



2026



MONTHLY TOURIST ARRIVALS REPORT:

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

September



Introduction

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

Sri Lanka welcomed 1,693,679 international tourist arrivals during the January-September 2026 period, compared with 1,725,494 arrivals recorded during the same period in 2025. This represents a modest year-on-year decrease of 1.8%. Tourism performance throughout the period showed notable fluctuations, with substantial variations in monthly arrival levels. Strong growth was recorded at the beginning of the year, with arrivals increasing by 9.7% in January and 16.2% in February. February recorded the highest monthly arrival figure of the period, reaching 279,328 tourists. However, this upward trend was followed by pronounced contractions in March and April, when arrivals declined by 19.8% and 22.3%, respectively.

A recovery emerged in May, with tourist arrivals increasing by 9.6%, although this improvement was not sustained in June, which recorded a further decline of 9.9%. During the subsequent months, the gap compared with the previous year narrowed considerably, with arrivals in July, August and September declining by only 1.7%, 3.3% and 0.3%, respectively. This indicates a gradual stabilization of tourism demand towards

the latter part of the period. Overall, Sri Lanka's tourism sector experienced a marginal contraction during the first nine months of 2026, despite considerable month-to-month volatility. The relatively limited cumulative decline demonstrates the resilience of international tourism demand and suggests that the sector has maintained a relatively stable recovery trajectory. India, China, Australia, the United Kingdom and Germany remained among the principal source markets in September, continuing to make a significant contribution to overall tourist arrivals. The sustained performance of these key markets, combined with the comparatively stable arrival levels observed during the latter months, offers a cautiously positive outlook for the remainder of 2026. Maintaining targeted promotional activities across key markets, strengthening international air connectivity, and improving the quality and diversity of the visitor experience will be important for reinforcing the recovery and facilitating continued growth in Sri Lanka's tourism sector.

Table 1. Monthly tourist arrivals, September 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	196,845	(1.7)
August	198,235	191,704	(3.3)
September	158,971	158,557	(0.3)
October	165,193		
November	212,906		
December	258,928		
TOTAL	2,362,521	1,693,679	



Tourist Arrivals | September 2026

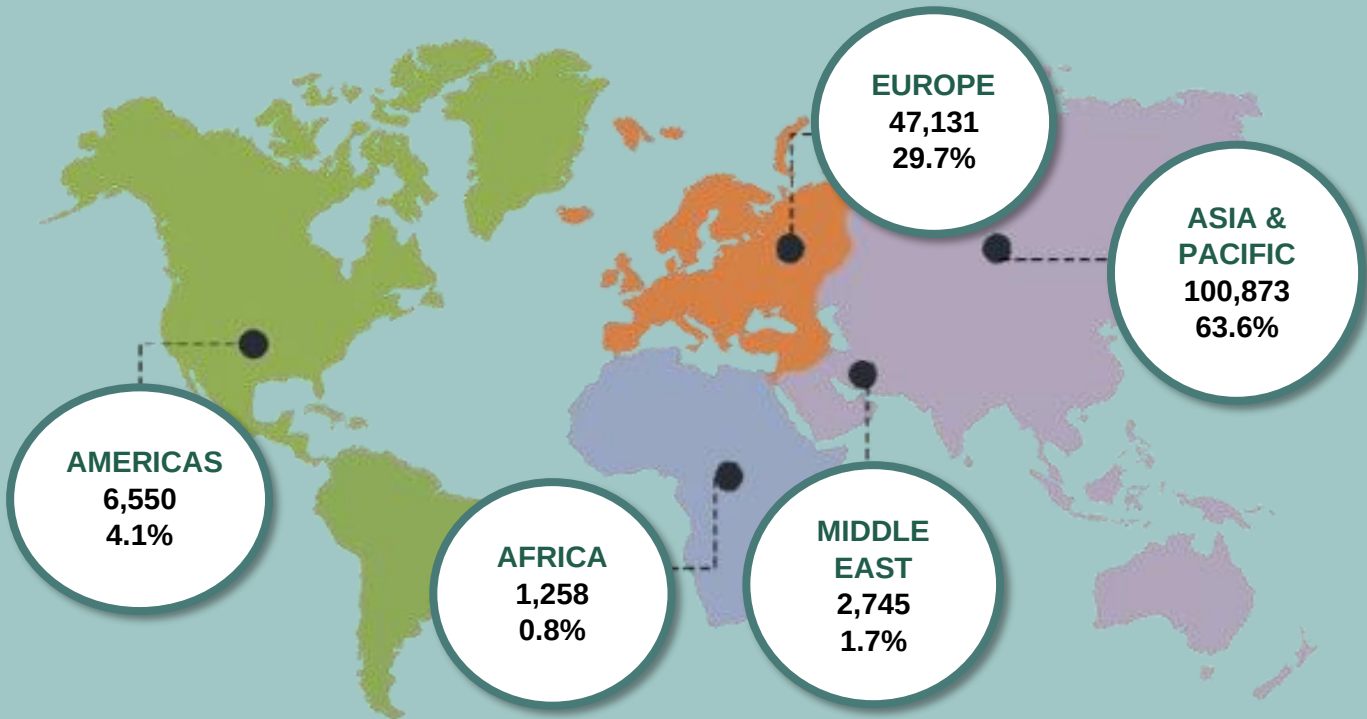
158,557



Tourist arrivals by region and percentage share

September 2026

Map 1. Tourist arrivals by region and percentage share



In September 2026, Sri Lanka recorded a total of 158,557 international tourist arrivals, with the majority originating from the Asia & Pacific and European regions. Asia & Pacific represented the largest source region, contributing 100,873 arrivals, equivalent to 63.6% of the total. Europe followed with 47,131 arrivals, accounting for 29.7%. Collectively, these two regions represented 93.3% of Sri Lanka's total tourist arrivals during the month, demonstrating the country's strong dependence on these established source markets.

In comparison, the contribution from other regions remained relatively limited. The Americas accounted for 6,550 arrivals (4.1%), while the Middle East contributed 2,745 arrivals (1.7%) and Africa recorded only 1,258 arrivals (0.8%). The distribution therefore indicates a highly concentrated source-market structure, with Sri Lanka relying predominantly on regional Asian markets and established European long-haul markets.

This concentration reflects the strong market presence and established tourism appeal Sri Lanka maintains within Asia & Pacific and Europe. However, the relatively low contribution from the Americas, Middle East and Africa also suggests considerable scope for further market development. Expanding the geographical diversity of tourist arrivals could help reduce the country's dependence on a limited number of major markets and improve resilience against economic, geopolitical or other external shocks affecting these regions. Accordingly, greater emphasis on targeted promotional initiatives, market-specific strategies and improved connectivity with emerging markets in the Americas, Middle East and Africa could support broader diversification of Sri Lanka's international tourism base.



Top primary markets and top potential markets

Top primary markets, September 2026



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, September 2026

**New Zealand**

Arrivals: 1,446 / % Share: 0.9

21

**Nepal**

Arrivals: 781 / % Share: 0.5

26

**Belgium**

Arrivals: 1,373 / % Share: 0.9

22

**Austria**

Arrivals: 751 / % Share: 0.5

27

**Poland**

Arrivals: 1,317 / % Share: 0.8

23

**South Korea**

Arrivals: 684 / % Share: 0.4

28

**Indonesia**

Arrivals: 1,238 / % Share: 0.8

24

**Thailand**

Arrivals: 651 / % Share: 0.4

29

**Singapore**

Arrivals: 1,159 / % Share: 0.7

25

**Vietnam**

Arrivals: 587 / % Share: 0.4

30

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





Top ten source markets

September 2026

In September 2026, India reinforced its position as Sri Lanka’s undisputed largest source market, contributing 51,931 arrivals, which marked a modest 4.5% year-on-year increase. China remained a distant second with 11,722 arrivals, reflecting a steady 11.4% growth compared to the same period last time. Among European markets, performance dropped sharply: France posted decline of 5.2 % (4,876 arrivals). More concerning was the double digit drops for both Germany (-22.1%, to 7,277), and Spain (-29.1%, to 3,430), signaling possible competitiveness or preference shifts affecting European travelers. The United Kingdom held steady with a marginal 0.1% downtick (10,738 arrivals), while Japan and Australia emerged as the clear bright spots, recording robust growth of 30.2% and 20.3% respectively, pointing to rising demand from the Asia-Pacific region. Overall, while India and the China continue to anchor Sri Lanka’s tourism inflows, the pronounced erosion in key European markets particularly Germany and Spain coupled with the encouraging surges from Australia and Japan, underscores the urgency of diversifying promotional strategies to stabilize traditional strongholds while aggressively nurturing high growth emerging markets.

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

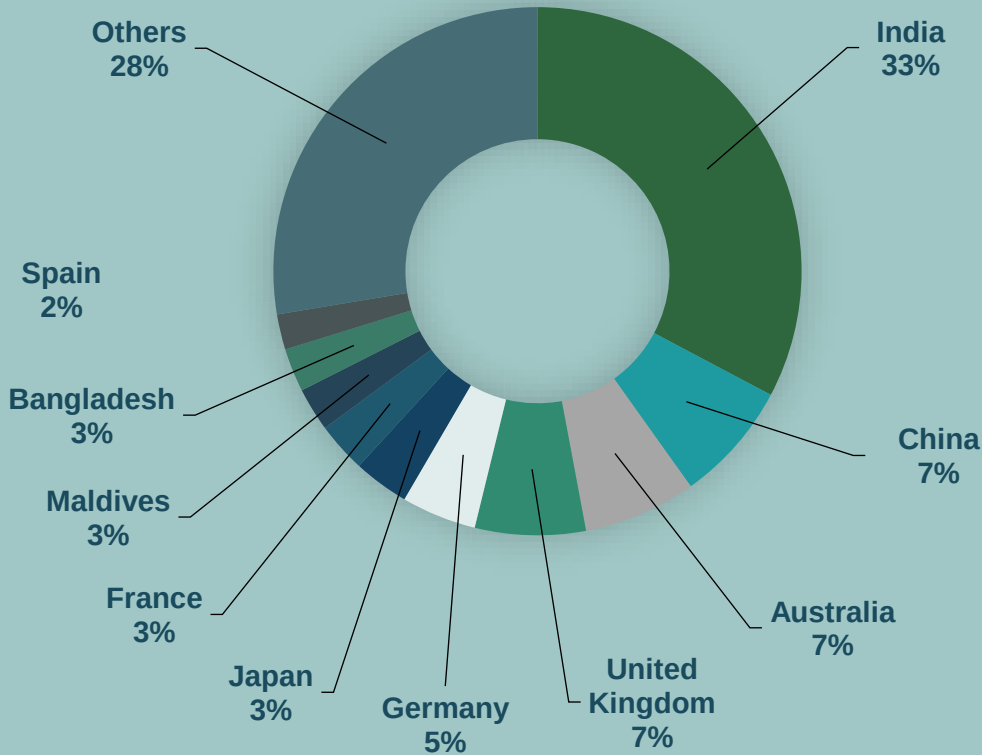
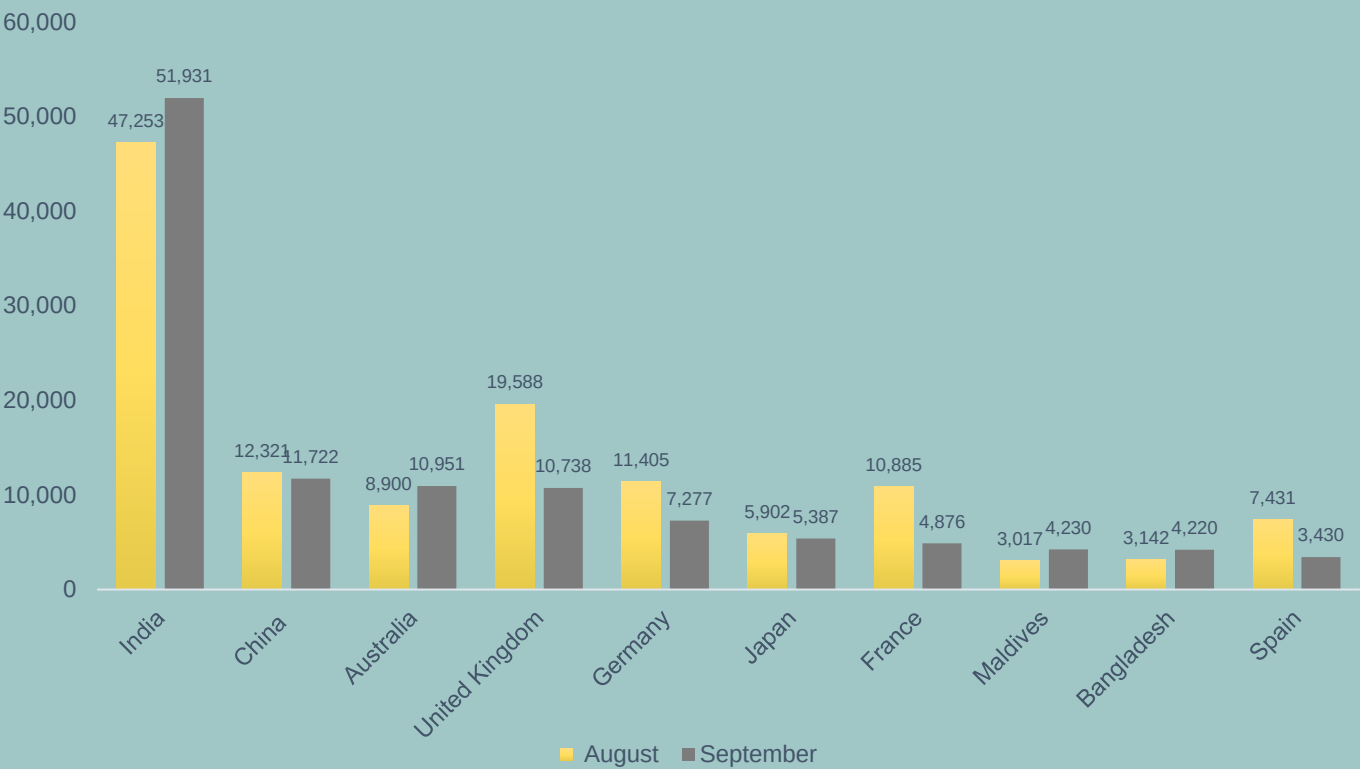




Table 2. Top ten source markets to Sri Lanka, September 2026

Rank	Country of Residence	Tourist arrivals (September 2026)			Tourist arrivals	
		By Air	By Sea	Total	September 2025	Percentage Change (2026/2025) September
1	India	51,515	416	51,931	49,697	4.5
2	China	11,722	0	11,722	10,527	11.4
3	Australia	10,950	1	10,951	9,105	20.3
4	United Kingdom	10,723	15	10,738	10,752	(0.1)
5	Germany	7,273	4	7,277	9,344	(22.1)
6	Japan	5,384	3	5,387	4,137	30.2
7	France	4,867	9	4,876	5,144	(5.2)
8	Maldives	4,230	0	4,230	3,930	7.6
9	Bangladesh	4,220	0	4,220	4,953	(14.8)
10	Spain	3,430	0	3,430	4,841	(29.1)

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





Top ten source markets

January to September 2026

Over the first nine months of 2026, Sri Lanka recorded a total of 1,693,679 tourist arrivals, reflecting a marginal year-on-year contraction of approximately 1.8% compared to 1,725,494 during the same period in 2025. While this overall dip is modest, the underlying cumulative data reveals a deeply polarized landscape, characterized by a few standout performers offsetting severe erosion in several traditionally strong European markets.

On the positive side, Japan led all source markets with the highest growth rate, surging by a remarkable 16.9% compared to 2025. India reaffirmed its undisputed volume dominance with a commanding 437,414 arrivals, reflecting an impressive 16.6% expansion—an absolute gain of over 62,000 visitors, which cushioned the broader downturn. China also posted robust growth of 10.8% (112,550 arrivals), alongside Australia's healthy 12.4% increase (86,989 arrivals). Underscoring the rising and resilient demand from the Asia-Pacific region, these standout markets served as vital pillars for Sri Lanka's tourism recovery.

Conversely, the cumulative data exposes vulnerabilities, particularly among European source markets. The most alarming market is Russia, which plummeted by a staggering 32.1% to just 82,991 arrivals an absolute loss of over 39,000 visitors compared to the previous year, likely driven by persistent geopolitical tensions and reduced air connectivity and other factors. The Netherlands followed with a steep 20.8% decline, while France (-10.5%), and Germany (-9.1%) all registered significant contradictions. Even the traditionally stable UK market slipped marginally by 0.7%, and the United States recorded a moderate drop of 5.2%.

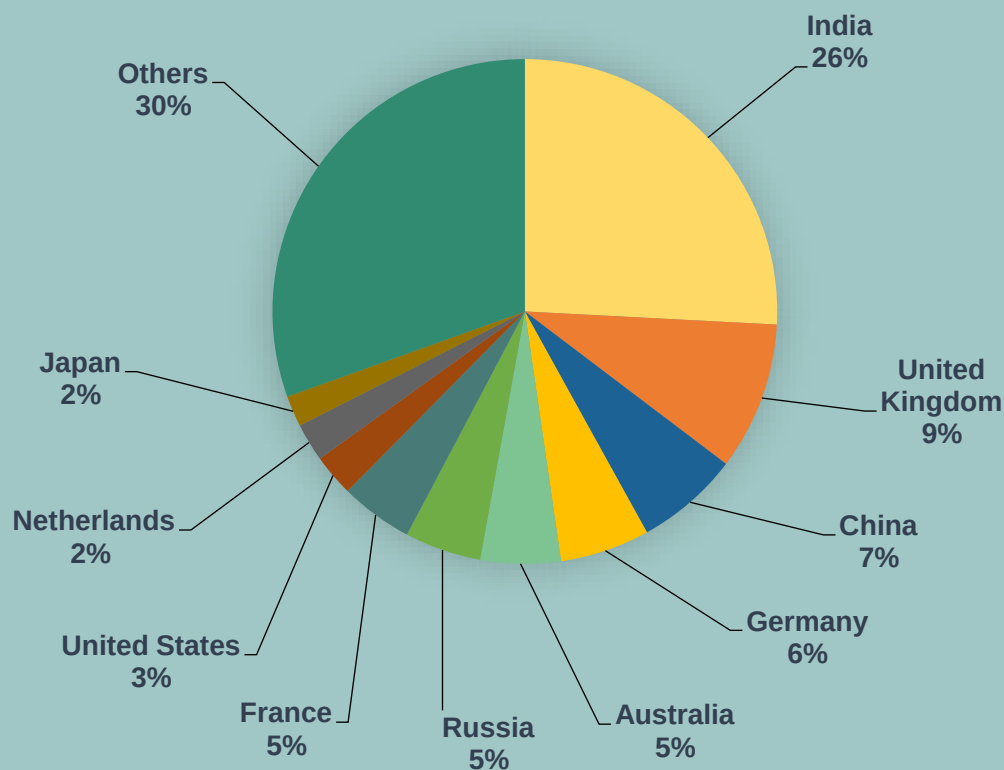




Table 3. Top ten markets to Sri Lanka, January to September 2026

Rank	Country of Residence	Tourist Arrivals (Jan -September 2026)	Tourist Arrivals (Jan -September 2025)	Percentage Change Jan – September 2026/2025
1	India	437,414	375,292	16.6
2	United Kingdom	160,727	161,893	(0.7)
3	China	112,550	101,590	10.8
4	Germany	97,278	106,988	(9.1)
5	Australia	86,989	77,380	12.4
6	Russia	82,991	122,144	(32.1)
7	France	78,860	88,155	(10.5)
8	United States	45,686	48,174	(5.2)
9	Netherlands	41,343	52,210	(20.8)
10	Japan	33,661	28,799	16.9
11	Others	516,180	562,869	(8.3)
Total		1,693,679	1,725,494	(1.8)

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





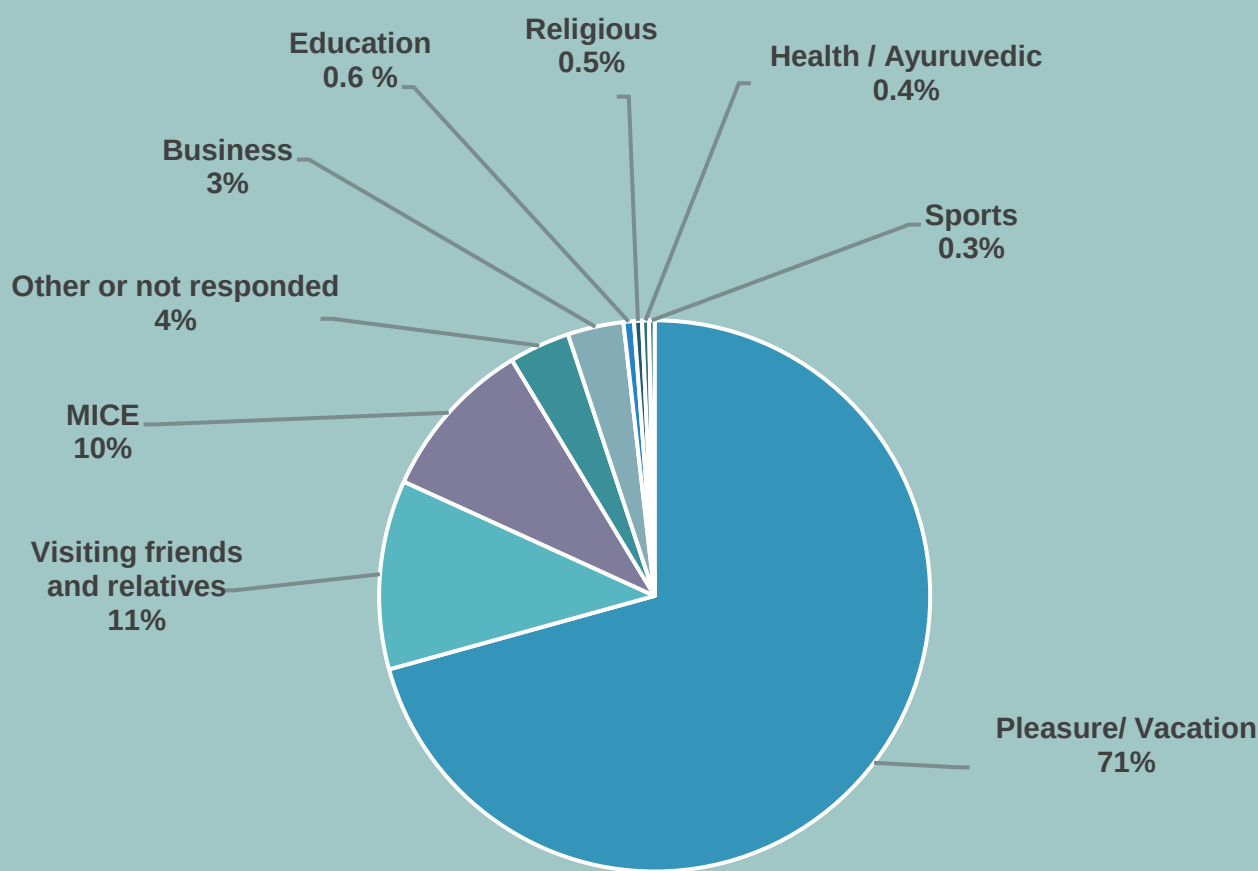
Tourist arrivals by purpose of visit

September 2026

The September 2026 purpose-of-visit profile shows that leisure travel continues to underpin international demand for Sri Lanka, with Pleasure/Vacation accounting for 71% of total visitor arrivals. Visiting Friends and Relatives (VFR) emerged as the second-largest segment at 11%, followed by MICE (Meetings, Incentives, Conferences and Exhibitions) at 10%. Business travel accounted for a further 3%, bringing the combined share of business-related travel, including MICE, to approximately 12.8% of arrivals. In contrast, the more specialised segments, namely religious, education, health/Ayurvedic and sports tourism, together represented only 1.8% of arrivals.

These findings reaffirm the country's established position as a leisure-oriented destination, while also pointing to considerable scope for diversification into specialised and higher-value segments. Greater strategic emphasis on MICE, wellness, sports, religious and education tourism could broaden the source market base, stimulate higher per-visitor expenditure, encourage longer lengths of stay, and strengthen the resilience and long-term sustainability of the tourism sector.

Chart 4: Purpose of visit, September 2026



**Chart 5: Purpose of visit vs main source markets**

An analysis of the purpose of visit by source market reveals that pleasure and vacation travel remained the principal motivation across most of Sri Lanka's key source markets in September 2026, although the proportions travelling for visiting friends and relatives (VFR), MICE and business purposes varied considerably. Leisure travel was most pronounced among visitors from China (88.77%), Japan (86.84%), Bangladesh (85.73%), Spain (84.02%) and India (75.38%), reflecting a strong orientation towards holiday tourism in these markets. France (73.50%) and Germany (72.97%) also exhibited predominantly leisure-oriented travel patterns.

VFR travel was most significant among visitors from the United Kingdom (30.50%) and Australia (29.80%), underscoring the importance of family ties and diaspora-related travel in these markets. Of the markets examined, the United Kingdom recorded the highest VFR share, while Germany (13.70%) and France (13.19%) also registered relatively substantial proportions.

MICE-related travel accounted for a moderate share of arrivals from Spain (13.35%), India (11.80%) and France (11.14%), suggesting potential for the further development of business events and other higher-value tourism activities in these markets. Business travel was highest among visitors from India (4.48%), followed by the United Kingdom (3.32%) and China (2.91%). Health and Ayurvedic tourism, though modest in overall terms, was comparatively more evident among visitors from Germany (3.64%) and Japan (1.54%)



Overall, the findings confirm that Sri Lanka's tourism demand remains primarily leisure-oriented, while revealing distinct variations in travel motivation across individual source markets. These differences point to the value of a targeted, source-market-specific approach to promotion and product development. Leisure-focused experiences may be emphasised in China, Japan, Bangladesh, Spain and India, whereas VFR-oriented strategies appear more appropriate for the United Kingdom and Australia. At the same time, selected European and Asian markets offer opportunities to strengthen the promotion of MICE and business tourism, enabling Sri Lanka to diversify its tourism offering and respond more effectively to the varied needs of international visitors.





Digital Agenda and Artificial Intelligence to Redesign Tourism: Implications for Sri Lanka



Introduction

Digital technologies and Artificial Intelligence (AI) are increasingly shaping how destinations are discovered, experienced, managed and promoted. AI-powered travel planning, personalised recommendations, automated customer service, predictive analytics and smart destination management are fundamentally reshaping the global tourism landscape. The World Tourism Day 2026 theme, "Digital Agenda and Artificial Intelligence to Redesign Tourism," underscores the need to embrace these developments in order to build a more competitive, inclusive, resilient and sustainable industry. For Sri Lanka, where tourism contributes significantly to foreign exchange earnings, employment, regional economic development and international connectivity, this transformation is both an opportunity and a strategic necessity. The theme also calls for a change in perspective: digital transformation should be understood not merely as the introduction of new technologies, but as an opportunity to redesign how the sector operates, delivers services, makes decisions and creates value.

Visitor Experience and Data-Driven Planning

Travellers now rely on digital platforms at every stage of their journey, from discovery and itinerary planning to payment and post-travel feedback. AI-powered assistants, multilingual chatbots and intelligent booking platforms can offer real-time information and tailored suggestions, connecting attractions, accommodation, transport and local experiences within an integrated digital environment. Multilingual services would be particularly valuable in improving Sri Lanka's accessibility to visitors from emerging and non-traditional source markets.

Digitalisation also allows tourism planning to become more evidence-based. Sri Lanka generates considerable volumes of tourism-related information through immigration records, airport surveys, accommodation establishments, service providers and online platforms, yet realising its full potential requires better integration, standardisation, analysis and accessibility. An integrated tourism data ecosystem, supported by AI-enabled analytical tools, could be used to forecast arrivals, assess demand, analyse visitor expenditure, monitor occupancy and anticipate fluctuations arising from geopolitical, economic, climatic and air connectivity factors. This represents an opportunity to move from reliance on historical statistics towards predictive, forward-looking planning, and the advancement of a tourism data warehouse initiative, together with AI-enabled analytical tools, is an important step in that direction.

Destination Management and Competitiveness

Smart destination management can help address visitor concentration, congestion, infrastructure pressure, waste management and the uneven distribution of tourism benefits. At destinations such as Sigiriya, Ella, Galle, Kandy and the coastal areas, digital visitor management, geospatial information systems and predictive analytics could provide information on visitor movements, peak periods and facility utilisation. Such information would support infrastructure planning, protect sensitive sites and guide visitors towards alternative attractions, thereby easing pressure on popular locations while creating opportunities for lesser-known destinations and local enterprises. This is especially pertinent to Sri Lanka, where long-term competitiveness depends not only on attracting more visitors but on managing destinations responsibly.



Digital visibility is equally critical to international competitiveness. Travellers increasingly discover destinations through social media, search engines, online platforms and AI-powered recommendation tools. AI-driven market intelligence can help identify emerging source markets and shifting consumer preferences, enabling campaigns targeted at specific segments such as adventure, wellness, cultural, wildlife, family, digital nomad and MICE travellers. As conversational AI tools increasingly influence destination choice, Sri Lanka must also ensure that accurate, comprehensive information on both established and emerging tourism products is available across relevant digital channels.

Inclusion and Sustainability

The benefits of digitalisation should extend beyond large establishments to SMEs, community-based operators, guides, homestay providers, transport operators and handicraft producers. Digital platforms offer these businesses access to wider markets, online booking, digital payments and promotion without heavy investment, while AI can support customer communication, translation, content generation and demand forecasting. This is vital to ensuring that tourism opportunities reach rural and less-developed destinations and that benefits are distributed more evenly. Initiatives such as the Tourism Start-Up Competition, held alongside the National Celebration of World Tourism Day 2026, provide a platform for young entrepreneurs, students and technology professionals to address real industry challenges.

Technology also supports sustainable and responsible tourism. Smart monitoring can assist in managing water and energy consumption, waste and environmental conditions, and AI-based tools can help assess visitor pressure on natural and cultural heritage sites. In ecologically sensitive areas, wildlife destinations, coastal environments and heritage locations, digital monitoring and reporting could strengthen the implementation of sustainability standards, while digital platforms can encourage responsible visitor behaviour. Technology should therefore be regarded as a means of protecting the natural and cultural assets on which Sri Lankan tourism depends, in addition to improving efficiency and profitability.

Institutional Readiness and Governance

Successful adoption of AI requires an enabling institutional environment and a coordinated approach among government institutions, industry associations, technology providers, universities and research institutions. Investment in digital literacy and AI-related skills is essential for tourism professionals, destination managers, entrepreneurs and public officials. Adoption must also be supported by safeguards covering data privacy, cybersecurity, information accuracy, transparency and responsible use, and technology should complement, not undermine, personal interaction, cultural understanding and authentic hospitality. Strengthened digital infrastructure, improved inter-agency data sharing, common data standards and a coordinated tourism digital transformation roadmap would provide a foundation for long-term progress. The introduction of GovPay for SLTDA services in September 2025 illustrates a practical step towards more convenient, efficient and transparent digital transactions in the tourism regulatory environment.





The digital transformation of tourism is already under way and will increasingly shape the competitiveness and sustainability of destinations worldwide. For Sri Lanka, the World Tourism Day 2026 theme offers an opportunity to move beyond conventional approaches towards a more intelligent, connected and data-driven industry that understands markets, improves visitor experiences, strengthens destination management, empowers local entrepreneurs and supports sustainable development. Its success, however, will depend less on the availability of technology than on the country's ability to integrate innovation into institutional processes, build human capacity and ensure that benefits are accessible across the tourism ecosystem. The objective is to use technology to enhance the human dimension of tourism, not to replace it, so that Sri Lanka's people, culture, hospitality, biodiversity and diverse destination experiences are connected more effectively with the world. A digitally empowered tourism industry, guided by reliable data, responsible innovation and human-centred development, can play a significant role in shaping the next chapter of Sri Lanka's tourism journey.



International tourist arrivals by country of residence

	September 2026			Tourist arrivals Sep 2025	% change Sep (26/25)	Total tourist arrivals up to Sep 2026	Total tourist arrivals up to Sep 2025	% change up to Sep (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
AMERICAS	6,541	9	6,550	6,656	(1.6)	85,378	90,021	(5.2)
North America	6,079	08	6,087	6,158	(1.2)	80,781	85,382	(5.4)
Canada	2,800	05	2,805	2,513	11.6	34,186	36,424	(6.1)
Mexico	106	0	106	76	39.5	909	784	15.9
United States	3,173	03	3,176	3,569	(11.0)	45,686	48,174	(5.2)
Caribbean & Central America	90	0	90	107	(15.9)	858	781	9.9
Costa Rica	07	0	07	05	40.0	80	83	(3.6)
Jamaica	08	0	08	05	60.0	59	36	63.9
Others	75	0	75	97	(22.7)	719	662	8.6
South America	372	1	373	391	(4.6)	3,739	3,858	(3.1)
Argentina	58	0	58	83	(30.1)	818	704	16.2
Brazil	128	01	129	123	4.9	1,265	1,434	(11.8)
Chile	39	0	39	38	2.6	447	489	(8.6)
Colombia	85	0	85	58	46.6	595	521	14.2
Others	62	0	62	89	(30.3)	614	710	(13.5)
AFRICA	1,256	02	1,258	1,209	4.1	12,332	12,183	1.2
North Africa	282	1	283	300	(5.7)	2,744	2,699	1.7
Morocco	86	01	87	89	(2.2)	813	848	(4.1)
Sudan	104	0	104	82	26.8	1,039	921	12.8
Others	92	0	92	129	(28.7)	892	930	(4.1)
Sub-Saharan Africa	974	01	975	909	7.3	9,588	9,484	1.1
Kenya	127	0	127	68	86.8	749	903	(17.1)
Mauritius	66	0	66	47	40.4	759	579	31.1
Nigeria	22	0	22	30	(26.7)	105	106	(0.9)
South Africa	332	01	333	409	(18.6)	3,449	3,627	(4.9)
Others	427	0	427	355	20.3	4,526	4,269	6.0



Monthly Tourist Arrivals Report September 2026

	September 2026			Tourist arrivals Sep 2025	% change Sep (26/25)	Total tourist arrivals up to Sep 2026	Total tourist arrivals up to Sep 2025	% change up to Sep (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
ASIA & PACIFIC	100,452	421	100,873	92,699	8.8	838,169	754,150	11.1
North East Asia	17,806	03	17,809	15,257	16.7	154,400	139,225	10.9
China	11,722	0	11,722	10,527	11.4	112,550	101,590	10.8
Japan	5,384	03	5,387	4,137	30.2	33,661	28,799	16.9
South Korea	684	0	684	567	20.6	8,006	8,678	(7.7)
Others	16	0	16	26	(38.5)	183	158	15.8
South East Asia	6,662	0	6,662	5,528	20.5	58,904	49,347	19.4
Cambodia	127	0	127	25	408.0	1,139	1,033	10.3
Indonesia	1,238	0	1,238	378	227.5	5,725	3,627	57.8
Malaysia	2,122	0	2,122	2,570	(17.4)	18,350	17,471	5.0
Myanmar	169	0	169	166	1.8	4,240	1,858	128.2
Philippines	581	0	581	643	(9.6)	5,328	5,101	4.5
Singapore	1,159	0	1,159	1,053	10.1	10,875	10,817	0.5
Thailand	651	0	651	449	45.0	6,718	6,257	7.4
Vietnam	587	0	587	216	171.8	6,084	2,897	110.0
Others	28	0	28	28	0.0	445	286	55.6
Oceania	12,441	02	12,443	10,350	20.2	97,970	87,120	12.5
Australia	10,950	01	10,951	9,105	20.3	86,989	77,380	12.4
New Zealand	1,445	01	1,446	1,200	20.5	10,550	9,411	12.1
Others	46	0	46	45	2.2	431	329	31.0
South Asia	63,543	416	63,959	61,564	3.9	526,895	478,458	10.1
Afghanistan	06	0	06	05	20.0	61	65	(6.2)
Bangladesh	4,220	0	4,220	4,953	(14.8)	33,052	45,438	(27.3)
Bhutan	36	0	36	70	(48.6)	469	487	(3.7)
India	51,515	416	51,931	49,697	4.5	437,414	375,292	16.6
Iran	138	0	138	846	(83.7)	1,557	7,460	(79.1)
Maldives	4,230	0	4,230	3,930	7.6	30,670	28,141	9.0
Nepal	781	0	781	595	31.3	5,225	4,272	22.3
Pakistan	2,617	0	2,617	1,468	78.3	18,447	17,303	6.6
EUROPE	47,101	30	47,131	56,090	(16.0)	733,099	844,870	(13.2)
Northern Europe	12,934	16	12,950	13,080	(1.0)	201,978	204,427	(1.2)
Denmark	571	01	572	601	(4.8)	13,279	13,315	(0.3)
Finland	142	0	142	193	(26.4)	3,195	3,095	3.2
Norway	523	0	523	515	1.6	8,224	9,742	(15.6)
Sweden	431	0	431	401	7.5	8,456	8,526	(0.8)
United Kingdom	10,723	15	10,738	10,752	(0.1)	160,727	161,893	(0.7)
Others	544	0	544	618	(12.0)	8,097	7,856	3.1

Monthly Tourist Arrivals Report September- 2026

	September 2026			Tourist arrivals Sep 2025	% change Sep (26/25)	Total tourist arrivals up to Sep 2026	Total tourist arrivals up to Sep 2025	% change up to Sep (26/25)
	Tourist arrivals							
	By Air	By Sea	Total					
Western Europe	19,185	13	19,198	23,596	(18.6)	268,592	302,914	(11.3)
Austria	751	0	751	708	6.1	11,355	12,924	(12.1)
Belgium	1,373	0	1,373	1,732	(20.7)	15,122	17,054	(11.3)
France	4,867	9	4,876	5,144	(5.2)	78,860	88,155	(10.5)
Germany	7,273	4	7,277	9,344	(22.1)	97,278	106,988	(9.1)
Netherlands	2,939	0	2,939	4,433	(33.7)	41,343	52,210	(20.8)
Switzerland	1,950	0	1,950	2,193	(11.1)	23,930	24,832	(3.6)
Others	32	0	32	42	(23.8)	704	751	(6.3)
Central/Eastern Europe	5,432		5,432	8,536	(36.4)	162,671	223,276	(27.1)
Belarus	116	0	116	208	(44.2)	6,220	5,958	4.4
Czech Republic	538	0	538	641	(16.1)	11,526	13,478	(14.5)
Estonia	14	0	14	39	(64.1)	2,309	2,837	(18.6)
Hungary	142	0	142	136	4.4	3,910	4,492	(13.0)
Kazakhstan	82	0	82	118	(30.5)	4,045	7,966	(49.2)
Lithuania	105	0	105	144	(27.1)	3,071	5,067	(39.4)
Poland	1,317	0	1,317	2,654	(50.4)	27,230	35,606	(23.5)
Romania	138	0	138	198	(30.3)	3,386	4,233	(20.0)
Russia	2,146	0	2,146	3,228	(33.5)	82,991	122,144	(32.1)
Slovakia	197	0	197	335	(41.2)	4,135	5,131	(19.4)
Ukraine	2,31	0	2,310	303	662.4	5,436	6,091	(10.8)
Others	406	0	406	532	(23.7)	8,412	10,273	(18.1)
Southern/ Mediterranean Europe	9,550	01	9,551	10,878	(12.2)	99,858	114,253	(12.6)
Greece	165	0	165	220	(25.0)	2,952	3,035	(2.7)
Italy	2,057	1	2,058	2,340	(12.1)	31,527	39,030	(19.2)
Portugal	405	0	405	459	(11.8)	4,345	5,768	(24.7)
Spain	3,430	0	3,430	4,841	(29.1)	27,269	34,436	(20.8)
Turkey	575	0	575	423	35.9	6,808	6,085	11.9
Israel	2,549	0	2,549	2,136	19.3	20,784	17,553	18.4
Others	369	0	369	459	(19.6)	6,173	8,346	(26.0)
MIDDLE EAST	2,745	0	2,745	2,317	18.5	24,701	24,270	1.8
Bahrain	127	0	127	76	67.1	1,227	1,063	15.4
Egypt	300	0	300	261	14.9	2,573	3,122	(17.6)
Iraq	291	0	291	302	(3.6)	1,384	1,265	9.4
Jordan	186	0	186	177	5.1	1,778	2,099	(15.3)
Kuwait	126	0	126	142	(11.3)	1,190	1,529	(22.2)
Lebanon	265	0	265	261	1.5	2,107	2,510	(16.1)
Oman	317	0	317	199	59.3	3,589	2,103	70.7
Qatar	64	0	64	34	88.2	652	733	(11.1)
Saudi Arabia	536	0	536	326	64.4	4,386	4,639	(5.5)
United Arab Emirates	375	0	375	464	(19.2)	4,840	4,295	12.7
Others	158	0	158	75	110.7	975	912	6.9
TOTAL	158,095	462	158,557	158,971	(0.3)	1,693,679	1,725,494	(1.8)



Main last departure airports and airlines to Sri Lanka, September 2026

An analysis of the last port of departure is vital to understanding certain patterns of travel, as it reveals the principal gateways through which international visitors reach Sri Lanka. The September 2026 data indicate that the country's air connectivity remains concentrated around a limited number of major regional transit hubs, chiefly across South Asia and the Middle East. This pattern underscores the importance of these hubs in shaping visitor flows, and suggests that airline capacity, route availability and transit connectivity at these points exert considerable influence on arrival performance.

Accordingly, Chennai (10.19%), Mumbai (7.83%), and Doha (7.74%) collectively represented 25.76% of all recorded last ports of departure, meaning that more than one-quarter of departing visitors passed through these three major gateways. This concentration has important implications for tourism resilience, as disruptions to aviation networks in India or to major Middle Eastern transit hubs could potentially affect the movement of tourists to and from Sri Lanka.

Gulf aviation hubs also played a significant role, with Abu Dhabi accounting for 7.5% and Dubai for 6.13% of departures. Meanwhile, Indian airports such as Delhi (5.83%), Bangalore (5.58%), and Hyderabad (3.66%) further demonstrate the importance of Indian aviation networks. Collectively, these Indian gateways accounted for 15.07%, highlighting India's dual significance as both an important tourism source market and a major connectivity partner for Sri Lanka.

Outside the Indian and Middle Eastern clusters, Kuala Lumpur (4.74%), Singapore (4.32%), and Istanbul (4.06%) indicate strong links with Southeast Asia and Turkey. Other Asian gateways, including Hong Kong (2.5%), Bangkok (2.06%) and Male (2.18%), also contributed to Sri Lanka's wider regional connectivity. European and long-haul gateways recorded comparatively smaller individual shares, with London accounting for 3.09% and Melbourne for 3.05%, while Narita represented 1.12% of total departures.

Overall, the data highlight three key characteristics of Sri Lanka's international air connectivity. First, the country remains considerably reliant on regional hub-based aviation networks rather than depending exclusively on direct point-to-point air services. Second, the sizeable contribution of Indian airports underlines India's strategic role not only as a major source of tourists but also as an important gateway facilitating international travel to and from Sri Lanka. Third, the significant shares recorded by Doha, Dubai, and Abu Dhabi demonstrate the continuing importance of Gulf aviation hubs in connecting Sri Lanka with European, North American, and other long-haul markets.

In light of these patterns, Sri Lanka's tourism and aviation policies should pursue a balanced connectivity strategy. While expanding direct air services to high-potential source markets remains important, equal attention should be given to maintaining and strengthening connections through key regional transit hubs. Greater diversification of transit options across Indian and Middle Eastern gateways could reduce dependence on individual hubs and improve the resilience of international visitor flows. At the same time, strengthening direct connectivity with strategically important source markets would further enhance Sri Lanka's accessibility and support the long-term growth and stability of the tourism sector.



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

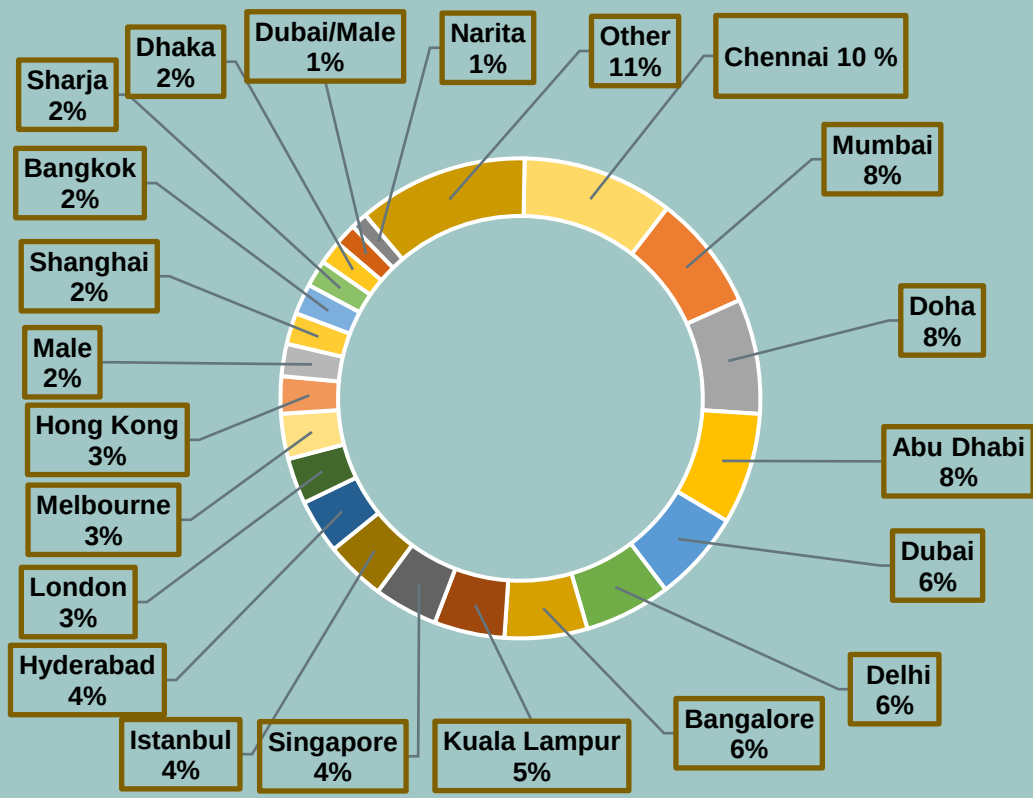
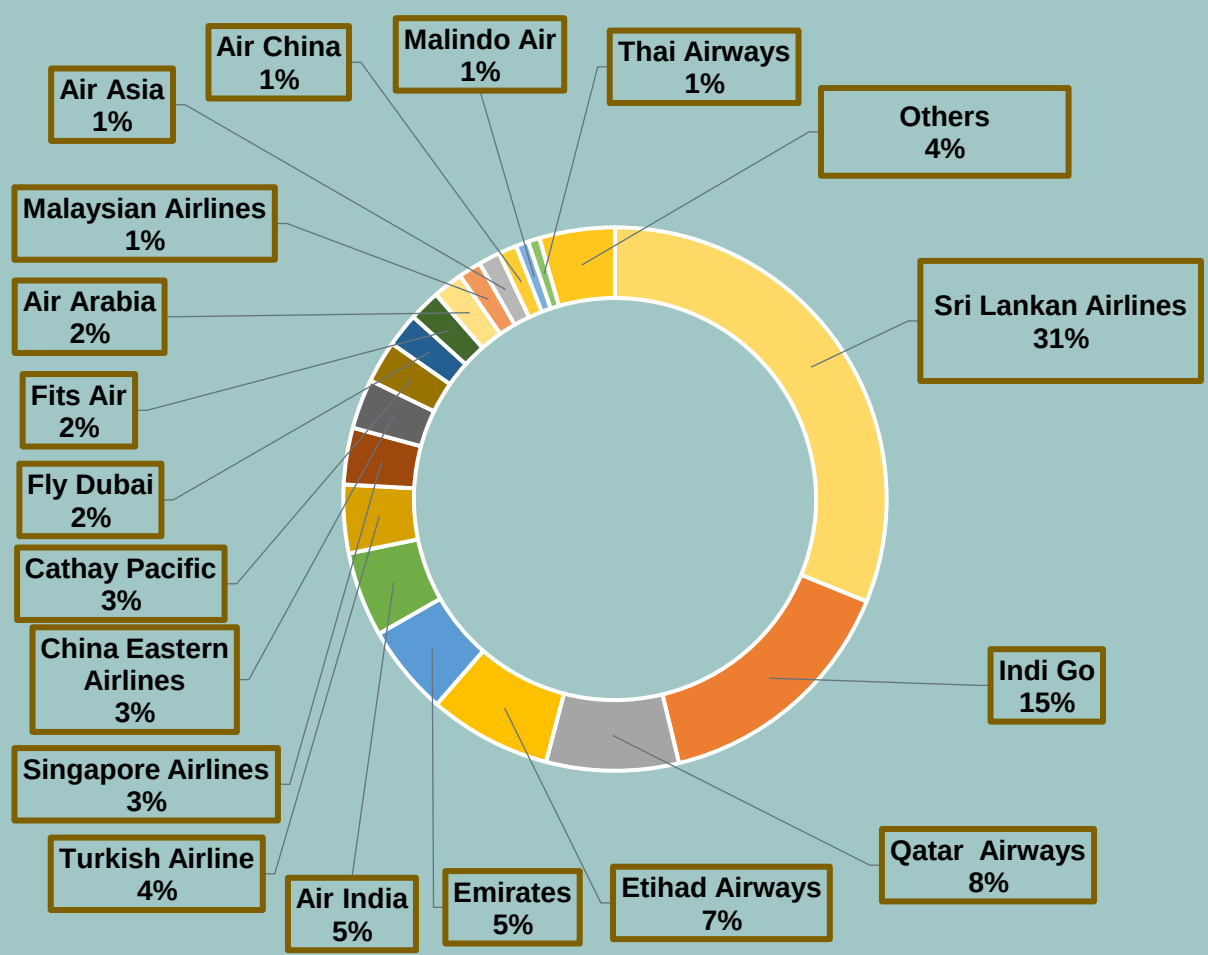


Chart 7. Main airlines to Sri Lanka, September 2026



Airlines play a vital role in carrying tourists to a destination, and the September 2026 airline arrival data illustrate this clearly in the case of Sri Lanka. International tourist arrivals during the month were largely supported by the national carrier, together with a relatively concentrated network of major regional and international airlines that collectively shaped the country's inbound air access. Sri Lankan Airlines remained the leading carrier, transporting 49,398 tourists, equivalent to 31.15% of total arrivals. This means that almost one-third of all tourists arriving in Sri Lanka during the month travelled with the national airline, emphasizing its important role in maintaining the country's international tourism connectivity and access to key markets.

IndiGo ranked as the second-largest carrier, accounting for 15.05% of tourist arrivals. This substantial share reflects the growing importance of India as a major source market for Sri Lanka, as well as the extensive air links between the two countries. The major Gulf carriers, namely Qatar Airways (7.87%), Etihad Airways (7.3%), and Emirates (5.37%), jointly accounted for 20.54% of arrivals. Their combined contribution highlights the strategic importance of Middle Eastern aviation hubs in facilitating tourist flows from Europe, North America, and other long-haul markets.

At the same time, the relatively high concentration of arrivals among a small number of major airlines presents a potential vulnerability for Sri Lanka's tourism sector. Any operational disruptions affecting these airlines or their principal hub airports could have a substantial effect on international visitor flows, as demonstrated by the impact observed in the months following the Middle East conflict. This underlines the importance of maintaining alternative connectivity options and reducing excessive dependence on a limited number of carriers and transit hubs.

Sri Lanka also maintained a relatively diverse secondary airline network. Air India accounted for 5.04% of tourist arrivals, followed by Turkish Airlines with 4.06%, Singapore Airlines with 3.38%, China Eastern with 2.95%, Cathay Pacific with 2.5%, and Fly Dubai with 2%. These carriers provide additional links to important markets across Asia, Europe, and the Middle East, contributing to the overall breadth of Sri Lanka's international air connectivity.

The five leading airlines, namely Sri Lankan Airlines, IndiGo, Qatar Airways, Etihad Airways, and Emirates, collectively accounted for approximately 66.74% of total tourist arrivals. This indicates a relatively high degree of dependence on a small group of major carriers and highlights the importance of these airlines to Sri Lanka's tourism performance.

Overall, the September figures demonstrate that Sri Lanka's tourism sector is closely associated with the capacity, stability, and resilience of its international airline network. The combination of a strong national carrier, extensive connectivity with India, and well-established links through Gulf aviation hubs provides a strong foundation for international visitor access. However, further development of direct international routes, together with greater diversification of airline partnerships and transit hubs, would help reduce connectivity-related risks and strengthen the resilience of Sri Lanka's tourism sector against external disruptions.



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

September 2026

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

Country	Chennai	Mumbai	Doha	Abu Dhabi	Dubai	Delhi	Bangalore	Kuala Lumpur	Singapore	Istanbul	Hyderabad	London	Melbourne	Hong Kong	Male	Shanghai	Bangkok	Sharja	Dhaka	Dubai/Male	Narita	Other	Total
India	13,981	11,080	138	416	857	7,009	8,211	178	265	13	5,528	11	53	37	134	5	260	149	16	28	3	3,559	51,931
China	21	12	21	35	115	22	5	1,231	221	9	4	8	7	2,018	258	2,682	525	26	81	56	3	4,362	11,722
Australia	158	51	81	69	84	235	51	1,017	2,629	21	39	100	4,256	261	99	23	235	20	6	20	2	1,494	10,951
United Kingdom	304	229	2,327	1,136	810	163	69	201	133	292	41	3,885	98	82	85	18	105	149	21	40	4	546	10,738
Germany	83	246	1,605	1,376	1,250	164	52	108	31	922	12	121	11	14	39	5	51	201	3	31	0	952	7,277
Japan	72	72	15	4	23	417	81	462	920	5	3	24	7	519	25	286	441	3	8	2	1,716	282	5,387
France	131	44	1,174	989	619	169	35	96	29	862	7	107	23	18	19	15	40	29	3	12	1	454	4,876
Maldives	28	1	4	4	453	5	21	151	16	0	3	0	2	2	1,262		105		4	1,875	0	294	4,230
Bangladesh	532	17	80	15	38	18	1	94	23	0	0	4	1	4	1,037	2	11	14	2,251	2	0	76	4,220
Spain	19	13	1,345	1,024	289	29	5	49	17	456	3	19	6	4	35	8	17	16	2	11	3	60	3,430

The last port of departure data for Sri Lanka's key source markets in September 2026 provide useful insights into the main aviation gateways through which international visitors travelled to the country. The findings reveal considerable variation in connectivity patterns across source markets. While some markets are primarily served through direct or geographically proximate routes, others depend more heavily on Middle Eastern and Asian transit hubs to reach Sri Lanka.

India demonstrates the highest concentration of departures through Indian cities. Chennai (13,981), Mumbai (11,080), Bangalore (8,211), Delhi (7,009), and Hyderabad (5,528) collectively accounted for approximately 88.2% of Indian arrivals. This pattern differs considerably from that observed among many European source markets, where Gulf aviation hubs also play a prominent role. The high proportion of arrivals through Indian cities reflects Sri Lanka's geographical proximity to India and the extensive air connectivity between the two countries. It also emphasizes the importance of maintaining existing direct services and expanding connectivity beyond the major Indian metropolitan areas to support continued growth from the Indian market.

Reliance on Gulf aviation hubs is particularly evident among visitors from the UK, Germany, and Spain. Doha, Dubai, Abu Dhabi, and Sharjah collectively represented approximately 78% of Spanish arrivals, 60.9% of German arrivals, 57.6% of French arrivals, and 41.2% of UK arrivals within the dataset. These figures demonstrate the important role played by Gulf hubs in linking Sri Lanka with European source markets. As a result, changes in flight capacity, ticket prices, schedules, or operational disruptions at major hubs such as Doha, Dubai, and Abu Dhabi could have a considerable impact on tourist movements from Europe to Sri Lanka.

The UK market presents a somewhat different connectivity structure. London alone accounted for 36.2% of UK arrivals, while Doha, Dubai, and Abu Dhabi collectively represented 39.8%. This indicates that UK visitors reach Sri Lanka through a combination of direct or near-direct services and hub-based routes. Consequently, the UK market has a relatively more diversified connectivity structure compared with markets such as Spain and Germany, although Gulf hubs continue to represent an important component of access.

China demonstrates a distinctly Asian-oriented connectivity pattern. Shanghai (2,682), Hong Kong (2,018), Kuala Lumpur (1,231), and Bangkok (525) emerged as important gateways for Chinese visitors, while only a relatively small proportion travelled through Gulf hubs. The combined contribution of these four major Asian gateways represents a substantial share of Chinese arrivals in the dataset. This suggests that strengthening connectivity with major Chinese cities, together with maintaining effective links through regional hubs such as Kuala Lumpur, Bangkok, and Hong Kong, could play an important role in further developing the Chinese market.

Australia exhibits another distinctive connectivity pattern, with Melbourne (4,256), Singapore (2,629), and Kuala Lumpur (1,017) serving as the principal gateways. Asian routes accounted for almost half of Australian arrivals recorded in the table, whereas Gulf-based connectivity played a comparatively smaller role. This highlights the strategic importance of maintaining strong aviation links with Singapore and Kuala Lumpur, alongside direct connectivity with major Australian cities, particularly Melbourne.

Japan also demonstrates a diversified Asian connectivity structure. Narita recorded 1,716 arrivals, followed by Singapore (920), Hong Kong (519), Kuala Lumpur (462), and Bangkok (441). These figures indicate that Japanese visitors access Sri Lanka through a combination of direct connectivity from Japan and transit services through major Asian hubs. Although this diversified structure provides some degree of resilience, it also suggests an opportunity to further strengthen direct air connectivity between Japan and Sri Lanka.

On the other hand, arrivals from the Maldives were primarily routed through Male, which recorded 1,262 arrivals, while Bangladesh was predominantly represented by Dhaka, with 2,251 arrivals.

Overall, the data illustrate both the strengths and potential vulnerabilities of Sri Lanka's existing international air-access structure. The extensive use of regional transit hubs enables Sri Lanka to attract visitors from distant markets that may not generate sufficient demand for extensive direct services. However, high reliance on a limited number of major transit hubs also increases exposure to geopolitical developments, operational disruptions, changes in airline capacity, and fluctuations in airfares and schedules. A more market-specific air connectivity strategy would therefore be beneficial, combining the development of direct routes with greater diversification of transit hubs. Such an approach could improve the resilience of Sri Lanka's international air network while supporting the long-term sustainability and expansion of the country's tourism sector.





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

Country	Sri Lankan Airlines	Indi Go	Qatar Airways	Etihad Airways	Emirates	Air India	Turkish Airline	Singapore Airlines	China Eastern Airlines	Cathay Pacific	Fly Dubai	Fits Air	Air Arabia	Malaysian Airlines	Air Asia	Air China	Malindo Air	Thai Airways	Other	Total
India	40.99	41.45	0.25	0.45	0.72	11.76	0.03	0.23	0.01	0.07	0.80	1.47	0.29	0.05	0.08	0.01	0.09	0.08	1.18	100.00
China	15.95	0.20	0.22	0.28	0.64	0.23	0.08	0.85	33.52	17.22	0.67	0.32	0.22	2.24	3.20	14.04	2.04	1.91	6.16	100.00
Australia	43.11	1.66	0.70	0.58	0.72	0.70	0.19	21.11	0.23	2.38	0.21	0.06	0.18	7.38	0.64	0.05	0.54	0.76	18.78	100.00
United Kingdom	43.31	2.91	22.49	10.58	6.92	2.10	2.72	0.92	0.20	0.76	0.73	0.09	1.39	0.36	0.62	0.03	0.44	0.44	2.99	100.00
Germany	16.11	1.73	22.06	18.83	14.86	3.64	12.67	0.30	0.12	0.19	2.67	0.07	2.76	0.11	0.69	0.19	0.36	0.25	2.40	100.00
Japan	52.09	1.11	0.28	0.07	0.20	2.77	0.09	13.22	5.42	9.63	0.09	0.02	0.06	2.91	2.41	0.19	1.78	3.06	4.59	100.00
France	11.69	2.77	25.18	20.24	11.51	3.32	17.68	0.37	0.31	0.37	1.03	0.04	0.59	0.21	0.94	0.06	0.57	0.35	2.77	100.00
Maldives	34.16	0.19	0.09	0.09	41.54	0.00	0.00	0.14	0.00	0.05	13.48	5.51	0.00	0.09	0.21	0.00	0.17	0.05	4.23	100.00
Bangladesh	37.68	12.63	1.85	0.36	0.45	0.66	0.00	0.38	0.07	0.09	0.50	43.13	0.33	0.21	0.24	0.00	0.28	0.09	1.04	100.00
Spain	3.85	0.70	39.53	29.83	7.58	0.38	13.29	0.26	0.26	0.12	0.87	0.29	0.47	0.17	0.64	0.12	0.41	0.15	1.08	100.00

The matrix of the top ten source markets and the principal airlines serving Sri Lanka highlights the extent to which each market's arrivals depend on specific carriers and their route networks. Accordingly Sri Lankan Airlines continues to serve as the principal carrier for several of Sri Lanka's key source markets, although the extent of reliance on the national carrier differs substantially across individual markets. The largest share of tourists travelling with Sri Lankan Airlines was recorded among visitors from Japan (52.09%), followed by the United Kingdom (43.31%), Australia (43.11%), India (40.99%), and Maldives (34.16%). These figures demonstrate the continuing significance of the national carrier in maintaining air connectivity with important Asian and long-haul tourism markets.

The Indian market displays particularly strong competition between IndiGo and Sri Lankan Airlines, which accounted for 41.45% and 40.99% of Indian tourist arrivals respectively. Combined, the two carriers transported approximately 82.44% of visitors from India, while Air India contributed a further 11.76%. This concentration indicates that the Indian tourism market is highly influenced by the availability and capacity of direct air services. Consequently, maintaining adequate flight frequencies and seat capacity is particularly important for sustaining tourist flows from Sri Lanka's largest source market.

The major European markets, in comparison, demonstrate a more diverse airline distribution and greater dependence on international hub carriers. In the United Kingdom, Sri Lankan Airlines held the largest share at 43.31%, followed by Qatar Airways at 22.49%, Etihad Airways at 10.58%, and Emirates at 6.92%. Germany showed a more distributed pattern, with Qatar Airways accounting for 22.06%, Etihad Airways 18.83%, Sri Lankan Airlines 16.11%, and Emirates 14.86%. France displayed a similar reliance on international connecting carriers, with Qatar Airways representing 25.18%, Etihad Airways 20.24%, and Turkish Airlines 17.68%.

Spain, representing an important Southern European market, showed an even greater dependence on connecting airlines. Qatar Airways held the largest share at 39.53%, followed by Etihad Airways at 29.83% and Turkish Airlines at 13.29%. This relatively dispersed airline structure suggests that Spanish visitors reach Sri Lanka predominantly through international aviation hubs rather than through a strong direct-service network.



China exhibits a distinct airline distribution compared with the European markets. Sri Lankan Airlines accounted for only 15.95% of Chinese tourist arrivals, while China Eastern Airlines recorded the largest share at 33.52%. Cathay Pacific followed with 17.22%, and Air China accounted for 14.04%. Collectively, these three airlines represented approximately 64.78% of Chinese arrivals. This indicates that further recovery and growth in the Chinese tourism market may be closely associated with the availability and expansion of services provided by Chinese and other regional Asian carriers.

The Japanese market recorded the highest dependence on Sri Lankan Airlines, with 52.09% of Japanese tourists travelling with the national carrier. Singapore Airlines, at 13.22%, and Cathay Pacific, at 9.63%, were the next most significant carriers. A similar pattern can be observed in the Australian market, where Sri Lankan Airlines accounted for 43.11% of arrivals, followed by Singapore Airlines at 21.11% and Malaysia Airlines at 7.38%. These patterns demonstrate that long-haul markets benefit from a combination of direct air services and established connectivity through major Asian aviation hubs.

Overall, the distribution of airline market shares demonstrates the close relationship between Sri Lanka's tourism performance and the availability, frequency, and reliability of international air services. Although Sri Lankan Airlines provides a substantial connectivity base for several important source markets, European and other long-haul markets remain significantly dependent on international carriers operating through major hubs such as Doha, Dubai, Abu Dhabi, and Istanbul. Consequently, disruptions affecting these transit hubs could potentially result in considerable impacts on tourist arrivals.

From a tourism and aviation planning perspective, maintaining a diversified network of airline partners and transit options is therefore essential. Strengthening direct air routes where commercially feasible, while simultaneously monitoring changes in airline market shares, flight frequencies, and available capacity, would help reduce connectivity risks and support the continued expansion and stability of Sri Lanka's international tourist arrivals.





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