uniform connectivity approach. Strengthening direct air links from high-potential markets, expanding code-share arrangements, and improving connectivity through emerging gateways could enhance Sri Lanka's accessibility, reduce dependence on transit hubs, and support the country's ambition to diversify and expand its international tourism base.

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

Country	Sri Lankan Airline	IndiGo	Qatar Airways	Emirates	Etihad Airways	Turkish Airline	Air India	Air Arabia	Singapore Airlines	Fly Dubai	China Eastern Airlines	Cathay pacific	Fits Air	Malaysian Airlines	Air Asia	Salam Air	Air China	Thai Airways	Others	Total
India	39.43	43.02	0.62	1.59	0.42	0.02	7.92	1.35	0.20	1.15	0.01	0.10	1.34	0.05	0.11	0.11	0.00	0.06	2.51	100.00
United Kingdom	33.56	2.95	17.18	15.08	11.33	4.65	3.43	2.40	0.93	1.95	0.11	0.66	0.27	0.32	0.76	0.41	0.13	0.22	3.64	100.00
Netherlands	12.38	9.73	18.00	18.31	11.01	15.15	8.18	1.35	0.16	3.72	0.12	0.10	0.16	0.11	0.62	0.06	0.06	0.11	0.66	100.00
China	17.22	0.41	0.17	0.92	0.25	0.09	0.12	0.21	0.93	0.62	34.90	19.41	0.76	2.08	2.44	0.03	9.97	2.18	7.30	100.00
France	24.58	2.48	22.88	7.15	15.48	12.00	6.67	1.84	0.58	1.04	0.15	0.37	0.33	0.31	1.11	0.32	0.08	0.15	2.49	100.00
Australia	47.55	1.20	0.89	1.01	0.75	0.20	0.41	0.20	28.52	0.51	0.21	2.99	0.07	11.49	2.06	0.01	0.10	0.93	0.92	100.00
Germany	20.88	1.37	25.67	18.36	8.23	8.86	4.42	4.46	0.57	3.16	0.19	0.33	0.23	0.18	0.80	0.23	0.06	0.27	1.74	100.00
Maldives	43.74	0.07	0.09	40.77	0.07	0.09	0.00	0.02	0.12	2.50	0.05	0.03	6.91	0.09	0.12	0.07	0.02	0.07	5.18	100.00
United States	23.18	12.15	16.24	4.63	13.60	3.53	2.36	0.43	7.78	1.08	1.45	7.83	0.39	0.63	1.49	0.07	0.20	0.93	2.03	100.00
Canada	41.74	3.51	11.89	8.79	14.60	0.34	1.89	0.27	1.81	1.45	1.07	9.09	0.27	0.84	0.69	0.11	0.06	0.53	1.03	100.00

An examination of the airline travelled by source markets reveals a highly segmented aviation landscape, in which traveller preferences appear to be shaped more by geographic proximity, and other factors. The Indian market, which contributes the largest absolute volume, exhibits a strongly dualistic pattern, with Sri Lankan Airlines (39.43%) and IndiGo (43.02%) jointly commanding over 82% of the corridor, further reinforced by Air India's 7.92% share.

This confirms that subcontinental inflow operates predominantly as a short-haul, high-frequency, direct-route ecosystem, driven by cost-conscious leisure and business travellers .By contrast, the major European long-haul markets the United Kingdom, Netherlands, France, and Germany display a distinctly Gulf-centric orientation, with the combined share of Qatar Airways, Emirates, and Etihad consistently exceeding that of the national flag carrier. In the Netherlands, for instance, Sri Lankan Airlines accounts for just 12.38%, while the Gulf trio together with Turkish Airlines (15.15%) jointly control over 62% of Dutch arrivals. The United Kingdom shows a broadly similar pattern, with Qatar Airways (17.18%), Emirates (15.08%), and Etihad (11.33%) collectively surpassing Sri Lankan Airlines' 33.56% share a configuration that firmly establishes the Gulf hubs as indispensable transit nodes for European visitors, and correspondingly ties Sri Lanka's European tourism volumes closely to capacity decisions made in Doha and Dubai.

The Chinese market represents a markedly different aviation ecosystem. Instead, this market is overwhelmingly served by China Eastern (34.90%), Cathay Pacific (19.41%), Air China (9.97%), and with Sri Lankan (17.22%) providing a secondary regional channel. The Australian market, meanwhile, stands out as a particular stronghold for Sri Lankan Airlines, which commands a dominant 47.55% share, complemented by Malaysia Airlines (11.49%) and Singapore Airlines (28.52%). Canada similarly shows a strong Sri Lankan Airlines presence at 41.74%, although Qatar Airways (11.89%) and Etihad (14.60%) retain a considerable combined share, underscoring a dual connectivity approach for North American markets.

The analysis highlights that airline preferences among Sri Lanka's key source markets are largely determined by geography, route connectivity, pricing, and hub accessibility. While regional markets such as India rely heavily on direct, high-frequency services, long-haul European and North American markets remain strongly dependent on Gulf transit hubs, making Sri Lanka's tourism flows sensitive to capacity and strategic decisions of major international carriers. At the same time, Sri Lankan Airlines maintains a strong competitive position in selected markets, particularly Australia and Canada. These patterns emphasize the importance of a diversified aviation strategy, including strengthening direct connectivity where viable while maintaining strategic partnerships with global hub carriers to support sustained tourism growth.

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