2025

Year In Review

Sri Lanka Tourism Development Authority

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January to December

HIGHLIGHTS

2025

Tourist arrivals

Tourist arrivals
2,362,521

Tourism revenue
3,219 USD Mn
3.2 billion USD
968,829.4 RS Mn

Tourism revenue

Average duration of stay

Average duration of stay
8.29* nights

TOURIST ARRIVALS TO SRI LANKA

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

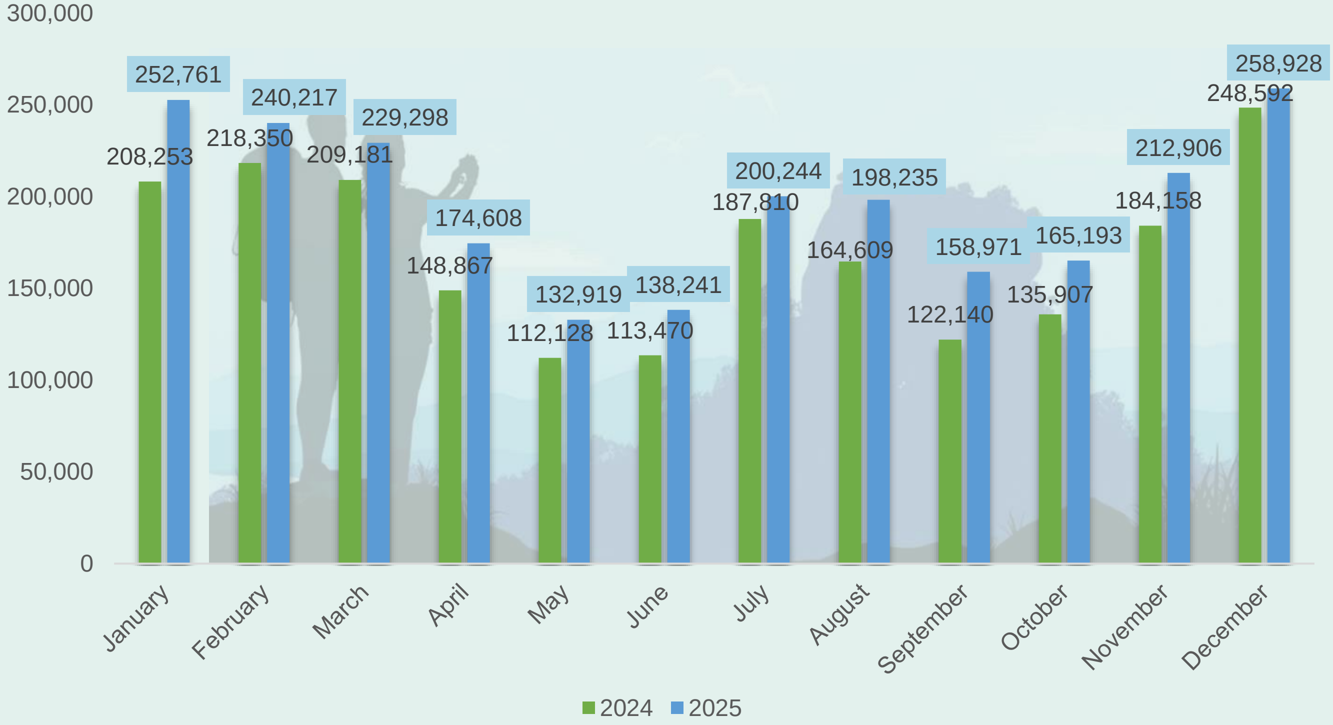


Table 01: Tourist arrivals by month & percentage change, 2024 & 2025

Month	2025	2024	2018	Percentage change 2025/2018	Percentage change 2025/2024
January	252,761	208,253	238,924	5.8	21.4
February	240,217	218,350	235,618	2.0	10.0
March	229,298	209,181	233,382	(1.8)	9.6
April	174,608	148,867	180,429	(3.2)	17.3
May	132,919	112,128	129,466	2.7	18.5
June	138,241	113,470	146,828	(5.9)	21.8
July	200,244	187,810	217,829	(8.1)	6.6
August	198,235	164,609	200,359	(1.1)	20.4
September	158,971	122,140	149,087	6.6	30.2
October	165,193	135,907	153,123	7.9	21.5
November	212,906	184,158	195,582	8.9	15.6
December	258,928	248,592	253,169	2.3	4.2
Total	**2,362,521**	**2,053,465**	**2,333,796**	**1.2**	**15.1**

Chart 02: Comparison of tourist arrivals 2018, 2024 & 2025

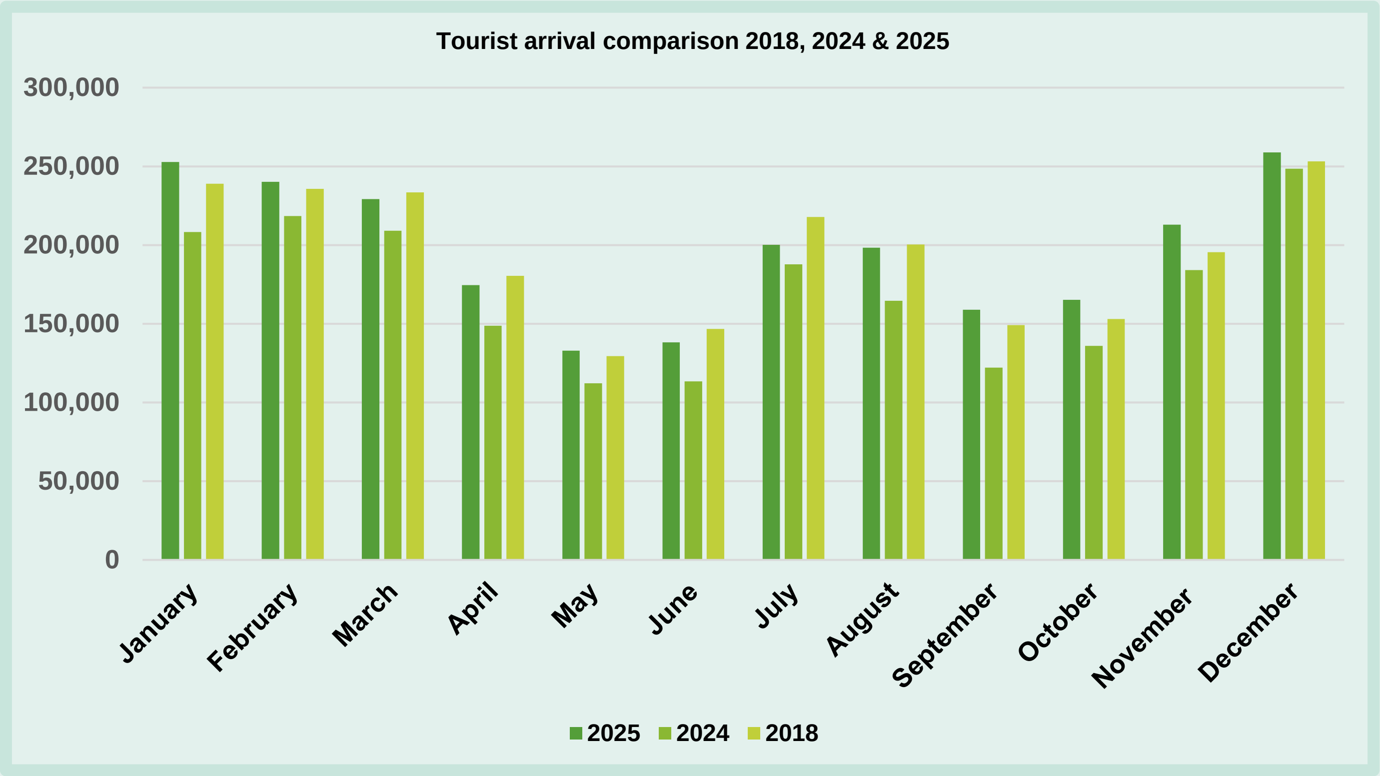
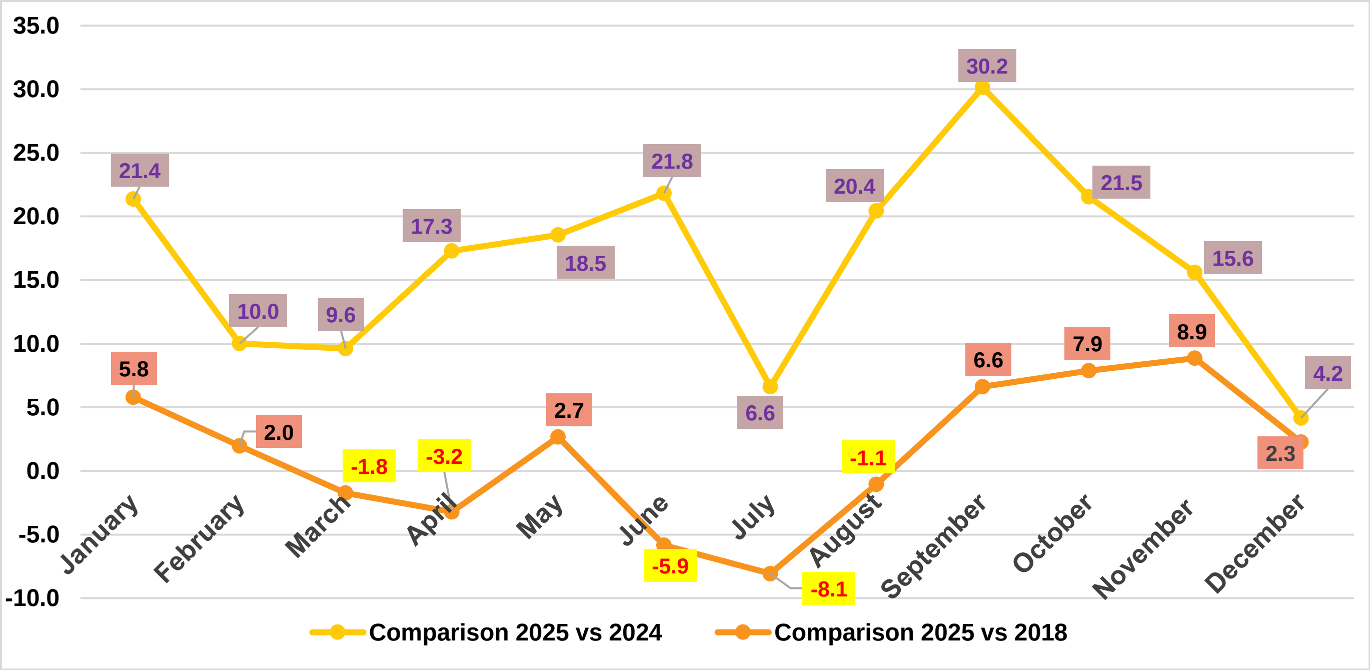


Chart 03: Comparison of growth change by month



Tourist arrivals in 2025 totaled 2,362,521, representing a robust 15.1% increase over 2024 and setting a new record as the highest number of arrivals in the country's history. This reflects a significant recovery in the tourism sector, highlighting renewed momentum and increased travel demand over the past year.

When comparing 2025 to 2018, the long-term trend shows a mixed performance. The months of September, October, and November demonstrate the strongest positive growth, with increases ranging from 6.63% to 8.86%. In contrast, the summer of April, June, July, and August along with March, are still underperforming relative to 2018, with July seeing a notable decline of 8.07%. This suggests that while some months have recovered, others may be facing changing traveler preferences or capacity constraints.

The year-on-year comparison between 2025 and 2024 tells a more optimistic story of short-term recovery. Every single month recorded positive growth, with September leading the way at an impressive 30.16%. Other months like June, January, October, and August also saw substantial increases above 20%. This widespread surge indicates a strong post-pandemic rebound, likely driven by renewed consumer confidence, easing of travel restrictions, or effective promotional efforts. December was the only exception; although it remained the busiest month with the highest number of arrivals, it recorded the lowest growth rate of 4.16%, possibly due to the impact of the Ditwah cyclone and related conditions.

The data indicates that 2025 marks a robust recovery from the recent past; however, growth remains modest when compared to the earlier benchmark of 2018. Contributing factors likely include geopolitical tensions in key source markets, unfavourable climatic conditions, challenges related to airport overcapacity, and delays in implementing marketing initiatives. The seasonal nature of tourism remains consistent. Moving forward, strategic focus could be placed on boosting travel during the underperforming months and capitalizing on the emerging peak months such as September, to drive future growth.

Tourist arrivals by region

January to December 2025

In 2025, international tourism hit a record high of 1.52 billion arrivals globally, marking roughly 4% growth year-on-year. Europe led all regions with 793 million visitors (+4%), followed by Asia & the Pacific with 331 million (+6%), recovering to 91% of pre-pandemic levels. The Americas drew 218 million tourists with a modest 1% gain, while Africa posted the strongest growth at 8% (81 million), with North Africa surging 11% (UN Tourism, 2026).

At the national level, Sri Lanka also had a record-breaking year, welcoming 2,333,797 tourists in 2025. Europe was the top source region, contributing 1,152,955 visitors (48.8%) of total arrivals, with key markets including the UK, Germany, and France highlighting Europe's pivotal role in Sri Lanka's tourism resurgence. Asia and the Pacific followed closely behind, recording 1,039,759 arrivals, or 44.0% 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.

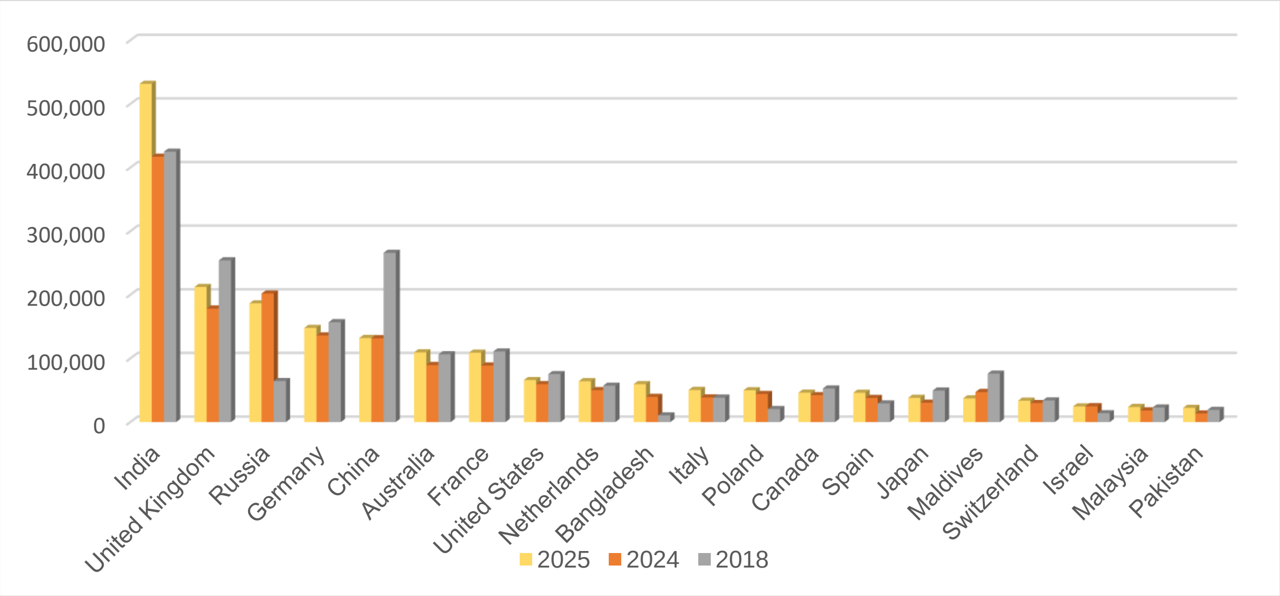
In contrast, the Americas accounted for 119,830 tourists, making up 5.1% of the total. Although a smaller share, this represents a steady contribution, mainly from markets such as the United States and Canada. The Middle East contributed 32,338 visitors (1.4%), while Africa recorded 17,639 arrivals (0.7%), 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.

Table 02: Top Source Markets 2018,2024, 2025

Country	2025	2024	2018	Percentage Change 24/25	Percentage Change 18/25
India	531,511	416,974	424,887	27.47	25.09
United Kingdom	212,277	178,339	254,176	19.03	(16.48)
Russian Federation	186,580	201,920	64,497	(7.60)	189.28
Germany	147,966	136,084	156,888	8.73	(5.69)
China	132,035	131,681	265,965	0.27	(50.36)
Australia	109,487	89,573	106,449	22.23	2.85
France	109,041	88,775	110,928	22.83	(1.70)
United States	65,973	59,532	75,308	10.82	(12.40)
Netherlands	64,164	50,116	57,160	28.03	12.25
Bangladesh	59,563	39,555	10,487	50.58	467.97
Italy	50,430	38,709	38,379	30.28	31.40
Poland	49,989	44,165	20,378	13.19	145.31
Canada	46,133	42,212	52,681	9.29	(12.43)
Spain	46,038	37,928	29,208	21.38	57.62
Japan	38,153	30,429	49,450	25.38	(22.85)
Maldives	37,165	47,222	76,108	(21.30)	(51.17)
Switzerland	33,624	29,829	33,965	12.72	(1.00)
Israel	24,591	24,845	13,833	(1.02)	77.77
Malaysia	23,684	18,259	22,808	29.71	3.84
Pakistan	22,296	13,451	19,116	65.76	16.64
Others	371,821	333,867	451,125	11.37	(17.58)
	2,362,521	**2,053,465**	**2,333,796**	**15.05**	**1.23**

Chart 04: Comparison of tourist arrivals from key source markets 2018,2024,2025



India: The Dominant and Growing Market

India remains the largest source market for Sri Lankan tourism by a significant margin, accounting for approximately 531,511 arrivals in 2025. This represents a robust recovery and growth trajectory, with a 27.47% increase from 2024 and a 25.09% increase from 2018. The consistent growth from pre-pandemic levels indicates that India is not only a resilient market but also one with immense potential due to its proximity and strong cultural and economic ties. The figures suggest that targeted marketing and improved connectivity have successfully capitalized on this neighboring market.

The Rise of Non-Traditional Markets: Russia, Bangladesh, and Poland

A striking trend is the emergence and rapid growth of markets that were relatively small in 2018. The Russian Federation has seen an substantial growth of 189.29% since 2018, increasing from 64,497 to 186,580 arrivals, making it the third-largest market. Similarly, Bangladesh has experienced a phenomenal 467.97% increase over the same period, albeit from a small base, reaching nearly 60,000 arrivals. Poland has also shown remarkable long-term growth of 145.31%. These shifts point to a diversification of Sri Lanka's tourism portfolio, reducing reliance on traditional Western markets and highlighting successful promotional efforts in Eastern Europe and South Asia. The year-on-year growth from 2024 to 2025 for Bangladesh (50.58%) and Pakistan (65.76%) further underscores this momentum.

Decline of Traditional Western Markets: UK, Germany, and China

In contrast to the emerging markets, several traditional strongholds have shown a decline compared to pre-pandemic levels. The United Kingdom, historically one of the top sources, saw a 16.48% drop from 2018, with 2025 arrivals (212,277) still well below 2018 levels (254,176). Similarly, Germany (-5.69%) and France (-1.70%) have not yet fully recovered. The most dramatic decline is from China, which plummeted by 50.34% from 265,965 in 2018 to just 132,035 in 2025, although it showed a marginal 0.27% increase from 2024. This suggests that while there is a slight year-on-year stabilization, the Chinese market is yet to rebound significantly, possibly due to its own economic conditions or shifting outbound travel patterns. The Maldives market also contracted sharply, down 51.17% since 2018 and 21.30% since 2024, indicating a potential shift in travel preferences or increased competition.

Short-Term Recovery vs. Long-Term Structural Change

The data reveals two different narratives: a strong short-term recovery and a long-term structural shift. The year-on-year changes between 2024 and 2025 are overwhelmingly positive, with 17 out of 21 markets showing growth. This indicates a successful post-pandemic rebound. However, the long-term comparison with 2018 tells a story of change. While India, Russia, Bangladesh, Poland, Spain, and Israel have significantly outperformed their 2018 numbers, many established Western markets are still lagging. This suggests that the composition of Sri Lanka's tourist demographic has fundamentally altered since 2018, with a greater reliance on new and emerging source markets

Performance of Smaller but Growing Markets

Several mid-tier markets demonstrated impressive growth, both in the short and long term. Italy (up 31.4% since 2018), Spain (up 57.62%), and the Netherlands (up 12.25%) have shown consistent increases. The United States and Canada, while showing positive year-on-year recovery (10.82% and 9.29% respectively), remain below their 2018 levels, indicating room for further growth.

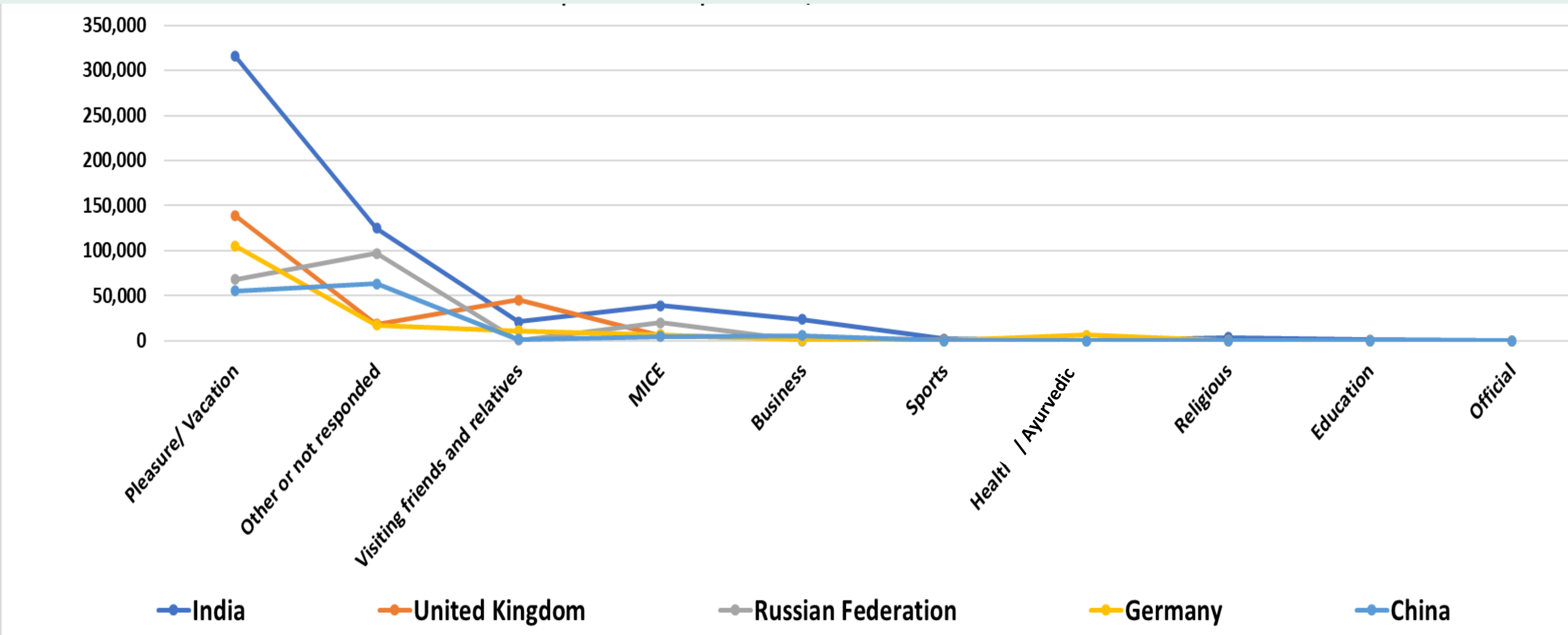
Sri Lanka's tourism landscape in 2025 is characterized by a strong recovery from the immediate post-pandemic lows, but with a significantly altered market composition. The traditional dominance of Western Europe and China has been challenged by the meteoric rise of India, Russia, and emerging South Asian markets. This diversification presents both an opportunity and a challenge, requiring adaptive marketing strategies to cater to these new demographics while working to regain lost ground in traditional sectors.

Analysis of Purpose of Visit

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

Country	Pleasure/ Vacation	Other or not responded	Visiting friends and relatives	MICE	Business	Sports	Health / Ayurvedic	Religious	Education	Official	Grand Total
India	315,923	125,142	20,954	38,866	23,580	2,414	54	3,521	1,056	1	**531,511**
United Kingdom	138,888	18,334	45,150	5,180	2,840	1,186	238	357	102	2	**212,277**
Russian Federation	67,784	97,198	657	20,295	276	122	180	26	42	0	**186,580**
Germany	105,434	17,243	11,045	6,752	957	100	6,363	33	38	1	**147,966**
China	55,494	63,548	1,829	4,940	5,869	172	31	68	82	2	**132,035**
Australia	64,216	9,554	30,716	2,553	1,345	633	158	249	62	1	**109,487**
France	81,255	7,656	9,701	9,269	713	52	224	128	42	1	**109,041**
United States	37,086	8,141	13,324	4,414	1,702	177	171	890	64	4	**65,973**
Netherlands	50,331	6,687	3,082	3,419	472	21	134	9	8	1	**64,164**
Bangladesh	40,347	14,095	1,165	2,560	918	326	16	117	19	0	**59,563**
Italy	36,410	5,603	3,264	4,199	717	43	150	10	34	0	**50,430**
Poland	34,399	6,086	398	8,648	259	24	140	30	4	1	**49,989**
Canada	15,647	3,822	24,719	1,040	416	66	101	312	10	0	**46,133**
Spain	37,024	3,202	520	4,781	350	22	113	9	17	0	**46,038**
Japan	27,642	4,433	1,483	2,090	1,827	104	552	15	7	0	**38,153**

Chart 05: Purpose of visit of key source markets 2025



Sri Lanka's tourism in 2025 remains overwhelmingly leisure driven. Across almost all major source markets, "Pleasure/Vacation" dominates as the primary purpose of visit. India leads with 315,923 leisure travelers out of a total 531,511 arrivals, followed by the United Kingdom (138,888), Germany (105,434), and the Russian Federation (67,784). This confirms that Sri Lanka continues to position itself primarily as a holiday destination rather than a business or education hub. The strong leisure orientation reinforces the importance of beach tourism, heritage sites, wildlife parks, and experiential travel products in national marketing strategies.

India clearly stands out as Sri Lanka's largest source market by a significant margin, contributing 531,511 visitors more than double the second-largest market, the United Kingdom (212,277). However, the Indian market is more diversified in purpose compared to European markets. In addition to leisure travel, India shows strong numbers in MICE (38,866), Business (23,580), and Visiting Friends and Relatives (20,954). This suggests deep economic, cultural, and diaspora linkages between the two countries. For Sri Lanka, India is not just a holiday market but a multi-segment strategic partner supporting conference tourism, trade-related travel, and short-haul repeat visits.

The United Kingdom, Germany, and France display a more classic long-haul European leisure profile. In these markets, vacation travel dominates heavily, while business and MICE segments are comparatively small. However, the UK shows a notably high "Visiting Friends and Relatives" segment (45,150), reflecting diaspora connections. Germany also records a comparatively strong "Health/Ayurvedic" segment (6,363), suggesting that wellness tourism has strong appeal in the German market. This indicates potential for further targeted marketing of Ayurveda and holistic wellness experiences in German-speaking countries.

The Russian Federation presents an interesting pattern. Although leisure travel is strong (67,784), the "Other/Not responded" category (97,198) is unusually high. This may indicate reporting inconsistencies or visa-category differences. Despite this, Russia remains one of the top total contributors (186,580), reinforcing its importance as a winter sun market. However, relatively low business and MICE numbers confirm that this is predominantly a seasonal holiday market with limited diversification.

China's arrivals (132,035) show a more varied distribution. While leisure remains significant (55,494), there is a moderate arrival for the purpose of business (5,869) and MICE (4,940) travel. This suggests that the Chinese market may include group tours or government linked travel. With improved air connectivity and bilateral engagement, China has potential to expand further in organized group tourism and business-related travel.

Australia and Canada stand out for their strong "Visiting Friends and Relatives" segments 30,716 and 24,719 respectively. This clearly reflects the Sri Lankan diaspora in these countries. These are resilient segments that are less sensitive to global economic downturns compared to leisure-only markets. Policies facilitating easier travel, competitive airfares, and targeted diaspora engagement could help stabilize arrivals from these long-haul markets.

The United States, Netherlands, Italy, Spain, and Poland show moderate but stable volumes. The United States has a relatively diversified profile, including leisure (37,086), visiting friends and relatives (13,324), and a noticeable religious segment (890). Poland shows a strong MICE component (8,648) relative to its total size, which may indicate organized group travel or incentive tourism. These niche strengths provide opportunities for tailored marketing campaigns.

Health/Ayurvedic tourism, while small in absolute terms, shows concentration in specific markets such as Germany (6,363), Japan (552), and India (though modest at 54). This confirms that wellness tourism is currently niche but has high-value potential. Given Sri Lanka's global reputation in Ayurveda, there is scope to strategically upscale and standardize this segment to attract higher-spending long-stay visitors.

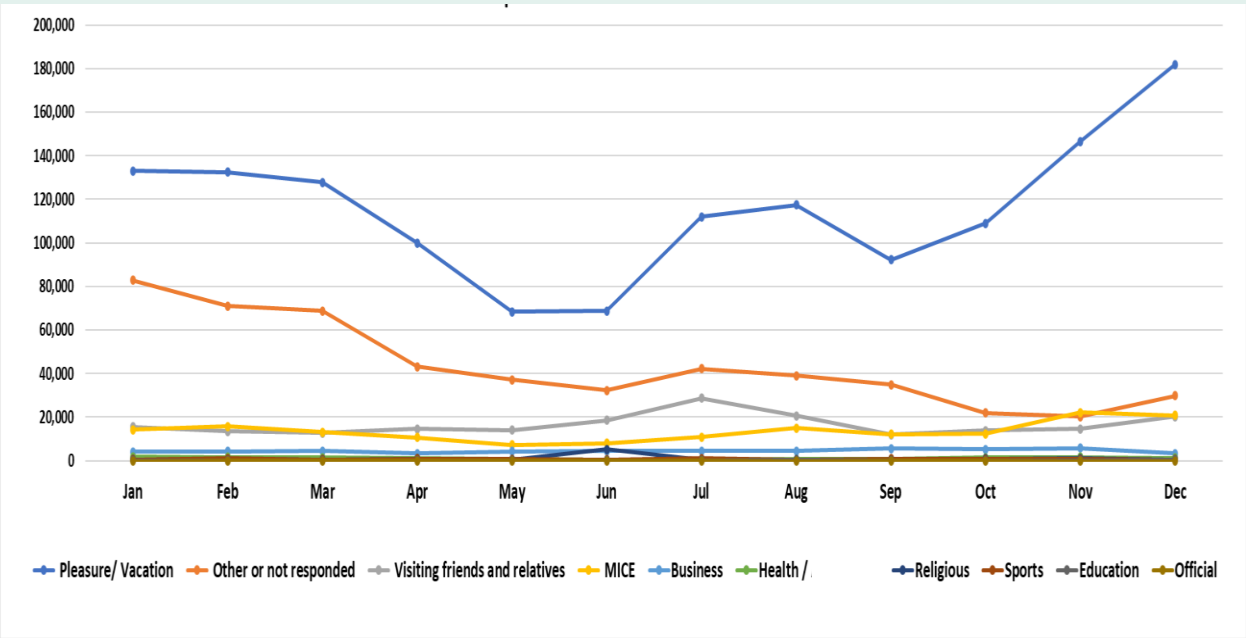
Religious tourism remains limited overall but visible in India (3,521) and the United States (890), reflecting Buddhist, Hindu, and Christian pilgrimage linkages. Education and official travel are minimal across all markets, suggesting that Sri Lanka is not yet positioned strongly as an education or institutional hub for inbound mobility.

Overall, the data reveals that Sri Lanka's 2025 tourism structure is highly leisure-dependent, with India functioning as a diversified and strategic anchor market. European and Russian markets remain strong seasonal leisure drivers, while diaspora-based markets such as Australia and Canada provide resilience. Moving forward, diversification into MICE, wellness, diaspora engagement, and short-haul repeat markets particularly India could strengthen stability and increase yield per visitor.

Table 04: Purpose of visit of tourists by month

Month	Pleasure/ Vacation	Other or not responded	Visiting friends and relatives	MICE	Business	Health / Ayurvedic	Religious	Sports	Education	Official
January	133,063	82,819	15,616	14,177	4,154	1,819	564	450	99	0
February	132,507	70,938	13,389	15,792	4,276	1,553	595	1,038	128	1
March	127,781	68,765	12,790	13,004	4,392	1,460	558	467	80	1
April	99,843	43,239	14,581	10,736	3,355	965	897	886	105	1
May	68,273	37,161	14,031	7,254	4,257	621	516	761	41	4
June	68,809	32,278	18,543	8,038	4,433	331	5,223	438	146	2
July	111,910	42,215	28,635	10,854	4,443	525	387	1,111	163	1
August	117,404	39,109	20,630	14,885	4,498	673	553	244	239	0
September	92,225	34,908	12,022	12,054	5,618	658	420	939	123	4
October	108,912	21,942	13,765	12,243	5,167	1,387	929	644	202	2
November	146,608	20,290	14,627	22,130	5,740	1,681	981	682	167	0
December	181,945	29,818	20,233	20,879	3,294	1,304	410	574	471	0
Total	**1,389,280**	**523,482**	**198,862**	**162,046**	**53,627**	**12,977**	**12,033**	**8,234**	**1,964**	**16**

Chart 06: Purpose of visit of tourist by month, January to December 2025



Monthly breakdown of tourist arrivals to Sri Lanka for 2025 by the purpose of visit, reveals distinct seasonal patterns, demand drivers, and behavioural trends among visitors based on their purpose of travel.

Tourism is Highly Seasonal, Peaking in the Winter Months

The data clearly indicates that Sri Lanka tourism is heavily seasonal, with the highest volume of arrivals occurring in the first quarter and the last quarter of the year. December recorded the highest number of total arrivals, driven predominantly by the "Pleasure/Vacation" segment (181,945), which is the largest single monthly figure for any category. This is likely due to the favourable weather in Sri Lanka coinciding with holiday seasons in key Western markets. Conversely, May and June represent the lowest point for leisure travel, which corresponds with the onset of the southwest monsoon in the south and west coasts, traditionally the low season for tourism.

Visiting Friends and Relatives" (VFR) is a Resilient, Year-Round Market

Unlike pure leisure travel, the VFR segment demonstrates remarkable resilience and stability throughout the year. While there is a noticeable spike in July (28,635) likely corresponding to summer holidays in Europe and school breaks in diaspora communities, the numbers remain relatively healthy even during the low season months (e.g., 14,031 in May and 18,543 in June). This suggests that VFR travelers are less sensitive to weather conditions and seasonal factors, making this a valuable market for smoothing out annual tourist arrival curves and ensuring a more consistent economic impact.

MICE and Business Travel Show Strong Late-Year Momentum

The MICE (Meetings, Incentives, Conferences, and Exhibitions) segment shows a distinct pattern, with a massive surge in the last quarter of the year. November (22,130) and December (20,879) are the peak months for this category, likely driven by year-end corporate events, incentive trips, and conferences taking advantage of the pleasant climate. Similarly, Business travel maintains a steady baseline but peaks in November (5,740) and September (5,618), aligning with global fiscal year-ends and trade fairs. This late-year concentration of high-spending corporate travelers is a critical revenue driver.

Niche Segments Exhibit Specific Seasonal Peaks

Special interest tourism segments, while smaller in volume, show very specific seasonal peaks that align with cultural and natural events:

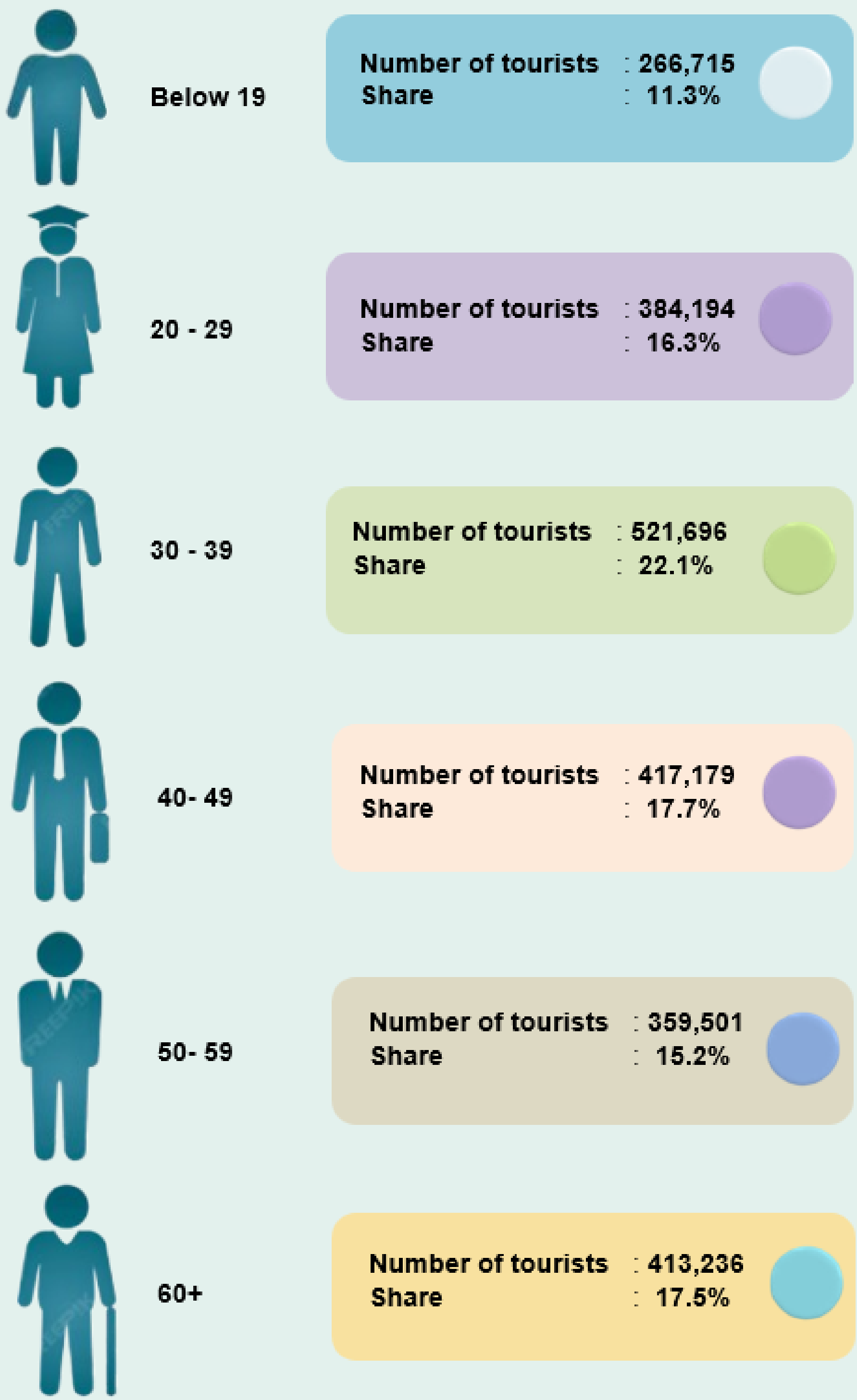
Religious Tourism: A clear spike is visible in June (5,223), which dwarfs all other months. This could be almost certainly linked to a religious convention such as Bora annual spiritual convention in June, a major religious event in Sri Lanka attracting pilgrims. A secondary, smaller peak is seen in April (897), potentially around the Sinhala and Tamil New Year.

Sports Tourism: This segment shows volatility, with notable peaks in February (1,038) and July (1,111). This could be attributed to international cricket tours, sporting events, or marathons scheduled during these months.

Education Tourism: While the smallest segment, there is a distinct surge in December (471), which may correspond to international student exchange programs or short-term educational tours during the winter break in Western countries.

Tourist arrivals by age category, 2025

Chart 07: Tourist arrivals by age category, January to December 2025



An analysis of the age demographics for tourists visiting Sri Lanka in 2025 reveals a well-distributed market across all age groups, with the most significant finding being the substantial growth in the senior travel segment compared to pre-pandemic levels.

The Core Market: The 30-39 Demographic Leads the Way

The 30-39 age group remains the single largest cohort of visitors, accounting for 22.1% (521,696 tourists) of all arrivals. This demographic, typically comprising early-to-mid-career professionals and young families, is often attracted to a mix of adventure, culture, and relaxation. Their dominance suggests that Sri Lanka's diverse product offering ranging from hiking and wildlife to heritage sites and boutique hotels successfully appeals to this active age bracket. The market share for this group is virtually unchanged from 2018 (22.4%), indicating a stable and reliable source of visitors.

The Silver Economy is Booming: A Significant Shift in Senior Travel

The most notable trend in the data is the remarkable increase in travelers aged 60 and above. This group now constitutes 17.5% (413,236 tourists) of all arrivals, a significant jump from just 15% in 2018. This 2.5 percentage point increase makes it the fastest-growing demographic segment. This rise points to the growing importance of the "silver economy" in global tourism. For Sri Lanka, this suggests a successful appeal to retirees and senior travelers who are drawn to the country's rich cultural heritage, wellness and Ayurvedic retreats, and leisurely sightseeing opportunities. This shift may also reflect longer average stays and higher spending potential, as this group often travels outside of peak school holiday seasons.

The "Forties" Bounce Back and the Youth Segment Evolves

The 40–49 age group has seen a slight uptick, climbing to 17.7% from 17.4% in 2018.This reinforces the strength of the mature, experienced traveler market that values Sri Lanka's in-depth cultural and experiential offerings. Conversely, the 20-29 youth segment has experienced a noticeable decline, dropping from 18.2% in 2018 to 16.3% in 2025. While still a vital part of the tourism mix, this contraction could indicate increased competition from other budget-friendly or adventure focused destinations in the post-pandemic landscape, or a shift in travel preferences among younger demographics.

The 2025 data paints a picture of a resilient and evolving tourist demographic. While the core 30-39 market remains strong, the most significant shift is the aging of the tourist profile, with a pronounced increase in senior travelers. This suggests that Sri Lanka's tourism industry may need to continue adapting its products and services to cater to the needs and preferences of older, potentially higher-spending visitors, while also finding new ways to attract the younger backpacker and flash-packer segments.

Chart 08: Tourist arrivals by age, January to December 2025

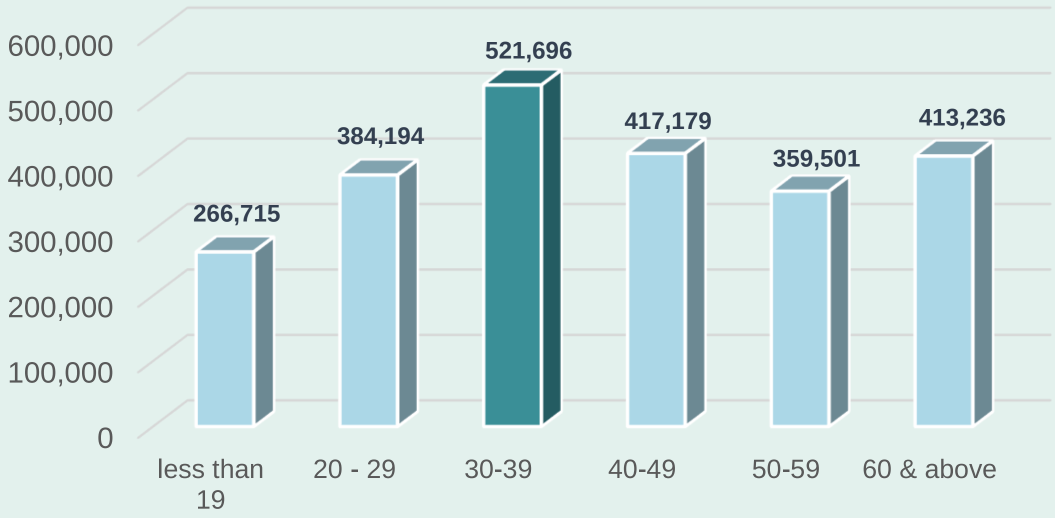
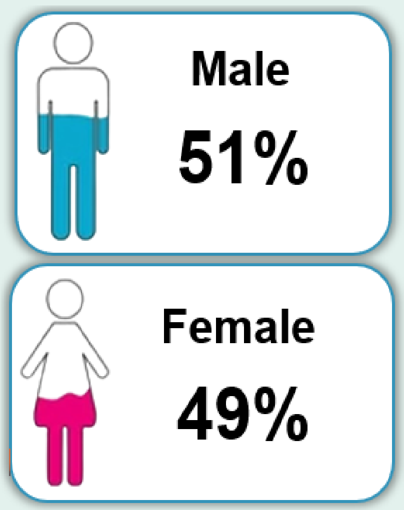


Chart 09: Tourist arrivals by gender, 2025



Gender distribution of tourists who visited Sri Lanka in 2025 Shows almost an even split. Of the total 2,362,521 arrivals, Male tourists numbered 1,212,691, accounting for approximately 51% of the market. Female tourists numbered 1,149,830, representing approximately 49% of the market. This near 50:50 split indicates that Sri Lanka appeals broadly as a destination, attracting male and female travelers in almost equal measure.

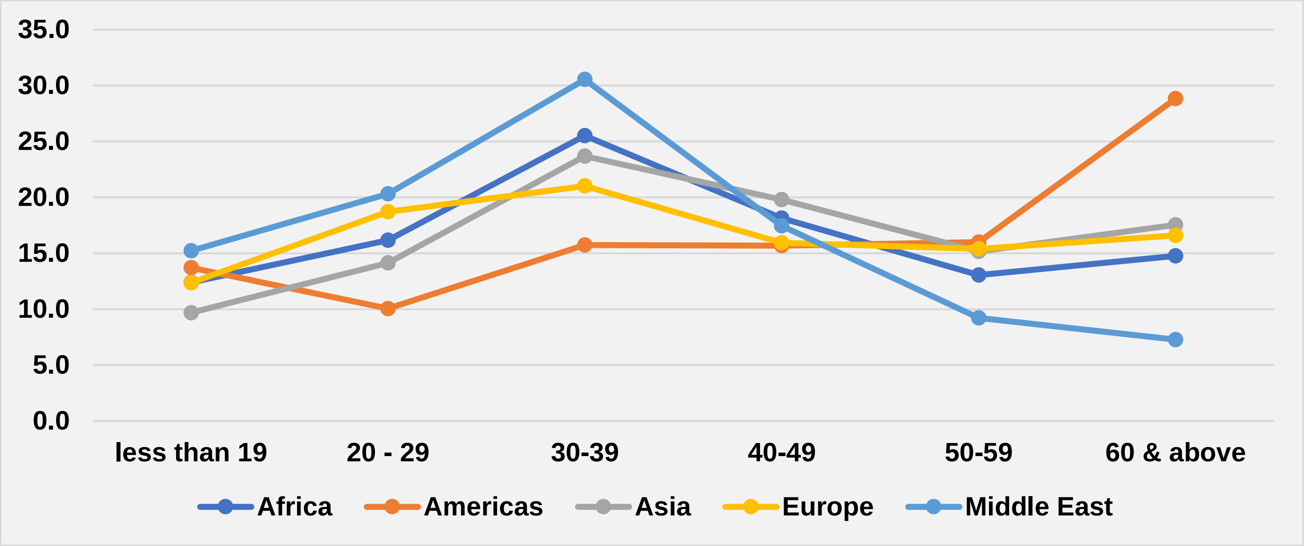
This balanced demographic profile suggests that Sri Lanka's tourism product has universal appeal. The country's diverse offerings ranging from adventure and wildlife to culture, wellness, and relaxation appear to cater effectively to the interests of all travelers, regardless of gender. For tourism marketers, this data implies that generic, gender-neutral campaigns highlighting the country's core strengths may be effective. However, it also presents an opportunity to develop targeted campaigns. For instance, promoting Sri Lanka's reputation as a safe and welcoming destination could further boost the female segment, while adventure and sports tourism messaging might resonate more with the male demographic.

This balanced gender distribution aligns with global travel trends, where business and leisure travel are increasingly gender-balanced. The slight male majority could be attributed to several factors, including a higher proportion of male business travelers, solo male adventurers or those coming from India for Casinos. Conversely, the strong female representation may reflect the growing number of women traveling solo, with friends, or as part of female-centric tour groups. Sri Lanka's ability to attract a nearly equal number of female travelers is a positive indicator of the destination's perceived safety and inclusivity, which are critical factors for female travelers when choosing a holiday destination.

Table 05: Tourist arrivals from different regions by age, 2025

Region	less than 19	%	20 - 29	%	30-39	%	40-49	%	50-59	%	60 & above	%	Total
Africa	2,186	12.4	2,851	16.2	4,500	25.5	3,197	18.1	2,300	13.0	2,605	14.8	**17,639**
Americas	16,434	13.7	12,048	10.1	18,853	15.7	18,782	15.7	19,171	16.0	34,542	28.8	**119,830**
Asia	100,722	9.7	146,990	14.1	246,206	23.7	205,809	19.8	157,612	15.2	182,420	17.5	**1,039,759**
Europe	142,448	12.4	215,737	18.7	242,262	21.0	183,750	15.9	177,442	15.4	191,316	16.6	**1,152,955**
Middle East	4,925	15.2	6,568	20.3	9,875	30.5	5,641	17.4	2,976	9.2	2,353	7.3	**32,338**
Total	**266,715**		**384,194**		**521,696**		**417,179**		**359,501**		**413,236**		**2,362,521**

Chart 10: Tourist arrivals from different regions by age, 2025



An analysis of tourists from different regions by their age categories reveals the dominance of the 30-39 age bracket across nearly all regions. This cohort represents the largest segment for Africa (25.5%), Asia (23.7%), Europe (21.0%), and the Middle East (30.5%). This suggests that Sri Lanka is highly successful in attracting a prime working-age demographic individuals who are likely established in their careers, have disposable income, and are seeking a mix of adventure, culture, and relaxation.

The data for the Americas presents a completely different profile that warrants analysis. Unlike all other regions, the largest age cohort from the Americas is the 60 & above category, comprising a substantial 28.8% of visitors. Furthermore, the 50-59 bracket is also significant at 16.0%. This paints a clear picture: Sri Lanka is a premier long-haul destination for American seniors. These are likely retirees or empty-nesters with significant time and financial resources, seeking bucket-list experiences, wildlife safaris, cultural heritage tours, and high-comfort travel and also diaspora coming to visit their friends and relatives. The relatively lower percentages in the 20-39 brackets from the Americas (10.1% and 15.7%) suggest that the high cost and long travel time may be prohibitive for younger, budget-conscious American travelers

The Middle Eastern market exhibits a distinctive pyramid-like structure heavily skewed toward youth and middle age. It has the highest percentage of visitors under 19 (15.2%) and in the 20-29 bracket (20.3%), alongside the dominant 30-39 group (30.5%). This indicates a strong trend of family travel and young adult groups. Conversely, it has the smallest proportion of visitors over 60 (just 7.3%). This demographic pattern may reflect travel behaviors driven by large family units, the popularity of Sri Lanka as a short-haul leisure destination for younger Gulf residents, and potentially, the presence of student groups. The sharp drop-off after age 50 suggests that older travelers from this region may prefer different types of destinations or have different mobility considerations.

Europe and Asia represent Sri Lanka's most balanced and broadly appealing source markets. Both show a relatively even distribution across all age categories, though with different centers of gravity. Europe has a slightly younger skew, with its largest group being 30-39 (21%) and a healthy spread across all brackets up to 60+. This suggests a mix of backpackers, gap-year students, and career professionals. Asia's distribution, while also balanced, peaks in the 30-49 range, hinting at a strong component of regional business travel, family holidays, and cultural tourism. For both regions, the data confirms that Sri Lanka offers a versatile product mix capable of attracting solo travelers, couples, and families across the age spectrum, from young adventurers to senior heritage seekers.

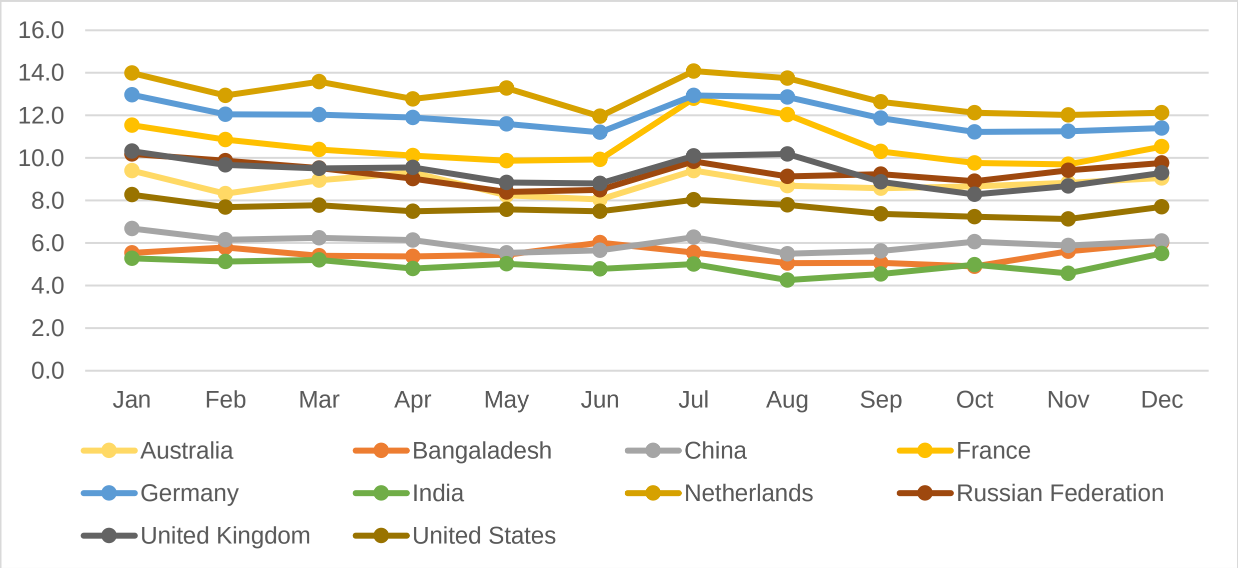
Monthly Average Duration of Stay of tourists from key source markets

Table 06: Average duration of stay of tourists from key source markets by month, 2025

Country	Number of arrivals	Duration of stay											
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
India	**531,511**	5.3	5.1	5.2	4.8	5.0	4.8	5.0	4.3	4.6	5.0	4.6	5.5
United Kingdom	**212,277**	10.3	9.7	9.5	9.6	8.8	8.8	10.1	10.2	8.9	8.3	8.7	9.3
Russian Federation	**186,580**	10.2	9.9	9.5	9.0	8.4	8.5	9.8	9.1	9.2	8.9	9.4	9.8
Germany	**147,966**	13.0	12.0	12.0	11.9	11.6	11.2	12.9	12.9	11.9	11.2	11.3	11.4
China	**132,035**	6.7	6.1	6.2	6.1	5.5	5.7	6.3	5.5	5.6	6.1	5.9	6.1
Australia	**109,487**	9.4	8.3	9.0	9.3	8.2	8.0	9.4	8.7	8.6	8.7	8.8	9.1
France	**109,041**	11.5	10.9	10.4	10.1	9.9	9.9	12.8	12.0	10.3	9.8	9.7	10.5
United States	**65,973**	8.3	7.7	7.8	7.5	7.6	7.5	8.0	7.8	7.4	7.2	7.1	7.7
Netherlands	**64,164**	14.0	12.9	13.6	12.8	13.3	12.0	14.1	13.8	12.6	12.1	12.0	12.1
Bangladesh	**59,563**	5.5	5.8	5.4	5.4	5.5	6.0	5.6	5.1	5.1	4.9	5.6	6.0

Chart 11: Tourist arrivals vs duration of stay, 2025

Chart 12: Monthly average duration of stay of tourists from key source markets



European Markets Lead in Length of Stay, Showcasing Deep Destination Appeal

Tourists from European countries consistently demonstrate the longest average stays throughout the year, underscoring Sri Lanka's strong appeal as a long-haul leisure destination. The Netherlands emerges as the market with the highest overall duration, with averages frequently exceeding 13 days and peaking at 14.1 days in July. Germany follows closely, maintaining impressive averages between 11 and 13 days year-round, with peaks in January (13.0) and July (12.9). France also shows high durations, with a notable peak of 12.8 days in July. This pattern suggests that European travelers view Sri Lanka as a primary destination for extended holidays, often combining multiple regions such as the cultural triangle, hill country, and beaches into a single, comprehensive trip.

Regional Markets Show Shorter Stays, Reflecting Travel Proximity and Purpose

In contrast to long-haul European visitors, tourists from neighboring regional markets tend to have significantly shorter stays. India, Sri Lanka's largest source market, has the shortest average duration among all listed countries, ranging from 4.3 days in August to 5.5 days in December. This is indicative of the high-frequency, short-break nature of travel from India, which includes quick weekend getaways, business trips, and regular VFR travel. Similarly, Bangladesh shows averages between 4.9 and 6.0 days, while China ranges from 5.5 to 6.7 days. These figures reflect the geographical proximity and the prevalence of business and shopping-focused itineraries among these markets.

Distinct Seasonal Patterns Reveal Holiday Habits and Climate Preferences

The data reveals clear seasonal trends that align with school holidays, work patterns, and climate preferences in the source countries.

Summer Peak for Europeans: A significant spike is observed in July for most European markets (France, Germany, Netherlands, UK). This corresponds with the peak summer holiday season in Europe, when travelers take their longest annual breaks. This indicates that July is a critical month for maximizing tourist spending and length of stay from these high-yield markets.

Winter Holidays and Escaping the Cold: High durations are also evident in January and December for Europeans (e.g., Germany at 13.0 days in January, Netherlands at 14.0 days in January), coinciding with winter sun escapes and Christmas/New Year holidays.

Australian Consistency: Australia shows remarkably consistent stays throughout the year, ranging from 8.0 to 9.4 days, with slight peaks in January (9.4) and July (9.4). This stability reflects the steady flow of both leisure travelers and the strong VFR segment identified in previous analyses.

First Quarter Peaks for Russians: The Russian Federation shows its highest durations in the first quarter (10.2 days in January, 9.9 in February), likely driven by long-stay "wintering" tourists escaping the harsh northern winter.

The United States Shows Moderate but Stable Stays

The United States market exhibits moderate average stays, ranging from 7.1 to 8.3 days. While lower than European averages, this is respectable for a long-haul market. The stability across months suggests a mix of leisure and VFR travel, with no dramatic seasonal peaks, possibly reflecting a more diverse range of travel purposes and less reliance on a single extended holiday period compared to Europeans.

Table 07: Duration of stay of tourists by purpose of visit, 2025

Purpose of Visit	Average of duration of stay
Health / Ayurveda	14.7
Visiting friends and relatives	11.0
Pleasure/ Vacation	8.7
Sports	8.0
MICE	7.6
Other or not responded	7.5
Religious	6.8
Education	5.7
Official	5.5
Business	5.2
Grand Total	**8.1**

The data clearly indicates that tourists visiting for Health / Ayurvedic purposes have the longest average duration of stay, at 14.7 days. This is significantly higher than most other categories and aligns with the nature of wellness tourism, which typically involves treatment programs, detox routines, and meditation retreats that span one to three weeks. Similarly, those visiting Friends and Relatives (VFR) also exhibit a very long average stay of 11.0 days. This is expected, as these travelers often combine their visit with extended time spent with family, home-based accommodation, and less rigid itineraries.

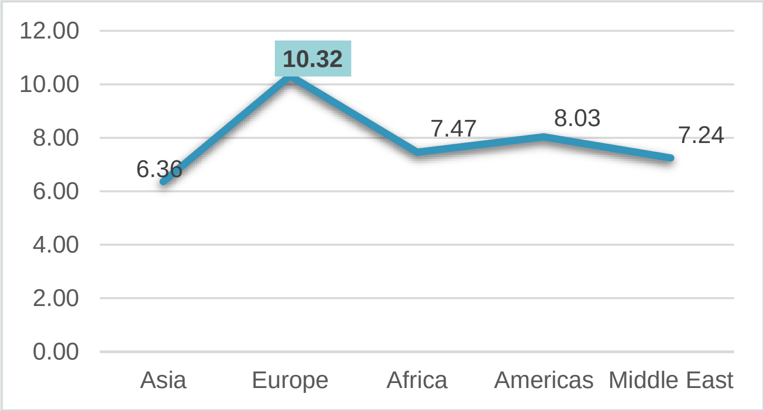
The core leisure segments fall into a middle tier of stay duration. Pleasure/Vacation tourists, who form the largest volume segment, stay for an average of 8.7 days. This is a healthy duration, suggesting that Sri Lanka's diverse attractions from beaches to cultural triangles are sufficient to retain general holidaymakers for over a week. Sports tourists have a similar average stay of 8.0 days, which could correspond to the length of training camps, tournaments, or participation in events like marathons and cycling tours.

At the lower end of the spectrum, Business travelers have one of the shortest average stays at just 5.5 days. This is typical for corporate travel, where trips are often limited to specific meetings, negotiations, or site visits. Interestingly, the MICE (Meetings, Incentives, Conferences, and Exhibitions) segment has an even shorter stay at 5.2 days. While MICE delegations can be large and high spending, the data suggests that the core conference or event period is relatively compact.

Table 08: Average duration of stay by region

Region	Average duration of stays
Asia	6.36
Europe	10.32
Africa	7.47
Americas	8.03
Middle East	7.24

Chart 13: Average duration of stay by region



The data clearly identifies European tourists as the longest-staying visitors to Sri Lanka, with an average duration of 10.32 days. This figure is substantially higher than all other regions and provides critical insight into European travel behavior. For European travelers, Sri Lanka is typically a long-haul destination requiring significant travel time and expense. Consequently, they tend to maximize their trip by staying longer, often seeking in-depth cultural experiences, multi-destination itineraries (such as combining the Cultural Triangle with beach time in the south or hill country trekking), and slower-paced travel. This extended stay translates directly into higher economic impact per visitor, benefiting a wider range of businesses including hotels, restaurants, tour guides, and transport providers across multiple districts.

At the opposite end of the spectrum, Asian tourists record the shortest average stay at just 6.36 days. This is a classic characteristic of regional source markets, where Sri Lanka functions as a short-haul destination. Travelers from Asia, particularly from nearby countries like India, are more likely to visit for long weekends, brief business trips, or quick leisure getaways. The lower travel time and cost make shorter, more frequent visits feasible. This pattern has distinct implications for tourism strategy. Marketing to Asian markets should focus on "quick escape" packages, highlight proximity and ease of access, and promote specific, concentrated experiences such as a weekend of shopping and dining in Colombo, a quick pilgrimage tour, or a compact beach resort stay that fit within a tighter timeframe.

The Americas (8.03 days), Africa (7.47 days), and the Middle East (7.24 days) occupy a middle ground, with average stays clustering around the one-week mark. For travelers from the Americas, the 8-day average, while lower than Europe's, still represents a significant commitment for a long-haul trip. It suggests that while they may not have the extended vacation time of Europeans, they are still seeking a comprehensive week-long experience. The African and Middle Eastern averages, slightly lower, may reflect a mix of short-haul traffic from certain parts of Africa and the Middle East, combined with some longer-stay leisure travelers. This mid-range cluster indicates that these regions offer opportunities for both compact, targeted itineraries and slightly extended tours, requiring a flexible marketing approach that caters to varying travel purposes, from business and transit to dedicated leisure holidays.

TOURISM INCOME

Table 09: 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**
July	200,244	171.74**	9.26	**318.451**
August	198,235	148.26**	8.81	**258.929**
September	158,971	148.26**	7.76	**182.896**
October	165,193	148.26**	7.6	**186.136**
November	212,906	148.26**	7.97	**251.577**
December	258,928	148.26**	8.04	**308.645**
Total	**2,362,521**			**3,219.24**

** - Provisional / **

Average Expenditure per day 2025 – Jan ~ Jul ** **- 171.74 USD**

Base Value (Survey on Inbound Tourists 2024 January to July)

Average Expenditure per day 2025 – Aug ~ Dec ** **- 148.26 USD**

Base Value (Survey on Inbound Tourists 2025 August to December)

2

Tourist Accommodation

TOURISM ACCOMMODATION AND OTHER SERVICES

Table 10: SLTDA registered accommodation establishments, 2024 & 2025

Category	2025		2024	
	Number of establishments	Number of rooms	Number of establishments	Number of rooms
Boutique Hotel	39	877	38	835
Boutique Villa	50	353	49	345
Bungalow	1,268	5,432	1,052	4,390
Classified Tourist Hotel	**170**	**18,308**	**167**	**16,808**
1 Star	40	1,802	41	1,852
2 Star	39	2,123	40	2,431
3 Star	27	2,815	25	2,408
4 Star	31	3,835	31	3,834
5 Star	33	7,733	30	6,283
Guest House	1,862	21,463	1,647	18,445
Eco lodge	1	20	1	20
Heritage Bungalow	5	28	4	19
Heritage Home	2	2	2	2
Heritage Hotel	2	312	2	312
Home Stay Unit	1,160	3,416	1,112	3,308
Hostels	23	232	14	158
Rented Apartment	86	340	82	322
Rented Home	23	68	15	41
Themed Accommodation & Value-added Activities	1	11	1	11
Tourist Apartment Hotel	1	25		
Camp	16	150	-	-
Tourist Hotel	211	8,510	204	8,362
Other	7	31		
Total	**4,927**	**59,578**	**4,390**	**53,378**

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

An analysis of the accommodation statistics for 2024 and 2025 indicates a notable expansion in Sri Lanka’s tourism supply base, both in terms of the number of establishments and total room capacity. The total number of establishments increased from 4,390 in 2024 to 4,927 in 2025, reflecting a growth of 537 establishments (approximately 12%). Similarly, the total number of rooms expanded from 53,378 to 59,578, an addition of 6,200 rooms (around 11.6%). This parallel growth in establishments and rooms suggests a balanced expansion rather than mere fragmentation of smaller units.

The growth in classified tourist hotels is moderate but steady. The total number of classified establishments increased from 167 to 170, while room capacity rose significantly from 16,808 to 18,308. The most substantial room growth is observed in the 5-star category, which expanded from 6,283 to 7,733 rooms. This could be likely due to the upgrading of hotels within the classified Hotels. In contrast, the 1-star and 2-star categories show a slight decline in establishments and rooms, possibly reflecting upgrading to higher categories.

Unclassified and alternative accommodation segments demonstrate more dynamic expansion. Guest houses increased from 1,647 to 1,862 establishments, with room capacity rising from 18,445 to 21,463. Similarly, home stay units grew from 1,112 to 1,160 establishments, reflecting the continued strength of community-based and small-scale tourism enterprises. The bungalow category shows a particularly sharp increase, from 1,052 establishments in 2024 to 1,268 in 2025, with room capacity rising by over 1,000 rooms. This trend suggests growing demand for private, nature-oriented, or family-friendly accommodation options.

Boutique hotels and boutique villas also recorded marginal growth, indicating the sustained appeal of niche and experiential tourism products. The tourist hotel category expanded from 204 to 211 establishments, while rooms increased from 8,362 to 8,510, reflecting gradual but consistent growth in the mid-range segment. Meanwhile, themed accommodation and eco-lodges remain limited in number, suggesting potential areas for strategic development, particularly in line with sustainability and experiential tourism trends.

The data reflects a diversified and expanding accommodation landscape. Growth is strongest in high-end star-class hotels and in alternative accommodation segments such as guest houses, bungalows, and homestays. This dual growth pattern indicates that Sri Lanka’s tourism sector is catering simultaneously to luxury international travelers and budget or experience-oriented visitors. From a policy perspective, this expansion underscores the importance of maintaining quality standards, strengthening regulatory oversight, and aligning accommodation growth with sustainable tourism and destination management objectives.

Distribution of rooms by province, 2025

Table 11: Total rooms by province, 2024 & 2025

Province	Number of rooms 2025	Number of rooms 2024
Central Province	9,917	8,995
Eastern Province	2,727	2,620
North Central Province	2,609	2,424
North Western Province	2,314	2,138
Northern Province	1,169	1,063
Sabaragamuwa Province	1,528	1,455
Southern Province	15,722	14,122
Uva Province	3,159	2,869
Western Province	**20,433**	**19,769**
Total number of rooms	**59,578**	**55,455**

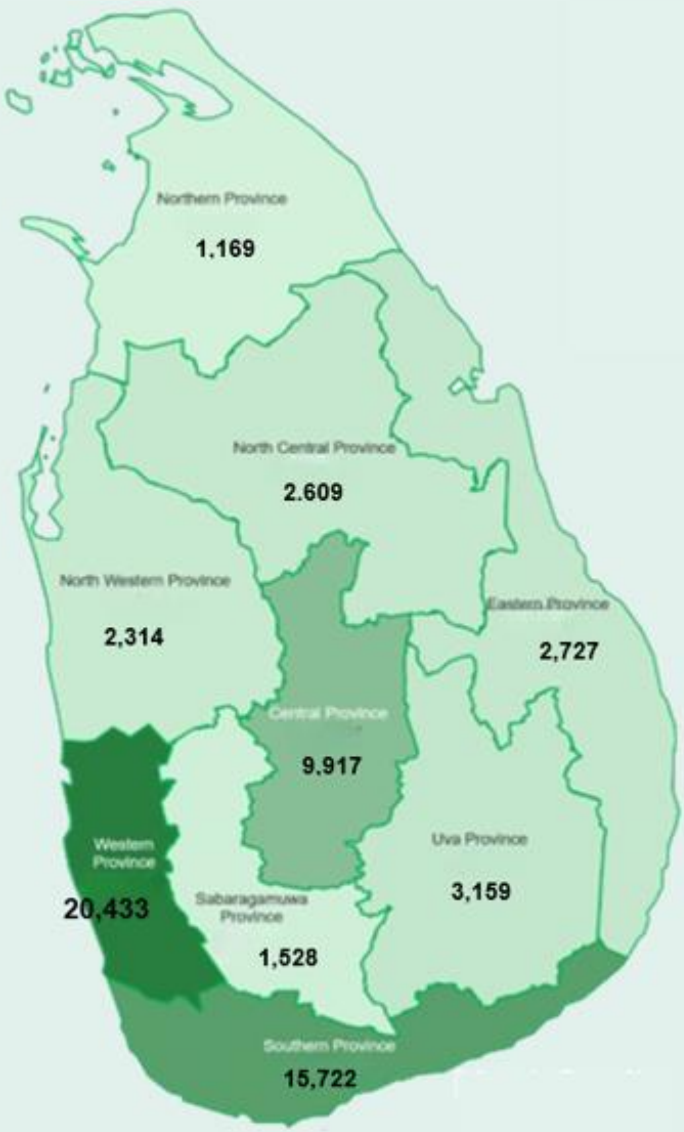
The Coastal Colossus: Western and Southern Dominance

Together, the Western Province (20,433 rooms) and the Southern Province (15,722 rooms) collectively dominate Sri Lanka's tourist accommodation sector, establishing themselves as two most significant regional contributors. *Western Province (34.3% share)*: As the location of the commercial capital (Colombo) and the primary international airport (in Gampaha district), this province benefits from a dual engine of business travel and transit tourism. It holds the highest concentration of upscale business hotels and airport transit accommodations. *Southern Province (26.4% share)*: This province is the heartland of Sri Lanka's leisure and beach tourism. With Galle as its crown jewel, followed by the beach stretches of Bentota, Mirissa, and Tangalle, this province caters almost exclusively to the leisure traveler seeking sun, sand, and surfing.

The Sri Lankan tourist experience, for the majority of visitors, is currently defined by a journey that begins in the West and proceeds down the South coast. Any national tourism strategy must recognize that this corridor is the industry's economic engine

The Central Highlands: A Strong Cultural and Climatic Counterpoint

The *Central Province (9,917 rooms)* holds a commanding 16.6% of the national room capacity, making it a strong and essential third pillar of the tourism industry. This province, encompassing Kandy, Nuwara Eliya, and Matale, offers a completely different product from the coast: cultural heritage, tea plantations, and cooler climates. Its significant room inventory supports the popular "Cultural Triangle + Hills" circuit, proving that tourists are willing to travel inland. However, its capacity is still only half that of the Southern Province, indicating that while popular, the volume of tourists to the hills is lower than those heading to the beach.



The Emerging and Frontier Zones

A group of provinces holds a modest but notable share of rooms, representing either emerging destinations or areas with niche appeal.

Uva Province (3,159 rooms / 5.3%): This is a surprising but positive data point. Much of this capacity is likely concentrated in the Ella and Bandarawela corridor, which has seen a massive boom in backpacker and boutique tourism, spilling over from the Central Province. *Eastern Province (2,727 rooms / 4.6%) and North Western Province (2,314 rooms / 3.9%):* These provinces represent the next frontier. The East (Trincomalee, Batticaloa, Arugam Bay) has significant natural assets but lacks the room capacity of the South. The North Western Province (Kurunegala, Puttalam) likely includes the Kalpitiya peninsula, known for kite surfing and dolphin watching, indicating a niche but growing market. *North Central Province (2,609 rooms / 4.4%):* Home to the ancient capitals of Anuradhapura and Polonnaruwa, this province's room inventory supports the heritage pilgrim and tourist market. The numbers suggest it remains a day-trip destination for many or supports shorter stays compared to the coast or hills.

Three provinces stand out for their acute lack of tourist accommodation infrastructure.

Northern Province (1,169 rooms / 2.0%): Despite the end of the conflict many years ago, holds a minuscule share of national room capacity. Jaffna, a city with deep cultural significance, is severely under-served by formal tourist accommodation. This represents a massive missed opportunity for economic development. Sabaragamuwa Province (1,528 rooms / 2.6%): Home to the gem capital Rathnapura and the pilgrimage site of Adam's Peak (Sri Pada), this province's low room count is striking. It suggests that tourism here is either day-trip based or reliant on very small, unregistered guesthouses.

The Underdeveloped Interior and North

Three provinces stand out for their acute lack of tourist accommodation infrastructure.

Northern Province (1,169 rooms / 2.0%): Despite the end of the conflict many years ago, the Northern Province holds a minuscule share of national room capacity. Jaffna, a city with deep cultural significance, is severely under-served by formal tourist accommodation. This represents both a historical tragedy and a massive missed opportunity for economic development. *Sabaragamuwa Province (1,528 rooms / 2.6%):* Home to the gem capital Rathnapura and the pilgrimage site of Adam's Peak (Sri Pada), this province's low room count is striking. It suggests that tourism here is either day-trip based or reliant on very small, unregistered guesthouses.

Overconcentration Risk: With over 60% of rooms in just two provinces, the Sri Lankan tourism industry is highly vulnerable. A localized issue (bad weather in the South) can have an outsized impact on national tourism revenue. Furthermore, this concentration leads to overcrowding and environmental pressure in popular coastal towns during peak season.

Dispersion as a National Priority: The data makes a powerful case for a national policy of tourism dispersion. The goal should be to induce tourists into spending more time and money in the Northern, Eastern, and Sabaragamuwa provinces. This would relieve pressure on the South and West while spreading economic benefits more equitably.

Investment Opportunity: For investors and developers, the provinces with the lowest room counts (North, Sabaragamuwa) represent the highest potential for first-mover advantage, provided the access and marketing challenges can be overcome.

Infrastructure and Circuit Development: To unlock the potential of the underdeveloped provinces, improvements in road, rail, and digital connectivity are essential. Tourists cannot be expected to stay in places they cannot easily reach. Creating themed tourism circuits (e.g., a "Northern Heritage Trail" or a "Gem and Pilgrimage Circuit" in Sabaragamuwa) would be a logical next step.

Distribution of Rooms by District

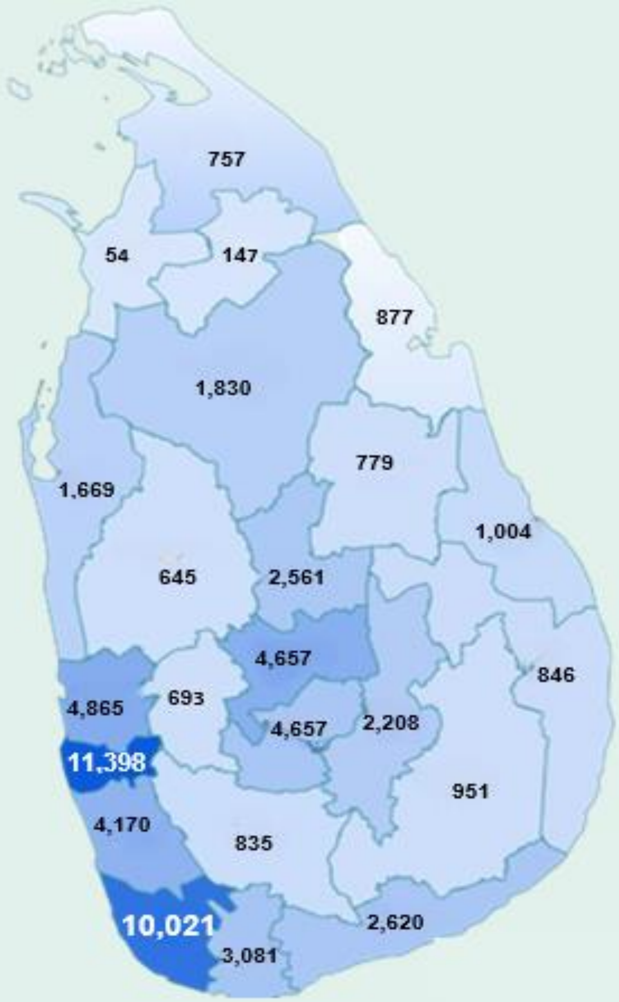


Table 12: Total rooms by districts, 2025

District	Number of rooms
Ampara	**846**
Anuradhapura	**1,830**
Badulla	**2,208**
Batticaloa	**1,004**
Colombo	**11,398**
Galle	**10,021**
Gampaha	**4,865**
Hambantota	**2,620**
Jaffna	**757**
Kalutara	**4,170**
Kandy	**4,657**
Kegalle	**693**
Kilinochchi	**159**
Kurunegala	**645**
Mannar	**54**
Matale	**2,561**
Matara	**3,081**
Moneragala	**951**
Mullaitivu	**52**
Nuwara Eliya	**2,699**
Polonnaruwa	**779**
Puttalam	**1,669**
Rathnapura	**835**
Trincomalee	**877**
Vavuniya	**147**
Grand Total	**59,578**

The distribution of tourist accommodation in Sri Lanka is heavily skewed toward the Western and Southern coastal regions, revealing a classic pattern of sun and sand tourism dominance. The Colombo and Galle districts alone account for over one-third of all registered rooms, highlighting the concentration of tourist infrastructure in the commercial capital and the popular southern beach belt. In contrast, the Northern and Eastern provinces remain significantly underdeveloped in terms of formal tourist accommodation, indicating both a historical imbalance and a substantial opportunity for future growth.

The Coastal Dominance: The "Golden Triangle" of Tourism Infrastructure

The data reveals an overwhelming concentration of rooms in the districts that form the core of Sri Lanka's traditional tourist circuit.

Colombo (11,398 rooms) and Galle (10,021 rooms) are the undisputed leaders. Together, they account for 21,419 rooms, or 36% of the national total. When adding the adjacent coastal and proximate districts Gampaha (4,865), Kalutara (4,170), Matara (3,081), and Hambantota (2,620) the Western and Southern coastal belt emerges as the undisputed tourism heartland. This concentration reflects the historical focus on beach tourism and business travel. The stretch from Negombo (in Gampaha) down through Colombo, Bentota (Kalutara), Galle, and towards Yala (Hambantota) has received the bulk of investment in hotels and infrastructure for decades. Tourists flying into the country's main airport (CMB) naturally gravitate to these easily accessible and well-developed coastal zones.

The Cultural Triangle: A Strong Secondary Tier

The districts housing Sri Lanka's ancient capitals and heritage sites form a robust second tier of accommodation capacity, catering to the culture-seeking tourist. Kandy (4,657 rooms), the hill capital and a UNESCO World Heritage site, is the strongest performer outside the coastal lowlands. Anuradhapura (1,830) and Polonnaruwa (779) provide the necessary rooms for pilgrims and tourists visiting the ancient ruins. Matale (2,561), which includes the popular tourist destination of Sigiriya and Dambulla, shows surprisingly high room numbers, highlighting the density of resorts and hotels in the Sigiriya zone specifically. Nuwara Eliya (2,699)**,** the hill country hub, also demonstrates significant capacity, catering to the tea tourism and "Little England" market.

The Eastern Promise vs. The Northern Gap

The distribution exposes a stark disparity between the coastal belts of the South/West and the rest of the island.

Eastern Province: Trincomalee (877) and Batticaloa (1,004) show modest room capacity. While beautiful, these districts have significantly less formal accommodation than even small Southern coastal towns, indicating that the Eastern coastline, despite its potential, is still an emerging market.

The Northern Void: The Northern Province presents a clear developmental gap. Jaffna (757) the cultural capital of the North, has a surprisingly low room count for its population and significance. Mannar (54), Kilinochchi (159), Mullaitivu (52) and Vavuniya (147) collectively hold a minuscule fraction of the national room capacity. This starkly illustrates the lingering impact of the three-decade civil conflict on tourism infrastructure development. The North remains a frontier market for tourism.

The Underdeveloped Hinterland

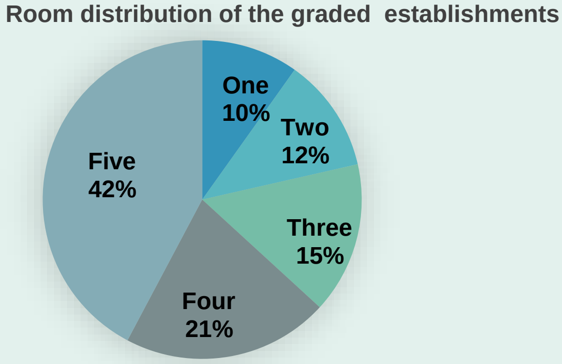
Several districts with significant tourism potential appear drastically under-served by registered accommodation.

Badulla (2,208) and Rathnapura (835): While Badulla has a decent count the gem capital of Rathnapura has very few rooms relative to its international fame. Ampara (846), Moneragala (951), and Puttalam (1,669): These districts, which house national parks (like Kumana, Gal Oya, and Wilpattu) and off-the-beaten-track experiences, have relatively low capacity, suggesting that tourism here is either under-developed or heavily reliant on unregistered or smaller boutique establishments not captured in this data.

The tourism economy is heavily reliant on a handful of districts. This creates vulnerability (e.g., a localized issue in the South could cripple national tourism revenue) and leads to overcrowding in peak seasons in places like Galle and Kandy. The data provides a clear roadmap investors and other relevant stakeholders. There is a massive opportunity to develop sustainable tourism infrastructure in the North and East. This would not only provide economic benefits to post-conflict regions but also help disperse tourists away from the congested Western-Southern belt. The type of rooms needed varies by district. The North may require more boutique hotels and heritage properties to attract curious travelers, while the East may need mid-range beach resorts to compete with the South. The current low numbers in Mannar and Mullaitivu suggest that community-based tourism and small guesthouses might be the most viable starting point rather than large hotels. To boost districts like Rathnapura, Badulla, and Moneragala, tourism circuits need to be developed that link them to the established hubs. Improved road and rail connectivity, combined with marketing of these regions as adventure, wildlife, and cultural destinations, can stimulate investment in accommodation.

Table 13: Distribution of rooms by star category, 2025

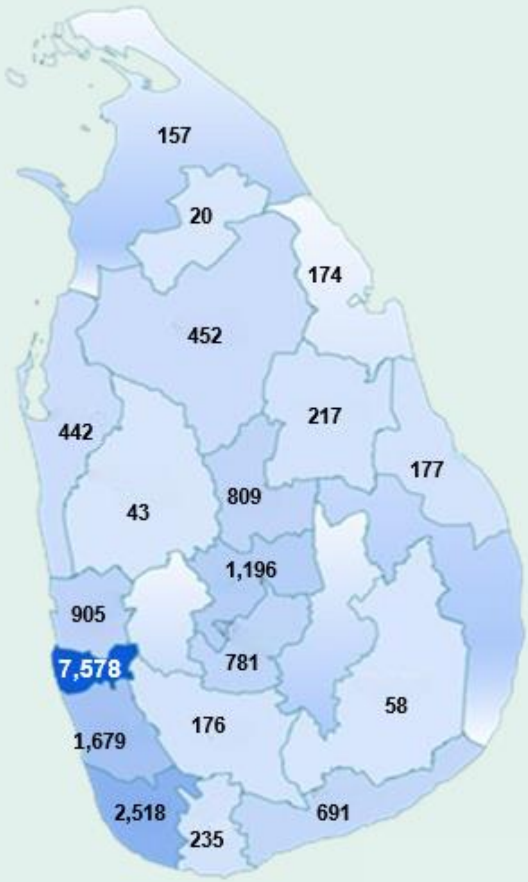
Star category	Number of rooms
One	1,802
Two	2,123
Three	2,815
Four	3,835
Five	7,733
Total	**18,308**



Distribution of rooms of Classified Hotels by districts –2025

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

District	Number of rooms 2025	Number of rooms 2024
Anuradhapura	452	475
Batticaloa	177	177
Colombo	**7,578**	**6,503**
Galle	**2,518**	**2,537**
Gampaha	905	905
Hambantota	691	691
Jaffna	157	155
Kalutara	1,679	1,679
Kandy	1196	1,105
Kurunegala	43	43
Matale	809	809
Matara	235	235
Moneragala	58	108
Nuwara Eliya	781	787
Polonnaruwa	217	161
Puttalam	442	442
Rathnapura	176	176
Trincomalee	174	174
Vavuniya	20	20
Grand Total	**18,308**	**17,182**



Distribution of rooms of all accommodation establishments

Table 15: Distribution of rooms of all accommodation establishments by districts

District	Boutique Hotels	Bungalows	Boutique Villas	Camping Sites	Eco Lodge	Guest Houses	Heritage Bungalows	Hotel Classified	Heritage Hotels	Heritage Home stay	Hostels	Home stay unit	Rented Apartment	Rented Homes	Tourist Apartment Hotel	Tourist Hotels	Themed Accommodation	Other	Grand Total
Ampara	_	62	10	_	_	517	_	_	_	_	10	158	_	4	_	85	_	_	846
Anuradhapura	21	221	10	24	_	765	_	452	_	_	_	144	_	_	_	193	_	_	1,830
Badulla	14	342	_	3	_	833	_		_	_	_	742	3	_	_	271	_	_	2,208
Batticaloa	57	78	_	_	_	280	_	177	_	_	_	26	_	4	_	382	_	_	1,004
Colombo	10	373	6	_	_	2,005		7,578	158	1	84	281	201	17	_	679	_	5	11,398
Galle	292	1,288	144	_	_	3,680	9	2,518	_	_	23	474	44	11	25	1,507	_	6	10,021
Gampaha	17	276	7	_	_	2,389	_	905	_	1	_	233	35	13	_	989	_	_	4,865
Hambantota	163	247	27	11	_	872	_	691	_	_	_	93	_	_	_	508	_	8	2,620
Jaffna	_	110	_	_	_	431	_	157	_	_	_	8	_	2	_	49	_	_	757
Kalutara	47	330	14	6	_	929	_	1,679	_	_	_	102	_	_	_	1,063	_	_	4,170
Kandy	10	565	43	10	_	1,371	9	1,196	_	_	8	492	20	8	_	925	_	_	4,657
Kegalle	_	86	7	5	_	533	_	_	_	_	_	49	_	_	_	13	_	_	693
Kilinochchi	__	27	_	_	_	132	_	_	__	_	__	_	_	__	__	_	_	_	159
Kurunegala	_	50	_	_	_	513	_	43	_	_	_	14	_	_	_	14	11	_	645
Mannar	_	_	_	_	_	51	_	_	_	_	_	3	_	_	_	_	_	_	54
Matale	95	158	23	_	_	693	_	809	_	_	5	198	8	_	_	568	_	4	2,561
Matara	62	424	7	_	20	1,678	_	235	_	_	91	204	19	9	_	327	_	5	3,081
Moneragala	_	48	_	77	_	598	_	58	_	_	_	20	_	_	_	150	_	_	951
Mullaitivu	_	2	_	_	_	47	_	_	_	_	_	3	_	_	_	_	_	_	52
Nuwara Eliya	52	388	44	_	_	1,039	4	781	154	_	11	67	3	_	_	156	_	_	2,699
Polonnaruwa	10	61	_	_	_	293	_	217	_	_	_	39	_	_	_	156	_	3	779
Puttalam	27	152	11	6	_	760	6	442	_	_	_	21	3	_	_	241	_	_	1,669
Rathnapura	_	90	_	8	_	503	_	176	_	_	_	38	_	_	_	20	_	_	835
Trincomalee	_	47	_	_	_	431	_	174	_	_	_	7	4	_	_	214	_	_	877
Vavuniya	_	7	_	_	_	120	_	20	_	_	_	_	_	_	_	_	_	_	147
Grand Total	**877**	**5,432**	**353**	**150**	**20**	**21,463**	**28**	**18,308**	**312**	**2**	**232**	**3,416**	**340**	**68**	**25**	**8,510**	**11**	**31**	**59,578**

Table16: Distribution of SLTDA registered other establishments by district, 2025

District	Association	Destination Event Management Company	Eco Lodge	Food Court	Spice Garden	SPA	Travel Agent	Tourist Friendly Eating places	Tourist Restaurant	Tourist Shops	Water Sports
Ampara	–	–	–	–	–	–	22	7	7	1	_
Anuradhapura	1	_	_	_	_	_	6	17	17	_	_
Badulla	_	_	_	_	_	_	2	8	13	_	_
Batticaloa	_	_	_	_	_	3	12	_	3	_	1
Colombo	4	1	_	1		65	951	93	438	30	3
Galle	2	_	_	_	3	16	39	47	75	9	9
Gampaha	2	_	_	_	_	16	278	34	124	6	2
Hambantota	1	_	_	_	_	5	5	8	21	_	_
Jaffna	_	_	_	_	_	_	3	6	11	_	_
Kalutara	1	_	_	_	_	12	56	14	20	5	6
Kandy	_	_	_	_	_	10	60	28	35	29	_
Kegalle	1	_	_	_	13	_	18	7	26	_	3
Kilinochchi	_	_	_	_	_	_	_	4	2	_	
Kurunegala	_	_	_	_	_	2	41	10	35	_	1
Mannar	_	_	_	_	_	_	_	_	1	_	_
Matale	1	_	_	_	24	4	3	6	19	15	_
Matara	_	_	1	_	_	7	6	32	37	1	9
Moneragala	1	_	_	_	_	1	1	6	14	_	_
Mullaitivu	_	_	_	_	_	_	_	5	5	_	_
Nuwara Eliya	_	_	_	_	_	9	2	4	16	2	_
Polonnaruwa	_	_	_	_	1		1	10	9	1	_
Puttalam	_	_	_	_	_	1	25	13	20	_	15
Rathnapura	_	_	_	_	_	1	5	9	12	1	_
Trincomalee	_	_	_	_	_	3	4	_	6	_	3
Vavuniya	_	_	_	_	_	_	2	_	2	_	_
Grand Total	**14**	**1**	**1**	**1**	**41**	**155**	**1,542**	**368**	**968**	**100**	**52**

3

Air Connectivity

AIR CONNECTIVITY

Contribution of airlines on tourist arrivals to Sri Lanka

The contribution of Airlines to Sri Lankan tourism reveals a market that is both concentrated and strategically diverse, with the national carrier playing a dominant role. Sri Lankan Airlines leads by a significant margin, carrying 581,421 passengers and capturing nearly a quarter (24.6%) of the market. This position establishes it as the primary gateway for tourists, a role that is further emphasized by the high level of concentration among the top players. The five largest airlines Sri Lankan Airlines, Indigo, Qatar Airways, Emirates, and Etihad Airways together account for a substantial 62.1% of all passenger traffic, highlighting their critical importance to the stability and growth of the tourism sector.

A deeper look into the composition of these leading carriers underscores the vital role of regional connectivity, particularly from the Middle East and India. The four major Gulf carriers function as a powerful collective bloc, transporting nearly 30% of all tourists by funneling long-haul travelers from Europe and the Americas through their hubs in Doha, Dubai, and Abu Dhabi. Simultaneously, the Indian market asserts its dominance through Indigo and Air India, which together handle over 16% of arrivals. IndiGo's position as the second-largest individual airline, in particular, confirms the immense volume of travel between the two neighboring countries, facilitated by its extensive and budget-friendly network.

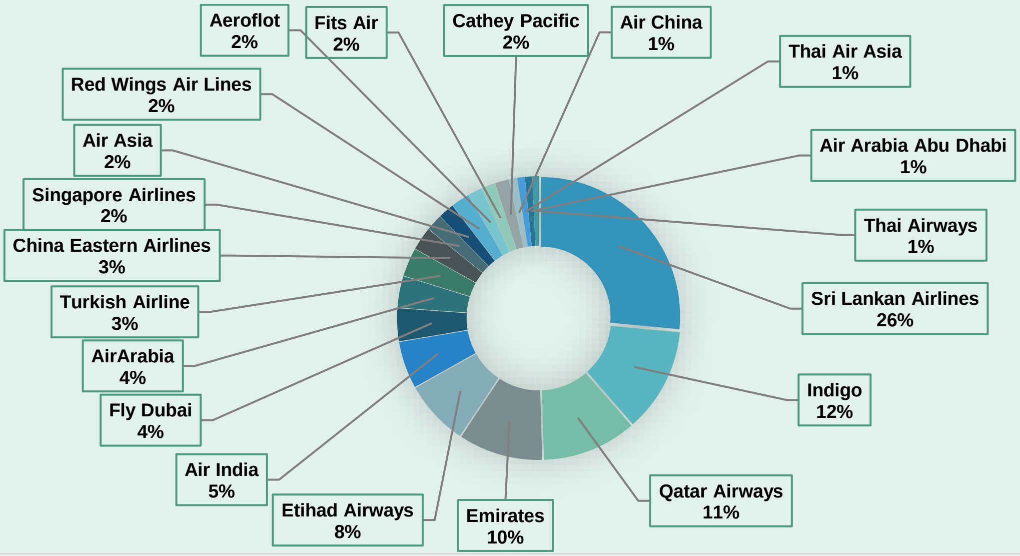
The market is further strengthened by the significant presence of low-cost carriers (LCCs), which are essential for stimulating demand from price-conscious leisure travelers across Asia. Airlines like Fly Dubai, Air Arabia, Air Asia, and Thai Air Asia are prominent fixtures in the table, ensuring that Sri Lanka remains an accessible and competitive destination for regional tourists. This blend of full-service and budget options creates a robust ecosystem, catering to a wide spectrum of travelers, from premium long-haul visitors to short-haul budget explorers.

Finally, the presence of airlines like China Eastern, Cathay Pacific, and Singapore Airlines, while holding smaller individual shares, represents crucial long-haul markets in East Asia that offer significant growth potential. Collectively, the data paints a picture of a well-rounded aviation landscape. To sustain and enhance tourist arrivals, strategic efforts should focus on strengthening Colombo's role as a regional hub, fostering strong bilateral ties with key partners in India and the Gulf, and engaging in joint marketing campaigns with airlines to promote Sri Lanka to their vast global networks.

Table 17: Contribution of airlines on tourist arrivals to Sri Lanka, 2025

Rank	Airline	Number of passengers	% Share
1	Sri Lankan Airlines	581,421	24.6
2	Indigo	265,582	11.2
3	Qatar Airways	240,446	10.2
4	Emirates	214,942	9.1
5	Etihad Airways	165,708	7.0
6	Air India	119,918	5.1
7	Fly Dubai	83,645	3.5
8	Air Arabia	80,239	3.4
9	Turkish Airline	72,516	3.1
10	China Eastern Airlines	58,886	2.5
11	Singapore Airlines	42,539	1.8
12	Air Asia	40,348	1.7
13	Red Wings Air Lines	36,544	1.5
14	Aeroflot	36,386	1.5
15	Fits Air	35,463	1.5
16	Cathey Pacific	34,742	1.5
17	Air China	21,084	0.9
18	Thai Air Asia	19,199	0.8
19	Air Arabia Abu Dhabi	18,344	0.8
20	Thai Airways	16,539	0.7
	Others	178,030	7.5
	Total	**2,362,521**	**100.00**

Chart 13: Distribution of tourist arrivals by airline, 2025



Contribution of airlines on tourist arrivals to Sri Lanka

Table:18: Main final departure airports to Sri Lanka, 2025

Rank	Final port	Number of tourists		Rank	Final port	Number of tourists	
1	Dubai	277,744	11.76	21	Dhaka	24,412	1.03
2	Doha	245,294	10.38	22	Paris	21,495	0.91
3	Chennai	200,302	8.48	23	Chengdu	21,171	0.90
4	Abu Dhabi	186,204	7.88	24	Sydney	17,745	0.75
5	Mumbai	119,418	5.05	25	Moscow	17,536	0.74
6	Bangalore	103,398	4.38	26	Frankfurt	17,168	0.73
7	Delhi	98,887	4.19	27	Narita	16,695	0.71
8	Singapore	87,207	3.69	28	Don Mueang	14,963	0.63
9	Kuala Lumpur	81,520	3.45	29	Kunming	13,592	0.58
10	Sharja	80,881	3.42	30	Kuwait	11,060	0.47
11	Istanbul	71,658	3.03	31	Tiruchchirappalli	10,069	0.43
12	London	70,920	3.00	32	Domodedovo	9,662	0.33
13	Hyderabad	54,758	2.32	33	Tolmachevo Novosibirsk	9,631	0.41
14	Male	46,404	1.96	34	Kochi	9,440	0.40
15	Bangkok	45,167	1.91	35	Zurich	8,320	0.35
16	Shanghai	44,274	1.87	36	Guangzhou	7,859	0.33
17	Dubai/Male	37,266	1.58	37	Warsaw	7,542	0.32
18	Moscow	35,030	1.48	38	Bahrain/Male	7,440	0.31
19	Hong Kong	34,871	1.48	39	Almaty	7,080	0.30
20	Melbourne	27,999	1.19	40	Incheon	6,918	0.29
					Others	153,521	6.50
					Total	**2,362,521**	

The data on final departure points offers a geographic roadmap of how tourists are connecting to Sri Lanka. The dominance of Middle Eastern hubs (Dubai, Doha, Abu Dhabi) is the most striking feature, highlighting their role as global transit centers. Following closely is the immense regional influence of India, with multiple cities (Chennai, Mumbai, Bangalore, Delhi) featuring in the top 10. The data confirms that Sri Lanka's tourist traffic is primarily funneled through a few major international connectivity hubs and direct regional neighbors, with long-haul destinations in Europe, East Asia, and Australia making up a significant secondary tier.

The Supremacy of the Gulf Hubs as Global Connectors

The top three positions are held by Dubai (277,744), Doha (245,294), and Abu Dhabi (186,204). Combined, these three Middle Eastern hubs alone account for 709,242 passengers, or 30% of all arrivals. This is a profound insight into travel behavior: nearly one in three tourists arriving in Sri Lanka transits through the UAE or Qatar.

These cities are not major source markets for tourists themselves. Instead, they function as massive airline hubs. Emirates, Qatar Airways, and Etihad Airways use these airports to consolidate passengers from across Europe, the Americas, Africa, and the Middle East and funnel them onto a single flight to Colombo. This underscores Sri Lanka's reliance on Gulf carriers for long-haul connectivity

The Critical Indian Market: A "Bridge" not a "Hub"

If the Gulf cities represent transit for long-haul travelers, the Indian cities represent pure regional demand. Chennai (200,302), Mumbai (119,418), Bangalore (103,398), and Delhi (98,887) occupy four of the top seven spots. The total from just these four Indian metros is 522,005 passengers, or 22.1% of all arrivals.

Geographic Proximity: The high number from Chennai (Rank 3) is particularly notable due to the short flying time and high frequency of flights, catering to business, shopping, and short-break leisure traffic.

Market Segmentation: The presence of Hyderabad (Rank 13) and Tiruchirappalli (Rank 31) further emphasizes the deep penetration of the Indian market, catering to specific regional linguistic and cultural ties.

Southeast Asian Connections: Regional Leisure Hubs

Singapore (87,207) and Kuala Lumpur (81,520) are major connection points, ranking 8th and 9th respectively. Unlike the Gulf hubs which connect Europe, these airports serve as hubs for Southeast Asian traffic and beyond (e.g., Australia via Singapore). The presence of Bangkok (45,167) and Don Mueang (14,963) the latter being the hub for Air Asia reinforces the strong flow of leisure traffic from the ASEAN region, often via low-cost carriers.

Long-Haul Markets: Europe, East Asia, and Australasia

Europe: London (70,920) is the standout European departure point, reflecting strong ties with the UK. Istanbul (71,658) also features prominently, acting as a hub for Turkish Airlines connecting Southern and Eastern Europe. Paris (21,495), Frankfurt (17,168), and Zurich (8,320) indicate steady flows from Western Europe. The presence of Warsaw (7,542) suggests growing or niche Central European interest.

East Asia: Shanghai (44,274) and Hong Kong (34,871) are the primary departure points for Chinese tourists, with Chengdu, Kunming, and Guangzhou also making the list. Tokyo's Narita (16,695) and Seoul's Incheon (6,918) represent the Japanese and Korean markets.

Australasia: Melbourne (27,999) and Sydney (17,745) capture the important Australian diaspora and tourist market, many of whom are likely of Sri Lankan origin or tourists seeking sun and culture.

Niche Corridors and Secondary Hubs

Several entries highlight specific travel corridors:

Male (46,404): The high number from the Maldives is interesting, suggesting a "two-center" holiday pattern where tourists combine a beach holiday in the Maldives with a cultural/heritage tour in Sri Lanka, or significant business/short-haul traffic between the neighboring island nations.

Russian Connections: The listing of multiple Moscow airports (Sheremetyevo likely in Rank 18, and Domodedovo in Rank 32) along with Tolmachevo (9,631) in Siberia indicates a broad and resilient Russian market, likely driven by beach tourism.

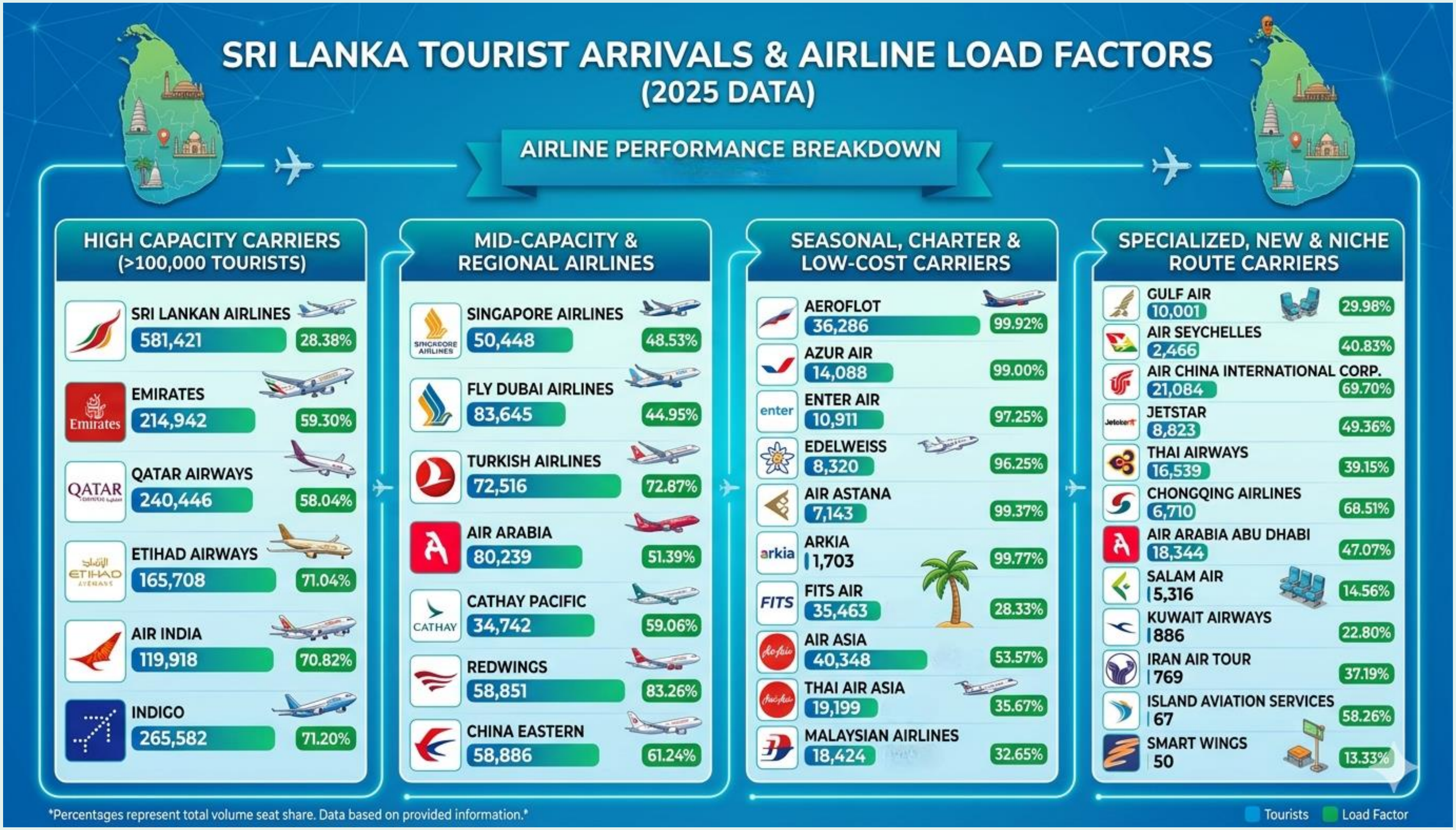
Strategic Implications

Hub Dependency: Sri Lanka's tourism is heavily dependent on the connectivity strategies of a few major Gulf and Southeast Asian airlines. Any disruption to operations in Doha, Dubai, or Singapore (e.g., geopolitical issues, pandemic restrictions) would have an immediate and severe impact on arrivals.

Focus on Direct Connectivity: The data supports the business case for pursuing new or resumed direct flights to high-volume departure points like London, Melbourne, and key Chinese cities, as this reduces reliance on transit hubs and can stimulate demand.

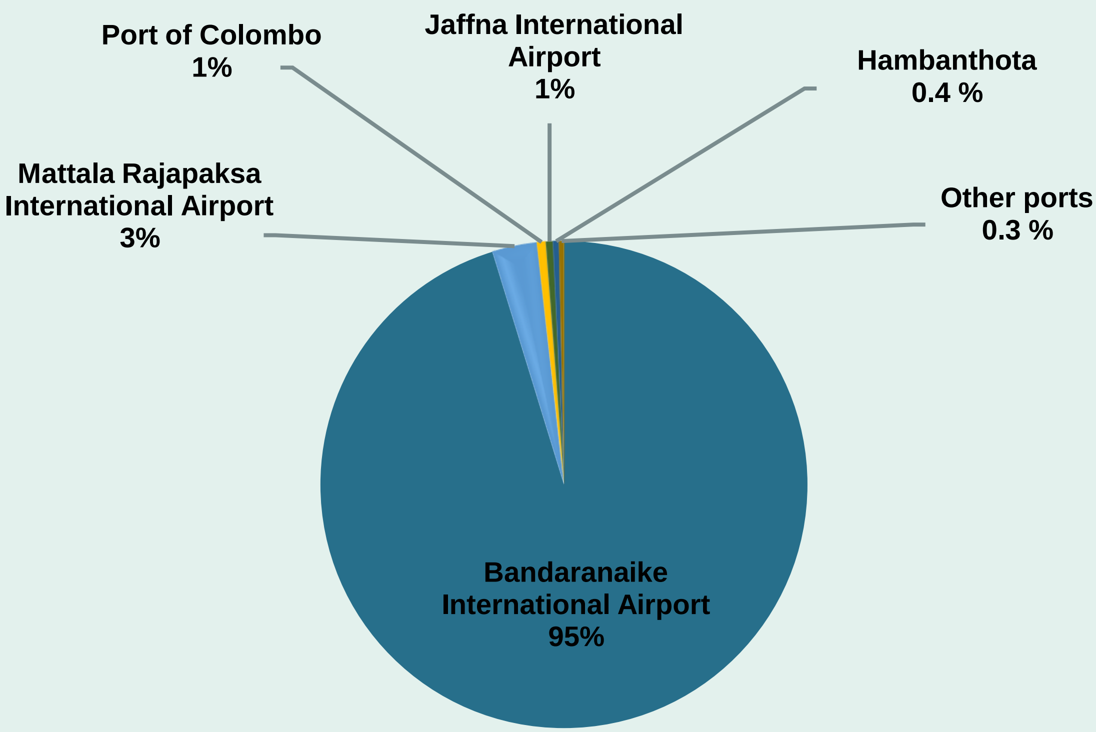
Targeted Marketing: These data can be used to tailor marketing efforts. For example: Target "stopover" packages for passengers transiting through Gulf hubs.

Contribution of airlines to tourism mobility



Tourist arrivals by port

Chart 13: Distribution of tourist arrivals by Port, 2025



The data on tourist arrivals by port, confirms that Sri Lanka's tourism industry is functionally dependent on-air travel, with Bandaranaike International Airport (BIA) serving as the nation's undisputed gateway. Handling over 2.25 million passengers, BIA accounts for a staggering 95.2% of all tourist arrivals. This figure underscores its critical role as the primary logistical hub for international tourism. The convenience of flying directly into the commercial capital, which offers the widest range of connecting flights, ground transportation, and initial accommodation options, makes it the default choice for the vast majority of visitors.

Tourist arrivals to Mattala Rajapaksa International Airport (MRIA), the country's second air hub, processed just 70,752 passengers (3.0% share). Similarly, Jaffna International Airport received only 11,065 arrivals (0.5%). This data suggests that these airports have yet to achieve the critical mass of airline connectivity, route viability, and surrounding tourist infrastructure needed to divert meaningful traffic away from Colombo.

They currently function as niche entry points, perhaps serving specific regional markets, rather than as genuine alternative gateways for mass tourism.

A significant finding is the minimal contribution of sea ports to tourist arrivals. The Port of Colombo, despite being a major hub for global shipping and cruise traffic, accounted for only 13,762 arrivals (0.6%). Hambantota port contributed a mere 9,475 (0.4%). This low volume indicates that Sri Lanka is yet to establish itself as a major destination for cruise tourism, which requires dedicated berthing facilities, seamless shore excursion programs, and effective marketing to cruise lines.

4.

Visitors to Major Tourist Attractions

VISITORS TO MAJOR TOURIST ATTRACTIONS, 2025

Wildlife Parks

Table 19: Visitors to major national parks, 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	346,229	47,182,740.00	426,535	2,663,491,140.48	44,844,950.00	0.00	772,764	2,755,518,830.48
Horton Plains	335,313	48,459,920.00	51,770	376,580,669.50	13,864,350.00	121,125.00	387,083	439,026,064.50
Udawalawa	170,890	25,338,450.00	197,981	1,446,693,819.39	23,067,950.00	0.00	368,871	1,495,100,219.39
Wasgomuwa	12,857	589,770.00	3,495	9,755,664.04	844,100.00	0.00	16,352	11,189,534.04
Minneriya	78,724	11,650,700.00	76,422	595,529,127.20	9,774,350.00	0.00	155,146	616,954,177.20
Bundala	8,706	516,450.00	9,203	32,145,737.87	1,167,000.00	0.00	17,909	33,829,187.87
Horagolla	11,823	445,966.23	97	141,029.20	0.00	0.00	11,920	586,995.43
Kaudulla	42,359	6,275,950.00	38,753	281,182,164.40	4,746,050.00	0.00	81,112	292,204,164.40
Galoya	8,615	508,320.00	9,593	33,644,036.00	391,650.00	11,667,000.00	18,208	46,211,006.00
Kumana	30,698	1,933,880.00	14,189	50,859,192.00	2,700,100.00	0.00	44,887	55,493,172.00
Angammedilla	3,948	346,350.00	480	2,428,461.18	225,450.00	0.00	4,428	3,000,261.18
Galways Land	10,269	808,870.00	693	2,304,323.93	3,600.00	0.00	10,962	3,116,793.93
Wilpattu	88,536	22,084,418.00	76,389	412,872,348.89	8,469,650.00	0.00	164,925	443,426,416.89
Maduruoya	2,365	135,510.00	488	1,645,312.80	164,950.00	0.00	2,853	1,945,772.80
Lahugala	416	25,860.00	62	234,064.20	64,950.00	0.00	478	324,874.20
Pigeon Island	73,389	10,653,980.00	20,585	148,900,320.00	0.00	2,417,550.00	93,974	161,971,850.00
Hikkaduwa	35,042	1,338,750.00	1,613	2,153,576.00	0.00	922,650.00	36,655	4,414,976.00
Eth Athuru Sevana	149,785	*0.00	101,119	*0.00	0.00	0.00	250,904	37,210,113.00
Kalawewa	1,947	*0.00	446	*0.00	100,800.00	85,450.00	2,393	657,738.81
Bareef - Kalpitiya	9,082	185,350.00	3,732	8,815,597.00	0.00	600.00	12,814	9,001,547.00
Mirissa	33,213	3,254,350.00	107,324	235,042,434.00	0.00	8,773,567.50	140,537	247,070,351.50
Girithale	8,471	280,980.00	153	89,322.20	0.00	0.00	8,624	370,302.20
Samanala Adaviya	432	*760.00	12	*1,201.76	0.00	0.00	444	42,214.79
TOTAL	**1,463,109**	**182,017,324.23**	**1,141,134**	**6,304,509,542.04**	**110,429,900.00**	**23,987,942.50**	**2,604,243**	**6,658,666,563.61**

*The local & foreign income for Kalawewa, Eth Athuru Sevana, and Samanala Adaviya have been included in the total revenue

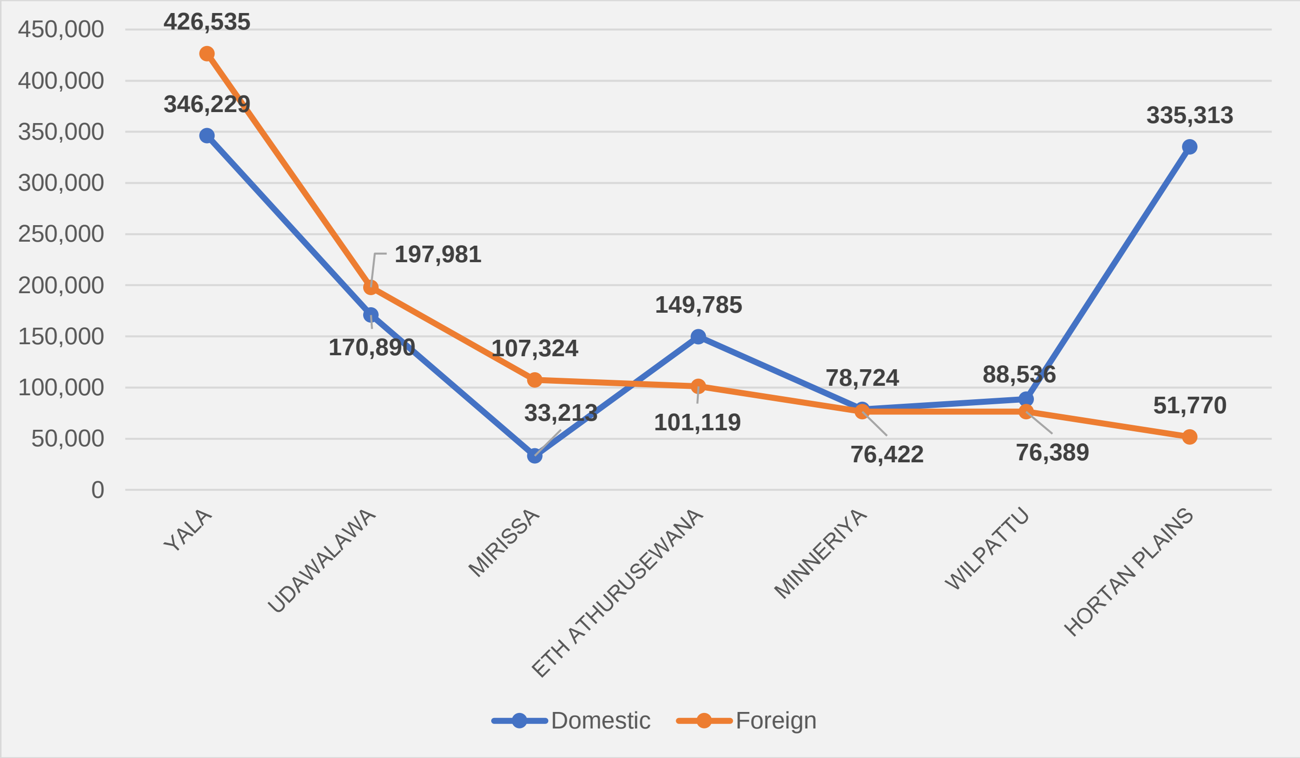
Source: Department of Wildlife Conservation

The visitor arrivals and revenue generated from national parks in Sri Lanka between January and December 2025 provide a comprehensive overview of tourism activity within the country's wildlife sector. During this period, a total of 2,604,243 visitors were recorded across parks and wildlife attractions. Of these, 1,463,109 (56.2%) were local visitors, while 1,141,134 (43.8%) were foreign visitors. This relatively balanced distribution highlights the importance of catering to both domestic and international markets when planning park services, facilities, and infrastructure. The total visitor income generated during the year amounted to Rs. 6,658,666,563.61.

Among individual parks, Yala National Park recorded the highest revenue, generating Rs. 2,755,518,830.48, supported by strong visitor numbers and considerable vehicle fee income. Udawalawa and Minneriya also demonstrated strong performance, generating Rs. 1,495,100,219.39 and Rs. 616,954,177.20, respectively. In addition to these wildlife parks, coastal experiences such as Mirissa Whale Watching, Kalpitiya, and Hikkaduwa attracted considerable number of foreign visitors and contributed significantly to overall income.

Conversely, several parks including Lahugala, Maduru Oya, Angammedilla, and Samanala Adaviya recorded relatively low visitor numbers and limited revenue. These locations may be underutilized due to factors such as their remote locations, limited visitor infrastructure, lower wildlife visibility, or insufficient marketing and promotion. Strategic initiatives aimed at improving accessibility, facilities, and promotional efforts could help unlock the tourism potential of these lesser-visited parks and enhance visitor numbers in the future

Chart 14: Visitation of foreign & domestic tourists to main national parks, 2025



The domestic and foreign visitor arrivals to key parks, provides a compelling overview of the visitation patterns across Sri Lanka's most prominent natural attractions.

Yala National Park records the highest total number of visitors (772,764) and, more importantly, the highest number of foreign visitors in the dataset. With 426, 535 international arrivals, foreigners constitute a staggering 55% of its total footfall. This reinforces Yala's reputation as a premier global wildlife destination, driven by the pursuit of special wildlife sightings.

Horton Plains, which presents a fascinating anomaly. With 335,313 domestic visitors, it is the most visited location by Sri Lankans in this dataset. In stark contrast, it records the lowest number of foreign visitors (51,770) among the listed parks. This inverts the model seen at Yala, with locals making up approximately 87% of visitors. This suggests that Horton Plains, famous for "World's End," functions primarily as a domestic adventure and leisure destination, popular for hiking and weekend getaways among Sri Lankan families and young travelers.

Similarly, Eth Athurusewana shows a strong domestic preference, with 149,785 local visitors compared to 101,119 foreigners. While the gap is narrower here, locals still hold the majority, indicating that this site serves as an important educational and recreational resource for the local population, fostering environmental awareness from a young age.

A cluster of attractions demonstrates varying degrees of balance between the two markets. Udawalawa National Park emerges as the most balanced major wildlife park, with 170,890 domestic and 197,981 foreign visitors. This near split suggests it successfully caters to both international tourists seeking reliable elephant herds and local visitors seeking accessible nature experiences.

Mirissa, primarily a whale-watching hub, shows a heavy tilt toward foreign visitors (107,324) but retains a notable domestic segment (33,213). This indicates that it is gradually gaining traction among locals.

Minneriya and Wilpattu National Parks exhibit almost identical patterns. Minneriya records 78,724 domestic and 76,422 foreign visitors, while Wilpattu shows 88,536 domestic and 76,389 foreign. In both cases, domestic visitors slightly outnumber internationals. This near-parity suggests that these parks are well-integrated into both the international safari circuit and the local tourism landscape.

Conservation forests

Table 20: Number of visitors & revenue to conservation forests, 2025

Name of the forest	Number of visitors		Total Visitors	Income without VAT		Total
	Domestic visitors	Foreign visitors		Domestic visitors	Foreign visitors	
Makandawa Conservation Forest	2,324	969	3,293	227,404.23	660,143.67	887,547.90
Kurulukele	4,619	02	4,621	253,888.62	1,525.44	255,414.06
Nuwaragala (Ampara)	1,247	219	1,466	137,112.14	27,291.93	164,404.07
Ek Gal Oya	0	0	0	0.00	0.00	0.00
Kottawa Conservation Forest	1,270	136	1,406	67,931.80	106,797.21	174,729.01
Kanneliya Conservation Forest	37,361	2,626	39,987	8,556,720.09	2,733,618.43	11,290,338.52
Adahalena Ella (Galle)	12,005	2,342	14,347	751,767.00	1,811,518.84	2,563,285.84
Hurulu Eco Park	75,360	221,434	296,794	13,092,372.89	381,092,144.05	394,184,516.94
Gal Oya	414	674	1,088	44,716.09	517,648.29	562,364.38
Sinharaja Conservation Forest	47,666	25,504	73,170	4,729,203.40	24,307,675.86	29,036,879.26
Kunckles Conservation	246,054	7,593	253,647	15,655,662.86	5,235,700.66	20,891,363.52
Udawattakele Conservation Forest / Kandy	29,121	12,772	41,893	1,679,899.21	9,900,965.54	11,580,864.75
Rathna Ella (Kandy)	9,384	1,196	10,580	574,100.62	973,614.59	1,547,715.21
Yahangala	207	05	212	40,417.26	16,921.78	57,339.04
Geradigala	0	0	0	0.00	0.00	0.00
Piduruthalagala (Nuwara Eliya)	66,965	1,305	68,270	3,237,082.01	1,476,491.91	4,713,573.92
Mandaramnuwara (Kolapathanaella) (Nuwaraeliya)	28,267	25	28,292	1,726,636.08	19,703.50	1,746,339.58
Badagamuwa Ecological Zone (Kurunegala)	11,674	1,427	13,101	705,432.08	12,966.07	718,398.15
Galwila Eco Park (Puttlam)	151	13	164	24,854.39	10,064.04	34,918.43
Dolukanda (Kurunegala)	0	0	0	0.00	0.00	0.00
Badulla (Elle Gala)	13,300	23,368	36,668	482,577.84	22,487,966.95	22,970,544.79
Kande Ela Nuwara Eliya	1,773	05	1,778	67,104.24	6,305.12	73,409.36
Total	**589,162**	**301,615**	**890,777**	**52,054,882.85**	**451,399,063.88**	**503,453,946.73**
Sub Destination	3,037	0	3,037	578,365.00	0	578,365.00
Total (With Sub Destination)	**592,199**	**301,615**	**893,814**	**52,633,247.85**	**451,399,063.88**	**504,032,311.73**

Source: Department of Forest Conservation

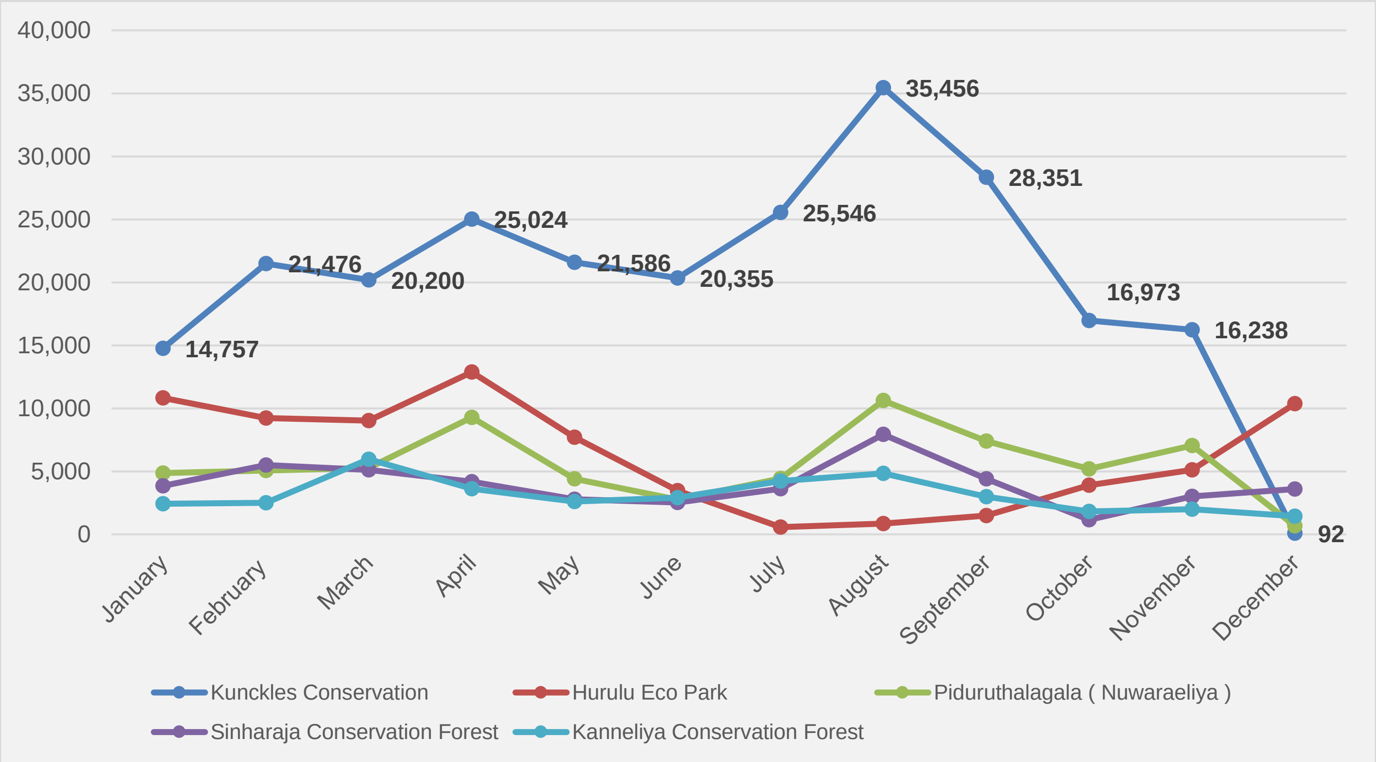
In 2025, total tourist arrivals to conservation forests reached 893,814, comprising 592,199 (66.3%) domestic tourists and 301,615(33.7%) foreign tourists. The total revenue generated during the year amounted to Rs. 504,032,311.73.

Among domestic visitors, the highest numbers were recorded at Knuckles Conservation (246,054), Hurulu Eco Park (75,360), and Piduruthalagala (66,965). For foreign tourists, Hurulu Eco Park attracted the most visitors (221,434), followed by Sinharaja Conservation Forest (25,504) and Badulla (Ella Gala) (23,368).

Considering overall visitation, Hurulu Eco Park, Knuckles Conservation, and Sinharaja Conservation Forest emerged as the most popular destinations for both domestic and international tourists.

In terms of revenue, the highest revenue earning conservation forest is the Hurulu Eco Park followed by Sinharaja Forest conservation and Badulla, Ella Gala.

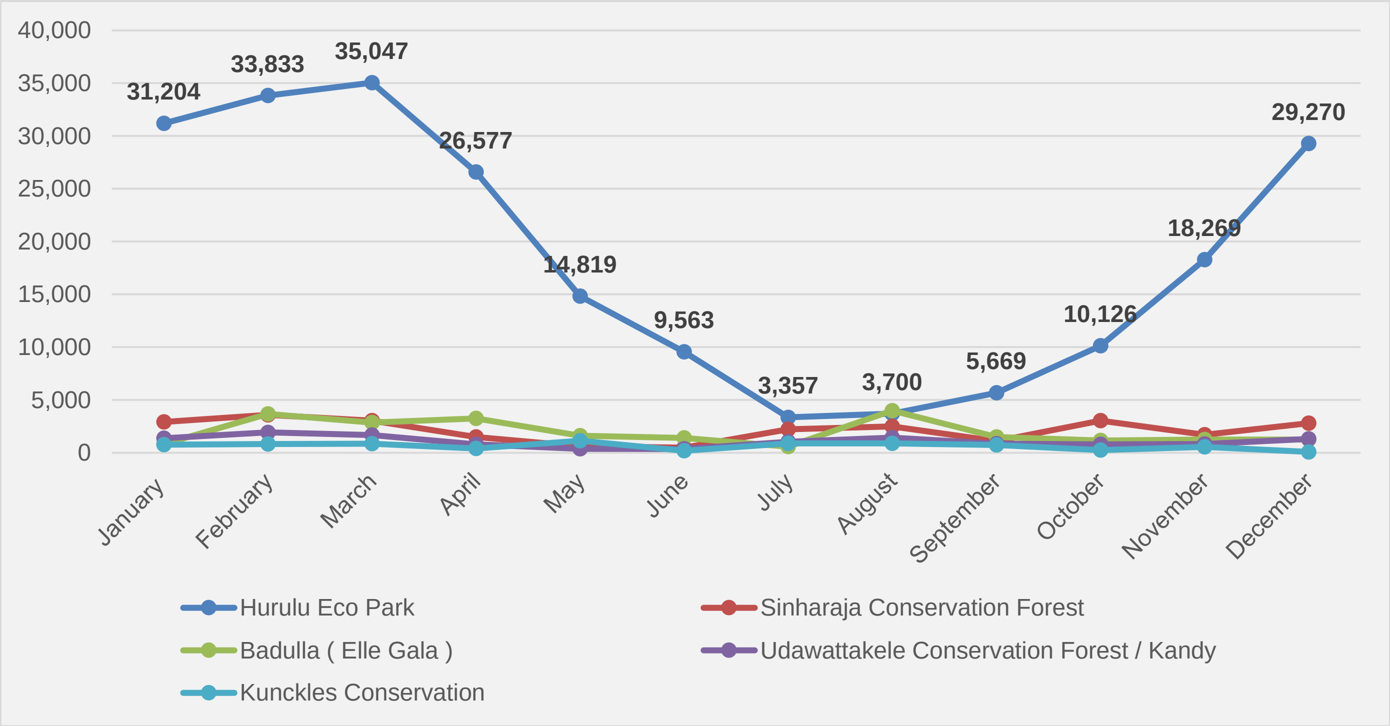
Chart 15: Visitation of domestic tourists to conservation forests, 2025



Tourist arrivals to key nature attractions in Sri Lanka during 2025 show pronounced seasonal patterns, with April and August emerging as the peak month for almost all sites. Knuckles Conservation Forest consistently attracted the highest number of domestic visitors, reaching 35,456 in August, followed by secondary peaks in April and July–September. The sharp decline toward the end of the year, particularly the drastic drop to 92 visitors in December, indicates the effects of Cyclone Ditwah.

Hurulu Eco Park experienced stronger visitation early in the year, peaking in April at around 13,000 visitors, likely coinciding with the Sinhala and Tamil New Year holidays, while mid-year numbers remained very low. Piduruthalagala and Sinharaja Forest Reserve exhibited moderate and relatively stable visitation, with August being the highest month, suggesting that cooler and favorable weather conditions influence travel to these highland and rainforest sites. Kanneliya Conservation Forest maintained the lowest but steady visitation throughout the year, reflecting potential constraints in awareness, accessibility, or infrastructure. Overall, domestic tourism demand is concentrated in specific months, highlighting the opportunity to redistribute visitor flows to lesser-known parks through targeted promotions, improved access, and off-season campaigns.

Chart 16: Visitation of foreign tourists to conservation forests, 2025



Analysis of foreign tourist arrivals to major parks shows that Hurulu Eco Park is the primary attraction for international visitors, with peak arrivals occurring in January, February, March, and December. In contrast, other parks experienced lower but relatively steady visitor numbers throughout the year.

Attractions administered by Central Cultural Fund, 2025

Table 21: Number of visitors to tourist attractions administered by Central Cultural Fund, 2025

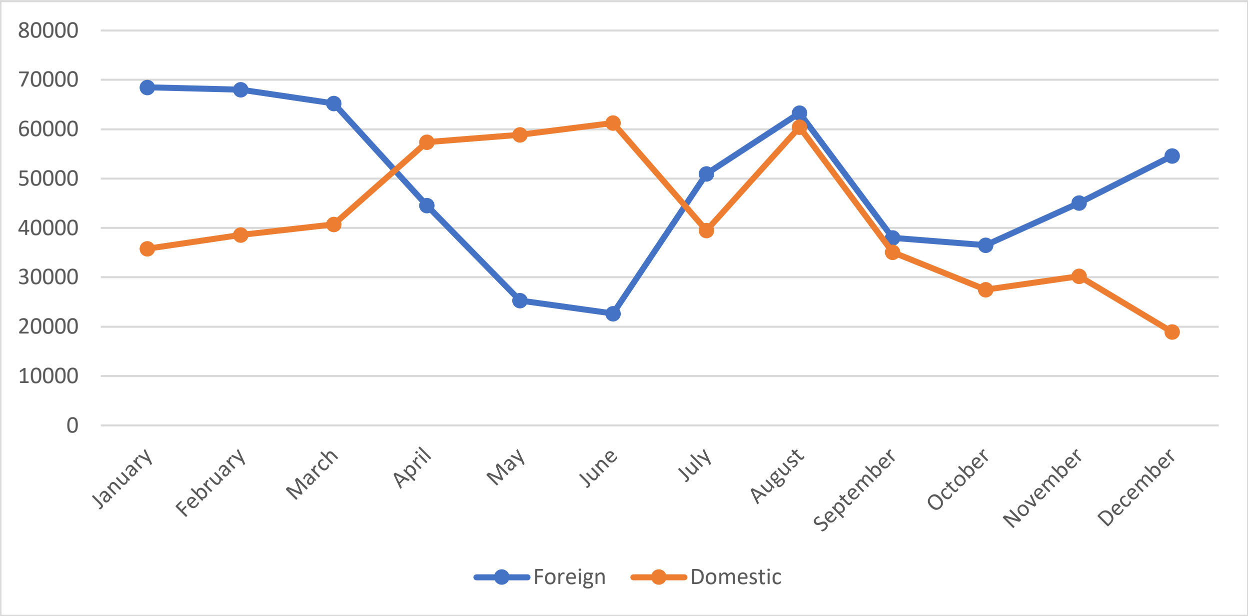
Locations	Number of foreign visitors	Number of local visitors	Total numbers of visitors	Local visitor income	Foreign visitor income	Total visitor income
Abhayagiriya	1,890	11,110	13,000	1,384,089.47	13,084,994.73	14,469,084.20
Jethawanaya	81,674	13,370	95,044	1,871,364.16	411,794,262.63	413,665,626.79
Sigiriya (Museum and Sigiriya Rock)	582,687	504,231	1,086,918	48,853,982.40	3,683,102,403.03	3,731,956,385.43
Polonnaruwa (Alahana, Gal Viharaya, Museum & Kingdom)	184,661	88,191	272,852	2,553,406.87	1,186,060,732.49	1,188,614,139.36
Kandy Museum	266	6,450	6,716	303,439.45	82,714.40	386,153.85
Galle Museum	16,141	37,416	53,557	3,703,886.03	23,047,194.76	26,751,080.79
Ramba Viharaya	253	3,924	4,177	374,643.91	197,087.26	571,731.17
Jaffna Fort	14,532	235,381	249,913	11,665,151.98	16,872,938.59	28,538,090.57
Trincomalee	8,607	22,447	31,054	2,390,644.05	10,025,366.54	12,416,010.59
Katharagama Museum	122	5,770	5,892	540,521.58	163,736.52	704,258.10
Ampara (Lahugala)	101	0	101	0.00	91,468.76	91,468.76
Buduruwagala (Monaragala)	50,892	0	50,892	0.00	38,361,242.06	38,361,242.06
Dambulla Museum	540	666	1,206	71,969.29	392,433.04	464,402.33
Ritigala forest Monastery	11,267	30,848	42,115	1,456,283.90	17,537,654.75	18,993,938.65
Ibbankatuwa Ancient Bural Ground	1,157	17,840	18,997	1,748,407.37	794,857.98	2,543,265.35
Namal Uyana	1,472	36,781	38,253	1,668,234.76	1,685,176.42	3,353,411.18
Rathugala	689	0	689	0.00	518,069.02	518,069.02
Seethawaka (Royal Palace)	10	3,502	3,512	277,524.90	457.63	277,982.53
Total	**956,961**	**1,017,927**	**1,974,888**	**78,863,550.12**	**5,403,812,790.61**	**5,482,676,340.73**

Source: Central Cultural Fund

From January to December 2025, the Central Cultural Fund (CCF) recorded 1,974,888 visitors across its heritage sites. Visitor numbers were fairly balanced, with 956,961 international tourists and 1,017,927 local visitors. However, despite this nearly equal distribution, international tourists generated the overwhelming majority of revenue. They accounted for 98% of the total direct site income, contributing Rs. 5,403,812,790.61, while domestic visitors contributed only 2%, amounting to Rs. 78,863,550.12.

Among the heritage sites, Sigiriya stood out as the leading attraction, receiving 1,086,918 visitors, which represents 55% of the total visitor count. It also generated the largest share of revenue, contributing 68% of total site earnings, amounting to Rs. 3,731,956,385.43. Other significant revenue-generating sites included Polonnaruwa Ancient City, which brought in Rs. 1,188,614,139.36, and Jethawanaramaya which generated Rs. 413,665,626.79. These figures highlight the strong financial contribution of key cultural heritage sites to Sri Lanka’s tourism sector.

Chart 17: Visitation of domestic and foreign tourists to Sigiriya, 2025



Sigiriya exhibits significant seasonal fluctuations in visitor numbers, with August being the busiest month overall, attracting approximately 123,737 visitors from both foreign and domestic markets. Foreign tourist arrivals reached their peak in January, February, and March**,** totaling 201,762 visitors, while domestic tourism peaked in April, May, June and August exceeding 50,000 visitors**,** likely coinciding with the local New Year celebrations and school holidays. Notably, domestic visitation declined in December**,** which is likely attributable to the disruption caused by Cyclone Ditwah**.**

Museums, 2025

Table 22: Number of visitors & revenue to national museums, 2025

	Foreign Tickets		Local Tickets	
Museums	Number of Foreign Tourists	Revenue (In Rs.)	Number of Local Tourists	Revenue (In Rs.)
Colombo National Museum	65,241	78,028,800.00	176,896	11,039,430.00
National Museum of Natural Sciences	8,334	10,323,440.00	80,665	4,823,890.00
Dutch Museum *	3,510	828,800.00	9,877	282,350.00
Independence Memorial Museum	1,811	899,000.00	14,773	478,150.00
Kandy National Museum	3,430	1,807,800.00	16,997	1,428,030.00
Rathnapura National Museum	169	43,000.00	32,626	1,114,525.00
Galle National Museum	4,879	2,224,400.00	26,621	817,685.00
Galle Maritime Museum	9,936	3,767,200.00	40,368	1,804,070.00
Hambantota National Museum	292	193,250.00	4,284	76,320.00
Polonnaruwa Museum	286	301,800.00	44,786	3,083,230.00
Total	**97,888**	**98,417,490.00**	**447,893**	**24,947,680.00**

Source: Department of National Museums

The Colombo National Museum stands as one of the key museums , dwarfing all others in both visitor numbers and revenue. It alone accounts for the vast majority of foreign tourists (approximately 66.6% of the total) and an overwhelming 79.3% of total foreign ticket revenue. Beyond the national Museum, the data reveals a highly skewed landscape. The National Museum of Natural Sciences and the Galle Maritime Museum form a solid second tier, attracting a noteworthy mix of both domestic and international visitors, likely due to their specialized and widely appealing themes. The museums recorded a total of 545,781 visitors, of which 18% were foreign tourists and 82% were domestic tourists.

Zoological Gardens -2025

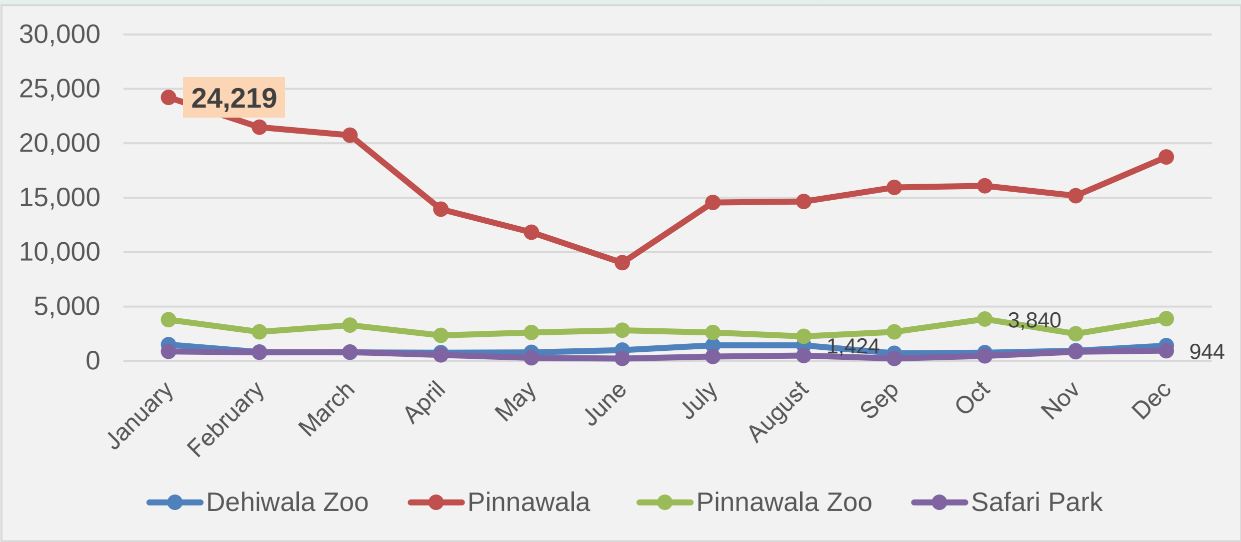
Table 23: Visitors & revenue to zoological gardens, 2025

Location	Year	Domestic Tourists		Foreign Tourists		Local & Foreign Online Ticket income (with VAT)	Total	
		Number	Revenue	Number	Revenue		Number	Revenue
Dehiwala	2024	1,008,669	230,854,079.00	14,422	57,380,674.20	_	1,023,091	288,234,753.20
	2025	**962,300**	**222,191,173.00**	**12,257**	**49,076,132.15**	**454,253.31**	**974,557**	**271,721,558.46**
Pinnawala	2024	477,137	104,393,774.00	172,876	770,511,429.84	_	650,013	874,905,203.84
	2025	**438,637**	**97,310,824.00**	**196,381**	**835,087,513.21**	**13,325,021**	**635,018**	**945,723,358.62**
Pinnawala Zoo	2024	276,962	62,092,249.00	25,665	38,711,528.40	_	302,627	100,803,777.40
	2025	**297,515**	**66,233,931.00**	**35,221**	**53,098,809.46**	**45,925.60**	**332,736**	**119,378,666.06**
Safari Park	2024	204,509	92,115,402.00	4,991	23,096,452.70	_	209,500	115,211,854.70
	2025	**242,356**	**110,518,092.00**	**6,886**	**32,008,275.85**	**0**	**249,242**	**142,526,367.85**
Total	2024	1,967,277	489,455,504.00	217,954	889,700,085.14	_	2,185,231	1,379,155,589.14
	2025	**1,940,808**	**496,254,020.00**	**250,745**	**969,270,730.67**	**13,825,200**	**2,191,553**	**1,479,349,950.99**

Source: Department of National Zoological Gardens

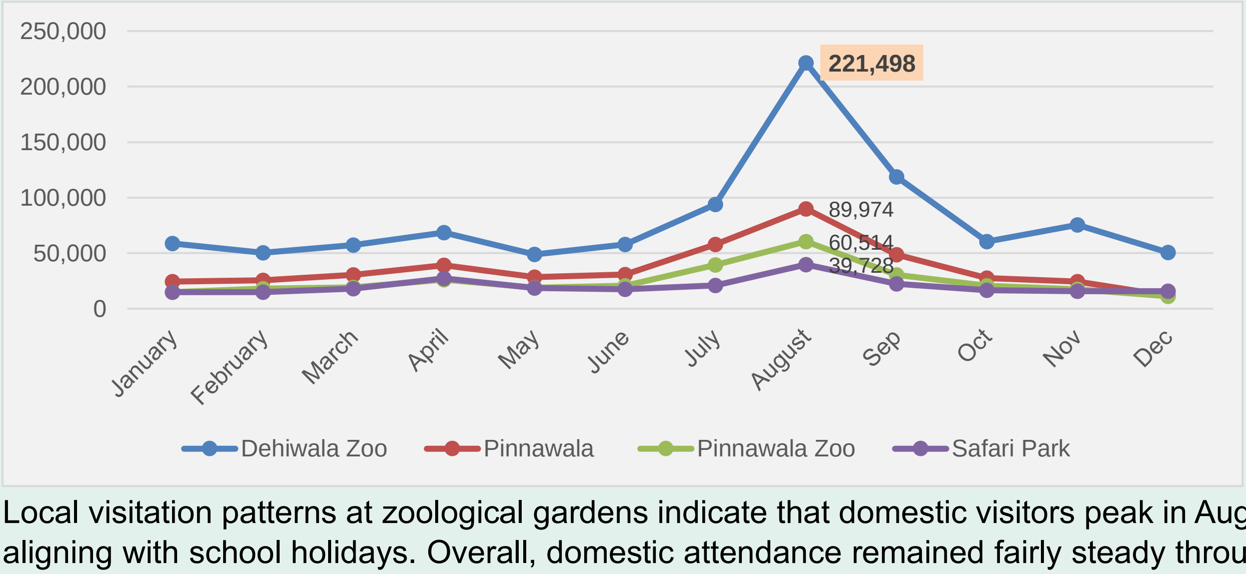
In 2025, zoological parks recorded a total of 2,191,553 visitors, of which 88.6% were domestic and 11.4% were foreign visitors. The total revenue generated for the year amounted to Rs. 1,479,349,950.99. Among domestic visitors, the highest revenue was generated by Dehiwala Zoo, followed by Ridiyagama Safari Park and Pinnawala Elephant Orphanage. For foreign visitors, Pinnawala Elephant Orphanage led in revenue, followed by Pinnawala Zoo and Dehiwala Zoos.

Chart 18: Visitation of foreign tourists to main Zoological parks, 2025



Among the four zoological parks, the Pinnawala Elephant Orphanage experienced notably high foreign visitor numbers, peaking in January, February, March, and December. In contrast, the other zoos show consistently low but stable visitation throughout the year.

Chart 19: Visitation of Local tourists to main Zoological parks, 2025



Local visitation patterns at zoological gardens indicate that domestic visitors peak in August, likely aligning with school holidays. Overall, domestic attendance remained fairly steady throughout the year, with a slight decline observed in May and December.

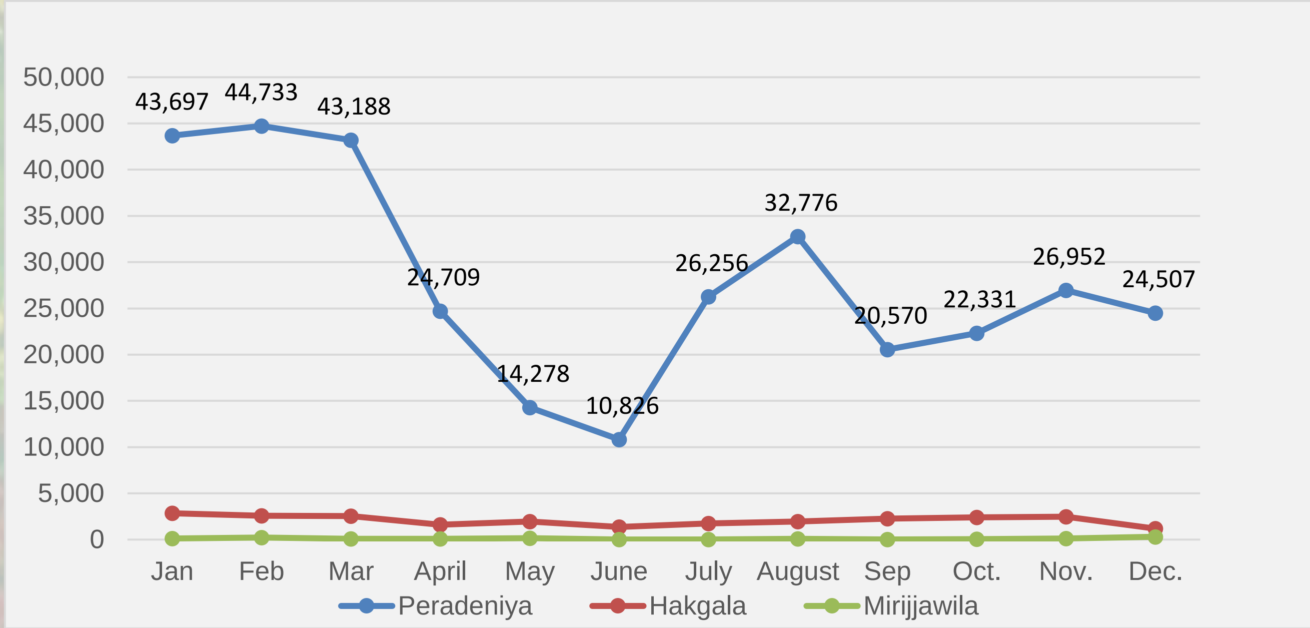
Botanical Gardens, 2025

Table 24: Visitors & revenue to national botanical gardens, 2025

Location	Foreign Tickets		Local Tickets		Total
	Number of Foreign visitors	Revenue RS (000)	Number of Domestic visitors	Revenue RS (000)	Revenue RS (000)
Peradeniya	334,823	1,143,188,130.00	781,038	130,287,282.00	1,273,475,412.00
Hakgala	24,925	85,397,780.00	497,525	88,405,684.00	173,803,464.00
Gampaha	315	1,119,230.00	124,640	25,798,578.00	26,917,808.00
Mirijjawila	1214	4,209,060.00	76,612	10,804,168.00	15,013,228.00
Avissawella	361	1,251,390.00	208,384	41,038,545.00	42,289,935.00
Ganewattha	10	34220	830	145,534.00	179,754.00
Total	**361,648**	**1,235,199,810.00**	**1,689,029**	**296,479,791.00**	**1,531,679,601.00**

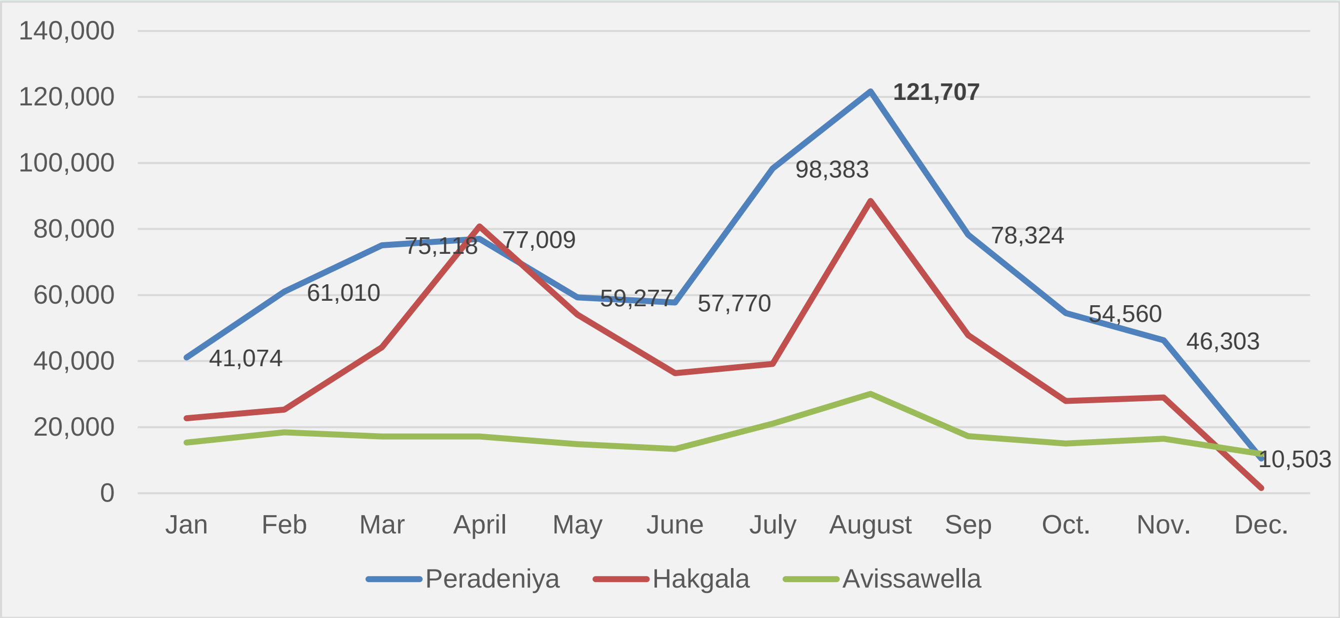
An analysis of visitors to Botanical gardens reveals that Peradeniya alone accounts for 92.6% of all foreign visitors and 92.5% of total revenue, establishing it as the premier international attraction. Across all gardens, local visitors (1.69 million) significantly outnumber foreign visitors (361,648). The Hakgala, Avissawella, Gampaha botanical gardens have also attracted considerable number of domestic visitors.

Chart 20: Visitation of foreign tourists to main botanical gardens, 2025



The monthly visitation trends of foreign tourists to the Peradeniya, Hakgala, and Mirijjawila botanical gardens indicate a high influx of visitors during January, February, and March, with additional peaks observed in August and November. The flow of foreign visitors to Hakgala and Mirijjawila is evenly distributed across the months, showing no notable peaks or troughs except for Hakgala in December which was likely due to the adverse impacts of the cyclone.

Chart 21: Visitation of local tourists to main botanical gardens, 2025



Domestic visitors, unlike foreign tourists, exhibit distinct visitation patterns throughout the year. At Peradeniya and Hakgala, April and August are the peak months, likely coinciding with school and other vacation periods. In contrast, Avissawella experiences a steady flow of domestic visitors year-round, with only a slight increase in August.

5

Tourism Investment

TOURISM INVESTMENT

Table 25: Tourism investment projects by province and district, 2025

Province	District	Total projects	Rooms	Investment value (USD Mn)
Western Province	Colombo	5	77	5.19
	Gampaha	7	174	25.03
	Kalutara	1	214	25.0
Central Province	Kandy	6	322	21.0
	Matale	17	273	14.95
	Nuwara Eliya	2	64	5.19
Southern Province	Galle	9	267	35.14
	Matara	29	475	24.725
	Hambantota	4	69	7.63
Northern Province	Jaffna	5	85	4.65
	Mannar	0	0	0
	Mullaitivu	0	0	0
	Vavuniya	0	0	0
	Kilinochchi	0	0	0
Eastern Province	Ampara	4	142	36.31
	Batticaloa	1	14	0.4
	Trincomalee	11	363	25.436
Uva Province	Badulla	13	544	70.6
	Monaragala	2	75	13.38
North Central Province	Anuradhapura	2	32	1.38
	Polonnaruwa	0	0	0
North Western Province	Kurunegala	1	85	8.8
	Puttalam	2	37	2.32
Sabaragamuwa Province	Rathnapura	2	13	0.306
	Kegalle	3	88	11.85

An analysis of the investment projects data for 2025, reveals several key insights regarding the distribution of economic activity and tourism investment attractiveness across districts.

Concentration and Disparity in Investment

A striking finding is the extreme disparity in investment distribution. While 25 districts are listed, four districts (Mannar, Mullaitivu, Vavuniya, Kilinochchi, and Polonnaruwa) recorded zero projects and zero investment.

This indicates a complete absence of new economic development in these areas during 2025, potentially highlighting regions affected by historical factors, lack of infrastructure, and other factors. At the opposite end, the Badulla district stands out as the top destination for investment, attracting a massive USD 70.6 Mn across 13 projects. This suggests a major, potentially singular, large-scale development or a highly successful investment drive in that region. Other significant investment hubs include Ampara (USD 36.31 Mn), Galle (USD 35.14 Mn), Matara (USD 24.7Mn), Gampaha (USD 25.03 Mn), Kalutara (USD 25 Mn), and Trincomalee (USD 25.4 Mn)

Investment vs. Scale of Projects

The data reveals that high investment value does not always correlate with the number of projects. For instance, Kalutara recorded only a single project, but it was a substantial one, bringing in USD 25.0 Mn. Similarly, Ampara achieved the second-highest investment (USD 36.31 Mn) with just 4 projects. This indicates that these districts are attracting high-value, capital-intensive ventures. Conversely, Matara has the highest number of projects (29) but a moderate total investment (USD 24.725 Mn). This pattern suggests a vibrant ecosystem of smaller-scale enterprises, fostering local economic activity and entrepreneurship.

Table 26: Investment projects received and approved from 2010 to 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	4,587	958.87	3	262	17.17
2011	153	8,794	1,157.23	44	2,159	251.57
2012	72	3,934	576.24	57	3,695	313.22
2013	60	4,102	1124.295	36	2,327	370.64
2014	68	3,752	957.79	42	2,747	426.398
2015	59	3,347	430.98	36	2,256	889.945
2016	76	3,934	590.02	41	1,579	145.633
2017	96	2,977	314.82	45	2,391	379.77
2018	141	4,044	935.06	44	1,377	159.724
2019	132	2,589	190.71	57	2,027	755.73
2020	54	1,702	236.06	24	690	95.47
2021	45	1,299	116.55	30	922	103.985
2022	43	1,053	65.574	22	393	36.833
2023	68	1,944	241.142	34	1,273	170.126
2024	76	1,384	160.729	29	576	41.723
2025	126	3,413	339.287	42	1,205	196.18
Total	**1,324**	**52,755**	**8395.357**	**586**	**25,879**	**4354.007**

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