2026

MONTHLY TOURIST ARRIVALS REPORT:

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

JUNE

Introduction

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

The year 2026 commenced on a highly positive note, with January (277,327) and February (279,328) recording robust year-on-year growth of 9.7% and 16.2% over 2025, and even stronger gains relative to 2018 (16.0% and 18.5% respectively). This indicates that the initial phase of 2026 benefitted from favourable demand conditions, potentially supported by improved air connectivity and sustained post-pandemic travel momentum

However, this upward trend reversed sharply in March (183,979), which registered a decline of 19.7% compared to 2025 and 21.2% relative to 2018. The contraction deepened further in April (135,643), which experienced a substantial drop of 22.3% year-on-year and 24.8% compared to 2018, marking the most severe monthly contraction in the period under review. This abrupt shift deviates from Sri Lanka's typical seasonal pattern, where demand usually tapers gradually after the peak winter months rather than declining precipitously. The scale of the March–April reduction suggests the influence of the Middle Eastern conflict situation which heavily impaired the travel behaviour

A partial recovery is observed in May (145,745), which recorded modest growth of 9.65% over 2025 and 12.6% over 2018,indicating temporary stabilisation in travel flows. However, this improvement was not sustained, as June arrivals (124,551) declined again by 9.90% compared to 2025 and 15.1% relative to 2018, reinforcing the persistence of underlying demand weakness. Collectively, the first half of 2026 (January–June) totals 1,146,573 arrivals, slightly below both 2025 (1,168,044) and 2018 (1,164,647), reflecting marginal deficits of 1.84% and 1.55% respectively. While these gaps appear limited in magnitude, they mask significant intra-period volatility, where strong early gains were effectively offset by steep losses in March and April.

The key source markets for the month of June includes India, United Kingdom, Australia, China, and United States.

UN Tourism's latest assessment indicates that the ongoing geopolitical conflict is likely to slow global tourism growth, reducing international arrivals by around 1–2 percentage points below the earlier 2026 forecast of 3%–4%. The impact is expected to stem not only from disruptions in and around the Middle East but also from wider consequences such as reduced traveller confidence, higher airfares, and constrained airline capacity due to rising oil prices and fuel supply pressures. These factors are collectively encouraging a shift in demand toward shorter-haul destinations while dampening overall travel growth.

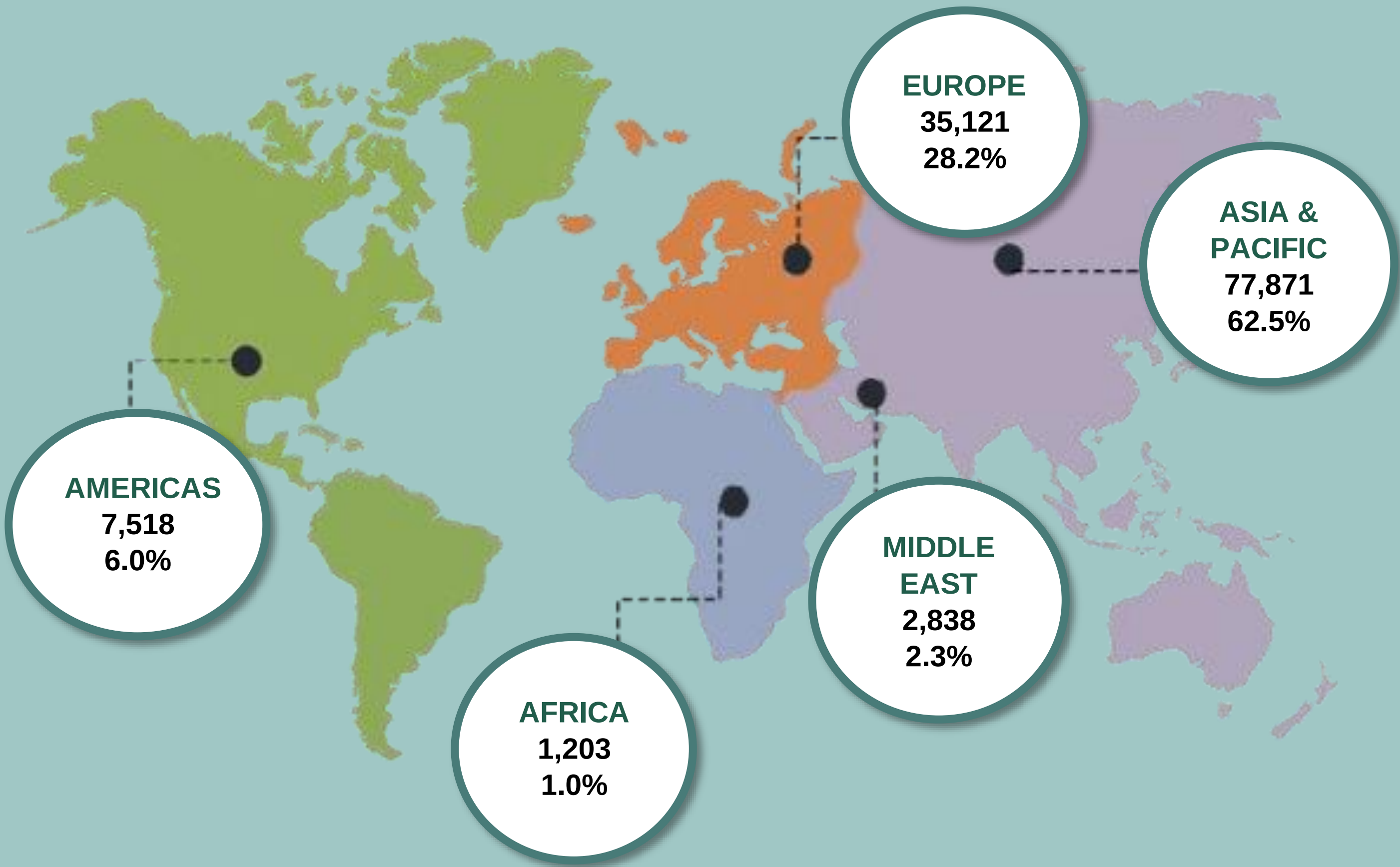
At the same time, the UN Tourism Confidence Index shows cautiously positive but weaker expectations for May–August 2026, with experts scoring the period at 105, down from 117 earlier in the year. While 39% of experts anticipate improved performance compared to 2025, 28% expect similar outcomes, and 31% expect weaker results. Overall, the outlook reflects a tourism sector that remains resilient but increasingly constrained by geopolitical uncertainty and rising travel costs (World Tourism Barometer, May 2026).

Table 1. Monthly tourist arrivals, June 2026

Month	2025	2026	% Change 2026/25
January	252,761	277,327	9.7
February	240,217	279,328	16.2
March	229,298	183,979	(19.8)
April	174,608	135,643	(22.3)
May	132,919	145,745	9.6
June	138,241	124,551	(9.9)
July	200,244		
August	198,235		
September	158,971		
October	165,193		
November	212,906		
December	258,928		
TOTAL	2,362,521	1,146,573	

Tourist arrivals by region and percentage share June 2026

Map 1. Tourist arrivals by region and percentage share



Sri Lanka's tourism market continues to display a pronounced geographic concentration, with the Asia-Pacific region accounting for 62.5% of total tourist arrivals. This regional dominance has been driven largely by rising arrivals from India, China, Bangladesh, and the Maldives. While such concentration sustains healthy visitor volumes and supports growth in short-haul travel, it simultaneously exposes the country to heightened vulnerability from regional political instability, economic headwinds, and disruptions to aviation networks.

Europe remains the second-largest source market, contributing 28.2% of total arrivals and continuing to serve as a vital long-haul segment, led by key markets such as the United Kingdom, Germany, and France. However, European travel demand has grown increasingly sensitive to global economic uncertainty, rising travel costs, and geopolitical tensions. Notably, arrivals from Europe rose by approximately 17.8% compared to May 2026, a trend likely attributable to the cessation of the Gulf conflict during this period.

The Middle East and Africa contributed comparatively modest shares of approximately 2.3% and 1.0% of total arrivals, respectively, underscoring Sri Lanka's limited market penetration in these regions and reinforcing the broader case for source-market diversification to strengthen resilience against external shocks.

Top primary markets and top potential markets

Top primary markets, June 2026

Rank	Country	Arrivals	% Share
01	India	43,423	34.9
02	United Kingdom	10,474	8.4
03	Australia	8,710	7.0
04	China	8,224	3.1
05	United States	3,806	3.1
06	France	3,762	3.0
07	Germany	3,735	3.0
08	Bangladesh	3,438	2.8
09	Canada	3,393	2.7
10	Maldives	2,561	2.1
11	Pakistan	2,245	1.8
12	Japan	2,103	1.8
13	Spain	1,975	1.6
14	Israel	1,836	1.5
15	Netherlands	1,751	1.4
16	Italy	1,669	1.3
17	Switzerland	1,542	1.2
18	Singapore	1,498	1.2
19	Russia	1,276	1.0
20	Malaysia	1,266	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, June 2026

21 **Norway**
Arrivals: **1,012 / % Share: 0.8**

22 **New Zealand**
Arrivals: **959 / % Share: 0.8**

23 **Belgium**
Arrivals: **930 / % Share: 0.7**

24 **Denmark**
Arrivals: **668 / % Share: 0.5**

25 **Oman**
Arrivals: **659 / % Share 0.5**

26 **Thailand**
Arrivals: **606 / % Share: 0.5**

27 **United Arab**
Arrivals: **590 / % Share: 0.5**

28 **Poland**
Arrivals: **555 / % Share: 0.4**

29 **Nepal**
Arrivals: **525 / % Share: 0.4**

30 **Sweden**
Arrivals: **508 / % Share: 0.4**

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

Top ten source markets

June 2026

An analysis of the top ten source markets for Sri Lanka in June 2026 presents a mixed performance compared to the same month in 2025, with notable declines overshadowing isolated pockets of growth. India continues to dominate as the leading source market, with 43,423 arrivals up from 37,934 in June 2025 marking a steady 14.4% increase. This growth is again bolstered by both air and sea arrivals (42,748 by air and 675 by sea), underscoring India's geographic proximity, deep cultural ties, and sustained travel demand. The United Kingdom retains second place with 10,474 visitors; however, it recorded a year-on-year decline of 9.9%, signaling a slight declining in long-haul travel from Western Europe compared to the robust growth seen in 2025. Australia climbed to third position, posting a healthy 19.3% increase to reach 8,710 arrivals, reflecting strong connectivity and enduring appeal from the Oceania region. In contrast, China, ranked fourth, continued its downward trajectory with a 6.6% drop to 8,224 arrivals (7,528 by air and 696 by sea), potentially due to persistent outbound travel hesitancy, limited flight restoration, or reduced destination competitiveness.

Notably, several traditionally strong Western and regional markets witnessed sharp contractions. The United States fell to fifth with 3,806 arrivals a significant 29.8% drop from 5,422 while Germany plummeted by 32.1% to just 3,735, and Bangladesh recorded the steepest decline among the top ten, collapsing 41.0% to 3,438 arrivals. France and Canada also showed softer figures, declining 13.4% and 20.0% respectively, while the Maldives, rounding out the list at tenth, dropped 18.9% to 2,561 arrivals. Across all markets, air travel remains the overwhelming mode of entry, with sea arrivals remaining negligible except for India (675) and China (696), pointing to niche maritime potential that has yet to scale meaningfully beyond these two nations.

Overall, while India and Australia provided bright spots with double-digit growth, the widespread year-on-year declines across the U.S., Germany, Bangladesh, and the UK indicate a challenging month for Sri Lankan tourism in June 2026. This downturn coupled with the continued stagnation of the Chinese market and the sharp erosion of high-yield European and North American segments reinforces the critical need for aggressive market diversification, renewed promotional campaigns in affected regions, and a thorough reassessment of destination pricing, airlift capacity, and traveler perception to reverse these negative trends and build long-term resilience.

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

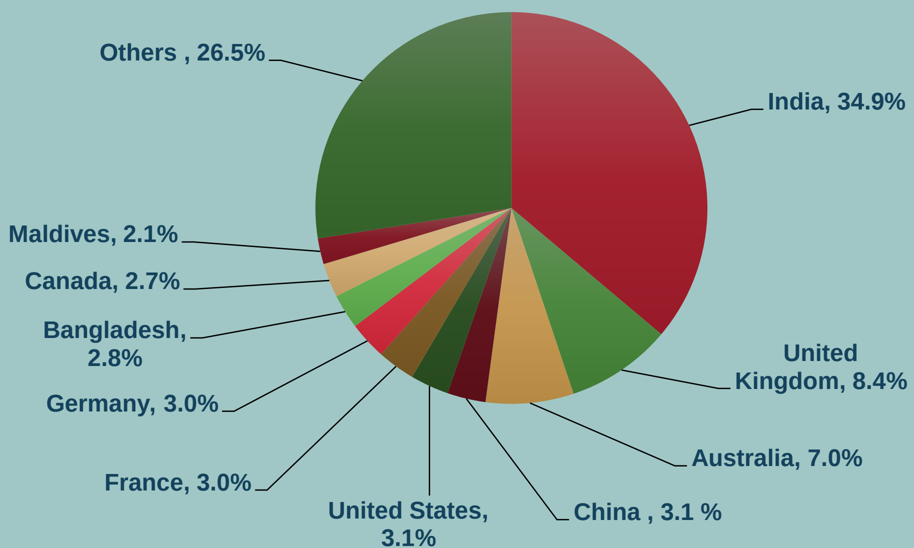
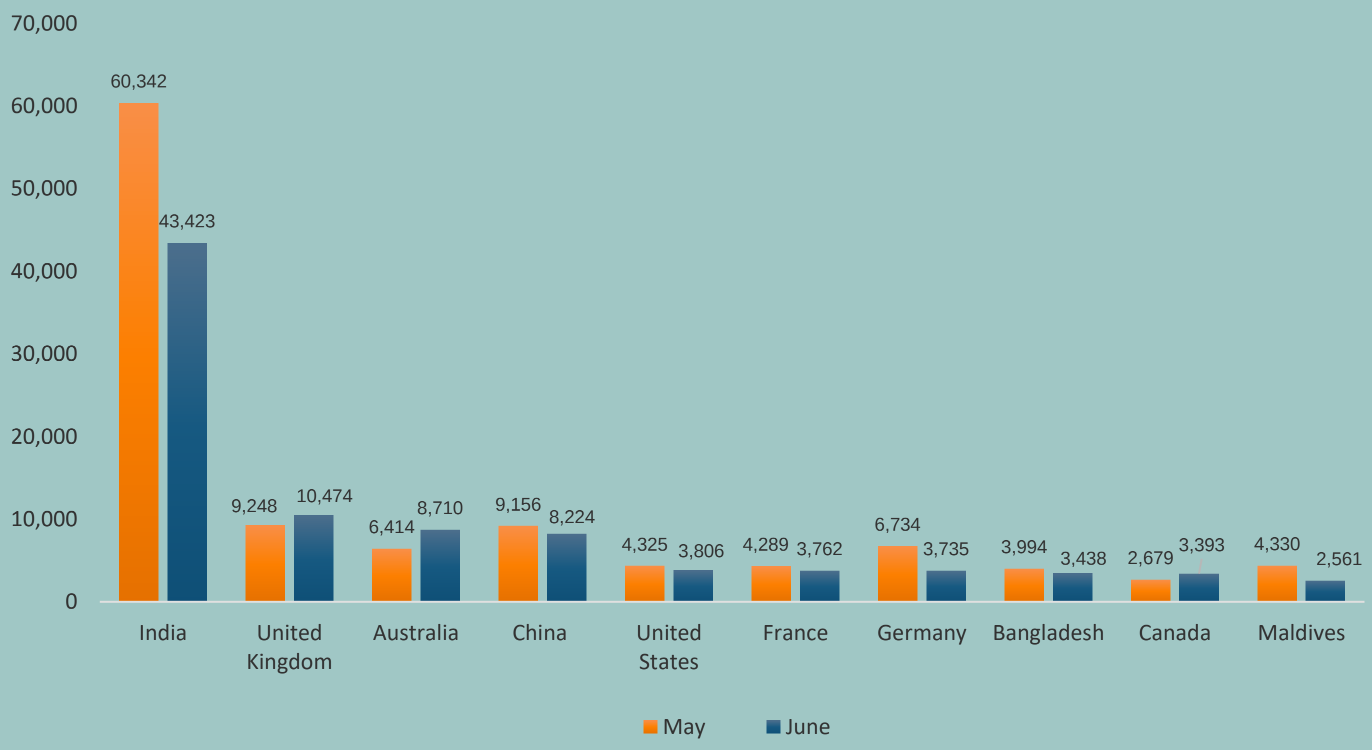


Table 2. Top ten source markets to Sri Lanka, June 2026

Rank	Country of Residence	Tourist arrivals (June 2026)			Tourist arrivals	
		By Air	By Sea	Total	June 2025	Percentage Change (2026/2025) June
1	India	42,748	675	43,423	37,934	14.4
2	United Kingdom	10,468	06	10,474	11,628	(9.9)
3	Australia	8,705	05	8,710	7,299	19.3
4	China	7,528	696	8,224	8,804	(6.6)
5	United States	3,796	10	3,806	5,422	(29.8)
6	France	3,755	07	3,762	4,345	(13.4)
7	Germany	3,729	06	3,735	5,498	(32.1)
8	Bangladesh	3,438	0	3,438	5,826	(41.0)
9	Canada	3,385	08	3,393	4,239	(20.0)
10	Maldives	2,561	0	2,561	3,157	(18.9)

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



Top ten source markets

January to June 2026

An analysis of cumulative tourist arrivals for the first half of 2026 (January to June) reveals a marginal overall contraction, with total arrivals dipping by 1.8% from 1,168,044 in 2025 to 1,146,573 in 2026. This slight decline masks a deeply polarized performance across source markets, where robust gains from a few Asian powerhouses are being offset by pronounced erosion across traditional European and North American strongholds. Notably, the "Others" category which accounts for nearly 29% of total arrivals also shrank by 9.8%, signaling a broad-based weakening in secondary and niche markets that collectively represent a significant share of Sri Lanka's visitor base.

On the positive side, India continues to cement its role as the undisputed engine of Sri Lankan tourism, posting a remarkable 21.4% growth to reach 293,683 arrivals a net increase of nearly 51,689 visitors compared to the same period in 2025. This sustained momentum underscores the unmatched advantages of geographic proximity, deep cultural connectivity, and expanding air and sea linkages. China has staged a notable recovery, reversing its earlier monthly declines with a 15.8% increase to 76,171 arrivals, signaling a gradual but welcome return of Chinese outbound travel. Australia also delivered solid double-digit growth of 11.9%, reaching 57,436 arrivals, while the United Kingdom remained largely flat with a marginal 0.6% uptick to 108,567, retaining its second-place ranking through sheer stability rather than expansion.

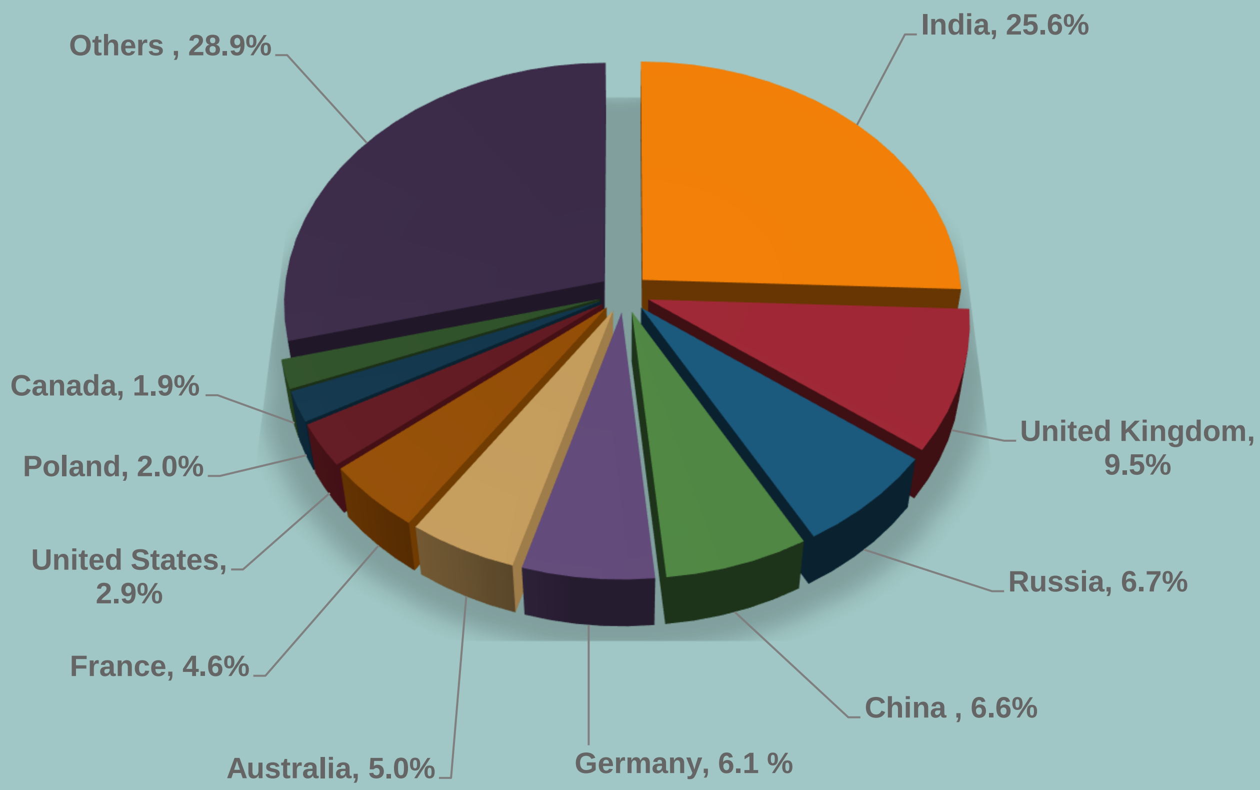
Conversely, the most striking negative trend is the dramatic collapse of the Russian Federation, which plummeted by 31.1% from 112,312 to just 77,349 arrivals. This steep fall has pushed Russia down to third place, likely driven by persistent geopolitical challenges, currency fluctuations, limited flight connectivity, and payment transfer difficulties that have made Sri Lanka a less accessible destination for Russian travelers. European markets broadly struggled across the board: France declined by 13.8%, Poland by 10.1%, and Germany by 6.5%, collectively pointing to a softening of Western and Central European interest, possibly due to increased competition from Mediterranean alternatives or changing consumer preferences. Similarly, North American markets exhibited weakness, with the United States falling 4.2% and Canada dropping 7.5%, suggesting that the long-haul travel boom witnessed in the immediate post-pandemic period may be plateauing or facing affordability headwinds.

The first-half 2026 data paints a picture of a tourism sector undergoing a significant structural recalibration. While India and China are emerging as the primary growth engines, offering a clear strategic pathway for regional expansion the simultaneous erosion of historically vital European and Russian markets poses a serious challenge to Sri Lanka's tourism diversification goals.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~June 2026)	Tourist Arrivals (Jan ~June 2025)	Percentage Change Jan – June 2026/2025
1	India	293,683	241,994	21.4
2	United Kingdom	108,567	107,902	0.6
3	Russian Federation	77,349	112,312	(31.1)
4	China	76,171	65,787	15.8
5	Germany	69,758	74,576	(6.5)
6	Australia	57,436	51,325	11.9
7	France	52,997	61,457	(13.8)
8	United States	32,967	34,413	(4.2)
9	Poland	23,456	26,079	(10.1)
10	Canada	22,313	24,116	(7.5)
11	Others	331,876	368,083	(9.8)
	Total	**1,146,573**	**1,168,044**	**(1.8)**

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



Tourist arrivals by purpose of visit
June 2026

The purpose of visit profile of tourists who arrived in Sri Lanka in June continues to demonstrate the country's strong positioning as a leisure destination. Pleasure and vacation travel accounted for an overwhelming 63% of total arrivals. This reflects Sri Lanka's appeal during the peak summer travel season, driven by its beaches, natural attractions, favourable climate, and diverse holiday experiences.

Among the non-leisure segments, visiting friends and relatives purpose accounted for 15% of arrivals, making it the largest niche travel segment, its share has significantly increased compared with May. Business travel and MICE related visits each contributed 4% and 7% indicating a modest level of professional travel. Health and Ayurvedic tourism (0.3%) and religious travel (0.2%) remained relatively small but highlight opportunities to further develop Sri Lanka's wellness and spiritual tourism offerings. Meanwhile, Sports and education purposes each accounted for only 0.3% and 1% of arrivals, while official travel was negligible. Overall the June visitor profile reinforces Sri Lanka's heavy dependence on leisure tourism.

While this reflects the country's established strengths as a holiday destination, it also highlights the need to diversify the tourism portfolio by strengthening higher-value niche segments such as MICE, wellness, cultural, sports, and business tourism. Expanding these segments would help reduce reliance on leisure travel, enhance tourism resilience, and encourage a more balanced distribution of visitor arrivals throughout the year.

Chart 4: Purpose of visit, June 2026

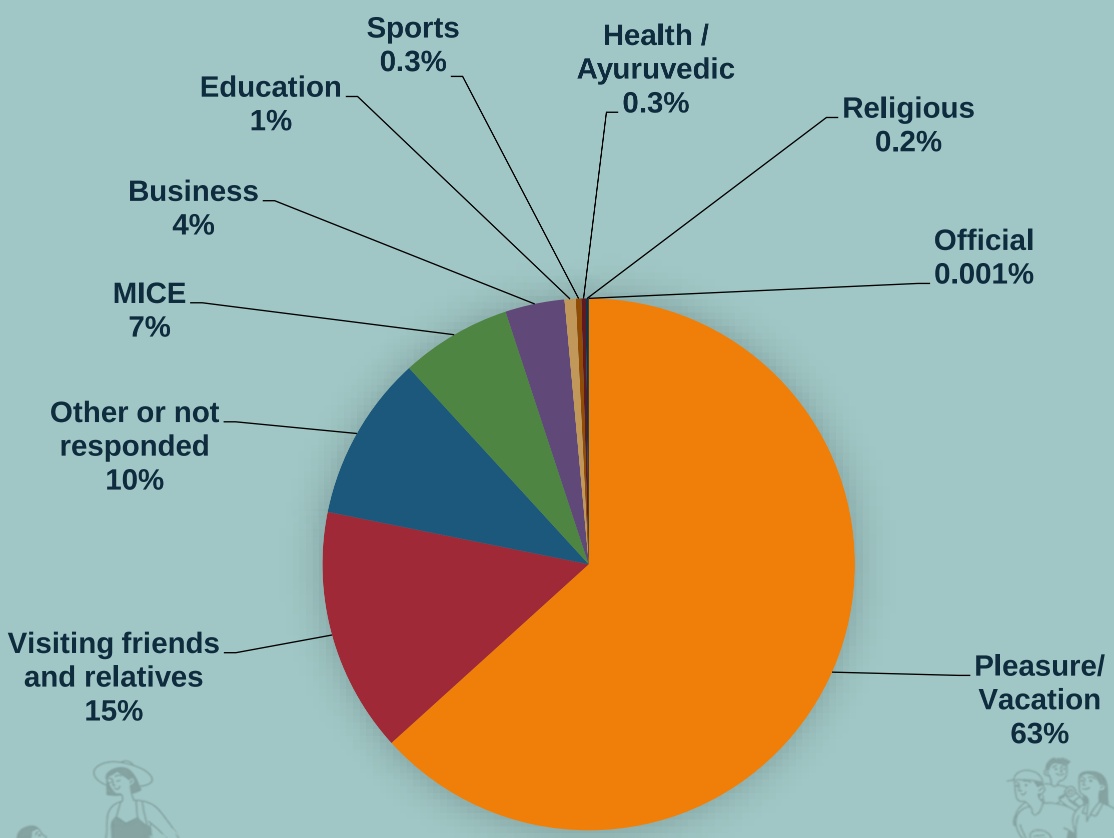
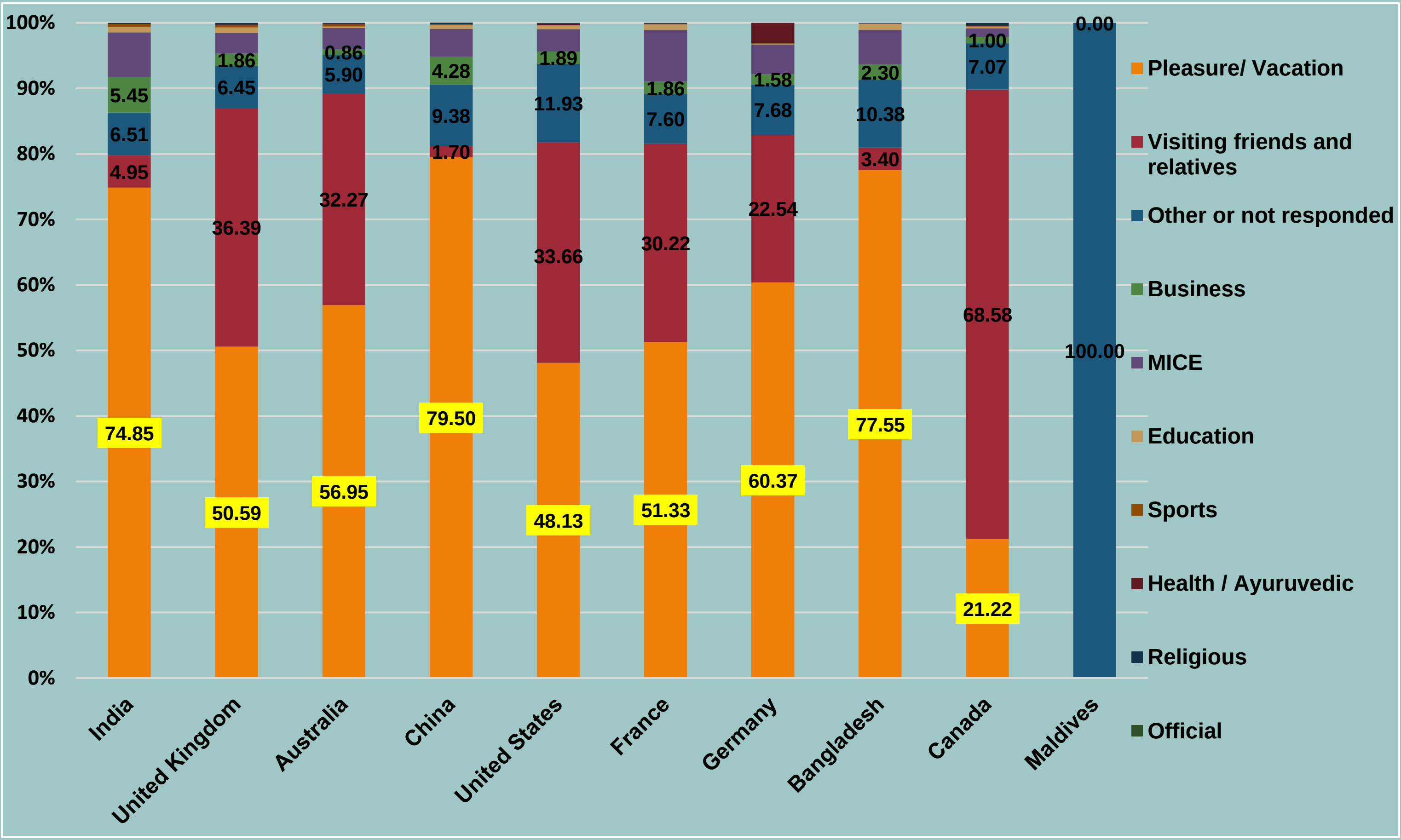


Chart 5: Purpose of visit vs main source markets



The disaggregated data of purpose of visit by source market reveals striking contrasts in tourist motivations, heavily influenced by geographical proximity, diaspora size, and market maturity. For Asian neighbors India (74.85%), China (79.50%), and Bangladesh (77.55%) "Pleasure/Vacation" overwhelmingly dominates, underscoring Sri Lanka's primary appeal as a readily accessible beach-and-culture holiday destination for these regional giants. Conversely, VFR figures for these markets are negligible (4.95%, 1.70%, and 3.40%, respectively), indicating that travel from these countries is driven almost entirely by fresh tourism experiences rather than diaspora connections

In stark contrast, Western markets exhibit a much more balanced profile. While "Pleasure/Vacation" remains the single largest category ranging from 48.13% in the US to 60.37% in Germany"Visiting Friends and Relatives" assumes a significantly elevated role. The United Kingdom (36.39%), Australia (32.27%), the United States (33.66%), and France (30.22%) all show substantial VFR shares, reflecting strong expatriate communities, historical colonial ties, and second-generation Sri Lankans residing abroad. Canada stands out as the most extreme case in this regard, where VFR (68.58%) actually surpasses vacation (21.22%), making it the only market where family/friend visits are the primary motivator likely attributable to Canada's large and active Sri Lankan diaspora.

Niche segments exhibit distinct geographic pockets. MICE tourism finds its strongest footholds in France (7.95%) and India (6.78%), suggesting these markets view Sri Lanka favourably for corporate conferences and incentive travel, while pure "Business" travel is most pronounced in India (5.45%) and China (4.28%), aligning with their robust bilateral trade and commercial linkages with Sri Lanka. On the specialty wellness front, Germany demonstrates a unique and outsized affinity for "Health / Ayurvedic" (3.08%), far exceeding all other countries a clear signal for targeted promotional campaigns around Ayurveda retreats in the German-speaking market. In contrast, categories like Sports, Education, Religious, and Official remain uniformly negligible across almost all countries, collectively hovering under 1% and indicating minimal current demand in these areas.

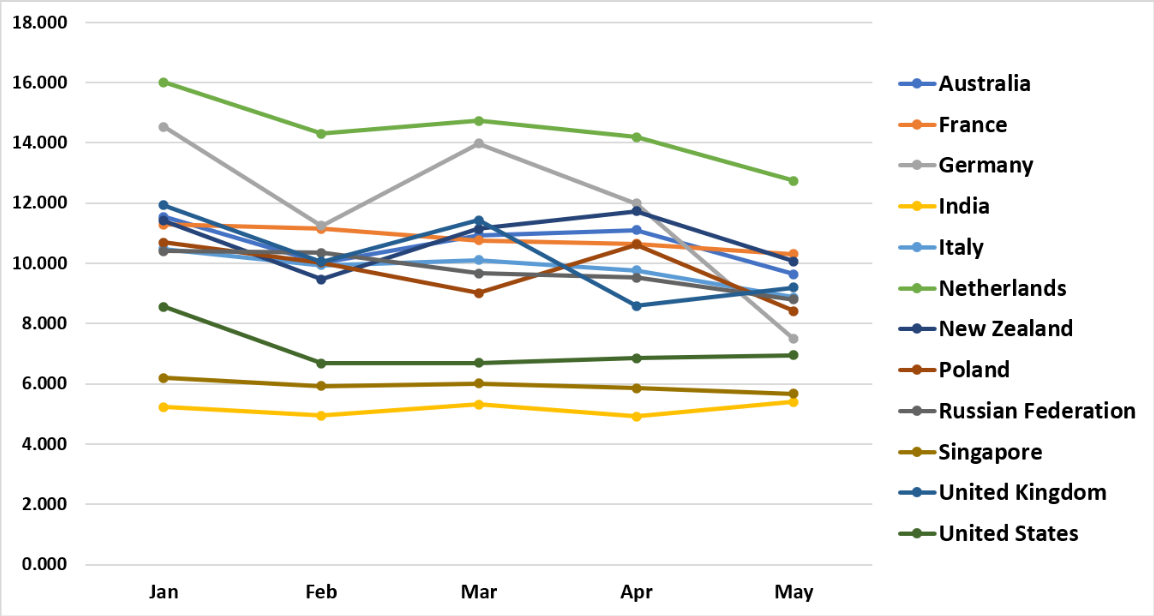
The data underscores that Sri Lanka’s tourism product resonates heterogeneously across the globe, leisure is a universal pillar, but Western markets carry a robust VFR overlay, while Asian neighbours supply bulk vacation traffic. MICE and business hold distinct regional strongholds, and wellness is a Germany-specific opportunity. This heterogeneity strongly advises differentiated marketing strategies catering to diaspora ties for Canada and the UK, promoting MICE capabilities to France and India, leveraging Ayurveda to attract German wellness seekers to ensure accurate future planning.

Duration of Stay in Sri Lanka: Emerging Trends and Implications for Destination Competitiveness

The duration of stay is a critical tourism performance indicator as it directly influences tourism earnings, visitor expenditure, and overall destination value creation. While arrival numbers measure volume, length of stay determines the depth of economic impact generated per visitor. Below table indicates the trend in length of stay for the first half of 2026 among key source markets .

Trend in Length of Stay during the first half of 2026

	Jan	Feb	Mar	Apr	May	June
Australia	11.543	10.004	10.935	11.11	9.64	10.75
France	11.282	11.140	10.761	10.65	10.30	10.97
Germany	14.524	11.250	13.972	11.99	7.50	12.22
India	5.235	4.945	5.321	4.91	5.41	5.22
Italy	10.473	9.939	10.108	9.77	8.87	10.07
Netherlands	16.008	14.305	14.728	14.18	12.74	14.76
New Zealand	11.412	9.471	11.153	11.73	10.07	10.90
Poland	10.698	10.026	9.015	10.62	8.42	10.26
Russian Federation	10.413	10.350	9.671	9.53	8.80	10.06
Singapore	6.194	5.926	6.019	5.85	5.68	6.21
United Kingdom	11.924	10.044	11.433	8.58	9.20	10.83
United States	8.557	6.677	6.691	6.85	6.95	7.24



The table shows the average duration of stay (nights) of tourists from ten major source markets between January and June. Overall, the duration of stay remained relatively stable across most markets, with moderate seasonal fluctuations. European markets consistently recorded the longest average stays, while regional Asian markets, particularly India and Singapore, exhibited significantly shorter stays. The data also indicates a noticeable decline in May across almost all markets, followed by a recovery in June.

The Netherlands recorded the highest average duration of stay throughout the six-month period, ranging from 12.74 to 16.01 nights, making Dutch tourists the most valuable in terms of visitor nights. Germany followed closely, with stays generally exceeding 12 nights except for a temporary decline to 7.50 nights in May. Other long-haul European markets such as Australia, France, Italy, Poland, and the Russian Federation consistently stayed between 9 and 11.5 nights, demonstrating strong potential for generating higher tourism expenditure. These markets contribute substantially to accommodation occupancy, food and beverage sales, transport services, and visitor spending due to their extended stays.

In contrast, India recorded the shortest average duration of stay, fluctuating only between 4.91 and 5.41 nights, while Singapore remained between 5.68 and 6.21 nights. Despite India being Sri Lanka's largest source market by arrivals, its shorter average stay suggests that many visits are for short holidays, business, religious travel, or quick leisure trips. Consequently, although India contributes significantly to arrival numbers, its overall contribution to visitor nights and tourism receipts is comparatively lower than many long-haul markets.

A common pattern across nearly all markets is the decline in average stay during May. Germany experienced the sharpest reduction, dropping from 11.99 nights in April to 7.50 nights in May, before recovering to 12.22 nights in June. Similar, though less pronounced, declines were observed in Australia, France, Italy, the Netherlands, Poland, Russia, New Zealand, and Singapore. his suggests that the shorter duration of stay observed in May was likely influenced by the conflict situation in the Middle East, as nearly 30% of tourists travelling to Sri Lanka transit through major Middle Eastern aviation hubs. The resulting flight disruptions, schedule changes, travel related inflation and travel uncertainty may have prompted visitors to shorten their holidays. The rebound in June indicates the return of longer vacation travel as the Northern Hemisphere summer season begins and the de escalculation of the conflict in the Middle East .

.Contributing Factors for the duration of stay

Several interrelated factors have been identified in tourism literature as potential contributors to the observed fluctuations in duration of stay. Regional tourism analyses point to increasing itinerary competition, with Sri Lanka being progressively bundled alongside destinations such as the Maldives, India, or Southeast Asian hubs within multi-country travel packages, thereby reducing the number of nights allocated to Sri Lanka specifically. Compounding this, airline and industry commentaries suggest that fluctuating airfares and limited direct connectivity from certain source markets are prompting travellers to optimize costs by shortening stays in relatively higher-cost destinations. Perceptions of value for money also appear to play a role; destination perception studies from comparable island economies indicate that cost perception directly influences itinerary length.

This is further reinforced by a broader, post-COVID-19 shift in traveller behaviour, with global research from bodies such as UN Tourism and the OECD highlighting a structural move toward shorter, more frequent trips as travellers increasingly prioritize experience intensity over extended duration. Further, tourism studies suggest that product concentration and limited circuit expansion may also be contributing to the trend, as visitor movement remains largely confined to a few established circuits, namely the Cultural Triangle, the South Coast, and the Hill Country leading to faster saturation and reduced incentive to extend stays beyond these core itineraries..

Implications for Sri Lanka

The findings reinforce the importance of maintaining a balanced market portfolio. While neighbouring markets such as India provide high arrival volumes and improve year-round demand, long-haul European markets generate significantly more visitor nights and, consequently, higher economic benefits. Tourism strategies should therefore not focus solely on increasing arrivals but also on maximizing the length of stay, as longer stays generally translate into greater expenditure on accommodation, attractions, transport, shopping, and local services.

Sri Lanka should continue to strengthen marketing efforts in high-yield European markets, particularly the Netherlands, Germany, France, and Italy, where visitors naturally spend longer periods in the country. Campaigns highlighting multi-destination itineraries, wellness tourism, nature, culture, and slow-travel experiences could further encourage extended stays. These markets offer greater potential to increase foreign exchange earnings without necessarily increasing visitor numbers.

For India and Singapore, targeted interventions should aim to increase the average duration of stay. This can be achieved by promoting multi-region travel itineraries, encouraging beach-and-hill-country combinations, expanding special-interest tourism such as wellness, wildlife, adventure, and cultural circuits, and offering attractive airline-hotel packages for longer vacations. Even an increase of one or two nights in these high-volume markets would generate substantial additional tourism revenue.

Overall, the analysis demonstrates that visitor nights are as important as visitor arrivals in determining the economic value of tourism. Markets with longer average stays provide a disproportionately higher contribution to the tourism economy, making duration of stay a critical performance indicator for Sri Lanka's tourism policy and marketing strategies. Future destination marketing should therefore measure success not only by increasing arrivals but also by enhancing the quality, spending, and length of the visitor experience

International tourist arrivals by country of residence

	June 2026 Tourist arrivals			Tourist arrivals June 2025	% change June (26/25)	Total tourist arrivals up to June 2026	Total tourist arrivals up to June 2025	% change up to June (26/25)
	By Air	By Sea	Total					
AMERICAS	**7,500**	**18**	**7,518**	**10,127**	**(25.8)**	**59,297**	**62,354**	**(4.9)**
North America	**7,228**	**18**	**7,246**	**9,722**	**(25.5)**	**55,956**	**59,120**	**(5.4)**
Canada	3,385	08	3,393	4,239	(20.0)	22,313	24,116	(7.5)
Mexico	47	0	47	61	(23.0)	676	591	14.4
United States	3,796	10	3,806	5,422	(29.8)	32,967	34,413	(4.2)
Caribbean & Central America	**78**	**0**	**78**	**103**	**(24.3)**	**591**	**504**	**17.3**
Costa Rica	07	0	07	04	75.0	60	64	(6.3)
Jamaica	10	0	10	06	66.7	33	19	73.7
Others	61	0	61	93	(34.4)	498	421	18.3
South America	**194**	**0**	**194**	**302**	**(35.8)**	**2,750**	**2,730**	**0.7**
Argentina	38	0	38	56	(32.1)	653	522	25.1
Brazil	59	0	59	119	(50.4)	937	1,053	(11.0)
Chile	26	0	26	23	13.0	341	333	2.4
Colombia	24	0	24	43	(44.2)	387	334	15.9
Others	47	0	47	61	(23.0)	432	488	(11.5)
AFRICA	**1,203**	**0**	**1,203**	**1,737**	**(30.7)**	**7,808**	**7,849**	**(0.5)**
North Africa	**307**	**0**	**307**	**306**	**0.3**	**1,541**	**1,571**	**(1.9)**
Morocco	80	0	80	84	(4.8)	476	536	(11.2)
Sudan	121	0	121	114	6.1	534	430	24.2
Others	106	0	106	108	(1.9)	531	605	(12.2)
Sub-Saharan Africa	**896**	**0**	**896**	**1,431**	**(37.4)**	**6,267**	**6,278**	**(0.2)**
Kenya	81	0	81	308	(73.7)	444	658	(32.5)
Mauritius	58	0	58	37	56.8	517	391	32.2
Nigeria	16	0	16	12	33.3	63	54	16.7
South Africa	320	0	320	344	(7.0)	2,385	2,339	2.0
Others	421	0	421	730	(42.3)	2,858	2,836	0.8

	Juen 2026			Tourist arrivals June 2025	% change June (26/25)	Total tourist arrivals up to June 2026	Total tourist arrivals up to June 2025	% change up to June (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	**76,489**	**1,382**	**77,871**	**80,178**	**(2.9)**	**551,688**	**491,607**	**12.2**
North East Asia	**10,135**	**699**	**10,834**	**11,568**	**(6.3)**	**100,772**	**88,708**	**13.6**
China	7,528	696	8,224	8,804	(6.6)	76,171	65,787	15.8
Japan	2,102	01	2,103	2,093	0.5	19,041	16,459	15.7
South Korea	490	02	492	660	(25.5)	5,446	6,371	(14.5)
Others	15	0	15	11	36.4	114	91	25.3
South East Asia	**4,970**	**02**	**4,972**	**5,857**	**(15.1)**	**38,303**	**32,432**	**18.1**
Cambodia	79	0	79	63	25.4	882	925	(4.6)
Indonesia	467	0	467	376	24.2	3,425	2,401	42.6
Malaysia	1,266	0	1,266	1,830	(30.8)	11,575	11,032	4.9
Myanmar	204	0	204	131	55.7	2,180	773	182.0
Philippines	483	0	483	745	(35.2)	3,526	3,172	11.2
Singapore	1,496	02	1,498	1,830	(18.1)	7,456	7,205	3.5
Thailand	606	0	606	597	1.5	4,587	4,620	(0.7)
Vietnam	300	0	300	255	17.6	4,356	2,107	106.7
Others	69	0	69	30	130.0	316	197	60.4
Oceania	**9,710**	**06**	**9,716**	**8,404**	**15.6**	**64,198**	**57,615**	**11.4**
Australia	8,705	05	8,710	7,299	19.3	57,436	51,325	11.9
New Zealand	958	01	959	1,084	(11.5)	6,483	6,061	7.0
Others	47	0	47	21	123.8	279	229	21.8
South Asia	**51,674**	**675**	**52,349**	**54,349**	**(3.7)**	**348,415**	**312,852**	**11.4**
Afghanistan	24	0	24	02	-	42	56	(25.0)
Bangladesh	3,438	0	3,438	5,826	(41.0)	22,308	33,137	(32.7)
Bhutan	61	0	61	49	24.5	345	329	4.9
India	42,748	675	43,423	37,934	14.5	293,683	241,994	21.4
Iran	72	0	72	196	(63.3)	1,178	5,978	(80.3)
Maldives	2,561	0	2,561	3,157	(18.9)	17,666	16,453	7.4
Nepal	525	0	525	352	49.1	3,147	2,652	18.7
Pakistan	2,245	0	2,245	6,833	(67.1)	10,046	12,253	(18.0)
EUROPE	**35,093**	**28**	**35,121**	**42,720**	**(17.8)**	**516,480**	**591,964**	**(12.8)**
Northern Europe	**13,398**	**09**	**13,407**	**15,418**	**(13.0)**	**140,260**	**139,434**	**0.6**
Denmark	668	0	668	816	(18.1)	9,852	9,466	4.1
Finland	158	0	158	145	9.0	2,862	2,639	8.5
Norway	1,012	0	1,012	1,473	(31.3)	5,833	6,731	(13.3)
Sweden	507	01	508	628	(19.1)	7,184	7,095	1.3
United Kingdom	10,468	06	10,474	11,628	(9.9)	108,567	107,902	0.6
Others	585	02	587	728	(19.4)	5,962	5,601	6.4

	June 2025			Tourist arrivals June 2025	% change June (26/25)	Total tourist arrivals up to June 2026	Total tourist arrivals up to June 2025	% change up to June (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
Western Europe	**12,024**	**18**	**12,042**	**15,502**	**(22.3)**	**176,189**	**195,932**	**(10.1)**
Austria	305	01	306	487	(37.2)	8,005	8,945	(10.5)
Belgium	930	0	930	1,135	(18.1)	7,733	8,764	(11.8)
France	3,755	07	3,762	4,345	(13.4)	52,997	61,457	(13.8)
Germany	3,729	06	3,735	5,498	(32.1)	69,758	74,576	(6.5)
Netherlands	1,749	02	1,751	2,423	(27.7)	21,599	26,139	(17.4)
Switzerland	1,540	02	1,542	1,589	(3.0)	15,659	15,582	0.5
Others	16	0	16	25	(36.0)	438	469	(6.6)
Central/Eastern Europe	**3,208**	**0**	**3,208**	**5,016**	**(36.0)**		**194,902**	**(25.1)**
Belarus	79	0	79	86	(8.1)	5,945	5,432	9.4
Czech Republic	319	0	319	625	(49.0)	9,134	10,596	(13.8)
Estonia	62	0	62	19	226.3	2,248	2,761	(18.6)
Hungary	97	0	97	126	(23.0)	3,318	3,852	(13.9)
Kazakhstan	53	0	53	96	(44.8)	3,789	7,710	(50.9)
Lithuania	113	0	113	126	(10.3)	2,673	4,662	(42.7)
Poland	555	0	555	1,138	(51.2)	23,456	26,079	(10.1)
Romania	123	0	123	219	(43.8)	2,848	3,407	(16.4)
Russia	1,276	0	1,276	1,891	(32.5)	77,349	112,312	(31.1)
Slovakia	127	0	127	133	(4.5)	3,422	4,130	(17.1)
Ukraine	167	0	167	214	(22.0)	4,695	5,237	(10.3)
Others	237	0	237	343	(30.9)	7,091	8,724	(18.7)
Southern/ Mediterranean Europe	**6,463**	**1**	**6,464**	**6,784**	**(4.7)**	**54,063**	**61,696**	**(12.4)**
Greece	94	0	94	106	(11.3)	1,969	1,809	8.8
Italy	1,668	01	1,669	2,174	(23.2)	16,914	19,557	(13.5)
Portugal	251	0	251	644	(61.0)	2,965	4,083	(27.4)
Spain	1,975	0	1,975	2,331	(15.3)	11,768	14,840	(20.7)
Turkey	417	0	417	607	(31.3)	4,769	4,396	8.5
Israel	1,836	0	1,836	573	220.4	11,124	11,048	0.7
Others	222	0	222	349	(36.4)	4,554	5,963	(23.6)
MIDDLE EAST	**2,838**	**0**	**2,838**	**3,479**	**(18.4)**	**11,300**	**14,270**	**(20.8)**
Bahrain	157	0	157	230	(31.7)	427	621	(31.2)
Egypt	285	0	285	425	(32.9)	1,626	2,259	(28.0)
Iraq	180	0	180	188	(4.3)	617	645	(4.3)
Jordan	160	0	160	286	(44.1)	1,081	1,469	(26.4)
Kuwait	81	0	81	190	(57.4)	569	936	(39.2)
Lebanon	136	0	136	263	(48.3)	1,248	1,761	(29.1)
Oman	659	0	659	286	130.4	1,310	998	31.3
Qatar	70	0	70	109	(35.8)	273	381	(28.3)
Saudi Arabia	441	0	441	660	(33.2)	1,757	2,555	(31.2)
United Arab Emirates	590	0	590	720	(18.1)	1,954	2,149	(9.1)
Others	79	0	79	122	(35.2)	438	496	(11.7)
TOTAL	**123,123**	**1,428**	**124,551**	**138,241**	**(9.9)**	**1,146,573**	**1,168,044**	**(1.8)**

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

The analysis of tourists' last ports of departure for June 2026 provides valuable insights into Sri Lanka's air connectivity patterns, the importance of international transit hubs, and emerging opportunities for destination marketing. India remains the dominant source of departing passengers, led by Delhi (10.24%), Chennai (9.23%), Mumbai (6.71%), Bangalore (5.59%), and Hyderabad (3.88%). The balanced representation across northern, southern, western, and central India reflects extensive air connectivity between the two countries and the influence of business, leisure, and diaspora travel. The prominence of Bangalore and Hyderabad further signals the growing importance of South India's technology and high-income markets, highlighting the need for region-specific marketing campaigns targeting leisure, MICE, and festival travel, particularly around Diwali and Pongal.

The Middle East emerges as Sri Lanka's principal transit corridor, with Doha (7.60%), Abu Dhabi (6.53%), Dubai (6.13%), and Sharjah (1.08%) collectively accounting for 21.34% of all last departure ports. This underscores the critical role played by Gulf carriers in connecting Sri Lanka with Europe, North America, and other long-haul markets. However, this heavy dependence also represents a strategic vulnerability. Ongoing geopolitical tensions and conflicts in the Middle East have the potential to disrupt aviation operations through these hubs, resulting in flight diversions, airspace restrictions, increased travel costs, and reduced traveller confidence. Such disruptions could create temporary barriers for tourists travelling from key long-haul markets and adversely affect visitor arrivals to Sri Lanka. Consequently, while maintaining strong partnerships with Gulf airlines remains essential, Sri Lanka should also pursue route diversification and strengthen alternative transit options through Southeast Asia and other global aviation hubs to enhance resilience.

Southeast Asia represents another significant connectivity corridor, with Singapore (5.13%), Kuala Lumpur (4.82%), and Bangkok (2.63%) contributing a combined 12.58% of departures. These airports function both as regional origin points and major transit hubs, suggesting opportunities to strengthen partnerships with ASEAN airlines and leverage low-cost carriers to increase accessibility and stimulate multi-destination travel within the region.

Within Europe and the Mediterranean, Istanbul (4.50%) and London (3.82%) together account for 8.32% of departures. Istanbul surpasses London as the leading European departure point, reflecting the extensive network operated by Turkish Airlines and its role as a gateway connecting travellers from across Europe. This presents opportunities for collaborative destination marketing with Turkish Airlines and other European carriers to expand Sri Lanka's visibility across secondary European markets.

East Asia contributes a comparatively modest share, led by Hong Kong (2.62%), Shanghai (1.29%), and Chengdu (0.72%), together accounting for 4.63% of departures. The relatively low representation of mainland Chinese airports is consistent with seasonal travel patterns, as June falls outside China's major outbound holiday periods. The absence of major hubs such as Beijing and Guangzhou also suggests that direct connectivity remains limited, with Hong Kong continuing to serve as an important regional gateway.

Similarly, Australasia records a modest contribution, with Melbourne (2.21%) and Sydney (0.99%) jointly accounting for 3.20% of departures, indicating that June is not a peak outbound travel period for the Australian market. South Asian neighbours continue to generate steady regional traffic, with Malé (3.27%) and Dhaka (1.16%) together representing 4.43% of departures.

From a policy perspective, these findings suggest several strategic priorities. Sri Lanka should continue deepening market penetration in India through region-specific promotional campaigns; strengthen partnerships with Gulf, Southeast Asian, and European airlines to improve connectivity and develop stopover tourism; diversify transit options to reduce dependence on Middle Eastern hubs and enhance resilience against geopolitical disruptions and expand collaboration with low-cost carriers to improve regional accessibility. Overall, the June 2026 last-port-of-departure analysis provides a robust evidence base for aviation planning, tourism marketing, and route development while reinforcing the importance of integrating air connectivity analysis with visitor origin data to support more informed tourism policy and long-term destination competitiveness.

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

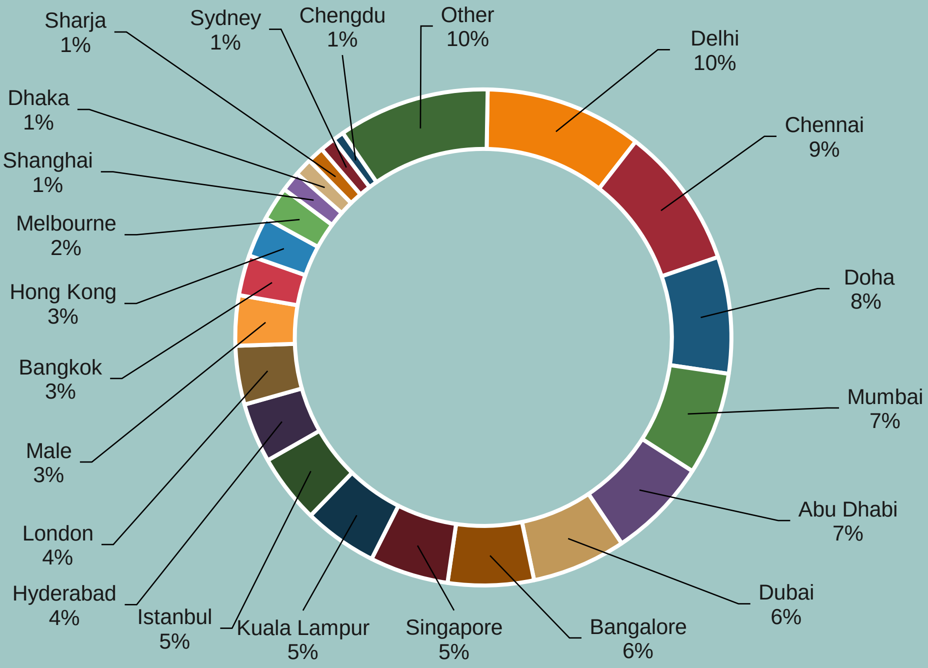
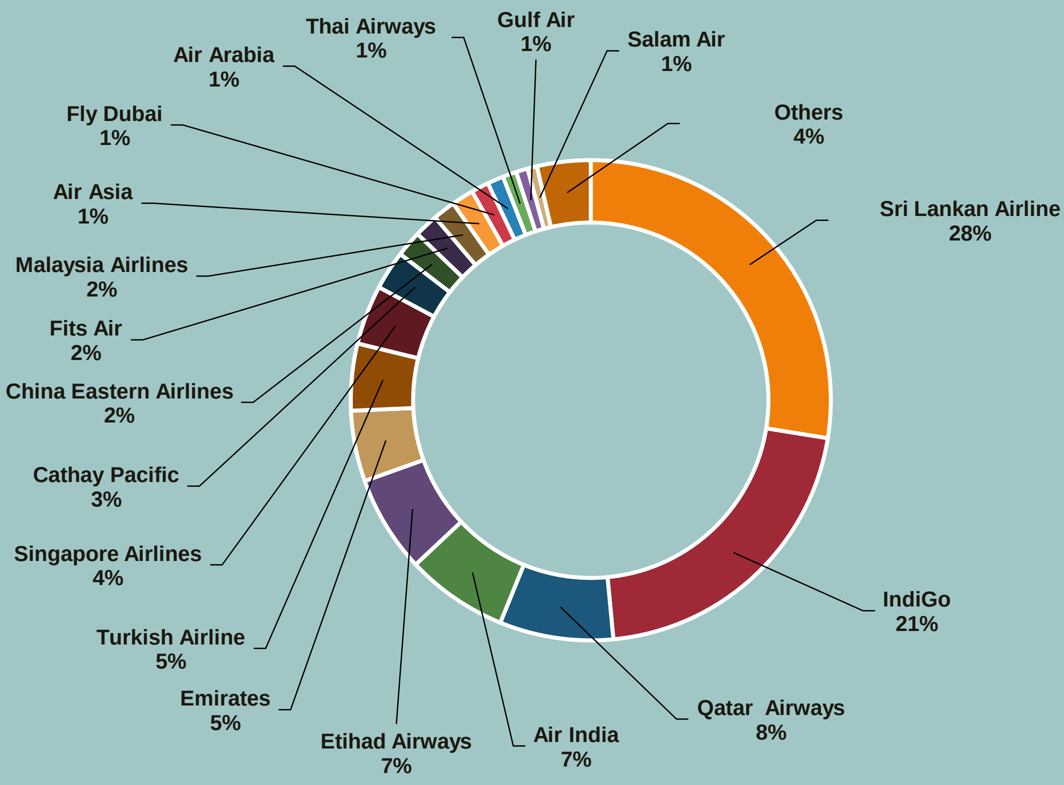


Chart 7. Main airlines to Sri Lanka, June 2026



The airline distribution for June 2026 reveals a highly concentrated market structure, with the two largest carriers Sri Lankan Airlines (34,289 passengers; 27.53%) and IndiGo (26,115 passengers; 20.97%) collectively accounting for 48.5% of all tourist arrivals. This dominance reflects the national carrier's strong position in Sri Lanka's inbound tourism market and IndiGo's role as the leading low-cost carrier connecting India with Sri Lanka. When combined with Air India (8,541 passengers; 6.86%), Indian carriers account for 27.83% of total arrivals, reinforcing the strategic importance of the Indian aviation market and corroborating the earlier finding that Indian airports constitute the largest share of last departure points.

The Middle Eastern carriers represent the second major pillar of Sri Lanka's air connectivity. Qatar Airways (7.66%), Etihad Airways (6.53%), Emirates (4.76%), Fly Dubai (1.18%), Air Arabia (1.09%), Gulf Air (0.79%), and SalamAir (0.64%) together account for 22.65% of tourist arrivals. This substantial market share highlights the importance of Gulf carriers in facilitating transit traffic from Europe, North America, Africa, and other long-haul markets through major aviation hubs such as Doha, Abu Dhabi, and Dubai. Qatar Airways emerges as the leading Gulf carrier during the month, outperforming Emirates, However, the heavy reliance on Gulf carriers also exposes Sri Lanka's tourism sector to external geopolitical and operational risks. Ongoing instability in the Middle East, including airspace restrictions and regional conflicts, has the potential to disrupt transit operations, increase travel times and costs, and reduce traveller confidence. These risks underscore the importance of diversifying transit gateways and strengthening alternative connectivity through Southeast Asia and other regions to enhance the resilience of Sri Lanka's tourism industry.

Airlines from Southeast Asia collectively contribute 7.94% of arrivals, led by Singapore Airlines (4.00%), followed by Malaysia Airlines (1.52%), AirAsia (1.49%), and Thai Airways (0.93%). This reflects the region's growing importance as both a source market and a transit corridor. The relatively modest contribution from low-cost carriers suggests there is further potential to expand affordable regional connectivity through increased frequencies and additional services from hubs such as Singapore, Kuala Lumpur, and Bangkok.

Among the long-haul carriers, Turkish Airlines (4.50%) stands out as the principal European gateway, reflecting Istanbul's strategic role in connecting passengers from across Europe to Sri Lanka. In comparison, East Asian carriers make a relatively smaller contribution, with Cathay Pacific (2.62%) and China Eastern Airlines (1.76%) together accounting for 4.38% of arrivals, consistent with the subdued performance of East Asian markets during June. Fits Air (1.60%) also records a notable share, particularly in serving regional markets, while the "Others" category represents only 3.60% of total passengers.

The airline distribution closely mirrors the geographical pattern observed in the last-port-of-departure analysis, confirming that Sri Lanka's inbound tourism is primarily supported by three interconnected aviation pillars: SriLankan Airlines, Indian carriers, and Middle Eastern hub airlines. Direct long-haul connectivity from Europe, East Asia, and Oceania remains comparatively limited, with many visitors relying on international transit hubs rather than point-to-point services. This concentration presents both opportunities and challenges. While strengthening partnerships with existing airline partners through joint marketing initiatives, code-share agreements, and route development remains a strategic priority, Sri Lanka should also pursue greater diversification by attracting additional airlines from underrepresented markets such as mainland China, Southeast Asia, and Europe. Expanding connectivity through low-cost carriers and increasing direct services where commercially viable would reduce dependence on a limited number of airlines and transit hubs, thereby improving the resilience, competitiveness, and long-term sustainability of Sri Lanka's tourism sector against operational disruptions and geopolitical shocks.

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

June 2026

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

Country	Delhi	Chennai	Doha	Mumbai	Abu Dhabi	Dubai	Bangalore	Singapore	Kuala Lampur	Istanbul	Hyderabad	London	Male	Bangkok	Hong Kong	Melbourne	Shanghai	Dhaka	Sharja	Sydney	Chengdu	Others	Total
India	10,003	9,853	255	7,412	193	859	6,340	256	189	11	4,620	22	195	305	34	43	1	19	258	24	84	2,447	43,423
United Kingdom	325	227	2,024	196	1,189	590	74	143	381	932	17	3,563	98	160	78	37	16	19	11	34	4	356	10,474
Australia	115	77	69	28	63	58	33	2,622	1,419	34	14	48	78	160	181	2,486	12	6	4	1,051	10	142	8,710
China	23	29	29	9	45	98	8	250	742	7	4	2	192	625	1,705	7	1,288	49	6	2	758	2,346	8,224
United States	190	251	419	109	462	221	229	382	120	244	109	151	95	145	334	3	16	9	16	3	1	297	3,806
France	175	66	994	26	381	707	23	34	132	611	1	71	37	41	18	4	7	1	8	3	2	420	3,762
Germany	154	47	826	118	628	535	25	46	107	495	3	97	39	68	19	5	1	3	10	4	6	499	3,735
Bangladesh	114	438	42	27	23	29	1	9	84	2		2	1,191	30	1	8		1,286	21	4	9	117	3,438
Canada	97	99	445	23	532	376	35	108	87	44	17	437	4	57	380	8	9	7	5		3	620	3,393
Maldives	11	14	5	1	4	56	19	22	74	3	11	5	1,585	77		3	1	4	1			665	2,561

The analysis of the last departure ports of tourists visiting Sri Lanka reveals distinct regional aviation patterns and highlights the critical role played by major international hub airports in facilitating connectivity to the destination. Indian travellers primarily depart from Delhi, Chennai, and Mumbai, reflecting the importance of direct regional connectivity and the high frequency of flights between India and Sri Lanka. Visitors from the United Kingdom overwhelmingly use London as their final departure point, indicating that the majority of British travellers commence their journey directly from their home country. In contrast, long-haul markets exhibit a stronger reliance on international transit hubs. Australian tourists predominantly travel via Singapore, alongside direct departures from Melbourne, underscoring Singapore's role as a major gateway between Oceania and South Asia.

Chinese visitors mainly depart from Hong Kong and Shanghai, demonstrating the significance of these aviation hubs in connecting China with Sri Lanka. Tourists from the United States most frequently use Abu Dhabi and Singapore as their final departure points, reflecting the dependence on Middle Eastern and Southeast Asian hub airports for intercontinental travel. Similarly, visitors from France and Germany primarily transit through Doha, Istanbul, and Abu Dhabi, illustrating the strategic importance of Gulf and Turkish carriers in linking European markets with Sri Lanka. Regional connectivity is also evident among neighboring countries, with Dhaka serving as the principal departure point for Bangladeshi tourists and Malé acting as the primary gateway for travellers from the Maldives. Canadian tourists likewise rely predominantly on Abu Dhabi and Doha, further emphasizing the role of Gulf hubs in connecting North America with Sri Lanka.

These patterns indicate that while geographically proximate markets benefit from direct air links, long-haul source markets are heavily dependent on a limited number of global aviation hubs particularly Abu Dhabi, Doha, Singapore, and Istanbul which serve as vital transit gateways. This concentration of transit traffic also exposes Sri Lanka's tourism sector to external geopolitical risks.

The ongoing geopolitical tensions and conflicts in the Middle East have the potential to disrupt air transport operations through major Gulf hubs, resulting in flight cancellations, airspace restrictions, longer routing, increased airfares, and reduced traveller confidence. Given that a significant proportion of visitors from Europe and North America transit through Abu Dhabi and Doha, any prolonged disruption in these hubs could create a temporary barrier to travel to Sri Lanka and adversely affect visitor arrivals from these high-value source markets. The findings therefore underscore the importance of diversifying air connectivity through alternative transit hubs, strengthening direct air links where commercially feasible, and incorporating geopolitical risk assessments into Sri Lanka's tourism market and aviation strategies to enhance resilience against external shocks.

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

Country	Sri Lankan Airline	IndiGo	Qatar Airways	Air India	Etihad Airways	Emirates	Turkish Airline	Singapore Airline	Cathay Pacific	China Eastern Airlines	Fits Air	Malaysian Airlines	Air Asia	Fly Dubai	Air Arabia	Thai Airways	Gulf Air	Salam Air	Others	Total
India	25.09	53.34	0.44	15.20	0.42	1.07	0.03	0.28	0.08	0.00	0.36	0.09	0.12	0.62	0.61	0.13	0.09	0.15	1.90	100.00
United Kingdom	40.86	3.19	19.93	3.01	11.50	4.26	8.90	0.95	0.74	0.19	0.15	0.50	1.55	0.72	0.11	0.37	1.50	0.07	1.51	100.00
Australia	51.58	1.32	0.77	0.44	0.70	0.59	0.39	25.61	2.08	0.16	0.06	11.63	2.39	0.06	0.05	0.98	0.07	0.00	1.14	100.00
China	18.47	0.50	0.35	0.22	0.55	0.54	0.09	2.20	20.73	21.63	0.47	1.28	3.67	0.40	0.07	4.32	0.22	0.02	24.27	100.00
United States	23.28	14.00	11.09	3.65	12.24	4.89	6.41	8.85	8.78	0.45	0.45	0.34	1.42	0.87	0.42	0.81	0.76	0.05	1.23	100.00
France	15.26	2.07	26.63	4.36	10.21	17.76	16.24	0.77	0.48	0.21	0.21	0.58	1.81	0.80	0.21	0.40	0.24	0.08	1.67	100.00
Germany	18.15	2.54	22.22	5.62	16.79	13.09	13.25	0.83	0.51	0.03	0.27	0.11	1.61	1.20	0.27	0.67	1.29	0.03	1.53	100.00
Bangladesh	33.80	14.72	1.28	2.39	0.67	0.41	0.06	0.09	0.03	0.00	43.92	0.09	0.12	0.35	0.64	0.32	0.29	0.35	0.49	100.00
Canada	36.19	3.95	13.62	2.42	15.65	10.17	1.30	1.89	11.20	0.27	0.06	0.50	0.53	0.91	0.15	0.44	0.06	0.00	0.71	100.00
Maldives	66.69	0.23	0.20	0.04	0.16	0.20	0.12	0.39	0.00	0.04	4.76	0.20	0.23	5.31	0.04	0.31	18.35	0.00	2.73	100.00

The airline usage patterns of tourists travelling to Sri Lanka from key source mrkets reveal a strong concentration of passenger traffic among a relatively small number of carriers, reflecting both the availability of direct services and the strategic role of airline alliances and hub connectivity. Indian tourists predominantly travel on IndiGo and Sri Lankan Airlines, highlighting the importance of high-frequency regional services and the close aviation links between the two neighbouring countries. Visitors from the United Kingdom primarily rely on Sri Lankan Airlines and Qatar Airways, while Australian travellers favour Sri Lankan Airlines and Singapore Airlines, indicating that both the national carrier and established international airlines play a significant role in connecting these long-haul markets to Sri Lanka.

Chinese tourists mainly utilise China Eastern Airlines and Sri Lankan Airlines, demonstrating the importance of bilateral air connectivity between China and Sri Lanka. Tourists from the United States predominantly travel on Sri Lankan Airlines, suggesting that although direct services are unavailable, the airline serves as a preferred carrier through connecting flight arrangements. Visitors from France and Germany rely heavily on Qatar Airways, reinforcing the critical role of Gulf carriers in facilitating travel from continental Europe. Regional travel patterns also exhibit distinct airline preferences, with Bangladeshi tourists primarily using Fits Air, while travellers from Canada and the Maldives predominantly choose Sri Lankan Airlines.

Collectively, these findings demonstrate the central role of Sri Lankan Airlines in Sri Lanka's inbound tourism network, as it emerges as the preferred carrier across the majority of key source markets. At the same time, international airlines such as Qatar Airways, Singapore Airlines, China Eastern Airlines, IndiGo, and Fits Air provide complementary connectivity that broadens market access and strengthens Sri Lanka's global aviation network.The concentration of demand among a limited number of airlines also highlights both opportunities and vulnerabilities. Strong partnerships with these carriers are essential for sustaining visitor arrivals through joint marketing initiatives, network expansion, and increased seat capacity. Conversely, operational disruptions, route suspensions, or strategic changes by these airlines could have a disproportionate impact on arrivals from key source markets. These findings therefore underscore the importance of maintaining a diversified airline portfolio while strengthening strategic partnerships with both the national carrier and major international airlines to enhance the resilience and competitiveness of Sri Lanka's tourism sector.

Sri Lanka Tourism Development Authority

Research & International Relations Division

011 2426800 Ext. 151/155

research@srilanka.travel

www.sltda.gov.lk