2026

MONTHLY TOURIST ARRIVALS REPORT:

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

March

Introduction

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

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

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Summary

The analysis of tourist arrivals in 2026 shows a strong and promising start to the year, particularly in the first two months. January and February recorded 277,327 and 279,328 arrivals respectively, reflecting notable growth compared to both 2025 and 2018. This indicates a robust recovery in tourism demand and highlights Sri Lanka's growing attractiveness as a destination during the peak season.

However, this positive trend is disrupted in March 2026, where arrivals dropped significantly to 183,979. This represents a considerable decline compared to both the previous year (19.8) and 2018 (21.2) levels. The sudden dip can be largely attributed to the ongoing conflict in the Gulf/Middle East region, which has disrupted key transit hubs and affected travel flows, leading to reduced tourist arrivals to Sri Lanka.

Despite the decline in March, the cumulative performance for 2026 remains strong, with total arrivals reaching 740,634 by the end of the first quarter. The high volumes recorded in January and February have helped maintain overall growth momentum, indicating that the tourism sector is still on a recovery path.

Major source markets, including India, the United Kingdom, Russia, China, and Germany, have played a significant role in driving tourist arrivals.

Overall, 2026 demonstrates a pattern of strong growth combined with some volatility. While the early performance suggests the potential to surpass previous years, maintaining stability and mitigating external shocks such as geopolitical conflicts will be essential to ensure sustained tourism growth throughout the year

Table 1. Monthly tourist arrivals, March 2026

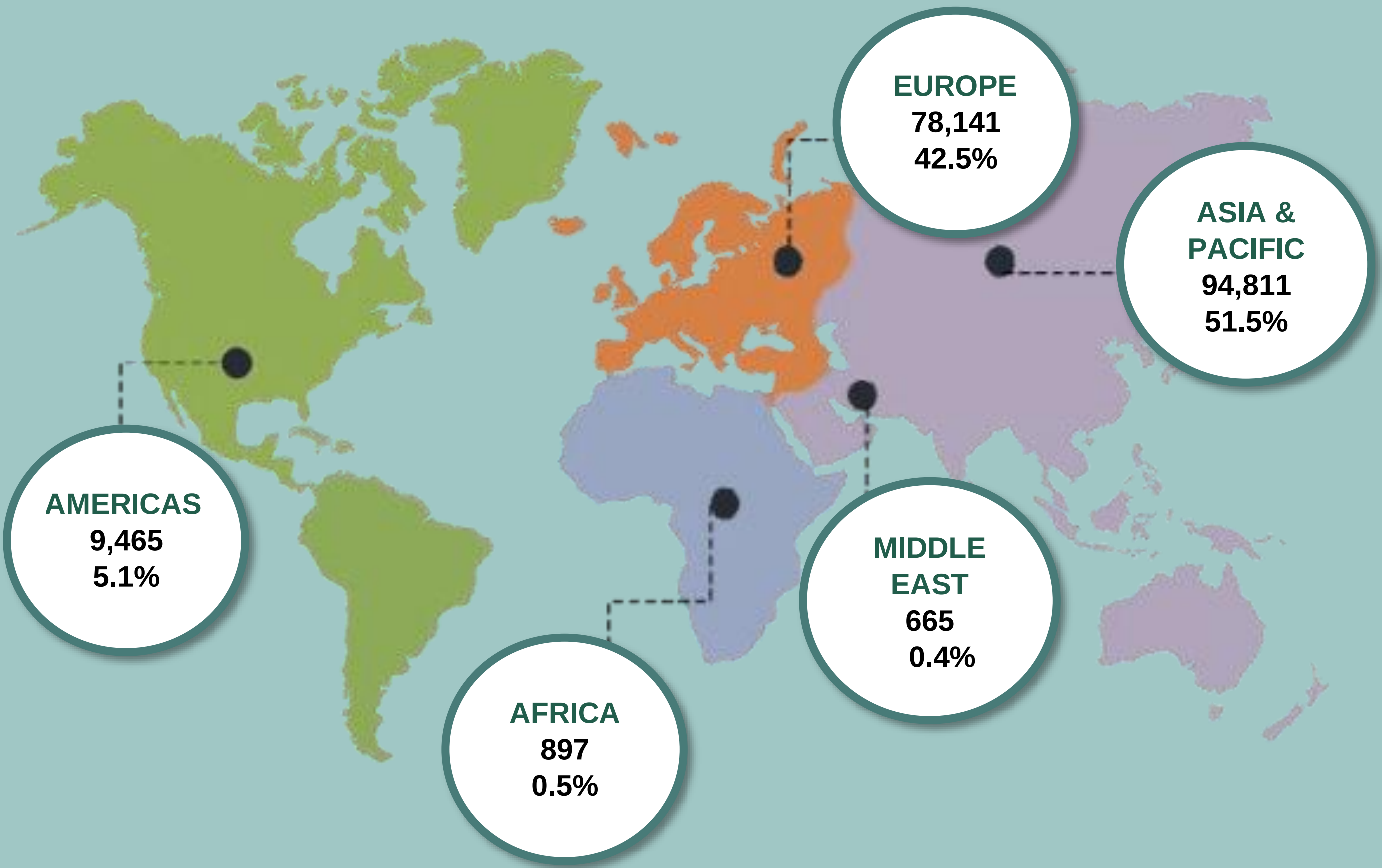
Month	2025	2026	% Change 2026/25
January	252,761	277,327	9.7
February	240,217	279,328	16.2
March	229,298	183,979	(19.8)
April	174,608		
May	132,919		
June	138,241		
July	200,244		
August	198,235		
September	158,971		
October	165,193		
November	212,906		
December	258,928		
TOTAL	2,362,521	740,634	

Tourist Arrivals | March 2026

183,979

Tourist arrivals by region and percentage share March 2026

Map 1. Tourist arrivals by region and percentage share



In March, Asia and the Pacific led tourist arrivals to Sri Lanka with 94,811 visitors (51.5%), benefiting from proximity and routes that bypass disrupted Middle Eastern airspace. However, this dominance reflects circumstance more than strategy, and remains exposed to rising fuel costs. In comparison the February 2026 the percentage share of Asia and Pacific has increased by 15.7%.

Europe remained Sri Lanka's second-largest source market in March, generating 78,141 arrivals and capturing a 42.5% share, a testament to sustained demand despite the closure of key Gulf transit hubs. European travelers adapted by rerouting through alternative gateways such as Turkey, India, and Southeast Asia. Yet the resilience is relative: compared to February, arrivals from Europe fell by 15.7%, reflecting the growing friction that Gulf airspace disruptions are imposing on long-haul connectivity.

Should the conflict extend further and fuel costs continue climbing, European travel to Sri Lanka risks becoming financially out of reach for a growing segment of would-be visitors turning today's modest decline into a more structural challenge for the island's tourism sector.

The Americas contribute 9,465 arrivals (5.1% of total) to Sri Lanka's tourism, making it a small but high-value market. Travelers from this region mainly the US, Canada, and Latin America tend to be long-haul, high-spending visitors who stay longer and opt for premium experiences like luxury resorts, wildlife safaris, and heritage tours.

However, this segment faces the greatest risk from Middle East airspace disruptions. Unlike European or Asian travelers who have alternative routing options, most North Americans rely on Gulf hub connections now severely disrupted making the Americas the most vulnerable market in the near term. However, it is noteworthy that in comparison to February 2026 the percentage share of tourists from Americas remain unchanged.

Africa and the Middle East together account for just 1,562 arrivals, or 0.9% of the total, with Africa at 897 (0.5%) and the Middle East at a mere 665 (0.4%).

Top primary markets and top potential markets

Top primary markets, March 2026

Rank	Country	Arrivals	% Share
01	India	47,533	25.8
02	United Kingdom	18,092	9.8
03	Russia	15,685	8.5
04	China	14,064	7.6
05	Germany	13,429	7.3
06	Australia	11,197	6.1
07	France	8,359	4.5
08	United States	5,362	2.9
09	Japan	4,440	2.4
10	Bangladesh	4,405	2.4
11	Canada	3,475	1.9
12	Malaysia	2,502	1.4
13	Netherlands	2,427	1.3
14	Switzerland	2,186	1.2
15	Italy	1,704	0.9
16	Maldives	1,618	0.9
17	Spain	1,429	0.8
18	Denmark	1,428	0.8
19	Singapore	1,399	0.8
20	New Zealand	1,242	0.7

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

Top potential markets, March 2026

Rank	Market	Arrivals	% Share
21	Belarus	1,203	0.7
22	Pakistan	1,158	0.6
23	Poland	1,139	0.6
24	South Korea	1,047	0.6
25	Vietnam	970	0.5
26	Austria	904	0.5
27	Sweden	896	0.5
28	Israel	870	0.5
29	Belgium	860	0.5
30	Czech Republic	748	0.4

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

Top ten source markets

March 2026

The data on tourist arrivals reveals a dramatic reshuffling of Sri Lanka's top source markets between March 2025 and March 2026. While total arrivals for these top ten countries show mixed performance, the most striking observation is the steep decline from several traditional European source markets, particularly Russia, France, Germany, and the United Kingdom contrasted with resilient or growing numbers from Asian markets such as India, China, Australia, and Japan. This pattern strongly suggests that the Middle East conflict and associated airspace closures, which escalated on 28 February 2026, have disproportionately affected long-haul European travel to Sri Lanka, while shorter-haul and Eastern routing have proven more robust.

India has overtaken all other markets to become Sri Lanka's undisputed largest source market, growing by over 21% year-on-year. This performance is remarkable given the regional turmoil. India's proximity, extensive air connectivity and the fact that flights between India and Sri Lanka do not require transit through Middle Eastern hubs have insulated this market from the airspace closures. For Sri Lanka, India now represents a stable, high-volume, short-haul anchor that can partially offset losses from Europe.

The UK remains Sri Lanka's largest European market, but the 19.4% drop is severe. British travelers have historically relied on Gulf carriers (Emirates, Etihad, Qatar Airways) via Dubai, Abu Dhabi, or Doha. With those hubs disrupted, many UK travelers have either postponed trips, switched to alternative destinations, or faced cancelled flights. The 165 arrivals by sea suggest a small but stable cruise segment, but the air-driven decline is considerable.

Russia has suffered the steepest decline among all top ten markets, losing nearly half of its arrivals. This is not solely due to the Middle East conflict. Russian travelers already faced sanctions-related banking and flight restrictions following the Ukraine war. However, the closure of Middle Eastern air corridors has further reduced routing options, as many Russian tourists previously transited through Dubai, Sharjah, or Doha. The near-absence of sea arrivals (10) confirms this is almost entirely an air connectivity crisis.

China shows the strongest percentage growth among all markets, up 26.5%. This reflects the continued post-pandemic recovery of Chinese outbound travel. Importantly, Chinese travelers to Sri Lanka often fly via direct connections or through Southeast Asian hubs (Bangkok, Kuala Lumpur, Singapore) rather than the Middle East, making this market less vulnerable to Gulf airspace closures. If this growth trajectory holds, China could challenge the UK for the second position in coming months.

Germany's 25.1% decline is also noteworthy after Russia. German tourists are classic long-haul, high-spending travelers who rely on one-stop connections via Gulf hubs. The disruption of those routes, combined with uncertainty and related factors have clearly suppressed demand. The 1,083 sea arrivals indicate that some German travelers are arriving via cruise itineraries, but this is insufficient to offset the air travel collapse.

Australia has delivered robust growth of 24.2%. This is notable because Australian travelers to Sri Lanka have routing options that bypass the Middle East entirely, including via Southeast Asia (Singapore, Kuala Lumpur, Bangkok) and direct flights. The conflict has not severely disrupted these alternative corridors. Australia's growing middle-class interest in Sri Lanka as a proximate, exotic destination and the presence of strong diaspora connections suggest that this market has strong future potential.

France has suffered a catastrophic 45.3% decline, second only to Russia in percentage terms. French travelers traditionally favour long-haul exotic destinations and have relied heavily on Gulf hubs to reach Sri Lanka. The scale of this drop suggests that beyond the immediate airspace crisis, French tour operators may have actively redirected clients to alternative destinations (e.g., Morocco, Turkey, or Southeast Asia) where connectivity remains intact.

The US market declined by 30.1%, a severe drop for a high-yield, long-haul segment. Notably, the US has the sea arrivals of 966, representing nearly 18% of American arrivals. This suggests that cruise itineraries which are less sensitive to daily airspace closures have partially cushioned the decline. However, the air-driven loss is substantial. American travelers have very few routing options to Sri Lanka that avoid the Middle East; most one-stop connections historically transited through Dubai or Doha. Until alternative routings (e.g., via Europe or Japan) become more viable, the US market will remain under pressure.

Japan shows healthy growth of nearly 20%, albeit from a smaller base. Japanese travelers often route through Southeast Asian hubs (Singapore, Bangkok, Kuala Lumpur) or via direct connections, avoiding the Gulf. This market's resilience underscores the importance of diversifying air access away from Middle Eastern hub points. For Sri Lanka, Japan represents an under-tapped, high-value market with room for further expansion.

Bangladesh is a short-haul, regional market with direct flight options (e.g., Dhaka to Colombo). The modest 6.5% decline is negligible and likely within normal monthly fluctuation. This market is not materially affected by the Middle East conflict, as Bangladeshi travelers do not require Gulf transit to reach Sri Lanka.

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

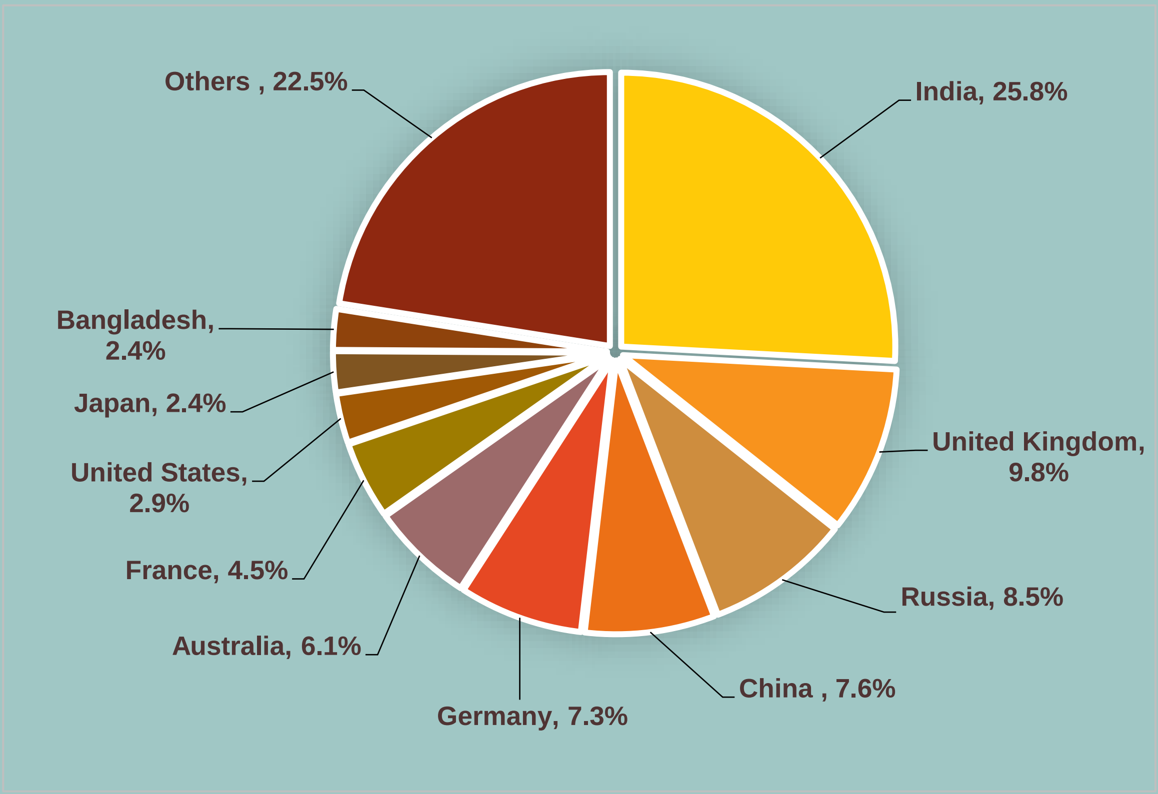
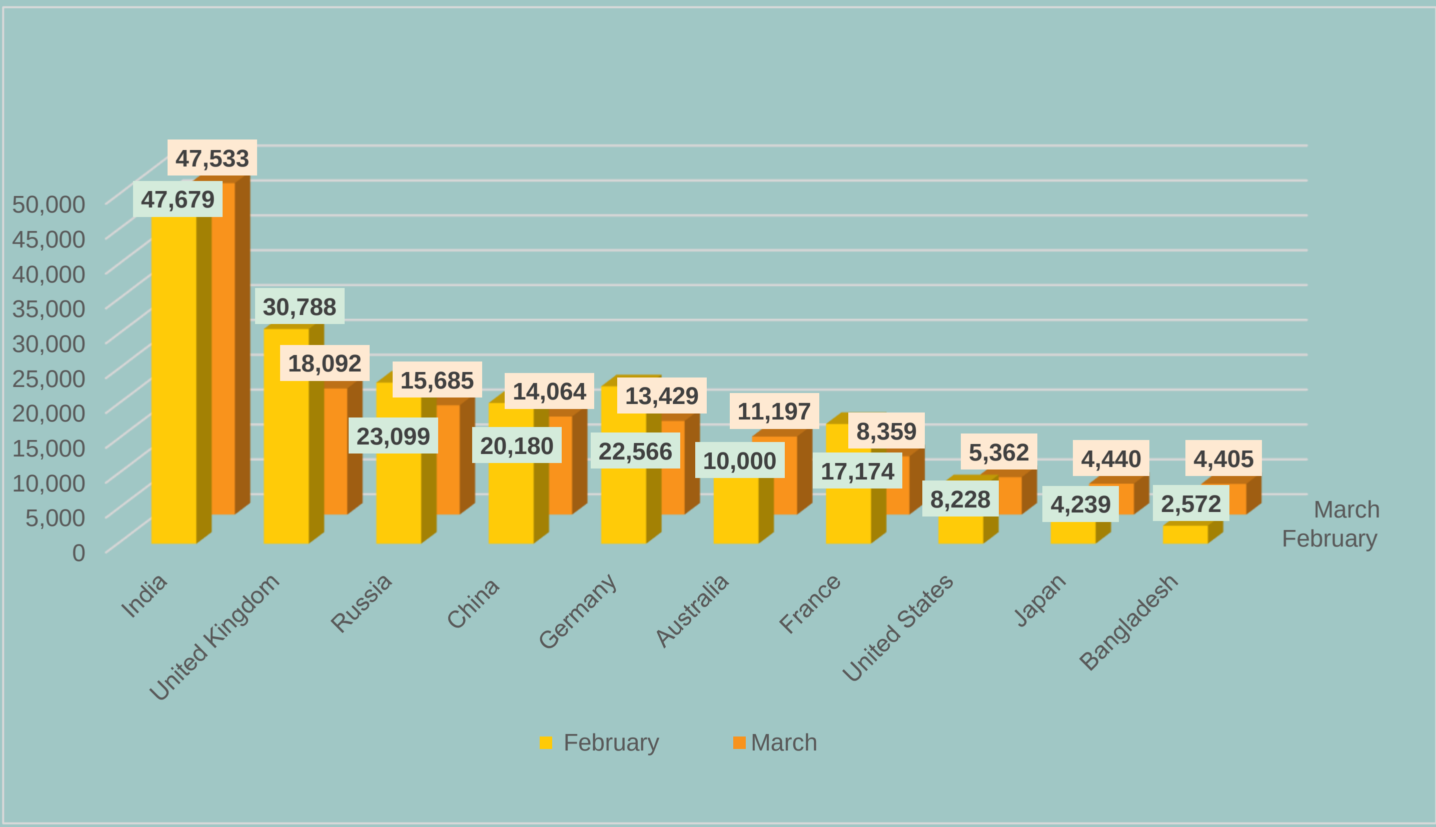


Table 2. Top ten source markets to Sri Lanka, March 2026

Rank	Country of Residence	Tourist arrivals (March 2026)			Tourist arrivals
		By Air	By Sea	Total	(March 2025)
1	India	47,524	9	47,533	39,212
2	United Kingdom	17,927	165	18,092	22,447
3	Russia	15,675	10	15,685	29,177
4	China	14,058	6	14,064	11,114
5	Germany	12,346	1,083	13,429	17,918
6	Australia	11,114	83	11,197	9,012
7	France	7,821	538	8,359	15,278
8	United States	4,396	966	5,362	7,676
9	Japan	4,431	9	4,440	3,708
10	Bangladesh	4,405	0	4,405	4,713

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



Top ten source markets

January to March 2026

Between the first quarters of 2025 and 2026, Sri Lanka recorded a moderate but positive growth in total tourist arrivals, rising from 722,276 to 740,634 an overall increase of 2.54 percent. While this indicates continued recovery, the growth rate remains modest compared to some regional competitors, suggesting possible constraints in flight capacity, accommodation availability, or lingering traveler perceptions regarding stability and value.

India firmly retains its position as Sri Lanka's dominant source market, with arrivals surging by 24.5 percent from 118,315 to 147,273. India now accounts for nearly one-fifth of all arrivals, and its contribution exceeds the combined total of the next three largest markets, the United Kingdom, Russia, and Germany. This strong performance is likely driven by proximity, increased flight connectivity, and targeted marketing. However, this heavy reliance on a single market introduces strategic vulnerability. The United Kingdom, ranked second, also showed robust growth of 12.5 percent, rising from 69,705 to 78,420 arrivals, reflecting renewed confidence in Sri Lanka as a long-haul destination.

In contrast, the Russian Federation historically a top source market for Sri Lanka's beach resorts experienced a notable decline of 29.6 percent. The drop may be attributed to ongoing sanctions-related challenges, and reduced flight availability, as well as possible redirection of Russian tourists to alternative destinations such as Turkey, the UAE, or Thailand. Continued decline in the next quarter would suggest a structural, rather than seasonal, shift. Germany, ranked fourth, posted steady growth of 7.1 percent, rising from 50,201 to 53,771 arrivals, while Australia recorded a strong 18.3 percent increase, likely due to the robust engagement with its Sri Lankan diaspora community.

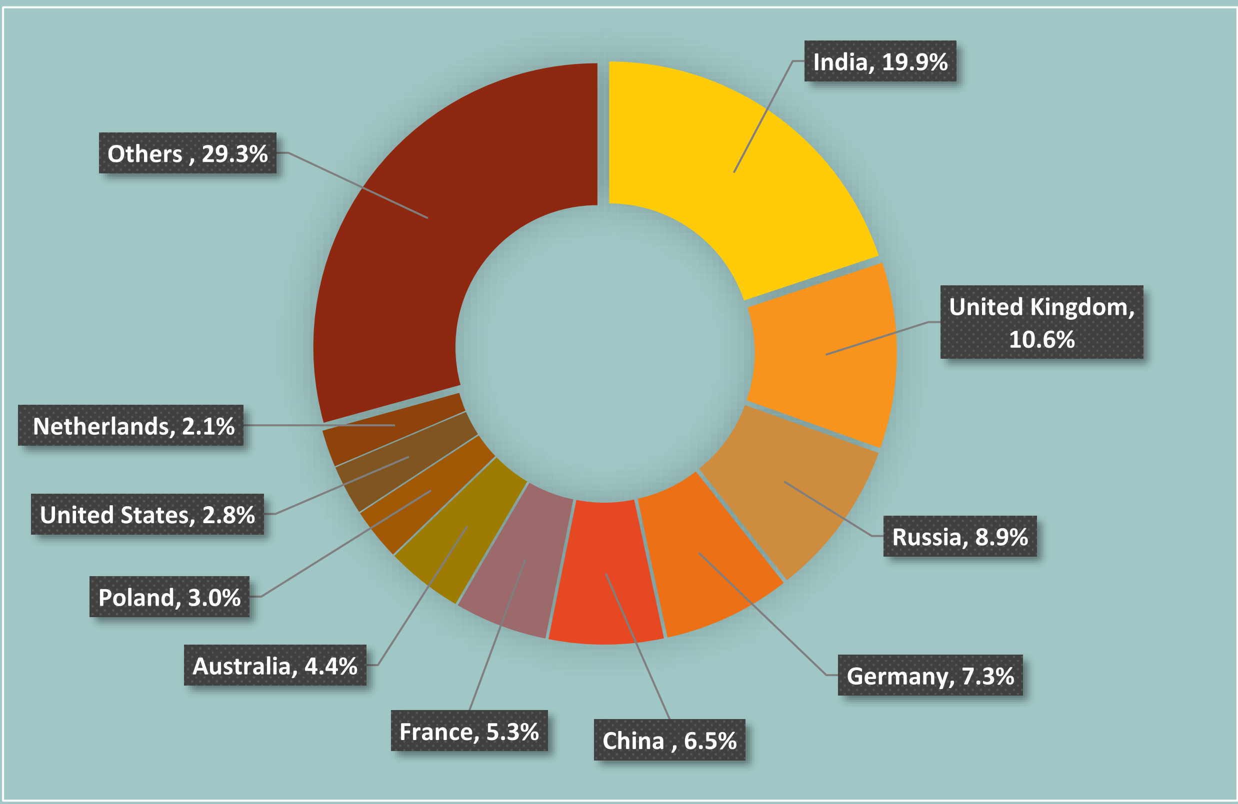
China's tourist arrivals rose from 39,513 (Q1 2025) to approximately 48,247 (Q1 2026) – an increase of 22.1% , adding nearly 8734 additional arrivals. France declined by 9.8 percent, Poland was nearly stagnant at 0.8 percent, and the United States showed a decline of approximately 1.0 percent, suggesting flat demand from North America. The Netherlands recorded the sharpest drop among the top ten, falling by 7.3 percent from 16,911 to 15,680 arrivals, possibly due to the current conflict situation in the Middle East region.

Sri Lanka's tourism recovery in early 2026 is uneven and increasingly concentrated, with the top five markets accounting for 53.2 percent of total arrivals compared to 52.8 percent a year earlier. India, the UK, and Australia are driving growth, while Russia, France and the Netherlands are contracting.

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

Rank	Country of Residence	Tourist Arrivals (Jan ~March 2026)	Tourist Arrivals Jan ~March 2025)
1	India	147,273	118,315
2	United Kingdom	78,420	69,705
3	Russian Federation	65,918	93,568
4	Germany	53,771	50,201
5	China	48,247	39,513
6	France	39,102	43,366
7	Australia	32,369	27,353
8	Poland	21,940	21,765
9	United States	20,963	21,182
10	Netherlands	15,680	16,911
11	Others	216,951	220,397
Total		**740,634**	**722,276**

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



Tourist arrivals by purpose of visit
March 2026

An analysis of tourist arrival data for Sri Lanka in March 2026 reveals that leisure and vacation travel is the dominant purpose, accounting for nearly half (48.41%) of all visitors, with 89,062 tourists. Beyond this purpose, the data shows that visiting friends and relatives (4.69%) and business travel (2.34%) represent modest but steady niches, while education (0.44%) is a smaller segment. Specialized purposes such as health and Ayurveda (0.32%), sports (0.19%), religious travel (0.16%), and official visits (0.001%) each account for less than half a percent of total arrivals. Although Sri Lanka continues to be a popular holiday destination, it is now crucial to target more on other tourist segments, such as VFR (visiting friends and relatives) travelers, to maintain a steady flow of arrivals even during periods of uncertainty or disruption.

Chart 4: Purpose of visit, March 2026

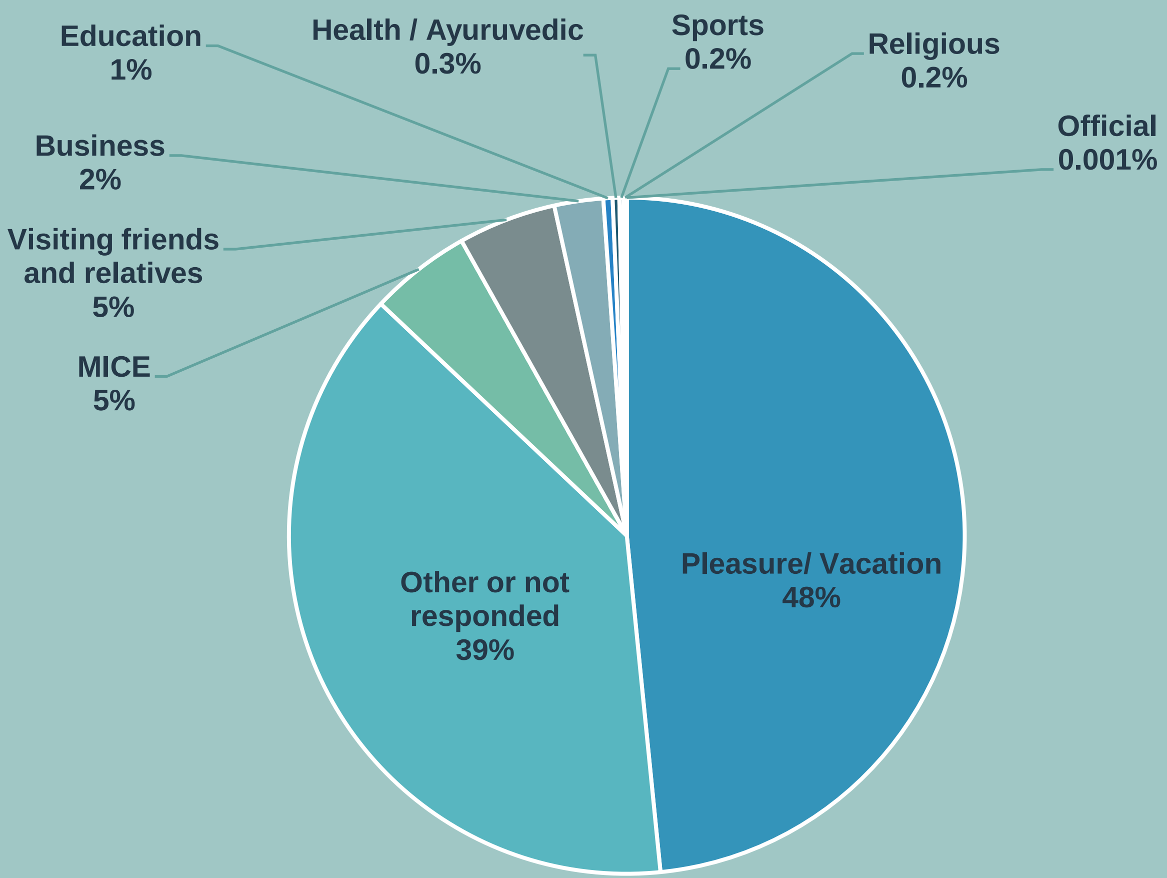
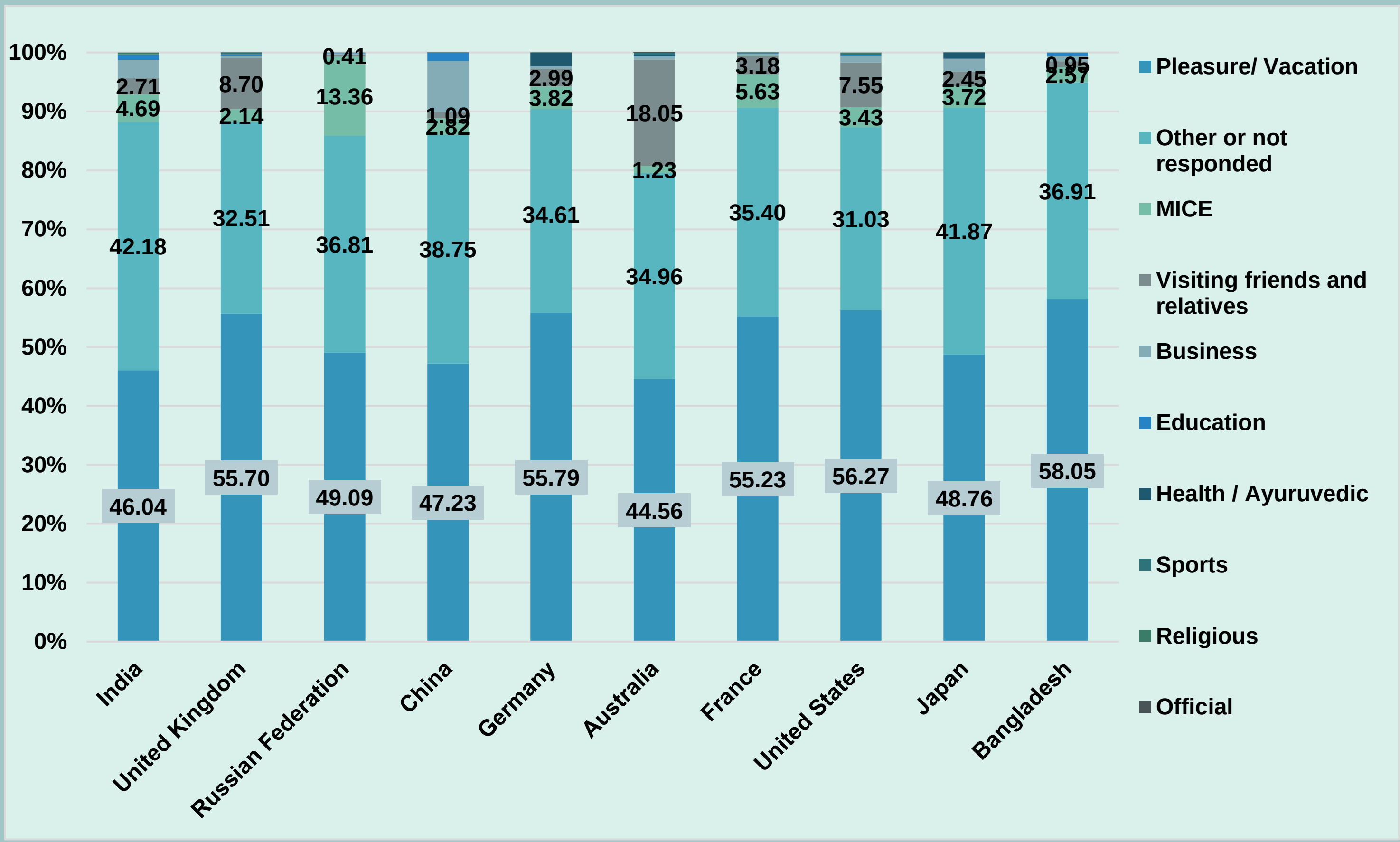


Chart 5: Purpose of visit vs main source markets



The data reveals significant market segmentation across ten major countries: India, United Kingdom, Russia, China, Germany, Australia, France, United States, Japan, and Bangladesh. While "Pleasure/Vacation" is the leading category for all markets, its share varies considerably from 44.56% (Australia) to 58.05% (Bangladesh). Notably, Germany (55.79%), the UK (55.70%), and the United States (56.27%) show very high vacation orientation, whereas Australia (44.56%) and India (46.04%) are slightly below average.

MICE (Meetings, Incentives, Conferences, Exhibitions) tourism shows extreme variation: Russia stands out with 13.36%, far exceeding all others (next is France at 5.63%). This likely reflects targeted business events or incentive groups from Russia during March 2026. By contrast, Australia (1.23%) and United Kingdom (2.14%) have minimal MICE presence.

Visiting Friends and Relatives (VFR) is exceptionally high for Australia (18.05%) and the UK (8.70%), indicating strong diaspora connections. Business travel is notable only for China (8.66%) and India (3.14%), reflecting commercial ties. For most Western markets, business is below 1%. Health/Ayurvedic tourism is a tiny but distinctive niche: Germany leads with 2.27%, far above all others (Japan 0.97%, Russia 0.10%). This aligns with Germany's known interest in wellness and alternative medicine. Education, Sports, Religious, and Official categories collectively account for less than 2% across all markets, indicating they are not primary drivers for any major source country.

Sri Lanka's tourism is overwhelmingly leisure-driven, but each source market has a unique secondary profile: Russia for MICE, Australia for VFR, China for business, and Germany for Ayurveda. Destination marketers should tailor promotions accordingly: wellness packages for Germany, diaspora-focused campaigns for Australia/UK, and MICE facilities for Russia.

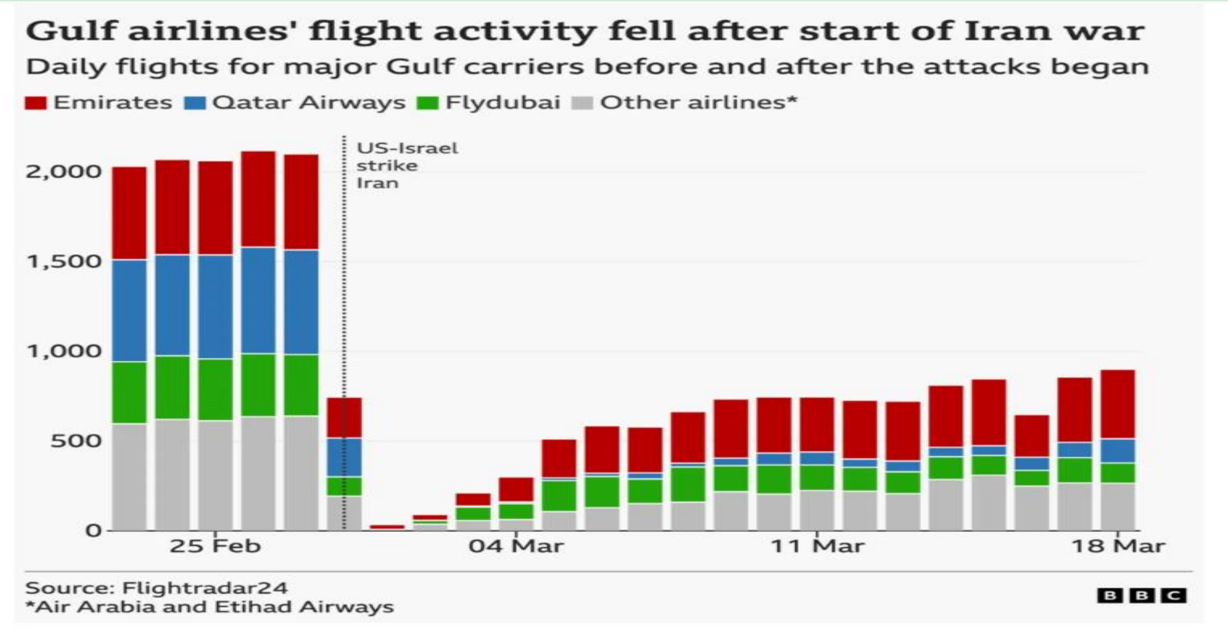
The Middle East Conflict’s Long Reach: From Global Air Corridors to Sri Lanka’s Shores

The military confrontation that erupted in the Middle East on 28 February 2026 has swiftly rippled beyond the battlefield, fundamentally disrupting global aviation and travel patterns. The coordinated U.S.-Israeli strikes on Iranian targets, followed by retaliatory attacks across the Persian Gulf, have triggered widespread airspace closures, disrupted critical shipping routes, and driven oil prices sharply higher.

What makes this conflict uniquely impactful for the travel sector is that its consequences extend far beyond the immediate war zone. Rather than simply rendering conflict-area destinations inaccessible, the fighting has undermined the fundamental infrastructure of global movement, disrupting intercontinental flight paths and supply chains, with the effects now reaching even distant nations like Sri Lanka.

Global Air Travel: A Corridor Cut

Sweeping airspace shutdowns across the Middle East and Gulf region, affecting major aviation hubs including Dubai, Abu Dhabi, Doha, and Bahrain have dramatically upended global air travel almost overnight. Dubai, home to the world's busiest international airport, has gone from a seamless transit point to a bottleneck, leaving thousands of passengers stranded



Source: BBC

The consequences, however, reach well beyond the Gulf. With Russian airspace having been off-limits since the Ukraine conflict, the Middle East had quietly become the last major high-capacity corridor linking Asia and Europe. Its closure now means that critical link has been cut entirely, leaving airlines with few viable alternatives and passengers facing severe disruptions on some of the world's busiest long-haul routes.

Southeast Asian routes, particularly those linking Thailand or Bali to European hubs, are severely disrupted. Airlines are announcing longer flight times, technical fuel stops, rerouting, and selected route suspensions.

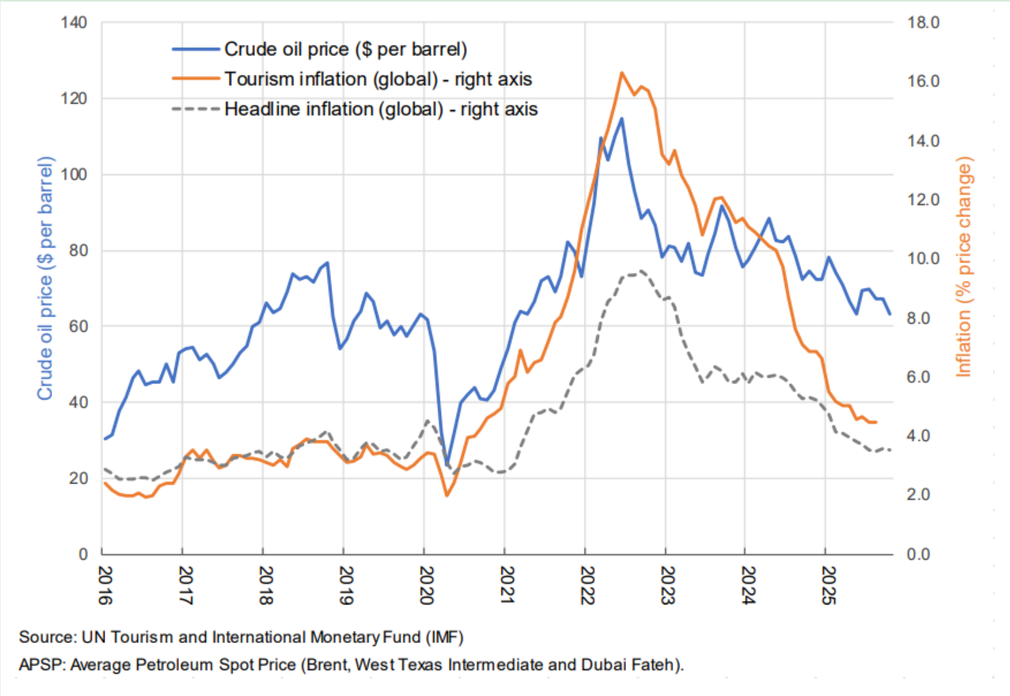
The European Aviation Safety Agency (EASA) has extended operational restrictions until at least 18 March, affecting European carriers and third-country flights to and from the EU (UN Tourism, 2026)

The result is not just inconvenience but is economic. Rising fuel costs and limited seat availability are driving airfares higher across Asia and Europe.

Oil, Inflation, and the Cost of Getting There

The conflict triggered a 42% surge in oil prices, from approximately USD 67 per barrel on 27 February to USD 95 by 9 March-the highest level since mid-2022. The Strait of Hormuz, through which 20% of the world's oil supply normally passes, is blocked, disrupting refined products including jet fuel. In response, the 32 member countries of the International Energy Agency agreed on 11 March to release 400 million barrels from emergency reserves, but volatility remains high.

For tourism, this is a double shock. As the Russia-Ukraine war demonstrated in 2022, oil spikes quickly translate into inflation. Between February and May 2022, a 24% rise in oil prices pushed headline inflation from 4.7% to 8.7% and tourism inflation from 6.6% to 13.9%. If current prices persist above USD 90 per barrel, the recent easing of global inflation could reverse, making long-haul travel costlier and less predictable (Un Tourism, 2026).



Source: UN Tourism

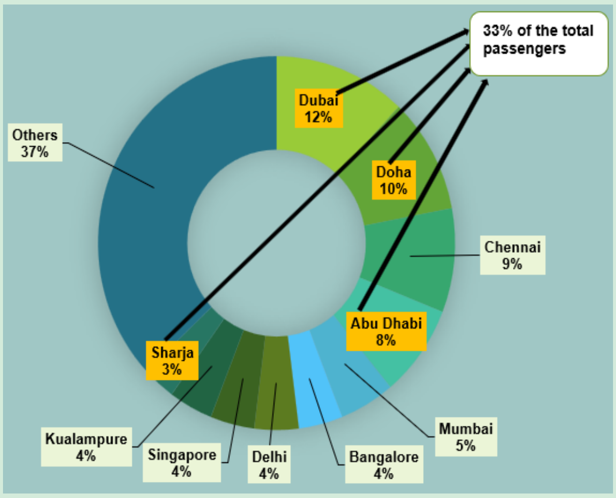
Shifting Demand and Traveler Caution

Travel patterns are already undergoing a notable shift. European and American tourists are turning away from the UAE and the broader Middle East, redirecting their plans toward Mediterranean Europe, Morocco, parts of Asia, and South America. Supporting data from Mabrian points to rising interest in short-haul European destinations, alongside steady demand for Asian markets that still enjoy direct flight access. A broader mood of hesitation has taken hold among travelers, dampening overall booking confidence. Historically, affected regions have bounced back relatively quickly once calm is restored but how long this conflict will last remains an open question, making recovery timelines difficult to predict (Adventure Travel news, 2026).

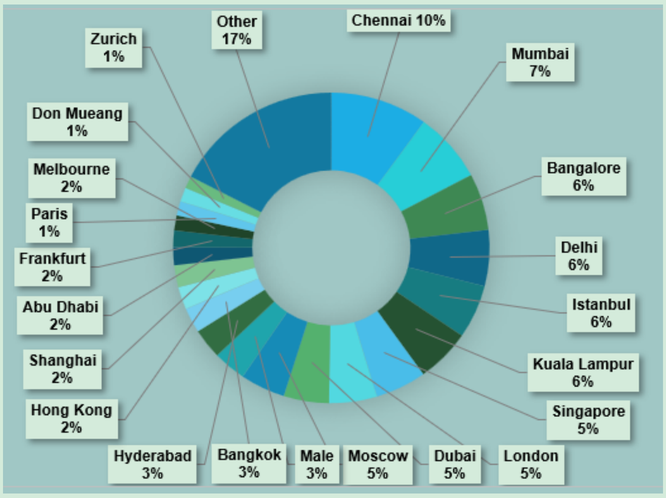
Impact on Sri Lanka's Tourism sector

Sri Lanka, though far removed from any conflict zone, is quietly bearing the economic weight of Middle East instability. Its tourism industry already battered by the 2019 Easter attacks and the COVID-19 pandemic, and natural disasters faces yet another setback. The Arabian Peninsula, once a growing source of tourists and a vital transit corridor connecting Sri Lanka to European and other long-haul travellers, has been destabilized by escalating regional tensions. This disruption has severed key travel routes and dampened tourist arrivals.

In 2025, Dubai, Abu Dhabi, Sharjah, and Doha together channelled approximately 33% of all tourist arrivals to Sri Lanka. These hubs were the essential bridge between the island and long-haul source markets in Europe, the UK, and North America. With those hubs now partially closed, operating under severe disruption, or facing massive flight cancellations, that bridge has been pulled up.



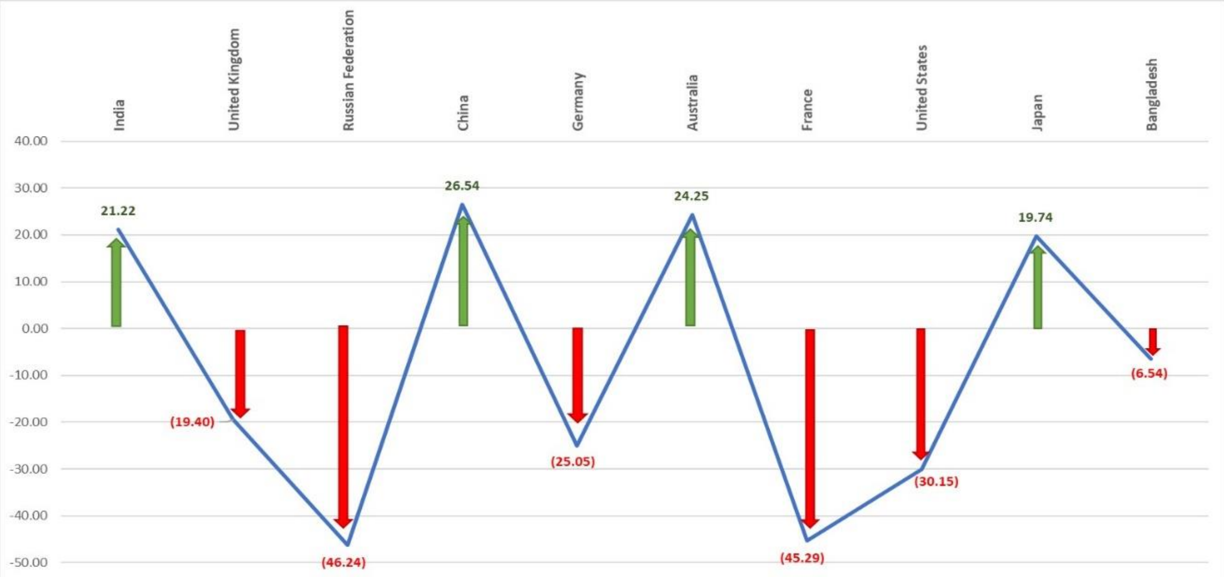
Main last departure airports, 2025



Main last departure airports March ,2026

The numbers are stark. Comparing March 2026 to March 2025, tourist arrivals to Sri Lanka have plunged by 19.7%. And when measured against February 2026 arrivals and contribution of the connecting hubs, the country has already lost a minimum of 81,600 tourists directly attributable to the Middle East conflict in the month of March. These are not cancellations due to safety fears about Sri Lanka itself. These are travelers who simply cannot reach the country because the air routes and transit points, they relied on no longer function reliably or affordably.

Comparison of tourist arrivals to Sri Lanka in March 2026 and 2025



For a destination like Sri Lanka, this represents a crisis of connectivity, not just confidence. Longer flight times, higher fares, and the unavailability of connecting seats through the Gulf are effectively pricing and routing the island out of reach for many potential visitors.

Looking Ahead

What happens next hinges on two critical factors: how long the conflict lasts and how stable oil prices remain. A prolonged conflict could significantly affect oil volume flows and ultimately drive-up prices. Should Middle Eastern airspace remain even partially closed for an extended period, Southeast Asian and South Pacific destinations will face mounting pressure to identify and establish alternative flight corridors.

Booking behaviour will likely stay unpredictable, with travelers hesitant to commit far in advance, keeping booking windows compressed and volatile. A 33% reliance on a handful of Gulf transit hubs was always a concentration risk. The conflict has exposed that vulnerability overnight. Recovery, when it comes, will require diversifying air access, strengthening direct long-haul charter options, and rebuilding traveler confidence not just in the destination, but in the journey itself.

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International tourist arrivals by country of residence

	March 2026 Tourist arrivals			Tourist arrivals March 2025	% change March (26/25)	Total tourist arrivals up to March 2026	Total tourist arrivals up to March 2025	% change up to March (26/25)
	By Air	By Sea	Total					
AMERICAS	**8,292**	**1,173**	**9,465**	**12,717**	**(25.6)**	**36,880**	**36,604**	**0.8**
North America	**7,820**	**1,131**	**8,951**	**12,030**	**(25.6)**	**34,849**	**34,744**	**0.3**
Canada	3,325	150	3,475	4,219	(17.6)	13,517	13,227	2.2
Mexico	99	15	114	135	(15.6)	369	335	10.1
United States	4,396	966	5,362	7,676	(30.1)	20,963	21,182	(1.0)
Caribbean & Central America	**71**	**1**	**72**	**101**	**(28.7)**	**322**	**257**	**25.3**
Costa Rica	07	0	07	15	(53.3)	30	37	(18.9)
Jamaica	02	0	02	02	0.0	13	10	30.0
Others	62	01	63	84	(25.0)	279	210	32.9
South America	**401**	**41**	**442**	**586**	**(24.6)**	**1,709**	**1,603**	**6.6**
Argentina	90	05	95	101	(5.9)	412	344	19.8
Brazil	139	29	168	213	(21.1)	600	624	(3.8)
Chile	54	0	54	86	(37.2)	236	208	13.5
Colombia	54	05	59	84	(29.8)	219	173	26.6
Others	64	02	66	102	(35.3)	242	254	(4.7)
AFRICA	**897**	**0**	**897**	**1,384**	**(35.2)**	**3,795**	**3,838**	**(1.1)**
North Africa	**132**	**0**	**132**	**177**	**(25.4)**	**557**	**722**	**(22.9)**
Morocco	52	0	52	65	(20.0)	196	249	(21.3)
Sudan	30	0	30	23	30.4	175	148	18.2
Others	50	0	50	89	(43.8)	186	325	(42.8)
Sub-Saharan Africa	**765**	**0**	**765**	**1,207**	**(36.6)**	**3,238**	**3,116**	**3.9**
Kenya	32	0	32	103	(68.9)	210	200	5.0
Mauritius	97	0	97	77	26.0	328	216	51.9
Nigeria	03	0	03	06	(50.0)	33	24	37.5
South Africa	341	0	341	669	(49.0)	1,275	1,427	(10.7)
Others	292	0	292	352	(17.0)	1,392	1,249	11.4

	March 2026			Tourist arrivals March 2025	% change March (26/25)	Total tourist arrivals up to March 2026	Total tourist arrivals up to March 2025	% change up to March (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	**94,693**	**118**	**94,811**	**82,225**	**15.3**	**295,811**	**250,209**	**18.2**
North East Asia	**19,548**	**18**	**19,566**	**15,797**	**23.9**	**64,008**	**54,006**	**18.5**
China	14,058	06	14,064	11,114	26.5	48,247	39,513	22.1
Japan	4,431	09	4,440	3,708	19.7	11,575	9,866	17.3
South Korea	1,044	03	1,047	963	8.7	4,125	4,583	(10.0)
Others	15	0	15	12	25.0	61	44	38.6
South East Asia	**7,503**	**06**	**7,509**	**5,799**	**29.5**	**21,614**	**15,293**	**41.3**
Cambodia	167	0	167	125	33.6	481	283	70.0
Indonesia	718	01	719	313	129.7	1,986	1,108	79.2
Malaysia	2,500	02	2,502	2,256	10.9	6,390	5,796	10.2
Myanmar	347	0	347	94	269.1	1,525	273	458.6
Philippines	671	01	672	585	14.9	1,604	1,390	15.4
Singapore	1,398	01	1,399	1,189	17.7	3,907	3,261	19.8
Thailand	678	01	679	903	(24.8)	2,630	2,247	17.0
Vietnam	970	0	970	314	208.9	2,951	824	258.1
Others	54	0	54	20	170.0	140	111	26.1
Oceania	**12,415**	**85**	**12,500**	**10,010**	**24.9**	**35,857**	**30,160**	**18.9**
Australia	11,114	83	11,197	9,012	24.2	32,369	27,353	18.3
New Zealand	1,240	02	1,242	965	28.7	3,320	2,703	22.8
Others	61	0	61	33	84.8	168	104	61.5
South Asia	**55,227**	**09**	**55,236**	**50,619**	**9.1**	**174,332**	**150,750**	**15.6**
Afghanistan	01	0	01	02	(50.0)	05	23	(78.3)
Bangladesh	4,405	0	4,405	4,713	(6.5)	11,079	14,601	(24.1)
Bhutan	48	0	48	22	118.2	224	153	46.4
India	47,524	09	47,533	39,212	21.2	147,273	118,315	24.5
Iran	102	0	102	3,695	(97.2)	736	5,196	(85.8)
Maldives	1,618	0	1,618	1,932	(16.3)	8,320	7,774	7.0
Nepal	371	0	371	307	20.8	1,921	1,370	40.2
Pakistan	1,158	0	1,158	736	57.3	4,774	3,318	43.9
EUROPE	**75,293**	**2,848**	**78,141**	**131,185**	**(40.4)**	**399,785**	**425,406**	**(6.0)**
Northern Europe	**22,198**	**236**	**22,434**	**27,658**	**(18.9)**	**103,061**	**91,505**	**12.6**
Denmark	1,411	17	1,428	1,299	9.9	7,927	6,834	16.0
Finland	307	12	319	452	(29.4)	2,416	2,050	17.9
Norway	735	11	746	960	(22.3)	4,171	4,025	3.6
Sweden	878	18	896	1,243	(27.9)	5,956	5,485	8.6
United Kingdom	17,927	165	18,092	22,447	(19.4)	78,420	69,705	12.5
Others	940	13	953	1,257	(24.2)	4,171	3,406	22.5

	March 2025 Tourist arrivals By Air	By Sea	Total	Tourist arrivals March 2025	% change March (26/25)	Total tourist arrivals up to March 2026	Total tourist arrivals up to March 2025	% change up to March (26/25)
Western Europe	**26,242**	**2,056**	**28,298**	**44,216**	**(36.0)**	**131,201**	**132,308**	**(0.8)**
Austria	795	109	904	1,756	(48.5)	6,789	6,888	(1.4)
Belgium	835	25	860	1,609	(46.6)	5,010	5,342	(6.2)
France	7,821	538	8,359	15,278	(45.3)	39,102	43,366	(9.8)
Germany	12,346	1,083	13,429	17,918	(25.1)	53,771	50,201	7.1
Netherlands	2,403	24	2,427	4,838	(49.8)	15,680	16,911	(7.3)
Switzerland	1,913	273	2,186	2,740	(20.2)	10,500	9,328	12.6
Others	129	04	133	77	72.7	349	272	28.3
Central/Eastern Europe	**21,816**	**52**	**21,868**	**47,972**	**(54.4)**	**127,483**	**163,041**	**(21.8)**
Belarus	1,203	0	1,203	1,257	(4.3)	5,432	4,762	14.1
Czech Republic	745	03	748	2,266	(67.0)	8,012	8,390	(4.5)
Estonia	306	0	306	757	(59.6)	2,055	2,606	(21.1)
Hungary	307	08	315	695	(54.7)	2,859	3,172	(9.9)
Kazakhstan	149	0	149	1,808	(91.8)	3,579	7,286	(50.9)
Lithuania	370	01	371	1,263	(70.6)	2,357	4,256	(44.6)
Poland	1,121	18	1,139	5,661	(79.9)	21,940	21,765	0.8
Romania	264	06	270	760	(64.5)	2,212	2,542	(13.0)
Russia	15,675	10	15,685	29,177	(46.2)	65,918	93,568	(29.6)
Slovakia	321	02	323	832	(61.2)	2,913	3,158	(7.8)
Ukraine	382	01	383	1,119	(65.8)	4,096	4,378	(6.4)
Others	973	03	976	2,377	(58.9)	6,110	7,158	(14.6)
Southern/ Mediterranean Europe	**5,037**	**504**	**5,541**	**11,339**	**(51.1)**	**38,040**	**38,552**	**(1.3)**
Greece	135	0	135	330	(59.1)	1,566	1,140	37.4
Italy	1,447	257	1,704	3,524	(51.6)	12,796	12,417	3.1
Portugal	376	19	395	876	(54.9)	2,088	2,364	(11.7)
Spain	1,207	222	1,429	2,548	(43.9)	7,611	7,772	(2.1)
Turkey	581	0	581	992	(41.4)	2,741	2,872	(4.6)
Israel	870	0	870	2,069	(58.0)	7,498	7,758	(3.4)
Others	421	06	427	1,000	(57.3)	3,740	4,229	(11.6)
MIDDLE EAST	**665**	**0**	**665**	**1,787**	**(62.8**	**4,363**	**6,219**	**(29.8)**
Bahrain	10	0	10	52	(80.8)	168	260	(35.4)
Egypt	114	0	114	276	(58.7)	603	1,102	(45.3)
Iraq	08	0	08	58	(86.2)	202	303	(33.3)
Jordan	75	0	75	329	(77.2)	468	804	(41.8)
Kuwait	17	0	17	130	(86.9)	405	508	(20.3)
Lebanon	161	0	161	474	(66.0)	559	976	(42.7)
Oman	76	0	76	25	204.0	416	393	5.9
Qatar	07	0	07	39	(82.1)	97	118	(17.8)
Saudi Arabia	109	0	109	201	(45.8)	830	1,046	(20.7)
United Arab Emirates	62	0	62	165	(62.4)	430	527	(18.4)
Others	26	0	26	38	(31.6)	185	182	1.6
TOTAL	**179,840**	**4,139**	**183,979**	**229,298**	**(19.8)**	**740,634**	**722,276**	**2.5**

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

The most striking finding in the month of March is the dominance of Indian airports, with four Indian cities Chennai (18,310 passengers, 9.95%), Mumbai (13,402, 7.28%), Bangalore (10,849, 5.90%), and Delhi (10,756, 5.85%) collectively accounting for nearly 29% of all arrivals. Chennai alone is the single largest departure point, reflecting its geographic proximity and frequent, short-haul connections to Sri Lanka. Hyderabad (5,766, 3.13%) adds further weight, making India by far the most important feeder market.

While Dubai, Doha, and Abu Dhabi dominated departures in February, the current war in Gulf and airspace restrictions have shifted traffic to new hubs such as Istanbul, Kuala Lumpur, and Singapore

Beyond India, the Southeast Asian hubs and Dubai play a vital role as transit points for long-haul travelers. Istanbul (10,265, 5.58%), Kuala Lumpur (10,254, 5.57%), Singapore (9,590, 5.21%), Dubai (8,519, 4.63%), and Bangkok (4,783, 2.60%) all feature prominently. These airports are not major origin markets themselves but serve as connecting hubs for European, Australian, and other distant travelers. Notably, Male (6,209, 3.37%) indicates significant two-way tourism between Sri Lanka and the Maldives.

European long-haul traffic is represented by London (9,009, 4.90%), Moscow (8,452, 4.59%), Frankfurt (3,153, 1.71%), Paris (2,715, 1.48%), and Zurich (2,342, 1.27%). Their shares are modest compared to Indian and hub-origin traffic, suggesting that European tourists are fewer in number or travel indirectly via Middle Eastern hubs.

Sri Lanka's tourist traffic in March 2026 is heavily dependent on short-haul Indian markets and connectivity hubs via the Middle East and Southeast Asia. Direct long-haul flights from Europe remain limited. Strategically, Sri Lanka should consider: (1) deepening frequency from Indian metros, (2) strengthening code-share agreements with Gulf and Asian carriers, and (3) exploring direct route incentives for underperforming but high-potential markets like Australia or Russia. Furthermore, the entry "Dubai/Male" (21st, 3,337) suggests a combined routing, possibly indicating passengers whose journey originated in Dubai with a stop in Male, or vice versa, before finally flying to Sri Lanka. This highlights the complex multi-stop itineraries common in regional travel, particularly involving the Maldives, a close neighbour and competing tourism destination.

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

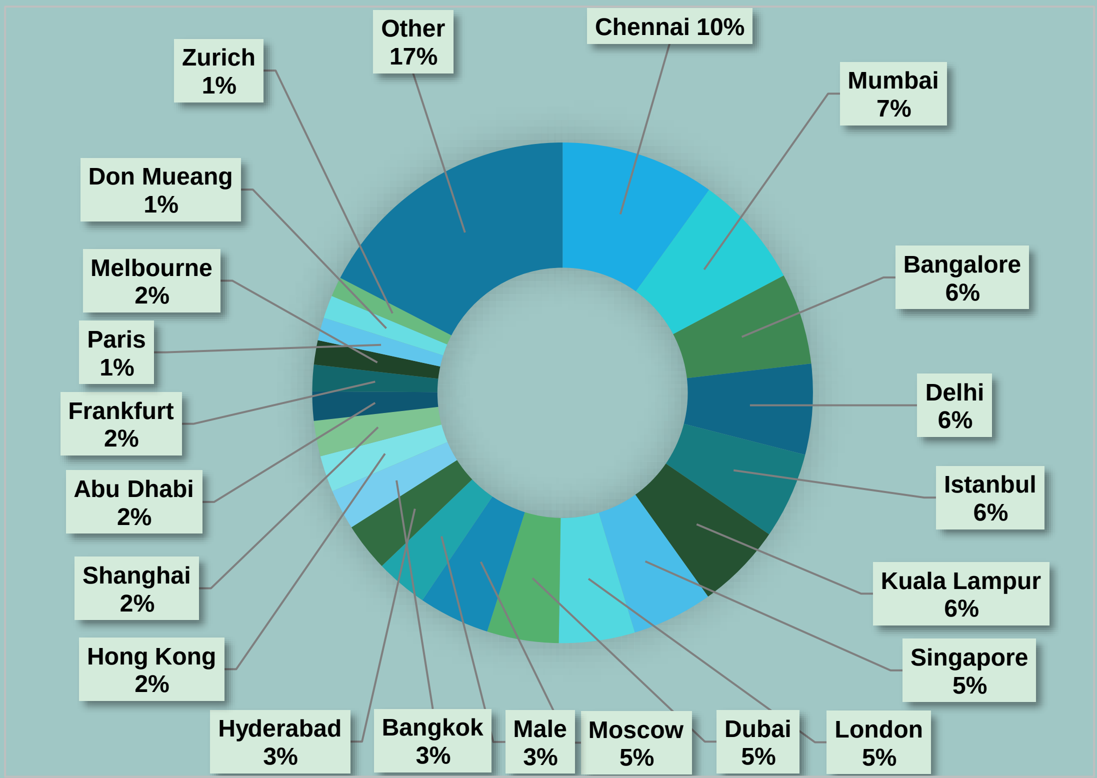
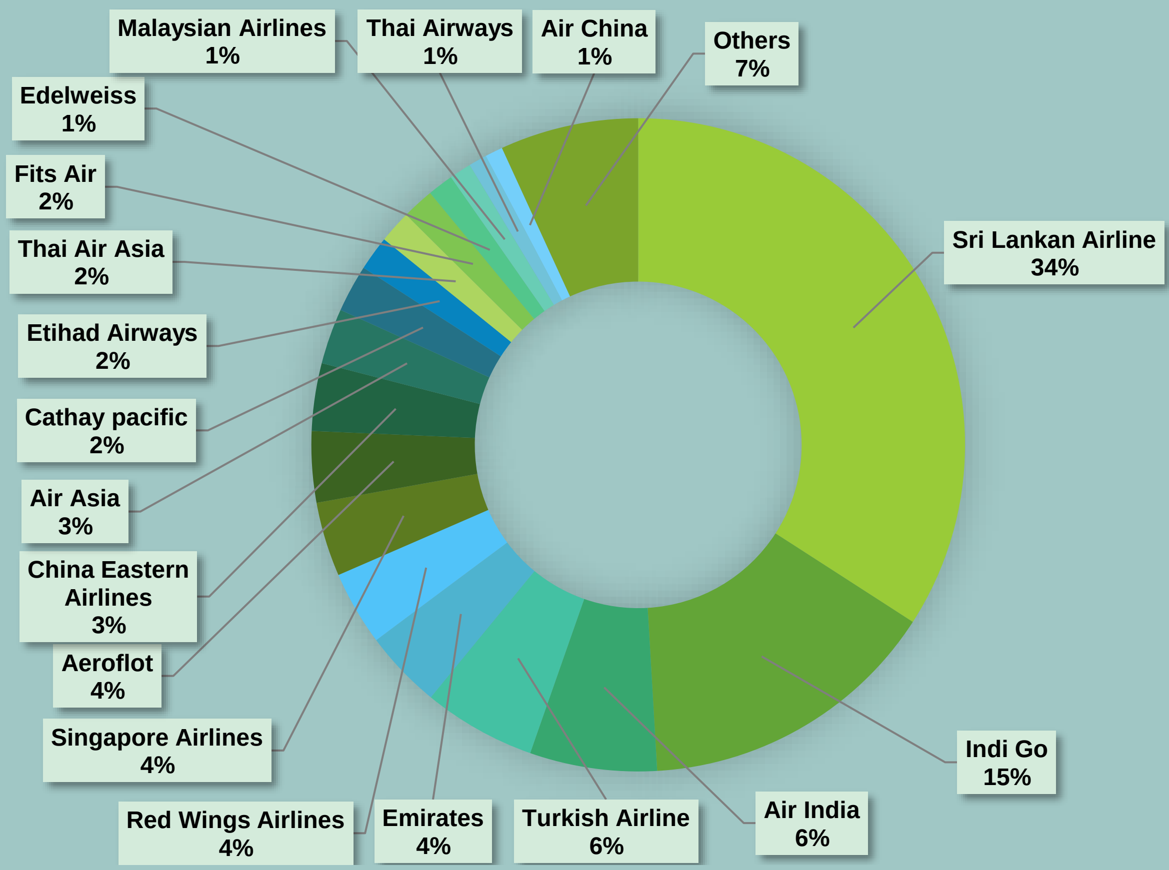


Chart 7. Main airlines to Sri Lanka, March 2026



Airline contribution to tourist arrivals in Sri Lanka for March 2026, reveals a clear market structure dominated by one national carrier and several low-cost and regional competitors.

Sri Lankan Airlines leads with 62,775 passengers, capturing 34.12% of all arrivals more than double its nearest competitor. This confirms the national carrier's pivotal role as the primary gateway for air travel to the country, benefiting from a network spanning Europe, the Middle East, India, and Southeast Asia. Relative to February 2026, Sri Lankan Airlines' share has risen by 10%, a growth likely attributed to the flight disruptions stemming from the Middle East conflict. The next three carriers are all Indian low-cost and full-service airlines: Indigo (27,511, 14.95%), Air India (11,567, 6.29%), and together they account for over 21% of arrivals. This aligns closely with earlier departure airport data showing strong Indian origin traffic.

Turkish Airlines (10,265, 5.58%) stands out as the leading long-haul non-Indian carrier, likely serving as a European and American transit hub via Istanbul. Emirates (7,094, 3.86%) follows, with a low number compared to February (8%) due to the disruptions caused by the Middle East war. Russian carriers feature prominently: Red Wings Airlines (6,773, 3.68%) and Aeroflot (6,476, 3.52%) together bring over 13,000 passengers, reflecting continued strong demand from the Russian market, supported by charter operations despite geopolitical challenges. Southeast Asian connectivity is evident through Singapore Airlines (6,771, 3.68%), Air Asia (5,062, 2.75%), and Thai Air Asia (2,959, 1.61%). China Eastern (6,159, 3.35%), Cathay Pacific (4,312, 2.34%), and Air China (1,610, 0.88%) collectively account for about 6.5%, indicating moderate but stable Chinese demand.

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

March 2026

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

Country	Chennai	Mumbai	Bangalore	Delhi	Istanbul	Kuala Lampur	Singapore	London	Dubai	Moscow	Male	Hyderabad	Bangkok	Hong Kong	Shanghai	Abu Dhabi	Frankfurt	Melbourne	Paris	Narita	Dhaka	Other	Total
India	14,090	7,985	7,980	5,060	22	327	276	17	1,017	1	206	5,228	527	55	5	232	2	36	4	16	14	4,433	47,533
United Kingdom	614	1,339	415	912	657	671	559	7,669	1,804	0	344	134	305	167	57	830	37	85	97	17	24	1,355	18,092
Russian Federation	156	64	63	151	174	221	18	4	324	8,284	422	13	123	20	174	208	5	2	9	8	33	5,209	15,685
China	73	25	24	20	11	1,692	516	8	221	1	372	7	676	1,642	3,245	57	0	3	1	8	65	5,397	14,064
Germany	401	1,558	681	1,000	2,142	365	185	164	800	5	284	39	226	59	22	378	2,666	14	93	1	10	2,336	13,429
Australia	130	90	90	376	12	1,090	3,991	32	158	0	104	26	191	374	22	69	1	2,515	8	7	14	1,897	11,197
France	163	235	122	630	2,042	255	88	151	785	0	149	12	123	35	29	256	127	13	2,170	0	4	970	8,359
United States	387	233	249	316	274	232	593	96	192	0	140	125	215	502	49	163	22	12	18	27	31	1,486	5,362
Japan	92	35	110	86	5	677	265	3	28	0	91	6	298	417	312	2	0	7		1,644	12	350	4,440
Bangladesh	1,022	29	1	100	7	173	57	2	26	0	1,131	22	41	2		6	0	4	31	7	1,683	61	4,405

A crosstabulation of last departure airports by key source markets provides deeper insights beyond simple counts, highlighting the specific connectivity patterns and transit hubs serving each major tourist-generating country.

The data reaffirms India’s position as Sri Lanka’s largest source market and indicates a clear travel pattern characterized by strong reliance on direct, short-haul connections. Unlike long-haul markets that depend on major transit hubs, Indian tourists primarily depart from cities such as Chennai, Mumbai, Bangalore, Hyderabad, and Delhi.

In contrast, tourists from the United Kingdom mainly depart from London, while those from Germany and France predominantly use Frankfurt and Paris, respectively, as their final departure points. This represents a shift from previous months, when European travelers largely transited through Middle Eastern hubs such as Dubai, Doha, and Abu Dhabi. The change is likely attributed to disruptions in flight operations caused by the ongoing conflict in the Middle East.

Meanwhile, Moscow and Shanghai serve as key departure points for Russian and Chinese tourists, respectively, while Narita is the main departure airport for Japanese travelers. Visitors from the United States and Australia primarily use Singapore as their last departure hub, whereas Bangladeshi tourists commonly depart via Dhaka and Malé.

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

Country	Sri Lankan Airline	Indigo	Air India	Turkish Airline	Emirates	Red Wings Airlines	Singapore Airlines	Aeroflot	China Eastern Airlines	Air Asia	Cathay pacific	Etihad Airways	Thai Air Asia	Fits Air	Edelweiss	Malaysian Airlines	Thai Airways	Air China	Other	Total
India	38.77	43.18	10.50	0.05	1.71	0.00	0.21	0.00	0.01	0.10	0.12	0.29	0.07	0.28	0.00	0.05	0.08	0.01	4.57	100.00
United Kingdom	56.22	5.57	7.98	3.63	8.35	0.00	1.87	0.00	0.35	2.16	0.92	4.30	1.30	0.67	0.41	0.72	0.43	0.03	5.10	100.00
Russian Federation	3.69	1.38	0.65	1.11	1.66	42.37	0.06	40.82	1.22	0.98	0.13	1.24	0.84	0.95	0.04	0.14	0.16	0.24	2.33	100.00
China	14.82	0.38	0.13	0.08	0.90	0.00	2.77	0.01	35.69	6.16	11.68	0.32	3.54	2.03	0.02	2.67	2.47	10.30	6.04	100.00
Germany	36.35	5.90	11.95	15.95	5.64	0.00	0.88	0.04	0.24	2.03	0.44	2.81	1.72	0.66	4.86	0.18	0.42	0.10	9.84	100.00
Australia	50.10	2.30	1.75	0.11	1.17	0.00	28.11	0.00	0.21	2.87	3.33	0.52	0.49	0.15	0.01	5.82	1.12	0.06	1.88	100.00
France	36.08	3.41	7.75	24.43	8.12	0.00	0.71	0.00	0.43	2.36	0.42	2.98	1.44	0.73	1.05	0.14	0.39	0.02	9.53	100.00
United States	26.76	10.35	5.46	5.11	2.76	0.00	7.37	0.00	1.03	2.46	9.36	2.91	1.83	1.06	0.21	0.50	0.84	0.13	21.86	100.00
Japan	52.45	3.04	1.46	0.11	0.52	0.00	3.83	0.00	7.21	11.76	9.39	0.05	2.75	0.54	0.00	1.73	3.90	0.36	0.90	100.00
Bangladesh	42.75	23.34	2.79	0.16	0.32	0.00	0.91	0.00	0.14	0.39	0.05	0.11	0.05	28.01	0.02	0.07	0.02	0.00	0.89	100.00

An analysis of tourist arrivals by key source markets, based on the airlines used for travel, reveals several important insights. IndiGo (43.18%) continues to be the most preferred airline among Indian tourists. In contrast, Russian tourists predominantly travel via Red Wings (42.37%) and Aeroflot (40.82%) while for Chinese tourists China Eastern Airlines (35.69%), Sri Lankan Airlines (14.82%) and Cathay Pacific (11.68%) are the most preferred airlines.

For all other major source markets including the United Kingdom, Germany, Australia, France, the United States, Japan, and Bangladesh Sri Lankan Airlines emerges as the primary carrier. This pattern of airline preference may be influenced by recent flight disruptions in the Middle East due to ongoing conflicts, which have likely affected traditional transit routes and connectivity options. In addition to Sri Lankan Airlines, Turkish Airlines serves as an alternative carrier for European travellers, particularly from Germany (15.95%) and France (24.43%), when travelling to Sri Lanka.

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