



2025



Year In Review

Sri Lanka Tourism Development Authority



HIGHLIGHT

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**January
to June**

HIGHLIGHTS



**Tourist
arrivals**

Tourist arrivals
1,168,044



Tourism revenue
1,712.6* USD Mn
1.71* billion USD
509,995.7* RS Mn

**Tourism
revenue**

**Average
duration of
stay**

Average duration of stay
8.34* nights



**Receipt per tourist per
day / average
expenditure per day**

171.74* USD

**Receipt per tourist
per day / average
expenditure per day**





TOURIST ARRIVALS TO SRI LANKA

Chart 01: Tourist arrivals by month, January to June 2024 & 2025

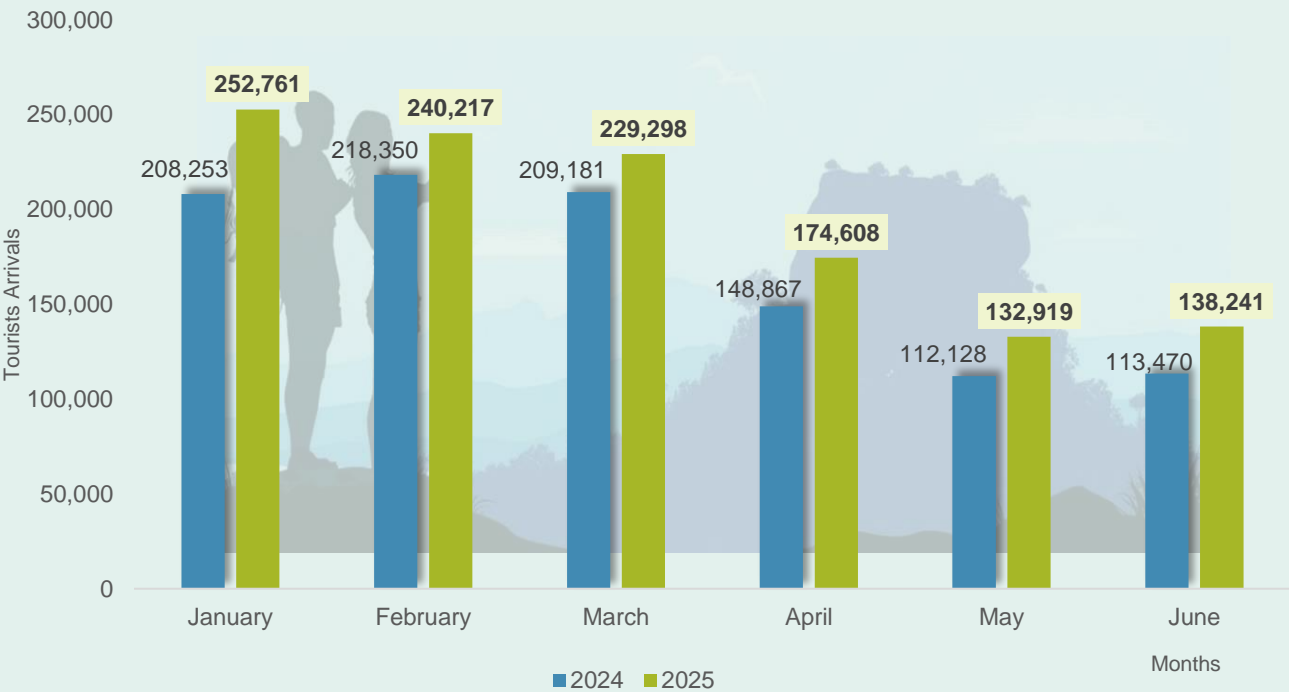


Table 01: Tourist arrivals by month & percentage change, 2024 & 2025

Month	2024	2025	% Cha. 2025/24
January	208,253	252,761	21.4
February	218,350	240,217	10.0
March	209,181	229,298	9.6
April	148,867	174,608	17.3
May	112,128	132,919	18.5
June	113,470	138,241	21.8
Total	1,010,249	1,168,044	15.6



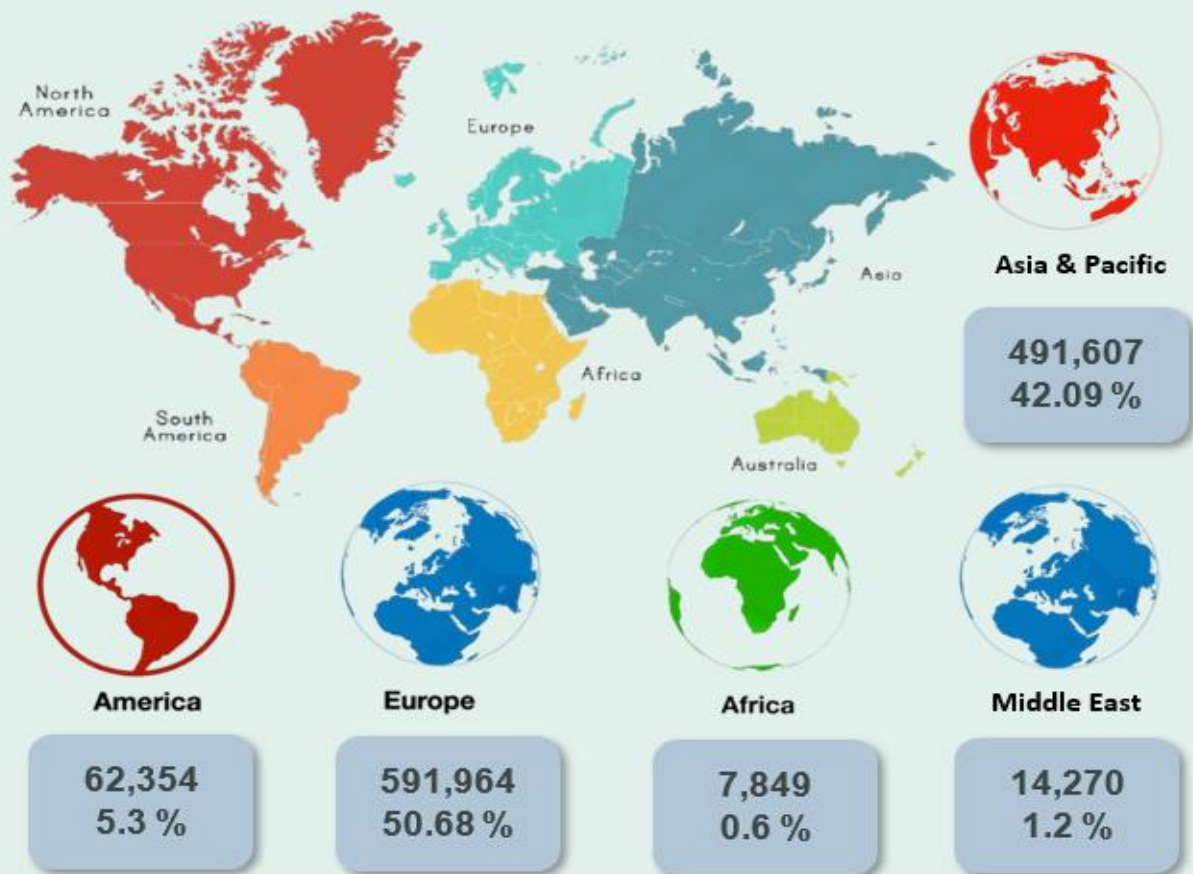


Tourist arrivals to Sri Lanka during the first half of 2025 showed a strong upward trend, with a total of **1,168,044** visitors, marking a **15.6%** increase compared to the 1,010,249 arrivals in the same period of 2024. Each month from January to June recorded year on year growth, indicating sustained recovery and rising global interest in the destination. January 2025 led with 252,761 arrivals, up by 21.4%, followed by February and March, which saw increases of 10.0% and 9.6%, respectively. The second quarter also showed significant improvement, with April arrivals growing by 17.3%, May by 18.5%, and June recording the highest growth rate at 21.8%. This consistent monthly growth suggests strengthened confidence in Sri Lanka as a tourist destination, possibly driven by improved connectivity, seasonal promotions, better visa facilitation, and enhanced marketing efforts. If this trend continues, the country is well positioned to surpass its previous annual tourism performance.





Tourist arrivals by region January to June 2025



From January to June, Europe emerged as the leading source region for tourist arrivals to Sri Lanka, contributing 591,964 visitors, which accounts for 50.7% of total arrivals. This dominant share underscores the continued importance of European markets particularly countries like the UK, Germany, and France in driving Sri Lanka’s tourism recovery and growth.

Asia and the Pacific followed closely behind, recording 491,607 arrivals, or 42.1% of the total. This reflects the strong presence of regional markets such as India, China, and Australia. Proximity, growing middle-class outbound travel, and improving air connectivity are key factors driving arrivals from this region.

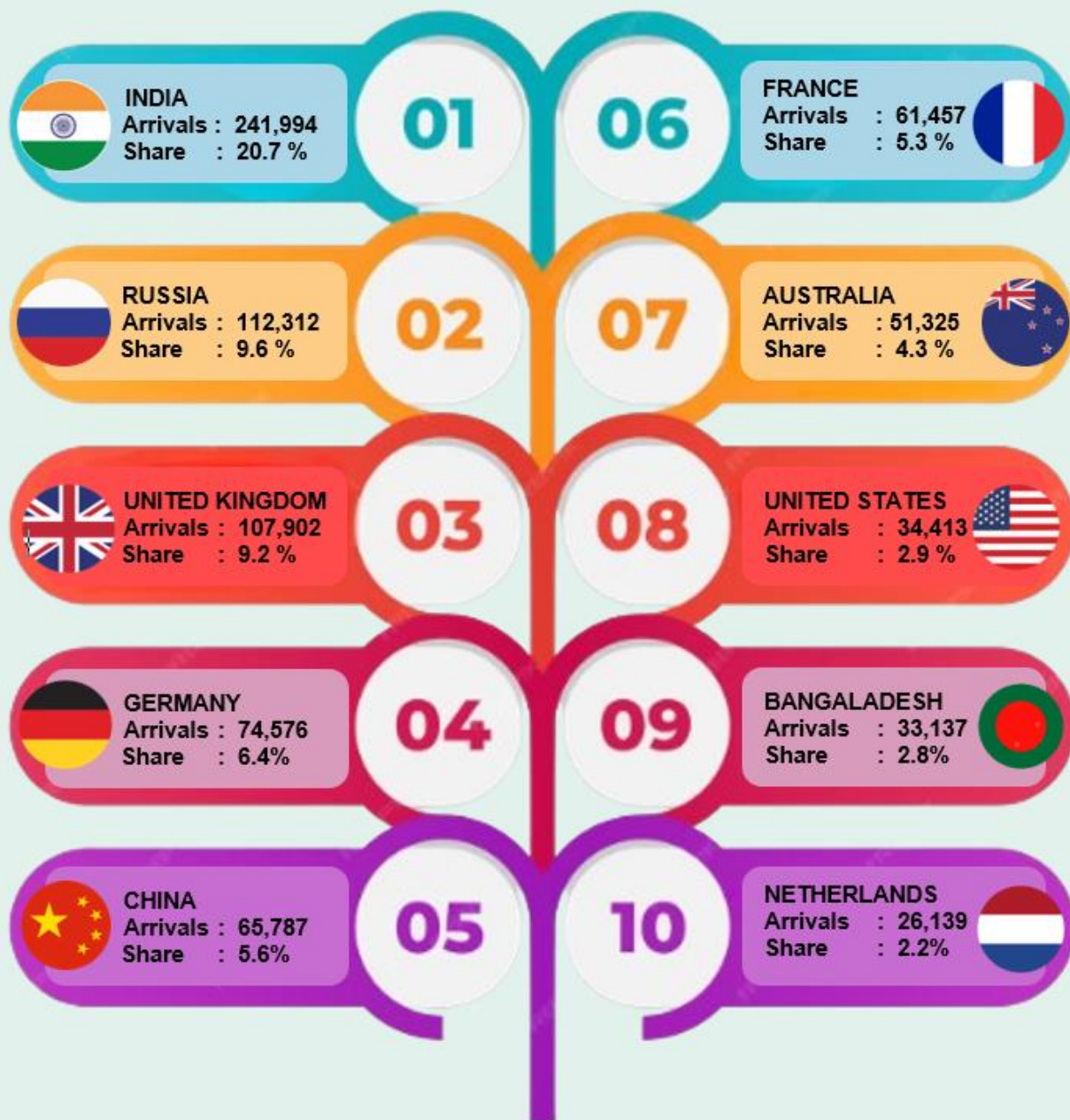
In contrast, the Americas accounted for 62,354 tourists, making up 5.3% of the total. Although a smaller share, this represents a steady contribution, mainly from markets such as the United States and Canada. The Middle East contributed 14,270 visitors (1.2%), while Africa recorded 7,849 arrivals (0.7%), both regions showing lower shares but with potential for targeted growth.

The data highlights a strong reliance on Europe and Asia-Pacific for Sri Lanka’s tourism industry, with emerging opportunities to diversify into the Americas, Middle East, and Africa.



Year in review, January to June 2025

Top ten source markets to Sri Lanka, January to June 2025



Sri Lanka's tourism sector demonstrated strong growth in the first half of 2025 compared to the same period in 2024, with total arrivals from the listed source markets increasing from approximately 1,010,249 to 1,168,044, marking a 15.6% year on year rise. This upward trend reflects a robust recovery for the industry, driven by significant contributions from key markets. The data highlights both the dominance of traditional source countries and the emergence of high growth markets, painting an optimistic picture for Sri Lanka's tourism landscape.



Table 02: Top ten markets to Sri Lanka, January to June 2024 & 2025

Country	Tourist arrivals 2025	Tourist arrivals 2024	Percentage change 25/24
India	241,994	184,468	31.2
Russian Federation	112,312	114,104	(1.6)
United Kingdom	107,902	89,352	20.8
Germany	74,576	70,070	6.4
China	65,787	68,764	(4.3)
France	61,457	49,340	24.6
Australia	51,325	40,746	26.0
United States	34,413	32,717	5.2
Bangladesh	33,137	15,632	112.0
Netherlands	26,139	19,466	34.3
Others	359,002	325,590	10.3

India remained the undisputed leader among Sri Lanka's source markets, with 241,994 arrivals in January to June 2025, accounting for 20.7% of the total arrivals listed. The country also recorded one of the highest growth rates at 31.2%, up from 184,468 arrivals in 2024. This surge highlights India's critical role in sustaining and expanding Sri Lanka's tourism sector. Meanwhile, the Russian Federation, despite a slight decline of (1.6%) (from 114,104 to 112,312 arrivals), retained its position as the second largest source market, indicating its continued importance despite geopolitical or economic challenges.

Several markets exhibited remarkable growth, with Bangladesh standing out as the fastest growing source market. Its arrivals more than doubled, soaring by 112.0% from 15,632 in 2024 to 33,137 in 2025. Though still a relatively small market in absolute numbers, this exponential increase suggests rising travel demand from Bangladesh. Other high growth markets included Australia (26.0%), which climbed from 40,746 to 51,325 arrivals, and France (24.6%), which increased from 49,340 to 61,457 arrivals. The United Kingdom, Sri Lanka's third largest market, also saw strong growth at 20.8%, rising from 89,352 to 107,902 arrivals, while the Netherlands posted a 34.3% increase, jumping from 19,466 to 26,139 arrivals.

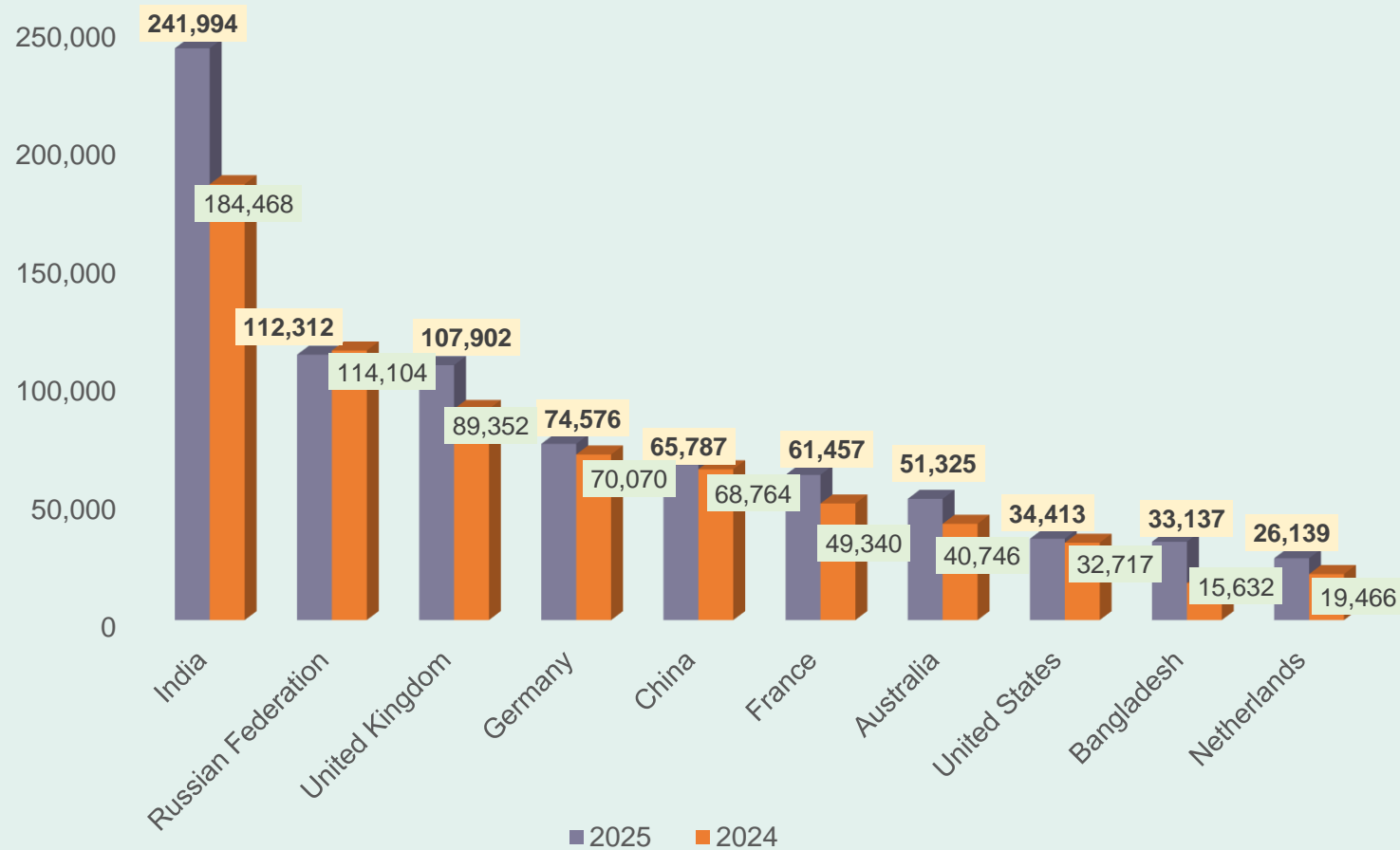
In contrast, some traditional markets experienced more moderate growth. Germany's arrivals grew by 6.4% (from 70,070 to 74,576), while China saw a modest (4.3%) decrease (from 68,764 to 65,787 arrivals). The United States, though a smaller contributor, still grew by 5.2%, rising from 32,717 to 34,413 arrivals.

The data suggests a shifting dynamic in Sri Lanka's tourism inflows, with emerging markets playing an increasingly vital role alongside established ones.



Comparison of top Ten Source Markets January to June 2025

Chart 02: Comparison of top ten markets





Analysis of Purpose of Visit

Table 03: Analysis of purpose of visit by top source markets, January to June 2025

Country	Pleasure/ Vacation	Other or not responded	Visiting friends and relatives	MICE	Business	Health / Ayurveda	Religious	Sports	Education	Official	Grand Total
India	132,838	70,510	9,162	14,740	11,341	24	1,979	1,041	359	0	241,994
Russian Federation	20,939	84,472	241	6,399	86	92	10	67	6	0	112,312
United Kingdom	74,087	9,514	19,011	2,769	1,468	126	239	650	36	2	107,902
Germany	51,762	10,508	4,862	3,322	443	3,594	16	56	12	1	74,576
China	20,034	40,660	731	1,763	2,426	11	41	102	18	1	65,787
France	46,238	4,542	4,528	5,515	366	113	104	35	15	1	61,457
Australia	30,476	5,085	13,358	1,115	630	80	194	373	13	1	51,325
United States	20,535	4,429	6,023	1,694	809	92	729	75	25	2	34,413
Bangladesh	19,008	11,714	672	1,088	423	9	98	124	1	0	33,137
Netherlands	19,082	4,013	1,313	1,417	233	71	3	4	3	0	26,139

Pleasure/Vacation dominates as the primary purpose of visit across most key markets, though its significance varies considerably by country. India, Sri Lanka's largest source market (241,994 arrivals), saw a majority (54.9%, 132,838 arrivals) visiting for leisure. This leisure focus was even more pronounced in France (75.2%, 46,238 arrivals), the Netherlands (73.0%, 19,082 arrivals), the United Kingdom (68.7%, 74,087 arrivals), and Germany (69.4%, 51,762 arrivals). Australia (59.4%, 30,476 arrivals), the United States (59.7%, 20,535 arrivals), and Bangladesh (57.4%, 19,008 arrivals) also demonstrated strong leisure orientation. In stark contrast, Russia and China stood out as significant exceptions. Only 18.6% (20,939 arrivals) of Russian tourists cited Pleasure/Vacation as their purpose, while China had just 30.5% (20,034 arrivals) for leisure.



Visiting Friends and Relatives (VFR) exhibits strong regional patterns, particularly linked to diaspora connections. Australia emerged as the leader in VFR travel proportionally, with 26.0% (13,358 arrivals) of its tourists citing this purpose. The United Kingdom (17.6%, 19,011 arrivals) and the United States (17.5%, 6,023 arrivals) also showed significant VFR segments. Business travel showed notable importance for India (4.7%, 11,341 arrivals the highest absolute number) and China (3.7%, 2,426 arrivals), aligning with established economic ties. MICE (Meetings, Incentives, Conferences, Exhibitions) was a notable segment for France (9.0%, 5,515 arrivals the highest share among major markets), India (6.1%, 14,740 arrivals highest absolute number), and Russia (5.7%, 6,399 arrivals).

Specialized niche purposes reveal distinct market opportunities and interests. Health/Ayurveda tourism was overwhelmingly dominated by Germany, which contributed 3,594 arrivals (4.8% of German tourists) the highest among major markets, reinforcing its status as a key long stay, high value segment. Religious Tourism was almost exclusively driven by India (0.8%, 1,979 arrivals) and the United States (2.1%, 729 arrivals), with negligible numbers from other countries. Sports Tourism saw India (0.4%, 1,041 arrivals) and the United Kingdom (0.6%, 650 arrivals) leading in absolute terms.

This purpose based segmentation offers vital insights for targeted tourism strategies. Leisure-Centric Markets (France, Germany, UK, Netherlands, Australia, US) warrant continued promotion of diverse experiences (cultural, beach, adventure). Diaspora Driven Markets (Australia, UK, US) highlight the need for enhanced VFR focused services and connectivity. Specialized Niches present clear opportunities: Germany's strong Ayurveda demand justifies targeted health tourism infrastructure development and marketing, while India's religious tourism potential appears underdeveloped relative to its sheer volume. Finally, Business/MICE shows potential for growth, particularly leveraging strong economic links with India and China. Understanding these distinct market priorities enables Sri Lanka to tailor offerings and allocate marketing resources strategically to maximize tourism revenue and economic impact.





Table 04: Purpose of visit by months

Month	Pleasure/ Vacation	Other or not responded	Visiting friends and relatives	MICE	Business	Religious	Health / Ayurveda	Sports	Education	Official	Grand Total
January	133,063	82,819	15,616	14,177	4,154	564	1,819	450	99	0	252,761
February	132,507	70,938	13,389	15,792	4,276	595	1,553	1,038	128	1	240,217
March	127,781	68,765	12,790	13,004	4,392	558	1,460	467	80	1	229,298
April	99,843	43,239	14,581	10,736	3,355	897	965	886	105	1	174,608
May	68,273	37,161	14,031	7,254	4,257	516	621	761	41	4	132,919
June	68,809	32,278	18,543	8,038	4,433	5,223	331	438	146	2	138,241
Grand Total	630,276	335,200	88,950	69,001	24,867	8,353	6,749	4,040	599	9	1,168,044

Tourist arrivals exhibited pronounced seasonality, with volumes peaking early in the year and declining steadily. The dominance of Pleasure/Vacation (630,276 arrivals, 54.0% of total) mirrored this seasonality, peaking strongly in January (133,063) and February (132,507), then declining sharply to its lowest point in May (68,273), confirming leisure travel's high sensitivity to seasonal calendars.

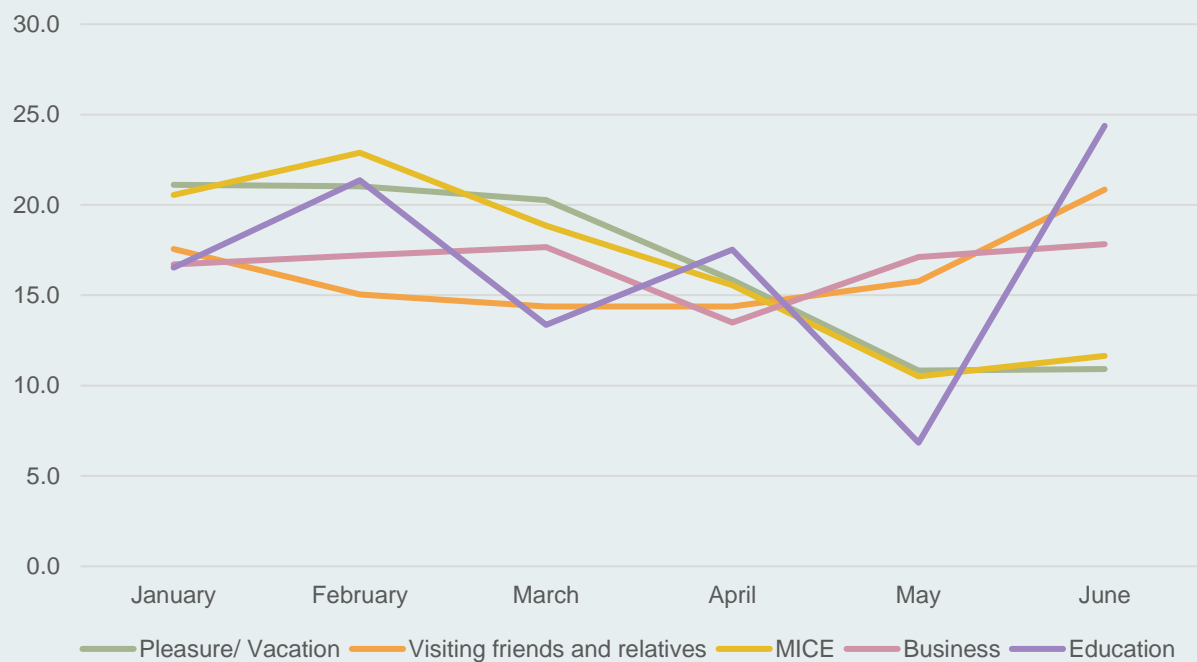
Visiting Friends and Relatives (VFR) demonstrated notable counter cyclical stability and a significant June surge. VFR arrivals (88,950, 7.6%) remained relatively consistent from January (15,616) through May (14,031), bucking the overall downward trend. However, June saw an unexpected and substantial spike to 18,543 arrivals its highest monthly figure. This indicates diaspora visits are less seasonally bound and may be driven by summer family reunions, holidays, or specific cultural festivals. MICE travel (69,001, 5.9%) followed the traditional corporate calendar, peaking in January (14,177) and February (15,792) before steadily declining to its May low (7,254). Business Travel (24,867 arrivals) showed minimal fluctuation, maintaining relatively steady volumes month to month, ranging narrowly from a low of 3,355 (April) to a high of 4,433 (June), indicating consistent commercial activity year round. Religious Tourism (8,353 arrivals) was dominated by an extraordinary June spike of 5,223 arrivals representing 62.5% of its half-year total likely driven by major festivals. Health/Ayurveda (6,749 arrivals) peaked in the winter months of January (1,819) and February (1,553), aligning with its appeal as a cold weather wellness retreat, before steadily declining through June (331). Sports Tourism (4,040 arrivals) experienced a peak in February (1,038) potentially linked to specific sporting events or favourable adventure sports conditions during that period.





The data highlights critical challenges and opportunities for Sri Lanka's tourism sector. The heavy seasonal reliance on Pleasure/Vacation, concentrated heavily in January-February, creates economic vulnerability. Diversification into more stable segments like VFR (especially leveraging its June resilience) and Business travel, alongside promoting off-season niches is crucial. Niche opportunities must be aligned with their natural seasonality: aggressively marketing Health/Ayurveda packages during (Jan-Mar), developing targeted pilgrimage packages for June's religious surge, and promoting MICE events in the early high-season (Jan-Feb). Infrastructure and staffing need to accommodate the high season peaks (Jan-Feb) while strategies to utilize capacity during lulls (May-Jun) such as promoting Business travel or June VFR /Religious packages should be developed. Understanding and leveraging these purpose driven seasonal patterns is essential for optimizing revenue, reducing vulnerability, and ensuring sustainable growth.

Chart 03: Tourist arrivals by purpose of visit by months, January to June 2025





Tourist arrivals by age category January to June 2025

Chart 04: Tourist arrivals by age category, January to June 2025

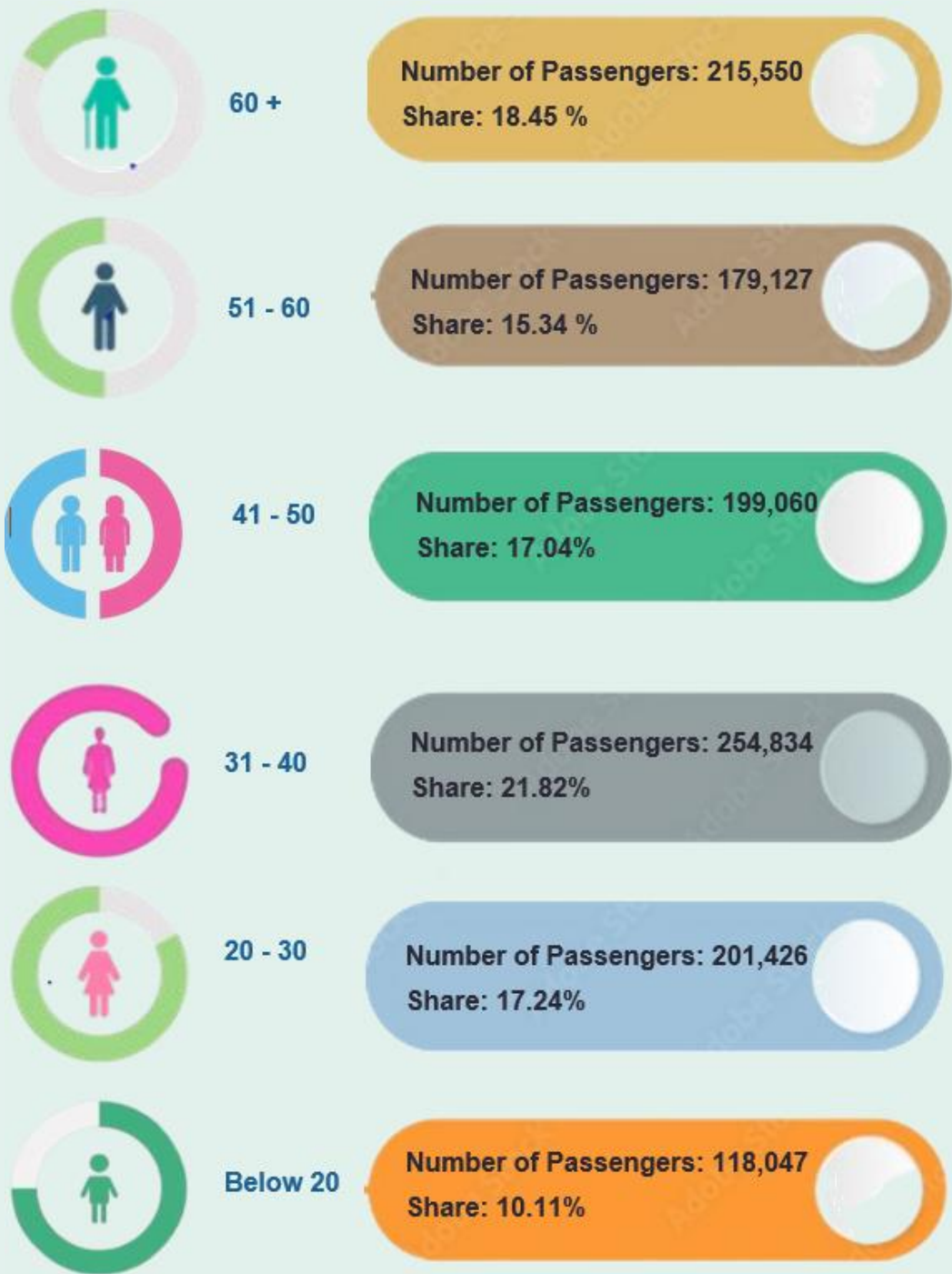




Chart 05: Tourist arrivals by age, January to June 2025

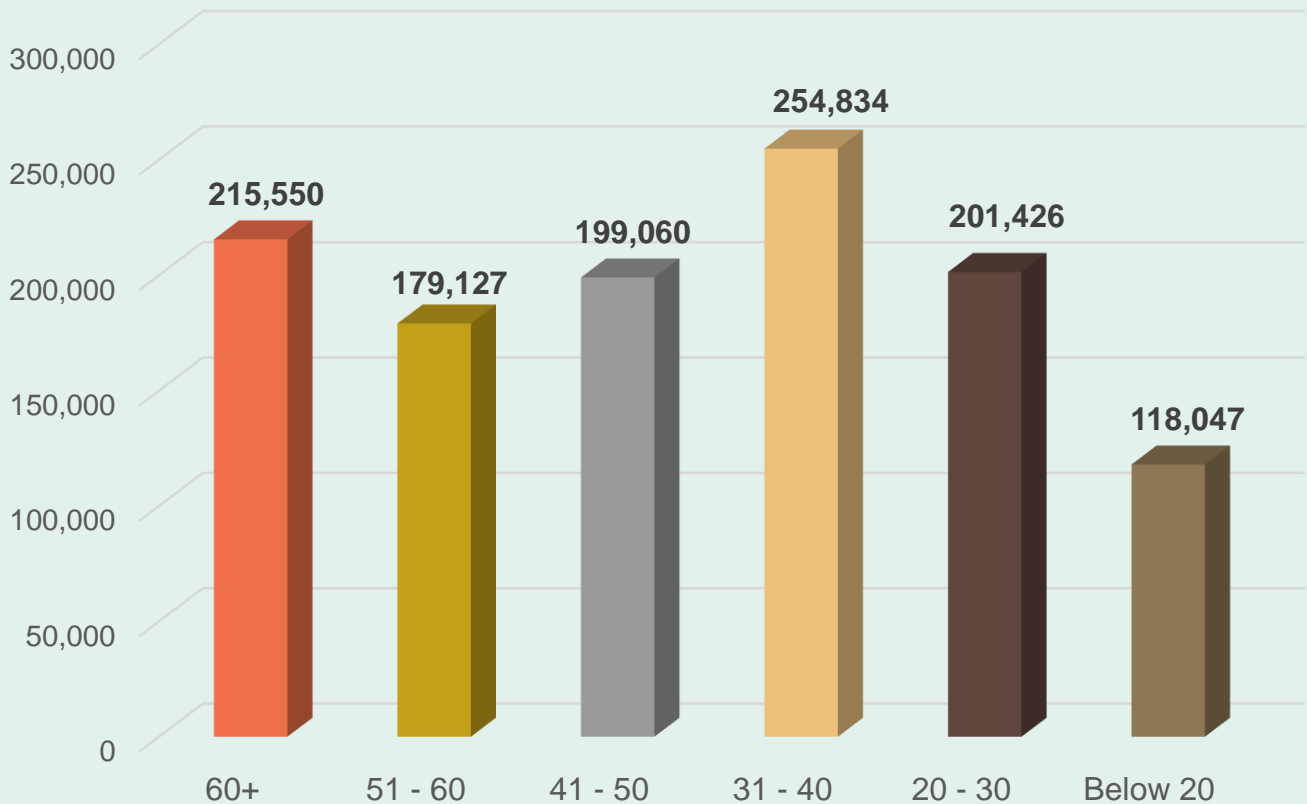
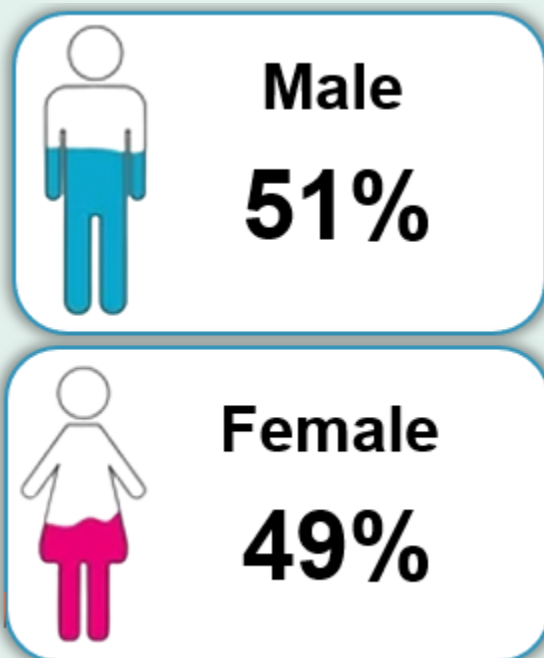


Chart 07: Tourist arrivals by gender January to June 2025



Sri Lanka's tourism sector is primarily driven by mature and senior travelers, with significant contributions from middle aged demographics. Tourists aged 31-40 years form the largest cohort, accounting for 21.82% (254,834 arrivals) of total visitors. This is closely followed by the 60+ age group (18.45%,215,550) 20-30 age group (17.24 % ,201,426) 41–50 age group (17.04%, 199,060 arrivals) and the 51–60 group (15.34%, 179,127 arrivals). Notably, travelers over 50 collectively represent 33.79% (394,677 arrivals) a substantial share highlighting Sri Lanka’s appeal for retirees, long stay wellness seekers, and higher spending mature tourists. The 60+ segment alone contributes 18.45% (215,550 arrivals), reinforcing the importance of senior travelers, likely linked to extended stays for health/Ayurveda or leisure.



Year in review, January to June 2025

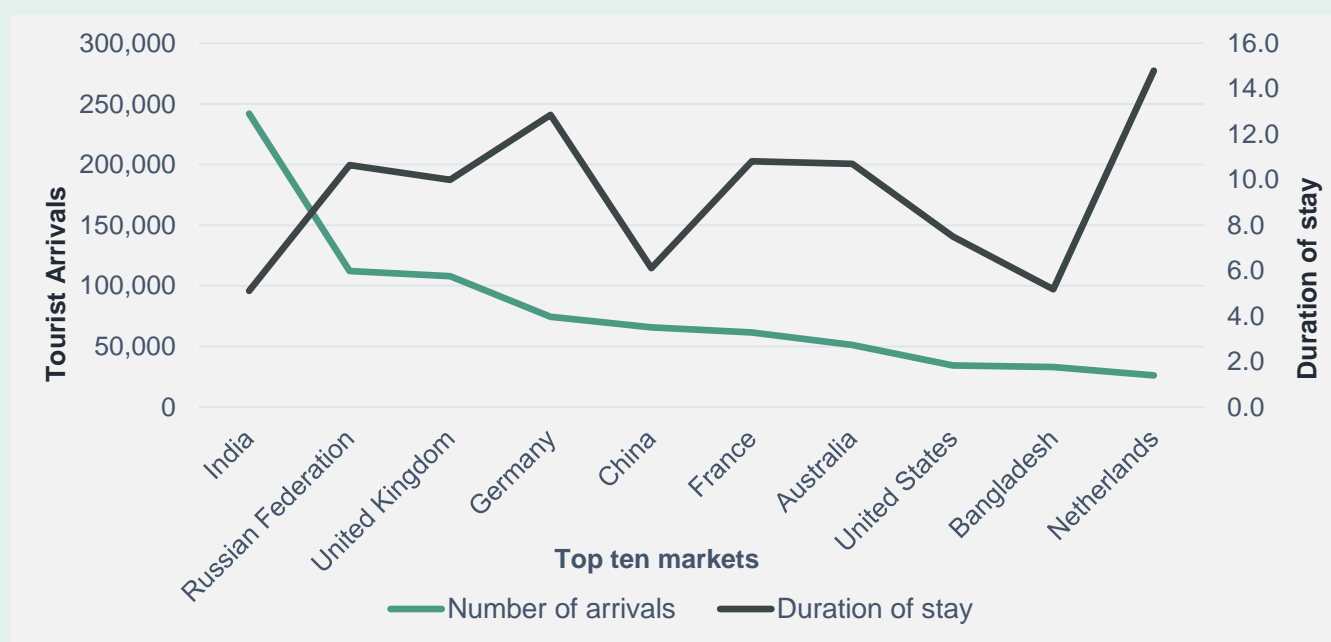


Average duration of stay by source markets

Table 05: Average duration of stay of tourists from key source markets by months, January to June 2025

Country	Number of arrivals	Duration of stay					
		Jan	Feb	Mar	Apr	May	Jun
India	241,994	5.18	4.99	5.32	4.81	5.39	4.98
Russian Federation	112,312	11.96	10.08	11.21	11.35	10.81	8.42
United Kingdom	107,902	10.53	10.42	10.01	10.09	9.16	9.78
Germany	74,576	14.96	13.81	13.87	13.12	8.77	12.57
China	65,787	6.46	6.24	6.12	6.13	5.67	6.05
France	61,457	11.77	11.13	10.58	10.53	10.17	10.69
Australia	51,325	11.67	10.15	10.57	11.44	10.36	9.99
United States	34,413	7.70	7.10	6.65	7.33	8.05	8.23
Bangladesh	33,137	4.81	5.45	5.31	4.85	5.26	5.44
Netherlands	26,139	16.26	14.92	15.46	13.69	14.37	14.08

Chart 06: Tourist arrivals vs duration of stay, January to June 2025





Tourists from the top source markets exhibited significant variation in their average length of stay in Sri Lanka during the first half of 2025. In general January is the month of the longest duration for many key source markets except for tourists from India (May), United States (May) and Bangladesh (February).

Markets averaging over 10 nights generally maintained this level, but with distinct patterns. France (61,457 arrivals) was notably stable year round, with average stays fluctuating minimally between 10.17 nights (May) and 11.77 nights (January). Australia (51,325 arrivals) also showed relative consistency, staying between 9.99 nights (June) and 11.67 nights (January), with a slight peak in April (11.44 nights). Russia's duration peaked in January (11.96 nights) and remained high until a noticeable dip in June (8.42 nights). Germany exhibited the most volatility, starting very high in January (14.96 nights), remaining above 13 nights through April (13.12 nights), then dropping sharply in May (8.77 nights) before partially recovering in June (12.57 nights). The Netherlands consistently had the longest durations, starting at 16.26 nights in January and staying above 13.5 nights every month.

Within the mid-range (6-10 nights), the United Kingdom (107,902 arrivals) showed stability, averaging between 9.16 nights (May) and 10.53 nights (January). The United States (34,413 arrivals) displayed a gradual but steady increase in stay length from 6.65 nights in March to 8.23 nights in June. China (65,787 arrivals) had the shortest stays in this group, consistently ranging between 5.67 nights (May) and 6.46 nights (January), making it a bridge to the short-stay markets. India and Bangladesh, as the primary short stay markets, maintained consistently low durations below 5.5 nights throughout the period, indicating frequent, shorter regional visits.

The data reveals clear seasonal influences and market behaviors. Long-stay European markets (Germany, Netherlands, Russia, UK, France) generally peaked in duration during the Northern Hemisphere winter months (January-February), suggesting travelers escaping colder climates for extended holidays. A notable shift occurred in early summer (June), with Russia experiencing its shortest average stay (8.42 nights) and the US reaching its longest (8.23 nights), hinting at differing summer travel patterns. Germany's significant May dip (8.77 nights) is an outlier needing further investigation. Markets also differed in consistency: India, Bangladesh, France, and the UK showed minimal monthly fluctuation, indicating predictable travel behavior. In contrast, Germany and Russia experienced significant volatility. Importantly, there was no direct correlation between market size (arrival numbers) and stay duration: high volume India had the shortest stays, while mid sized Netherlands had the longest.



These duration patterns offer crucial insights for Sri Lanka's tourism strategy. The long average stays of European and Russian tourists highlight their high per visitor revenue potential, suggesting value in premium, longer duration offerings targeted especially during their peak winter travel season. Conversely, the high volume but short stays of regional neighbors India and Bangladesh highlights the importance of accessibility, short break packages, and efficient transit and accommodation infrastructure to serve this frequent visitor segment. The gradual summer increase from the US presents an opportunity for targeted summer campaigns. Understanding the reasons behind volatile markets like Germany could help stabilize visitation and revenue. Overall, duration data complements arrival figures, providing insights essential for optimizing marketing, product development, and infrastructure planning.

Table 06: Duration of stay of tourists by purpose of visit, January to June 2025

Purpose of Visit	Average of duration of stay
Business	5.04
Education	5.36
Health / Ayurveda	15.22
MICE	7.97
Official	7.07
Other or not responded	7.87
Pleasure/ Vacation	8.87
Religious	6.93
Sports	9.01
Visiting friends and relatives	10.91
Grand Total	8.57

Significant variations in tourist stay duration exist based on the purpose of visit, with Health/Ayurveda and Visiting Friends and Relatives (VFR) emerging as the longest stay categories. Health/Ayurveda tourism commands a substantially longer average stay of 15.22 days nearly double the grand average of 8.57 days and the highest of any category. This underscores Sri Lanka's position as a premier wellness destination, attracting visitors seeking extended therapeutic treatments or holistic retreats. Similarly, tourists visiting friends and relatives (VFR) recorded the second-longest average duration at 10.91 days, reflecting deeper social connections, likely repeat visitation patterns, and immersive cultural experiences that necessitate longer stays. These two segments demonstrate exceptional per visitor revenue potential due to their extended durations.



Leisure oriented purposes also contribute significantly to longer stays, consistently exceeding the overall average. Pleasure/Vacation tourists stayed an average of 8.87 days, while Sports related visitors averaged 9.01 days. This indicates that traditional holidaymakers and those engaged in sporting activities (potentially including participants, spectators, or adventure tourists) contribute meaningfully to sustained tourism revenue. MICE (Meetings, Incentives, Conferences, Exhibitions) tourism also recorded a healthy average of 7.97 days, suggesting that business events often incorporate leisure extensions or require multi day engagements.

Mid duration purposes cluster around the grand average, including segments with specific logistical or structured itineraries. Official travel averaged 7.07 days, aligning with typical durations for government or institutional visits. Religious tourism recorded a moderate average of 6.93 days, indicative of pilgrimage circuits or spiritual retreats requiring a dedicated but not excessively long timeframe, shorter than VFR but longer than purely transactional visits.

Business and Education purposes represent the shortest stay segments, characterized by high traveler turnover. Business travel had the briefest average duration at just 5.04 days, aligning with global trends for efficiency-focused commercial trips, meetings, and trade activities. Education related visits averaged slightly longer at 5.36 days, still well below the grand average. This suggests the segment is dominated by short term workshops, academic conferences, or training programs rather than semester long exchanges, impacting the type of accommodation and services required.

The data provides crucial insights for tourism planning. The exceptionally long stays of Health/Ayurveda tourists solidify it as a high value niche deserving targeted infrastructure investment (specialized resorts, clinics) and international promotion. VFR tourism's stability and duration offer opportunities for enhancing community-based experiences and repeat visitation incentives. While Business and Education generate shorter stays, their volume remains important for urban hotels and ancillary services; optimizing transit efficiency and short-stay facilities is key for these segments. Leisure purposes (Pleasure, Sports, MICE) reinforce the need for diverse, high-quality experiences to maintain their healthy durations. Ultimately, understanding these duration patterns by purpose is vital for resource allocation, product development, and tailored marketing strategies to maximize both visitor numbers and economic impact per arrival.



Year in review, January to June 2025

TOURISM INCOME

Table 07: Tourism income

Month	Number of tourist arrivals	Average value of the month **	Average duration of the month**	Total value (USD Mn) **
January	252,761	171.74**	9.23	400.666
February	240,217	171.74**	8.91	367.581
March	229,298	171.74**	8.99	354.023
April	174,608	171.74**	8.56	256.690
May	132,919	171.74**	7.19	164.129
June	138,241	171.74**	7.14	169.514
Total	1,168,044			1,712.603

** - Provisional / **

Average Expenditure per day 2024 – Jan ~ Jun ** - **171.74 USD**

Base Value (Airport Survey 2024/2025 July to December)





Tourist Accommodation



Year in review, January to June 2025

TOURISM ACCOMMODATION AND OTHER SERVICES

Table 08: SLTDA registered accommodation establishments, January to June ,2024 & 2025

Category	2025 (Jan -June)		2024 (Jan -June)	
	Number of establishments	Number of rooms	Number of establishments	Number of rooms
Boutique Hotel	39	877	38	835
Boutique Villa	50	347	48	345
Bungalow	1,169	4,967	1,052	4,390
Classified Tourist Hotel	166	17,089	167	16,808
1 Star	40	1,802	40	1,852
2 Star	37	2,029	37	2,431
3 Star	27	2,821	27	2,408
4 Star	31	3,834	31	3,834
5 Star	31	6,603	31	6,283
Guest House	1,746	19,720	1,647	18,445
Eco lodge	1	20	1	20
Heritage Bungalow	4	19	4	19
Heritage Home	2	2	2	2
Heritage Hotel	2	312	2	312
Home Stay Unit	1,130	3,326	1,112	3,308
Hostels	16	155	14	158
Rented Apartment	84	334	82	322
Rented Home	21	58	15	41
Themed Accommodation & Value-added Activities	1	11	1	11
Tourist Apartment Hotel	1	25		
Tourist Hotel	206	9,440	204	8,362
Total	4,638	56,702	4,390	53,378

As at 30/06/2025

* The registrations of Eco lodge and Heritage Hotels were started from 2023 onwards.



Between January and June 2025, Sri Lanka's registered tourism accommodation sector saw a steady increase compared to the same period in 2024, with a 5.7% rise in the number of establishments (from 4,390 to 4,638) and a 6.2% increase in total rooms (from 53,378 to 56,702). Notably, the highest growth was seen in the bungalow segment, which added 117 new establishments and 577 rooms, indicating rising demand for small scale, niche accommodations. In the classified hotel sector, the 3 star and 5 star categories expanded significantly by 17.1% and 5.1% in room numbers, respectively while the 2 star category saw a 16.5% decline, likely due to reclassification or refurbishment. Guest houses continued to dominate in both volume and growth, adding 99 establishments and over 1,200 rooms. Home stay units also increased slightly, while other categories such as hostels, rented apartments, and boutique properties showed modest but positive growth. Heritage and eco based accommodations remained stable but underrepresented, highlighting an opportunity for targeted development. Overall, the data indicates a positive trend toward diversified and upgraded tourism offerings, with potential for further investment in heritage, eco, and value added accommodation experiences.





Distribution of rooms by provinces (January to June - 2025)

A comparative analysis of the number of rooms in SLTDA registered establishments across Sri Lanka's provinces for the periods January to June 2024 and January to June 2025 shows a notable upward trend in room capacity across most provinces, indicating continued investment and growth in the country's accommodation sector.

At the national level, the total number of rooms has increased from 53,378 in the first half of 2024 to 56,702 in the corresponding period of 2025. This reflects a net growth of 3,324 rooms, amounting to a 6.2% increase. The expansion signals a healthy trajectory for the tourism industry, supported by growing demand and a conducive environment for tourism related investment.

Among the provinces, the Western Province recorded the highest number of rooms, growing from 18,716 in 2024 to 19,924 in 2025. This increase of 1,208 rooms underscores the province's importance as the commercial and tourism hub of the country. The Southern Province, known for its beaches and heritage sites, saw the second largest increase, adding 820 rooms to reach a total of 14,536. The Central Province, home to major cultural attractions and natural beauty, also experienced significant growth, rising from 8,771 to 9,437 rooms a gain of 666.

Other provinces showed more modest growth. The Eastern Province added 223 rooms, while the North Central and North Western Provinces increased by 150 and 142 rooms, respectively. Sabaragamuwa Province saw a smaller addition of 77 rooms. Uva Province recorded only a marginal increase of 35 rooms, and the Northern Province remained nearly static with a slight increase of just 3 rooms, indicating minimal growth or continued stagnation in that region.

The strongest growth was concentrated in the Western, Southern, and Central Provinces areas that are already well established in the tourism circuit. The distribution of SLTDA registered rooms across Sri Lanka's provinces shows a significant concentration in the Western, Southern, and Central Provinces, which together account for nearly 78% of all available rooms. The Western Province leads with the highest number, followed by the Southern and Central Provinces, reflecting the strong focus of tourism infrastructure and investment in these areas due to their established attractions, superior infrastructure, and proximity to major transport hubs. In contrast, provinces such as Northern, Sabaragamuwa, North Central, and North Western have much fewer registered rooms, indicating underdevelopment or untapped tourism potential in these regions. This disparity highlights the need for targeted policy measures and investment to promote balanced tourism growth, diversify visitor experiences, and support broader regional economic development. These trends highlight the need for more targeted promotional and investment strategies in underrepresented regions such as the Northern and Uva Provinces to achieve a more balanced development of tourism infrastructure across the country.



Year in review, January to June 2025

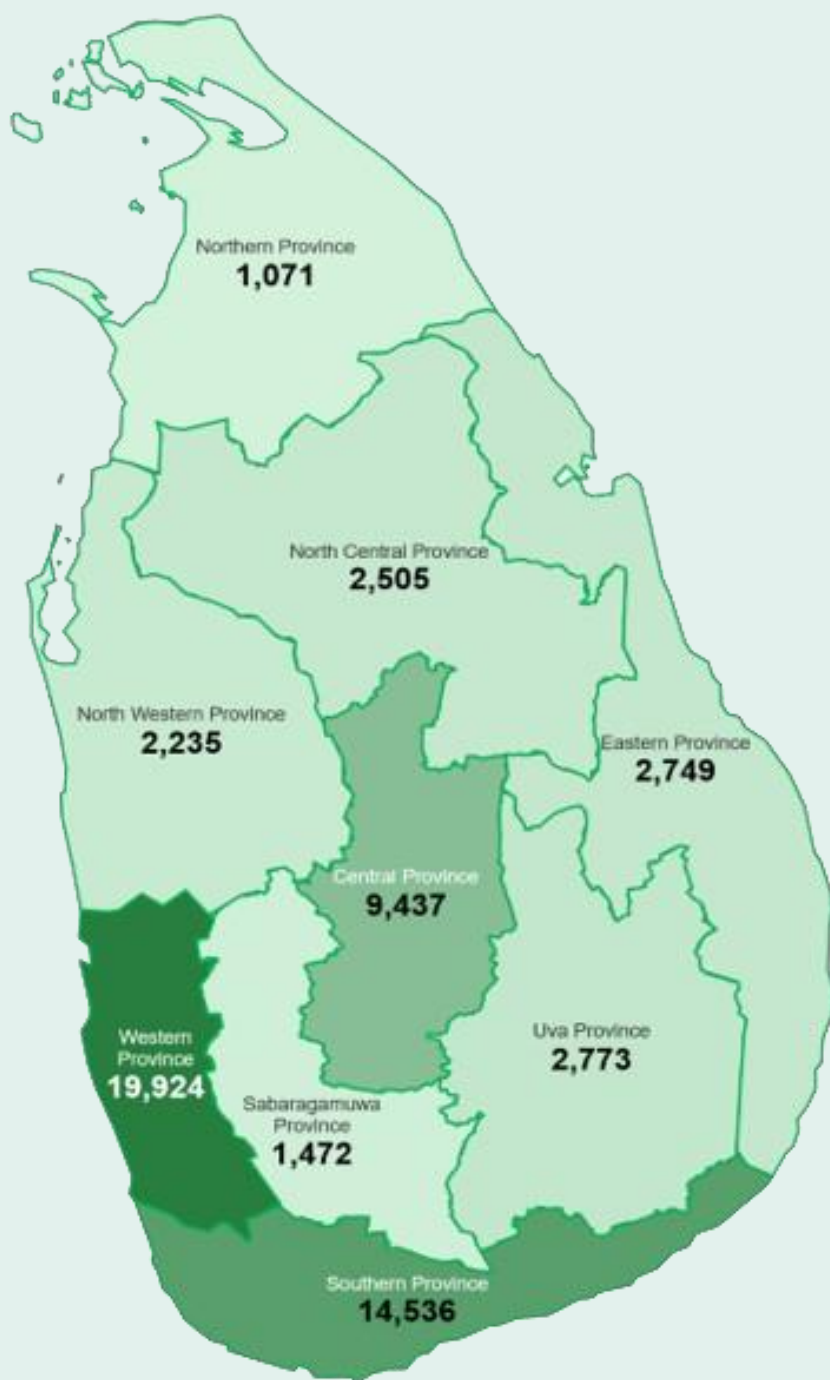


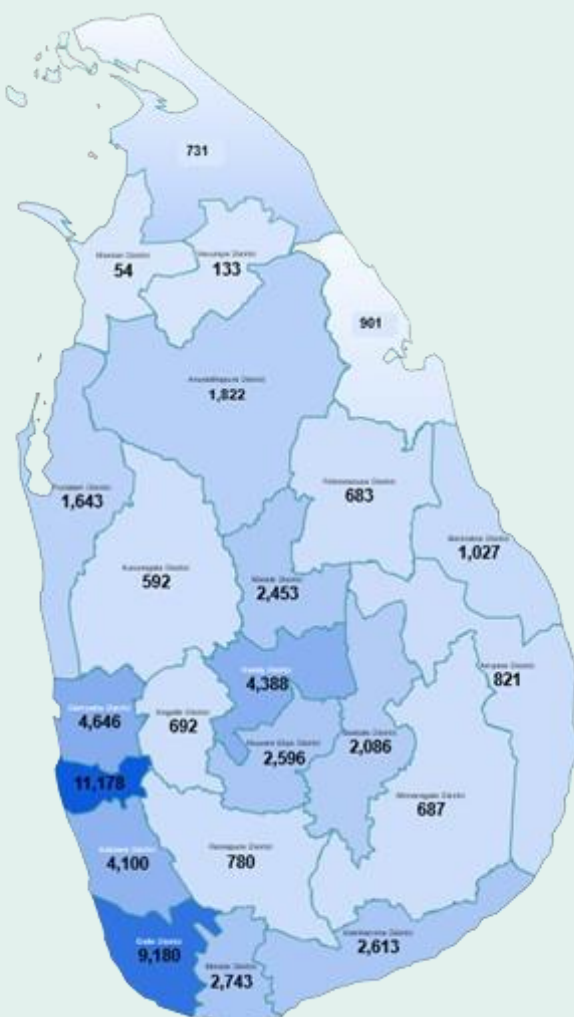


Table 09: Total rooms by provinces, 2024 & January to June 2025

Province	Number of rooms Jan – June 2025	Number of Rooms Jan – June 2024
Central Province	9,437	8,771
Eastern Province	2,749	2,526
North Central Province	2,505	2,355
North Western Province	2,235	2,093
Northern Province	1,071	1,068
Sabaragamuwa Province	1,472	1,395
Southern Province	14,536	13,716
Uva Province	2,773	2,738
Western Province	19,924	18,716
Total number of rooms	56,702	53,378

Rooms by Districts

Table 10: Total rooms by districts, January to June 2025



District	Number of rooms
Ampara	821
Anuradhapura	1,822
Badulla	2,086
Batticaloa	1,027
Colombo	11,178
Galle	9,180
Gampaha	4,646
Hambantota	2,613
Jaffna	731
Kalutara	4,100
Kandy	4,388
Kegalle	692
Kilinochchi	101
Kurunegala	592
Mannar	54
Matale	2,453
Matara	2,743
Moneragala	687
Mullaitivu	52
Nuwara Eliya	2,596
Polonnaruwa	683
Puttalam	1,643
Rathnapura	780
Trincomalee	901
Vavuniya	133
Grand Total	56,702



The distribution of SLTDA registered rooms across Sri Lanka’s districts reveals a strong concentration in key urban and coastal areas, with Colombo and Galle standing out as the top contributors, offering 11,178 and 9,180 rooms respectively. These are followed by Gampaha, Kalutara, Kandy, Matara and Nuwara Eliya, each providing between 2,500 and 4,700 rooms, reflecting their popularity as major business, cultural, and tourist centers. In contrast, several districts such as Mannar, Mullaitivu, Kilinochchi, and Vavuniya in the Northern Province, as well as Moneragala and Polonnaruwa, have fewer than 700 registered rooms each, highlighting significant regional disparities in tourism infrastructure. This uneven distribution suggests that while tourism development has flourished in the Western, Southern, and Central districts, many other areas remain underdeveloped or underutilized in terms of accommodation capacity. Addressing these gaps through targeted investment and promotion could help unlock the tourism potential of less visited districts, foster regional economic growth, and contribute to a more balanced and inclusive tourism sector in Sri Lanka.

Table 11: Number of rooms by star category, January to June 2025

Star category	Number of rooms
One	1,802
Two	2,029
Three	2,821
Four	3,834
Five	6,603
Total	17,089

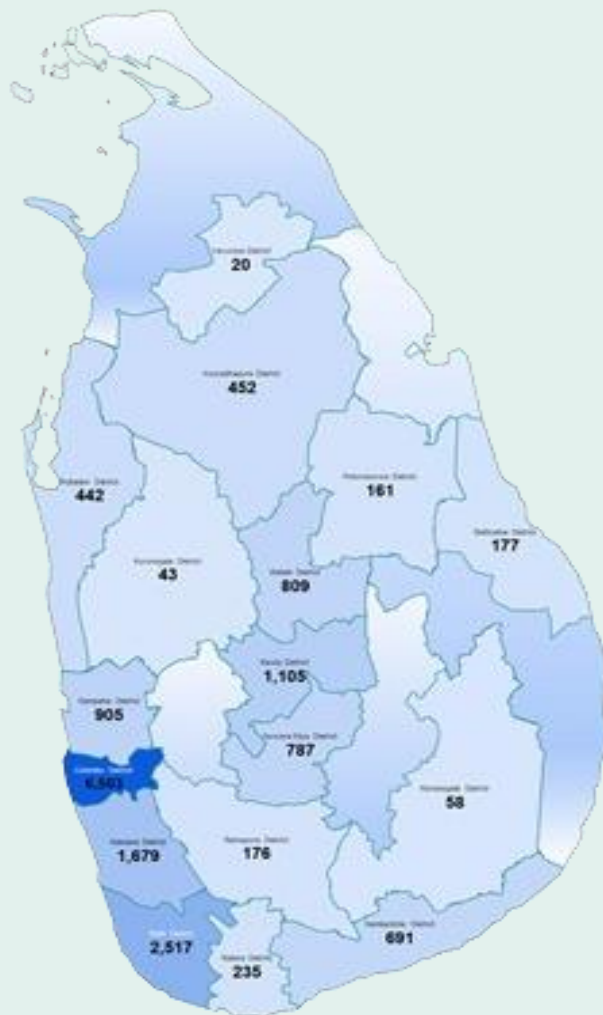
The analysis of SLTDA registered establishments by star category reveals that Sri Lanka’s accommodation sector is heavily skewed toward high end offerings, with five-star hotels accounting for the largest share of rooms (38.6%). Four star and three star establishments also represent a significant portion, together making up 39% of the total. In contrast, only 22.4% of rooms fall under the one and two star categories.



Distribution of rooms of Classified Hotels by districts – (January to June) 2025

Table 12: Distribution of rooms of classified hotels by districts, January to June 2025

District	Number of rooms Jan – June 2025	Number of Rooms Jan- June 2024
Anuradhapura	452	475
Batticaloa	177	177
Colombo	6,503	6,129
Galle	2,517	2,537
Gampaha	905	905
Hambantota	691	691
Jaffna	155	155
Kalutara	1,679	1,679
Kandy	1,105	1,105
Kurunegala	43	43
Matale	809	809
Matara	235	235
Moneragala	58	108
Nuwara Eliya	787	787
Polonnaruwa	161	161
Puttalam	442	442
Rathnapura	176	176
Trincomalee	174	174
Vavuniya	20	20
Grand Total	17,089	16,808



The table presents a district wise comparison of the number of rooms in classified hotels in Sri Lanka for the periods January to June 2024 and January to June 2025. Overall, there has been a modest increase in the total number of classified hotel rooms across the country, rising from 16,808 in 2024 to 17,089 in 2025. This represents a net growth of 281 rooms, or approximately 1.7%, indicating a steady but moderate expansion in the accommodation sector.



Among the districts, Colombo recorded the most significant increase, with the number of rooms rising from 6,129 in 2024 to 6,503 in 2025 an addition of 374 rooms. This growth reflects the ongoing investment in tourism infrastructure within the capital, which remains the central hub for business and urban tourism. Galle also showed a decrease of 20 rooms. Anuradhapura experienced a decline of 23 rooms (from 475 to 452), while Moneragala reported the most significant drop, with the number of rooms falling from 108 to 58 a loss of 50 rooms. These reductions may be attributed to reclassification, temporary closures, or other structural changes in the accommodation sector.

A large number of districts, including Gampaha, Hambantota, Jaffna, Kalutara, Kandy, Kurunegala, Matale, Matara, Nuwara Eliya, Polonnaruwa, Puttalam, Rathnapura, Trincomalee, and Vavuniya, reported no change in the number of classified hotel rooms. This suggests either a stable level of investment or a temporary pause in expansion activities in those areas.

Colombo, Galle, Kalutara, Kandy, and Gampaha continue to dominate in terms of room supply, collectively accounting for over 72% of the total classified accommodation capacity in the country. This concentration in a few districts indicates a regional imbalance in tourism infrastructure, which may need to be addressed through targeted policy interventions to encourage investment in underrepresented areas.





Air Connectivity



AIR CONNECTIVITY

Contribution of Airlines on tourist arrivals to Sri Lanka

An analysis of airlines carrying tourists to Sri Lanka from January to June reveals that Sri Lankan Airlines is the dominant carrier in this market, holding a commanding lead. It transported 276,976 passengers, capturing nearly a quarter (23.71%) of all traffic. This position underscores its role as the national flag carrier and its central importance in connecting Sri Lanka internationally, carrying more than double the passengers of its closest competitor.

Following this is a competitive group of major international and regional airlines. Indigo, a prominent Indian low-cost carrier, secured second place with 122,239 passengers (10.47%), highlighting the significant travel volume between India and Sri Lanka. The next three positions are occupied by major Middle Eastern hub carriers: Qatar Airways (116,638 passengers, 9.99%), Emirates (110,961 passengers, 9.50%), and Etihad Airways (80,844 passengers, 6.92%). This demonstrates the critical function of Gulf hubs (Doha, Dubai, Abu Dhabi) as primary connection points for long haul travel to and from Sri Lanka. Air India, the Indian national carrier, further solidifies the importance of the Indian market in sixth place with 59,767 passengers (5.12%).

Beyond these major players, the market features a diverse range of airlines. This includes further Middle Eastern presence like Fly Dubai (3.36%), Air Arabia (3.11%), and Air Arabia Abu Dhabi (0.77%). Russian carriers Red Wings Airlines (3.13%) and Azur Air (1.21%) indicate notable passenger flows originating from Russia. Major Asian and global network carriers such as Turkish Airlines (2.59%), China Eastern (2.58%), Singapore Airlines (2.14%), Aeroflot (1.96%), Cathay Pacific (1.24%), and Air China (0.96%) are represented, alongside low cost operators like Air Asia (1.56%) and Thai Air Asia (0.89%). Regional carrier Fita Air (1.48%) also features in this segment. This diversity reflects Sri Lanka's connectivity to a wide array of destinations across Asia, Europe, and the Middle East.





Table 13: Contribution of Airlines on tourist arrivals to Sri Lanka, January to June 2025

Rank	Airline	Number of passengers	% Share
1	Sri Lankan Airlines	276,976	23.71
2	Indigo	122,239	10.47
3	Qatar Airways	116,638	9.99
4	Emirates	110,961	9.50
5	Etihad Airways	80,844	6.92
6	Air India	59,767	5.12
7	Fly Dubai	39,264	3.36
8	Red Wings Air Lines	36,544	3.13
9	Air Arabia	36,374	3.11
10	Turkish Airline	30,278	2.59
11	China Eastern Airlines	30,120	2.58
12	Singapore Airlines	25,052	2.14
13	Aeroflot	22,940	1.96
14	Air Asia	18,208	1.56
15	Fits Air	17,229	1.48
16	Cathay Pacific	14,434	1.24
17	Azur Air	14,088	1.21
18	Air China	11,253	0.96
19	Thai Air Asia	10,376	0.89
20	Air Arabia Abu Dhabi	8,945	0.77
	Others	85,514	7.32
	Total	1,168,044	100.00





Contribution of Airlines on tourist arrivals to Sri Lanka

Table:14: Main final departure airports to Sri Lanka, January to June 2025

Rank	Final port	Number of tourists		Rank	Final port	Number of tourists	
1	Dubai	141,631	12.1	21	Paris	12,344	1.1
2	Doha	118,478	10.1	22	Dhaka	11,755	1.0
3	Chennai	95,391	8.2	23	Chengdu	11,150	1.0
4	Abu Dhabi	91,316	7.8	24	Frankfurt	9,558	0.8
5	Mumbai	57,666	4.9	25	Sydney	8,730	0.7
6	Bangalore	48,901	4.2	26	Narita	7,793	0.7
7	Singapore	45,073	3.9	27	Don Mueang	7,689	0.7
8	Delhi	43,242	3.7	28	Tolmachevo Novosibirsk	7,267	0.6
9	Sharja	36,711	3.1	29	Domodedovo	6,867	0.6
10	London	36,577	3.1	30	Almaty	6,717	0.6
11	Kuala Lumpur	36,528	3.1	31	Kunming	6,354	0.5
12	Moscow	35,030	3.0	32	Warsaw	6,048	0.5
13	Istanbul	29,560	2.5	33	Kuwait	5,287	0.5
14	Hyderabad	25,216	2.2	34	Sochi	4,738	0.4
15	Shanghai	23,137	2.0	35	Kochi	4,595	0.4
16	Male	22,602	1.9	36	Tiruchchirappalli	4,514	0.4
17	Bangkok	22,047	1.9	37	Koltsovo, Russia	4,100	0.4
18	Dubai/Male (Connectivity)	16,388	1.4	38	Kazan, Russia	4,085	0.3
19	Hong Kong	14,363	1.2	39	Guangzhou	3,736	0.3
20	Melbourne	13,125	1.1	40	Tyumen	3,710	0.3
					Others	78,025	6.7
Total						1,168,044	

Tourist arrivals by last departure airports to Sri Lanka during the first half of 2025 exhibited a clear concentration around key international transit hubs and proximate major cities. Middle Eastern hubs dominated, with Dubai (141,631 passengers) serving as the single largest point of final departure, accounting for approximately 12.1% of all arrivals. It was closely followed by Doha (118,478 passengers, 10.1%) This underscores the critical role of Gulf carriers and their hubs in facilitating global connectivity to Sri Lanka.

The Indian subcontinent constituted the second major source region, led significantly by Chennai (95,391 passengers, 8.2%), ranking third overall. Other major Indian metropolitan airports followed: Mumbai (57,666 passengers, 4.9%), Bangalore (48,901 passengers, 4.2%), Delhi (43,242 passengers, 3.7%), and Hyderabad (25,216 passengers, 2.2%). Together, these top five Indian departure points contributed over 23% of arrivals, highlighting the immense importance of the Indian market driven by geographical proximity and established travel links.



Visitors to Major Tourist Attractions



Year in review, January to June 2025

VISITORS TO MAJOR TOURIST ATTRACTIONS, 2025

Table:15 Visitors to major national parks, January to June 2025

Parks	Local tickets		Foreign tickets		Vehicle income (Rs)	Boat income (Rs)	Total number of visitors	Total revenue (including the vehicle and boat income)
	Local visitors	Local income (Rs)	Foreign visitors	Foreign income (Rs)				
Yala	171,948	26,056,690.00	217,093	1,581,471,517.26	22,384,800.00	0.00	389,041	1,629,913,007.31
Horton Plains	125,168	18,205,510.00	26,181	190,106,734.00	5,754,550.00	0.00	151,349	214,066,794.00
Udawalawa	78,558	11,673,900.00	99,842	723,308,013.24	11,442,450.00	0.00	178,400	746,424,363.24
Wasgomuwa	6,164	353,550.00	2,061	7,205,127.84	425,100.00	0.00	8,225	7,983,777.84
Minneriya	4,914	722,100.00	1,289	9,423,842.50	356,400.00	0.00	6,203	10,502,342.50
Bundala	4,897	291,060.00	5,690	19,665,758.38	694,900.00	0.00	10,587	20,651,718.38
Horagolla	4,824	180,260.00	34	47,732.60	0.00	0.00	4,858	227,992.60
Kaudulla	4,951	753,000.00	1,872	13,397,256.00	365,600.00	0.00	6,823	14,515,856.00
Galoya	3,377	199,290.00	3,627	12,720,622.00	153,000.00	4,528,000.00	7,004	17,600,912.00
Kumana	9,765	586,140.00	2,845	10,226,952.00	785,850.00	0.00	12,610	11,598,942.00
Angammedilla	3,496	333,510.00	472	2,404,081.18	204,250.00	0.00	3,968	2,946,473.18
Galways Land	5,035	574,330.00	343	1,266,098.00	3,600.00	0.00	5,378	1,844,028.00
Wilpattu	36,237	14,385,750.00	29,635	168,701,085.14	3,637,900.00	0.00	65,872	186,724,735.14
Maduruoya	1,052	59,730.00	179	627,312.00	65,700.00	0.00	1,231	752,742.00
Lahugala	372	24,510.00	45	176,112.00	43,250.00	0.00	417	243,872.00
Pigeon Island	27,718	4,003,750.00	2,659	19,237,560.00	0.00	768,150.00	30,377	24,009,460.00
Hikkaduwa	22,660	1,705,490.00	2,809	15,230,299.00	0.00	675,600.00	25,469	17,611,389.00
Eth Athuru Sevana	59,892	0.00	55,792	0.00	0.00	0.00	115,684	67,660,616.00
Kalawewa	385	0.00	88	0.00	20,100.00	7,150.00	473	172,188.69
Bareef - Kalpitiya	6,466	133,570.00	2,605	6,125,969.00	0.00	600.00	9,071	6,260,139.00
Mirissa	15,257	1,496,950.00	61,532	96,669,534.00	0.00	0.00	76,789	98,166,484.00
Girithale	3,565	173,000.00	1,903	5,470,362.00	0.00	0.00	5,468	5,643,362.00
TOTAL	596,701	81,912,090.00	518,596	2,883,481,968.14	46,337,450.00	5,979,500.00	1,115,297	3,085,521,194.88



The visitor arrivals and income generated from national parks in Sri Lanka from January to June 2025 offers a comprehensive picture of tourism activity within the country's wildlife sector. A total of 1,115,297 visitors were recorded across the parks and wildlife attractions, with 596,701 being local visitors and 518,596 being foreign visitors. This relatively balanced mix shows the importance of catering to both domestic and international markets when planning park services and infrastructure.

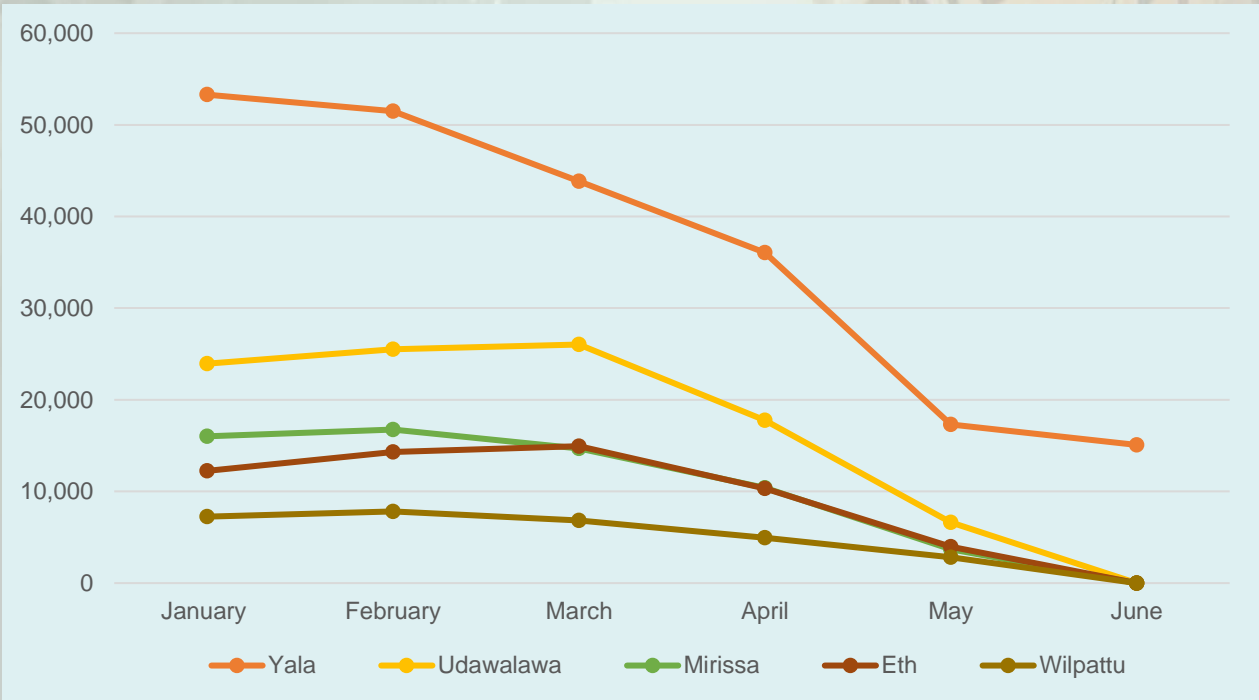
The total income generated amounts to Rs. 3.08 billion, of which the vast majority Rs. 3.03 billion comes from visitor entry fees. An additional Rs. 46.3 million was collected through vehicle fees and Rs. 5.9 million through boat services. Interestingly, foreign visitors accounted for more than 90% of the total visitor income (Rs. 2.88 billion), while local visitors contributed only Rs. 81.9 million.

Among the individual parks, Yala National Park emerged as the highest income generator, bringing in more than Rs. 1.6 billion, supported by high visitor numbers and substantial vehicle fee income. Horton Plains and Udawalawe also performed strongly, generating Rs. 214 million and Rs. 746 million respectively. Pigeon Island, despite receiving just over 30,000 visitors, earned over Rs. 24 million, demonstrating its popularity among high-paying foreign tourists. Meanwhile, Mirissa Whale Watching and Hikkaduwa stand out as key coastal experiences, drawing significant foreign interest and contributing sizable income Rs. 98.1 million and Rs. 21.6 million respectively.

On the other end of the spectrum, several parks such as Lahugala, Maduruoya, Angammedilla, and Horagolla reported both low visitation and limited income. These parks may be underutilized due to factors such as remoteness, limited infrastructure, low wildlife visibility, or a lack of effective marketing. Strategic efforts are needed to unlock their potential and improve visitor numbers.



Chart 07: Visitation of foreign tourists to main national parks, January to June 2025

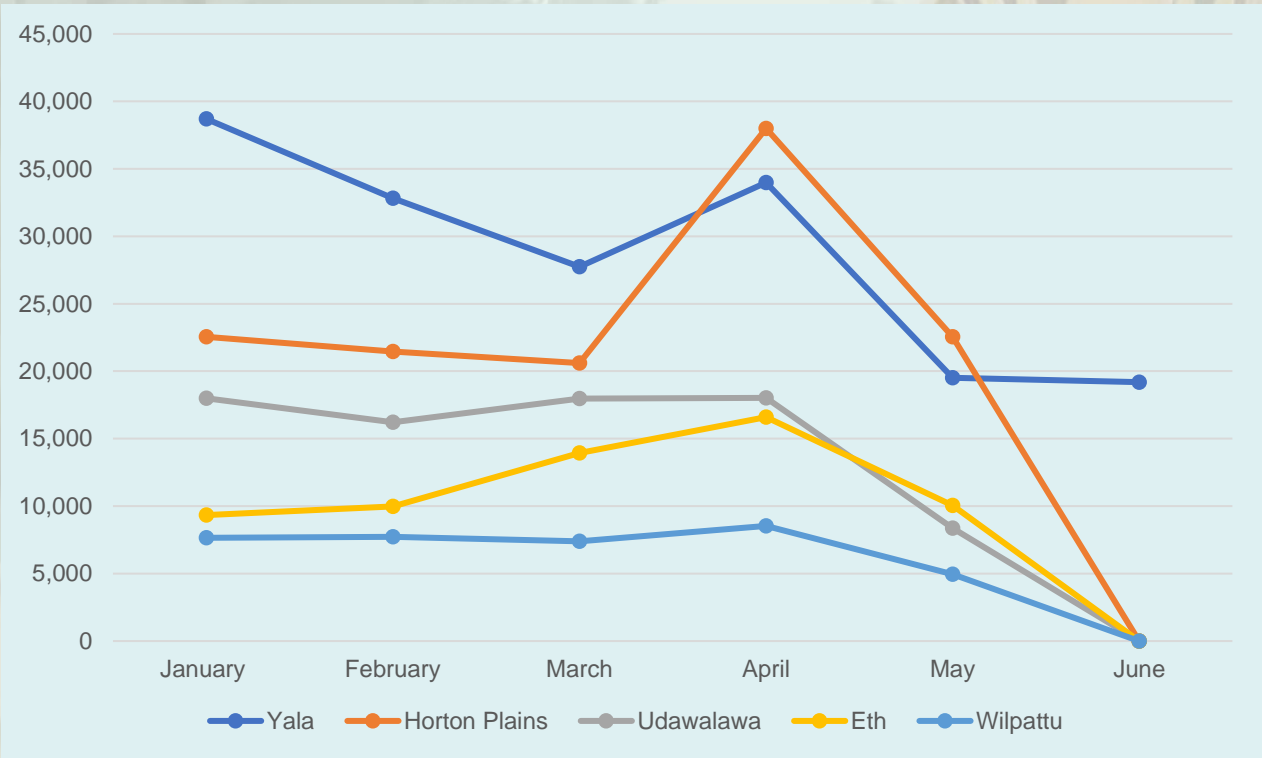


The chart shows a clear seasonal trend in foreign visitor arrivals to five key wildlife and marine sites in Sri Lanka Yala, Udawalawa, Mirissa, Eth Athuru Sevana, and Wilpattu from January to June 2025. Yala consistently attracted the highest number of tourists, starting with over 55,000 in January and dropping sharply by June. Udawalawa followed a similar pattern, with numbers falling almost to zero by June. Mirissa showed a more gradual decline, indicating greater resilience during the off season. Eth Athuru Sevana and Kalawewa recorded lower volumes overall, with steady decreases across the months.

The peak period for foreign tourist arrivals was between January and March, with significant declines from April onward, likely due to the southwest monsoon season and limited wildlife sightings. These trends highlight the importance of diversifying tourism offerings, especially during the off season, and enhancing infrastructure and promotion for under visited parks in other areas.



Chart 08: Visitation of local tourists to main national parks, January to June 2025



Local visitor numbers to key Sri Lankan national parks (including Yala, Horton Plains, Udawalawa, Eth, and Wilpattu) show a pronounced seasonal decline from April to June, starting at a high of approximately 40,000 visitors and steadily decreasing each month to just 5,000 by June. This sharp downturn, particularly noticeable after April, is strongly linked to the factors such as school holidays and weather patterns. Yala National Park appears to be the most popular destination, followed by Horton Plains and Udawalawa.



Year in review, January to June 2025



Visitors & Revenue, conservation forests, Jan-June 2025

Table 16: Visitors & revenue to conservation forests, January to June 2025

	Name of the forest	Number of visitors		Total	Income without VAT		Total
		Domestic tourists	Foreign tourists		Domestic tourists	Foreign tourists	
1	Makandawa	1,072	432	1,504	65,437.08	340,501.92	405,939.00
2	Bird Forest (Kegalle)	2,060	02	2,062	112,554.80	1,525.44	114,080.24
3	Nuwaragala (Ampara)	641	04	645	70,037.69	3,152.56	73,190.25
4	Ekgal Oya (Ampara)	0	0	0	0.00	0.00	0.00
5	Kottawa (Galle)	410	73	483	24,716.34	57,534.22	82,250.56
6	Kanneliya (Galle)	20,038	1,303	21,341	7,198,750.21	1,267,321.83	8,466,072.04
7	Adahelella Ella (Galle)	6,394	1,279	7,673	401,983.30	992,827.69	1,394,810.99
8	Hurulu Ecological Park	53,093	151,043	204,136	9,216,211.87	260,058,415.24	269,274,627.11
9	Gal Oya Ecological Park	222	80	302	23,211.85	59,542.37	82,754.22
10	Sinharaja	23951	12142	36093	2302686.46	12588625.06	14891311.52
11	Knuckles	123398	4201	127599	8060598.66	2562843.98	10623442.64
12	Udawatta Kele (Kandy)	13,809	6,502	20,311	835,213.94	5,067,706.68	5,902,920.62
13	Ratna Ella (Kandy)	5,238	628	5,866	324,420.62	546,223.42	870,644.04
14	Yahan Gala (Kandy)	38	01	39	7,790.00	820.00	8,610.00
15	Garedi Falls (Kandy)	0	0	0	0.00	0.00	0.00
16	Piduruthalagala (Nuwara Eliya)	31,619	625	32,244	1,153,629.85	959,268.55	2,112,898.40
17	Mandaram Nuwara Kolapathana	14,414	14	14,428	889,455.16	11,033.96	900,489.12
18	Badagamuwa Ecological Center	5,768	07	5,775	322,118.59	5,338.97	327,457.56
19	Galwila Ecological Park	89	11	100	9,161.48	8,487.76	17,649.24
20	Dolukanda Reserve Forest	0	0	0	0.00	0.00	0.00
21	Badulla (Ella Gala)	6,775	13,636	20,411	277,516.04	12,569,426.57	12,846,942.61
22	Kandeela	717	02	719	30,401.44	1,576.28	31,977.72
	Total	309,746	191,985	501,731	31,325,895.38	297,102,172.50	328,428,067.88

Source: Department of Forest Conservation



The data on visitors and revenue to conservation forests in Sri Lanka from January to June 2025 reveals several key insights. A total of 501,731 visitors visited these forests during the period, of which 309,746 were domestic tourists and 191,985 were foreign tourists. Despite domestic tourists comprising more than 60% of the total visitor count, it is the foreign tourists who contributed the most to the revenue. Out of the total revenue of approximately LKR 328.4 million, foreign tourists accounted for a remarkable LKR 297.1 million, which is over 90% of the earnings, while domestic tourists contributed LKR 31.3 million.

Among all the sites, Hurulu Ecological Park emerged as the highest revenue generating forest, earning approximately LKR 269.3 million more than 80% of the total income generated from all forests combined. This income came largely from foreign visitors, highlighting the park's popularity and high value among international tourists. Other top contributors to total revenue include Sinharaja Forest (LKR 148.9 million), Badulla (Ella Gale) (LKR 128.4 million), Knuckles Range (LKR 106.2 million), Kanneliya Forest (LKR 8.5 million), and Udawatte Kale (Kandy) (LKR 5.9 million). These five forests together dominate the sector's earnings, indicating where conservation and tourism investments are yielding the most returns.

In terms of foreign tourist arrivals, Hurulu Ecological Park again stands out with 151,043 foreign visitors roughly 79% of all international tourist entries across the forests. It is followed distantly by Badulla (Ella Gale) with 13,636 foreign visitors and Sinharaja with 12,142. This pattern underscores the dominance of certain forests in attracting the foreign market, likely due to their biodiversity, visibility in international travel media, or specialized wildlife experiences.

Domestic tourism remains strong in terms of numbers, with Knuckles, Hurulu Eco park and Pidurutalagala recording the highest domestic visits. This highlights the importance of these sites for local recreation and educational travel.

The data demonstrates that Sri Lanka's conservation forests hold immense value for tourism, particularly through foreign visitation. However, this value is concentrated in a handful of sites, while many others remain underutilized. Strengthening infrastructure, improving domestic tourism revenue strategies, and diversifying international visitor flows could help unlock more value from these natural assets.

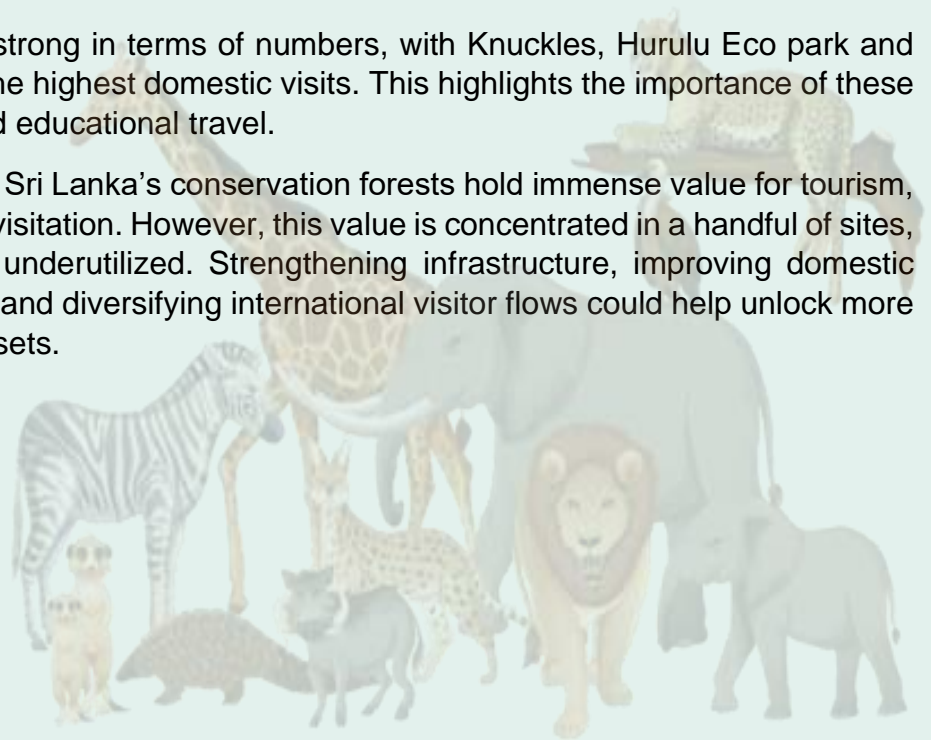
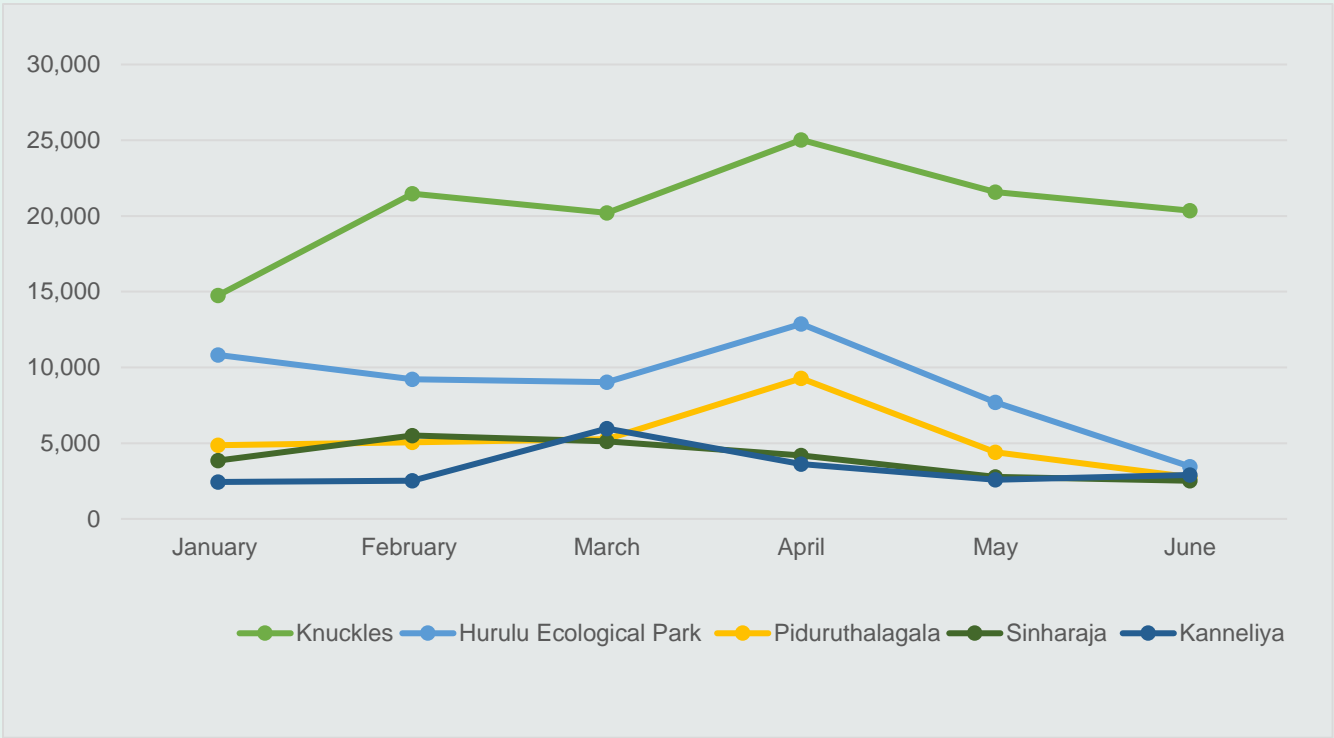




Chart 09: Visitation of domestic tourists to conservation forests, January to June 2025

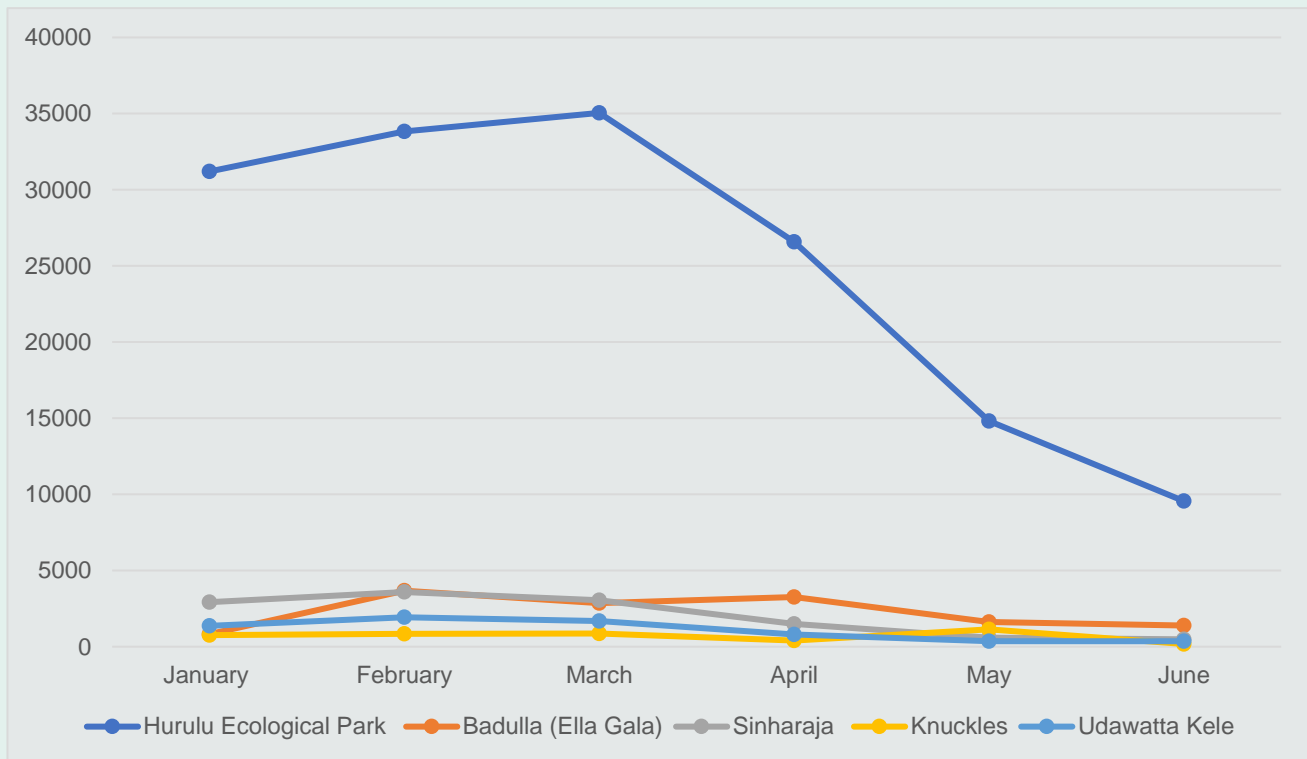


The visitation pattern of domestic tourists to key conservation forests from January to June 2025 shows that **Knuckles** was the most popular site, with consistently high numbers and a peak in April, likely due to the Sinhala and Tamil New Year holidays. **Hurulu Ecological Park** and **Piduruthalagala** also saw increases in April but experienced sharp declines afterward, indicating seasonal interest. **Sinharaja** and **Kanneliya** maintained relatively low and stable visitation throughout the period, possibly due to limited accessibility or awareness. Overall, domestic visitation is highly influenced by holiday periods, with April seeing the highest activity across most forests.





Chart 10: Visitation of foreign tourists, January to June 2025



The visitation pattern of foreign tourists from January to June 2025 shows that Hurulu Ecological Park was by far the most visited conservation forest, peaking in March with over 35,000 visitors before declining steadily to below 10,000 in June. This indicates a strong seasonal influence, likely tied to international travel patterns. In contrast, Badulla (Ella Gala), Sinharaja, Knuckles, and Udawatta Kele saw much lower and relatively stable foreign visitation, generally under 4,000 per month. Badulla performed slightly better among them, especially in March and April. The data suggests that foreign tourist activity is heavily concentrated in Hurulu, with other forests receiving limited international exposure or access, highlighting opportunities for broader promotion and tourism development.





Visitors to tourist attractions administered by Central Cultural Fund

Table 17: Visitors to tourist attractions administered by Central Cultural Fund, January to June 2025

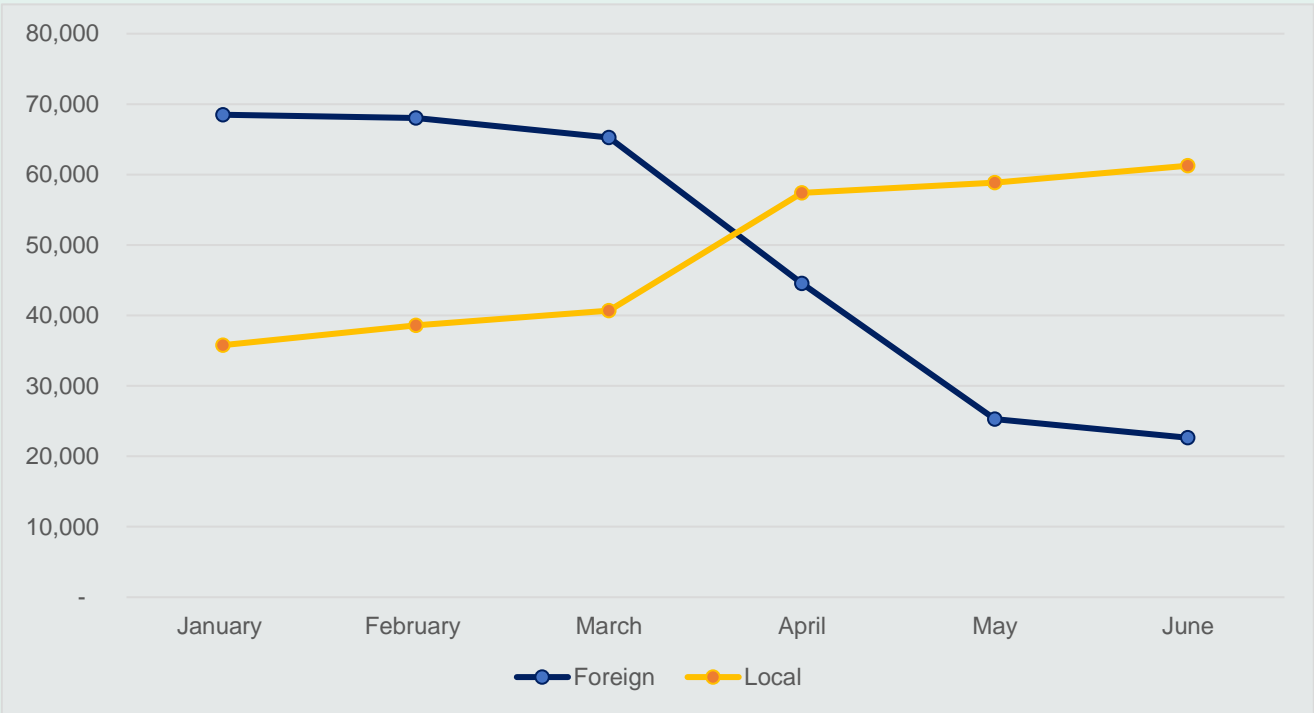
Locations	Number of foreign visitors	Number of local visitors	Total numbers of visitors	Local visitor income	Foreign visitor income	Total visitor income
Abhayagiriya	937	8,054	8,991	915,450.00	7,667,147.70	8,582,597.70
Jethawanaya	39,988	6,979	46,967	818,160.00	217,648,384.77	218,466,544.77
Sigiriya (Museum and Sigiriya Rock)	294,218	292,598	586,816	32,534,160.00	2,115,128,403.50	2,147,662,563.50
Polonnaruwa (Alahana, Gal Viharaya, Museum & Kingdom)	120,129	14,037	134,166	1,575,818.06	668,513,342.21	670,089,160.27
Kandy Museum	177	3,621	3,798	188,375.00	57,801.00	246,176.00
Galle Museum	8,810	21,076	29,886	2,330,100.00	14,624,383.70	16,954,483.70
Ramba Viharaya	115	3,046	3,161	337,623.00	102,933.00	440,556.00
Jaffna Fort	7,030	108,091	115,121	6,084,769.00	9,759,120.56	15,843,889.56
Trincomalee	4,062	11,094	15,156	1,473,840.00	4,179,434.09	5,653,274.09
Katharagama Museum	84	2,824	2,908	310,320.00	131,097.46	441,417.46
Ampara Lahugala	101	0	101	—	91,506.00	91,506.00
Buduruwagala (Monaragala)	25,969	0	25,969	—	23,065,219.54	23,065,219.54
Dambulla Museum	309	366	675	40,440.00	272,795.50	313,235.50
Ritigala forest Monastery	5,220	17,930	23,150	948,755.00	9,989,428.06	10,938,183.06
Ibbankatuwa Ancient Bural Ground	523	8,791	9,314	992,190.00	428,721.00	1,420,911.00
Namal Uyana	742	23,901	24,643	1,283,011.00	1,297,290.10	2,580,301.10
Rathugala	340	0	340	—	303,576.00	303,576.00
Seethawaka (Museum, Royal Place)	01	2,218	2,219	164,580.00	—	164,580.00
Total	508,755	524,626	1,033,381	49,997,591.06	3,073,260,584.18	3,123,258,175.24
Head Office (advance payments for tickets Sigiriya, Polonnaruwa, Anuradhapura)	—	—	—	—	1,290,632,732.58	1,290,632,732.58
Total					4,363,893,316.76	4,413,890,907.82



The Central Cultural Fund welcomed 1.03 million visitors to its heritage sites from January to June 2025, with an almost equal distribution between international tourists (508,755) and local visitors (524,626). Despite this balanced visitor profile, international tourists generated the vast majority of revenue accounting for 98% of direct site earnings (Rs. 3.07 billion) while domestic visitors contributed only 2% (Rs. 50 million).

Sigiriya emerged as the flagship destination, capturing 57% of all visitors (586,816) and generating 69% of site revenues (Rs. 2.15 billion). Other major revenue contributors included Polonnaruwa (Rs. 670 million) and Jethawanaya (Rs. 218.5 million).

Chart 11: Visitation of domestic and foreign tourists to Sigiriya, January to June 2025



Sigiriya experienced pronounced seasonal fluctuations, with March emerging as the peak month (approximately 95,000 total visitors), driven overwhelmingly by a surge in foreign tourists (~70,000) more than double any other month and reflecting Sri Lanka’s high tourism season. Domestic visitation peaked later in April (~25,000 visitors), likely aligned with local New Year holidays. While foreign visitors consistently outnumbered locals monthly, the gap widened dramatically in March before narrowing sharply by June. Post-March, foreign arrivals plummeted, whereas domestic traffic remained relatively stable outside April’s spike.



Tourism Investment



TOURISM INVESTMENT

Table 18: Tourism investment projects received from by provinces and districts,
January to June 2025

Province	District	Total projects	Rooms	Investment value (USD Mn)
Western Province	Colombo	2	36	3.22
	Gampaha	4	148	23.91
	Kalutara	0	0	0
Central Province	Kandy	3	253	11.8
	Matale	2	16	0.39
	Nuwara Eliya	2	64	5.19
Southern Province	Galle	5	227	32.13
	Matara	12	170	10.51
	Hambantota	1	26	2.24
Northern Province	Jaffna	2	47	2.74
	Mannar	0	0	0
	Mulaitivu	0	0	0
	Vavuniya	0	0	0
	Kilinochchi	0	0	0
Eastern Province	Ampara	2	126	35.47
	Batticaloa	0	0	0
	Trincomalee	2	76	3.4
Uva Province	Badulla	10	257	27.99
	Monaragala	0	0	0
North Central Province	Anuradhapura	0	0	0
	Polonnaruwa	0	0	0
North Western Province	Kurunegala	1	85	8.8
	Puttalam	1	20	1
Sabaragamuwa Province	Rathnapura	2	13	0.306
	Kegalle	0	0	0
Total		51	1564	169.096



The data for investments received during January to June 2025 across Sri Lanka highlights notable variations in project distribution, room capacity, and investment value by district and province.

The Southern Province shows strong investment momentum, particularly in Matara and Galle. Matara leads the country in terms of the number of projects (12), although with a relatively moderate investment value of LKR 10.51 million. Galle, on the other hand, attracted five projects but generated a significantly higher investment value of LKR 32.13 million, indicating larger scale or higher end developments. Hambantota recorded only one project with LKR 2.24 million, which may suggest limited investor interest or pending infrastructure developments.

The Eastern Province stands out for receiving the highest investment value during the period, largely driven by Ampara, which received LKR 35.47 million from just two projects, covering 126 rooms. This implies large-scale investments with significant room capacity. Trincomalee followed with two projects worth LKR 3.4 million. Batticaloa, however, had no investment activity, highlighting a disparity in investor confidence within the province.

In the Uva Province, all the investment was concentrated in Badulla, which recorded 10 projects totaling 257 rooms and LKR 27.99 million in investments. This shows a high level of investor interest in the area, potentially driven by its natural attractions and growing popularity among local and foreign tourists. Monaragala did not receive any investments during this period.

Kandy, in the Central Province, emerged as a key focus of investment, with 3 projects accounting for 253 rooms and LKR 11.8 million. This reflects its sustained importance as a cultural and heritage destination. Nuwara Eliya and Matale also attracted smaller investments (LKR 5.19 million and LKR 0.39 million, respectively), suggesting interest in boutique or midsized accommodation development.

In the Western Province, Gampaha led with 4 projects and LKR 23.91 million in investments, indicating its growing importance as a secondary hub close to Colombo. Colombo had 2 smaller projects (LKR 3.22 million), possibly due to saturation or focus shifting to peripheral areas. Kalutara saw no new investments, suggesting a slowdown or lack of new project proposals.

The Northern Province remains under invested, with only Jaffna showing activity (2 projects, 47 rooms, LKR 2.74 million). All other districts, including Mannar, Mullaitivu, Vavuniya, and Kilinochchi, recorded zero projects and investment, highlighting the ongoing challenge of attracting tourism investments in the post-conflict region.

Some areas in the North Western, North Central, and Sabaragamuwa Provinces show isolated activity. Kurunegala recorded one project worth LKR 8.8 million, while Puttalam and Rathnapura saw minor investments. Districts such as Anuradhapura, Polonnaruwa,



Monaragala, and Kegalle reported no investments during this period, suggesting the need for targeted incentives or marketing to attract investor interest.

Overall, from January to June 2025, Sri Lanka received a total of 51 projects, covering 1,564 rooms and generating LKR 169.096 million in investment. The distribution reveals significant concentration in a few key districts while many areas remain untapped, presenting opportunities for more balanced regional tourism development.

Table 19: Investment projects received and approved from 2010 - January to June 2025

Year	Received Projects			Approved Projects		
	Number of projects received	Number of rooms	Investment value (USD Mn.)	Number of projects approved	Number of rooms	Investment value (USD Mn.)
2010	55	4587	958.87	3	262	17.17
2011	153	8794	1,157.23	44	2159	251.57
2012	72	3934	576.24	57	3695	313.22
2013	60	4102	1124.295	36	2327	370.64
2014	68	3752	957.79	42	2747	426.398
2015	59	3347	430.98	36	2256	889.945
2016	76	3934	590.02	41	1579	145.633
2017	96	2977	314.82	45	2391	379.77
2018	141	4044	935.06	44	1377	159.724
2019	132	2589	190.71	57	2027	755.73
2020	54	1702	236.06	24	690	95.47
2021	45	1299	116.55	30	922	103.985
2022	43	1053	65.574	22	393	36.833
2023	68	1944	241.142	34	1273	170.126
2024	76	1384	160.729	30	586	41.723
2025 June 30	51	1564	169.096	22	424	53.566
Total	1,249	51,006	8,225.15	567	25,108	4,211.503



During this six month period in 2025, a total of 51 investment project proposals were received, covering 1,564 rooms with a cumulative proposed investment value of USD 169.096 million. This indicates a moderate but steady inflow of new interest in tourism-related developments, particularly given the challenges of economic recovery and global uncertainty in recent years.

Out of these, 22 projects were approved, which account for 424 rooms and a confirmed investment value of USD 53.566 million.

While the number of projects and investment volume is lower compared to peak years such as 2011 and 2018, the current figures suggest a gradual recovery and growing investor confidence, particularly after the downturn seen in 2020 and the cautious pace observed in 2021–2022. If the trend from the first half continues, the full-year total for 2025 could exceed that of 2024 in both volume and value of received and approved projects.

The January to June 2025 data shows a cautiously optimistic investment climate in Sri Lanka's tourism sector, with a respectable number of proposals received and a solid proportion moving forward to approval. This performance, halfway through the year, indicates potential for stronger second half results, especially with supportive policies and investor facilitation.



Occupancy 2024



Year in review, January to June 2025

Occupancy 2024

Table 20: Occupancy of graded establishments from different districts by months, 2024

District	No of hotels	January	February	March	April	May	June	July	August	September	October	November	December	Average occupancy
Ampara	3	26.3	22.6	23.5	25.8	30.7	36.6	51.0	60.1	43.7	16.0	10.6	24.7	31.0
Anuradhapura	9	34.4	32.0	30.5	23.9	17.0	18.2	29.3	38.3	25.3	27.3	27.5	27.3	27.6
Badulla	6	49.4	54.2	57.2	53.6	29.5	27.2	45.0	57.9	44.3	35.4	47.1	34.8	44.6
Batticaloa	7	47.7	54.0	57.7	60.5	56.7	65.1	78.7	89.3	65.2	40.1	27.8	42.9	57.1
Colombo	31	55.2	55.5	56.0	42.9	46.9	47.1	60.9	60.8	49.4	55.6	55.4	50.5	53.0
Galle	38	68.7	66.0	61.3	47.8	29.1	24.5	33.4	38.6	34.4	38.8	42.7	51.3	44.7
Gampaha	19	72.3	70.5	68.0	54.9	44.2	40.1	53.7	58.3	45.9	43.3	41.7	37.5	52.5
Hambantota	10	61.7	69.5	72.2	53.3	31.7	26.4	45.5	57.8	34.8	48.1	55.6	64.9	51.8
Jaffna	4	58.1	54.1	46.6	38.0	36.9	38.0	52.7	60.1	37.5	30.7	28.1	40.0	43.4
Kalutara	15	73.9	70.6	72.1	53.4	35.4	28.4	37.5	47.2	39.7	38.9	51.3	57.6	50.5
Kandy	16	60.2	57.1	64.0	49.9	34.3	35.0	50.2	57.7	42.8	42.4	46.6	47.1	48.9
Kegalle	3	9.8	8.1	9.7	11.1	9.7	8.6	9.9	12.3	12.0	12.7	12.2	14.4	10.9
Kurunegala	2	8.1	8.7	9.6	8.3	8.9	5.7	11.8	4.6	6.7	3.1	8.0	3.8	7.3
Matale	19	40.8	46.1	44.9	35.3	22.4	24.3	42.8	44.1	31.7	34.8	40.5	38.7	37.2
Matara	8	65.4	60.8	64.5	53.7	31.7	21.9	38.1	45.3	31.2	39.8	47.8	62.4	46.9
Moneragala	6	18.6	18.9	17.9	17.9	10.8	11.2	17.6	21.2	13.0	12.2	17.2	18.2	16.2
Nuwara Eliya	10	53.8	56.1	54.4	58.1	38.4	33.6	48.2	53.7	37.4	36.9	48.6	43.8	46.9
Polonnaruwa	2	34.8	43.3	35.9	28.3	16.3	18.1	35.5	50.1	21.3	19.0	25.2	37.9	30.5
Puttalam	4	58.8	55.8	57.6	46.0	30.6	29.2	45.7	39.0	31.4	33.8	44.3	27.6	41.6
Rathnapura	5	26.2	23.5	29.7	17.8	12.5	19.9	15.3	23.0	28.1	16.8	17.0	17.9	20.6
Trincomalee	3	40.4	43.6	43.9	45.3	38.6	43.9	64.8	72.2	49.7	33.2	25.2	21.5	43.5
Vavuniya	1	75.0	83.3	91.7	91.7	100.0	83.3	100.0	100.0	83.3	75.0	66.7	66.7	84.7
TOTAL	221	47.3	47.9	48.6	41.7	32.4	31.2	44.0	49.6	36.8	33.4	35.8	37.8	44.5

The above table consists of provisional occupancy data for the year 2024. it includes 221 graded establishments which is 48% of the total SLTDA registered graded establishments.



Table 21 : District wise occupancy, 2024

District	Average occupancy
Ampara	31.0
Anuradhapura	27.6
Badulla	44.6
Batticaloa	57.1
Colombo	53.0
Galle	44.7
Gampaha	52.5
Hambantota	51.8
Jaffna	43.4
Kalutara	50.5
Kandy	48.9
Kegalle	10.9
Kurunegala	7.3
Matale	37.2
Matara	46.9
Moneragala	16.2
Nuwara Eliya	46.9
Polonnaruwa	30.5
Puttalam	41.6
Rathnapura	20.6
Trincomalee	43.5
Vavuniya	84.7
TOTAL	44.5





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