

● SECOND QUARTER 2019 ●

***TOURISM INDUSTRY
REPORT***

SRI LANKA TOURISM DEVELOPMENT AUTHORITY

www.sltda.lk

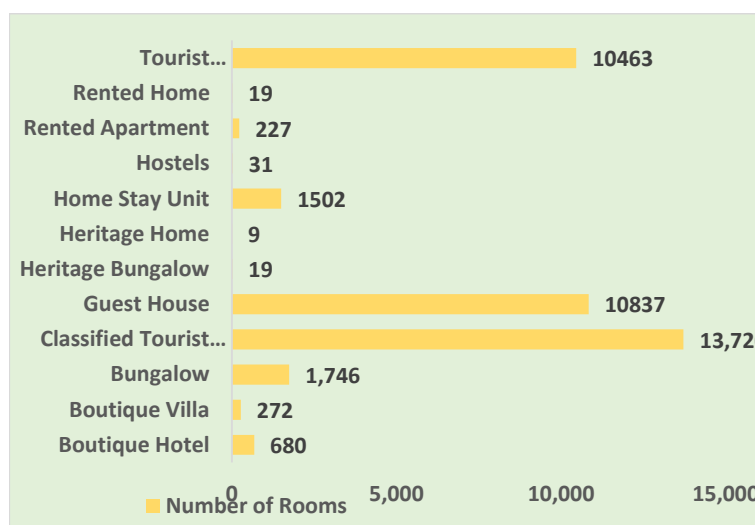
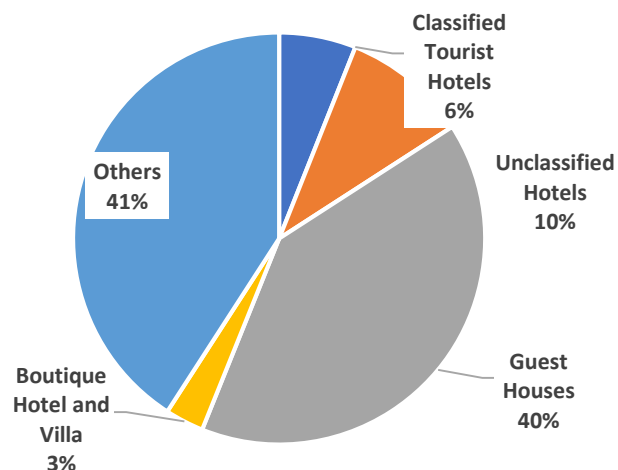
Photo courtesy of SLTDA, SLRC Lovingly Sri Lanka Programme



Tourist Accommodation

Number of SLTDA Registered Accommodation Establishments as at end June 2019

Categorization	Number of Establishments	Number of Rooms
Classified Tourist Hotels	149	13,720
Five star	23	5,150
Four Star	25	2,614
Three Star	24	2,416
Two Star	39	1,878
One Star	38	1,662
Tourist Hotel (Unclassified)	243	10,463
Boutique Hotel	34	680
Boutique Villa	41	272
Guest House	993	10,837
Bungalow	424	1,746
Heritage Bungalow	4	19
Heritage Home	3	9
Home Stay Unit	497	1,502
Hostels	4	31
Rented Apartment	71	227
Rented Home	6	19
Total	2,469	39,525



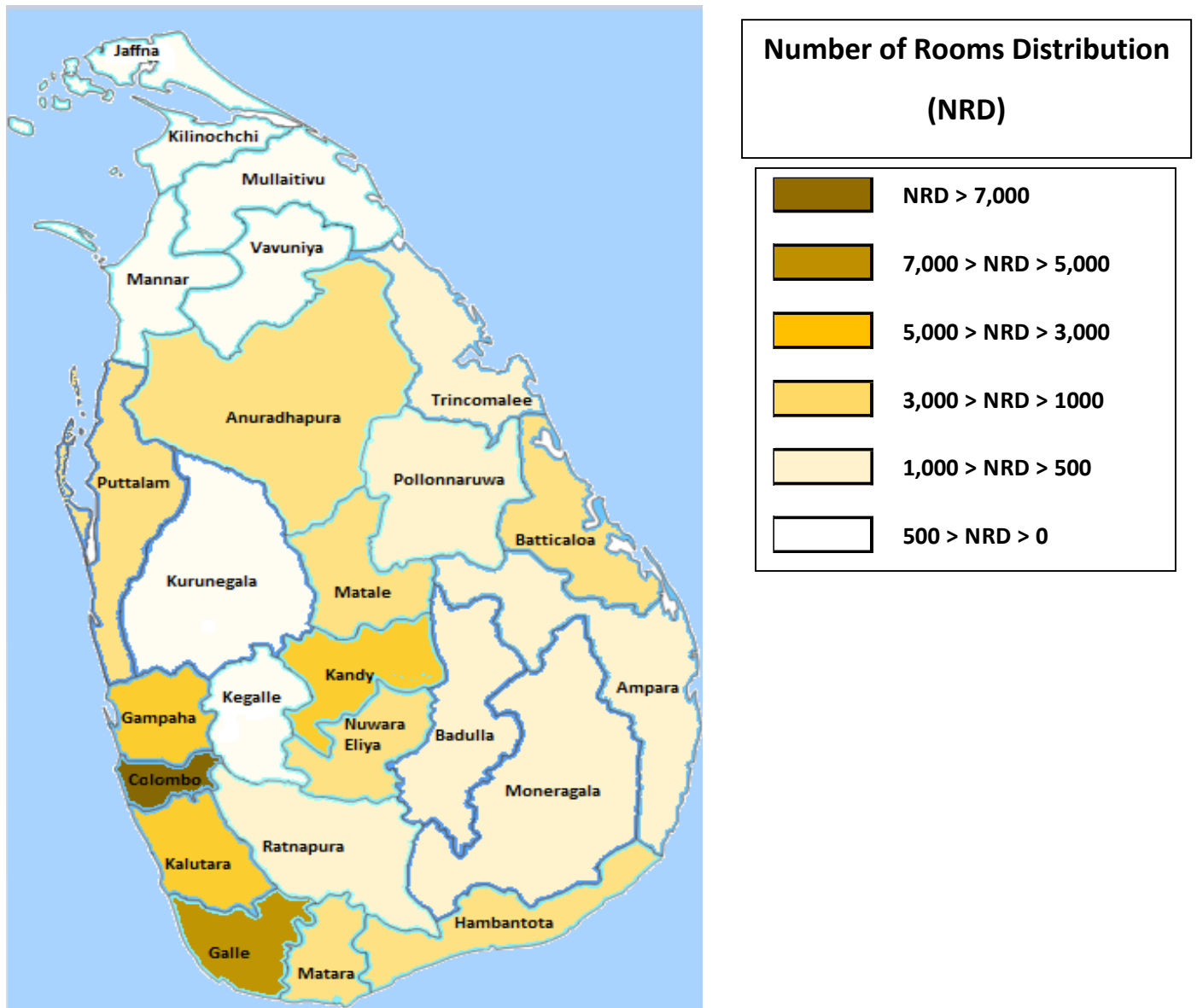
The total number of SLTDA registered accommodation establishments as at 30th June 2019 was 2,469.

The number of classified tourist hotels was 149 and among them 23 were five star hotels.

The presence of small and medium enterprises is strong with guest houses, homestays and bungalows recording the highest number of registered establishments with 993, 497 and 424 respectively.

The total room inventory was 39,525. Classified tourist hotels (1-5 star) had the highest inventory of 13,720 rooms.

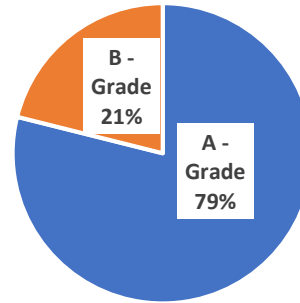
Geographical Distribution of Rooms of SLTDA Registered Tourist Establishments



The map depicts the distribution of rooms in SLTDA registered tourist establishments within each district. Colombo district recorded the highest number of rooms (7000 & over). Less than 500 rooms were recorded in the districts of Kurunegala, Kegalle, Mannar, Vavunia, Mullaitivu, Killinochchi and Jaffna.

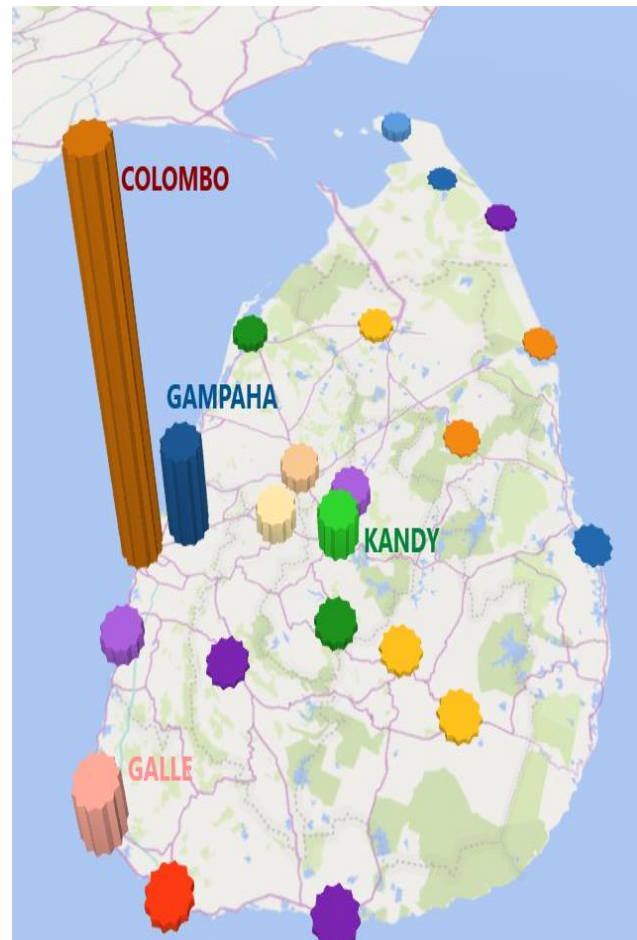
Number of SLTDA Registered Restaurants as at end June 2019

The total number of registered restaurants with SLTDA is 512. Among them 404 (79%) restaurants are Grade A, while 108 (21%) are Grade B restaurants.



Geographical Distribution of SLTDA Registered Restaurants

District	Number of Restaurants
Anuradhapura	4
Badulla	4
Batticaloa	1
Colombo	275
Galle	39
Gampaha	67
Hambantota	3
Jaffna	9
Kalutara	12
Kandy	25
Kegalle	16
Kilinochchi	1
Kurunegala	11
Matale	12
Matara	7
Moneragala	4
Mullaitivu	3
Nuwara Eliya	6
Polonnaruwa	2
Puttalam	6
Ratnapura	3
Trincomalee	2
Total	512



The map depicts the distribution of SLTDA registered restaurants within each district in Sri Lanka. Colombo district registered the highest number of SLTDA registered restaurants (275), while Batticaloa and Killinochchi recorded the lowest number with one restaurant in each district.

"A" Grade Restaurant: Obtain a minimum of 80% of the total marks given in the criteria for approval of tourist restaurants

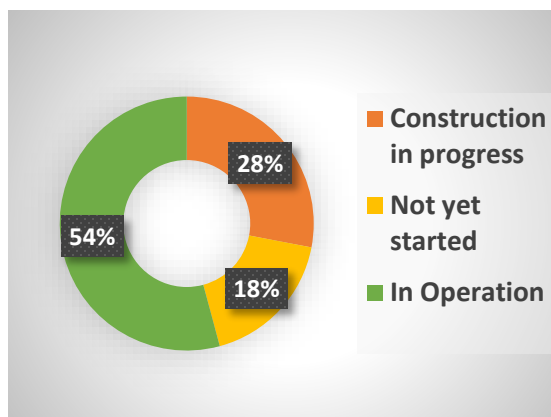
"B" Grade Restaurant: Obtain a minimum of 60% of the total marks given in the criteria for approval of tourist restaurants

Link to the Guideline: <http://www.slt-da.lk/sites/default/files/registration/Guidelines%20Restaurant.pdf>

TOURISM ACCOMADATION INVESTMENTS

Progress of Investment Projects – Up to end June 2019*

Status of the project	Number of Projects	Number of Rooms	Investment US \$ million
Construction in progress	107	6,797	957.998
Not yet started	68	2,210	248.97
In Operation	207	10,211	1,774.00
Final Approval Granted	382	19,218	2,980.96



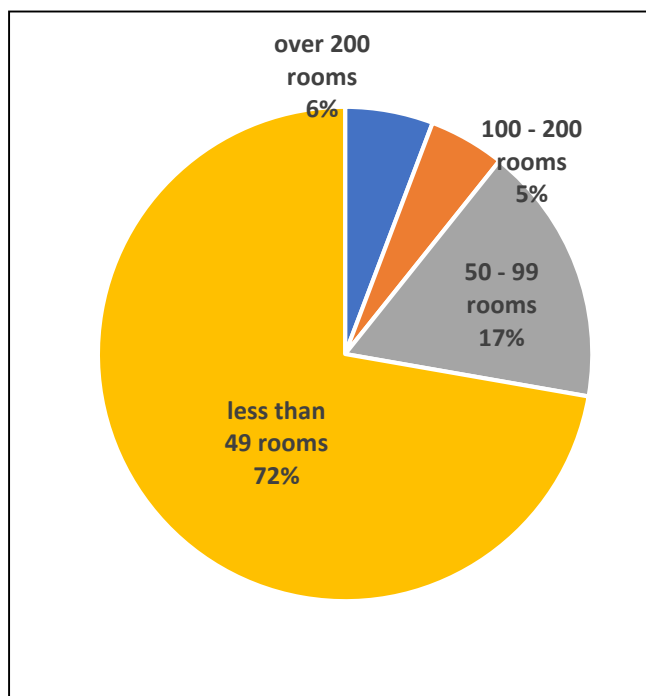
The above table and graph depict the number of investment projects handled by SLTDA up to end June 2019.

382 projects had been granted final approval while 107 are under construction and 207 are in operation. 68 tourism investment projects are yet to be commenced. The number of rooms of final approval granted projects are 19,218.

The total investment value of final approval granted projects is estimated at USD 2,980.96 million. The value of projects which are under construction is USD 957.998 million. The investment value of projects in operation is USD 1,774 million while the value of projects that have not commenced is USD 248.97 million.

Room Distribution of Final Approval Granted Projects*

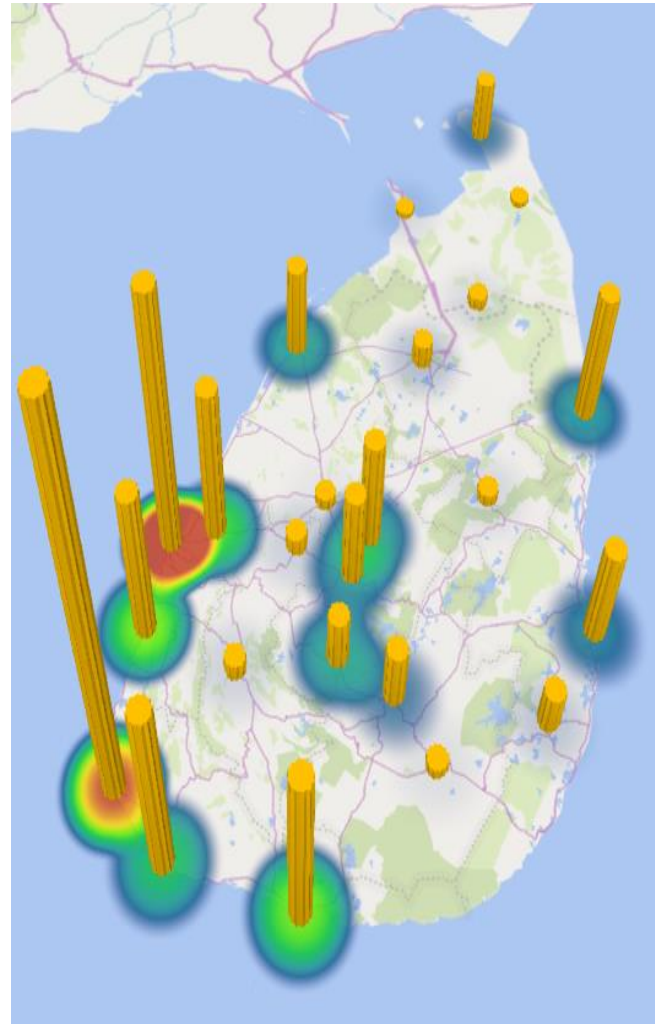
Number of Rooms	Number of Projects	Percentage
over 200	22	5.8
100 - 200	19	5.0
50 - 99	65	17.0
less than 49	276	72.3
Total	382	100.0



There are 22 tourism investment projects with accommodation of over 200 rooms. The highest number of projects (276) are those with less than 49 rooms.

Distribution of Tourism Projects and Number of Rooms by District

Districts	Number of Projects	Rooms
Ampara	7	95
Anuradhapura	4	111
Batticaloa	17	438
Badulla	10	300
Colombo	46	5,384
Galle	71	3,310
Gampaha	27	1,316
Hambantota	32	1,622
Jaffna	10	315
Kalutara	27	1,672
Kandy	16	559
Kegalle	3	70
Kurunegala	2	27
Kilinochchi	1	15
Matale	19	677
Matara	34	1,030
Nuwara Eliya	9	714
Puttalam	15	685
Trincomalee	22	615
Monaragala	2	42
Mannar	1	52
Polonnaruwa	2	54
Rathnapura	3	66
Vavunia	2	49
Total	382	19,218



- No of Project



- No of Rooms

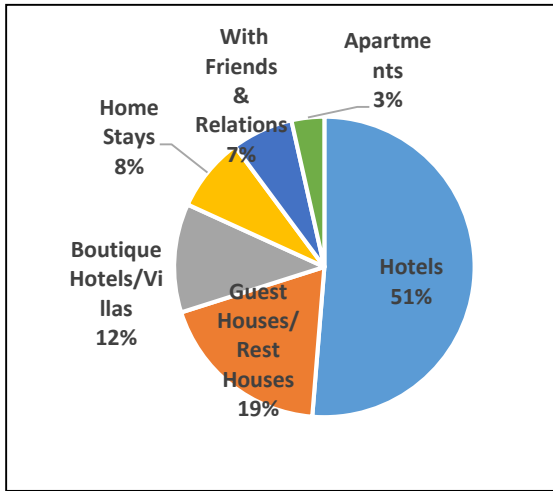
The map depicts the distribution of final approval granted projects and number of rooms by district. Accordingly, Galle district has the highest number of projects, while Colombo district has the highest number of rooms. Galle, Colombo, Hambantota, Kalutara, Gampaha, Trincomalee and Matara have more than 20 projects. Killinochchi and Mannar had the least number of projects of one in each district.

* Reporting period for the statistics on investments is from November 2010 to June 2019.

AIRPORT KIOSK SELF SURVEY 2019

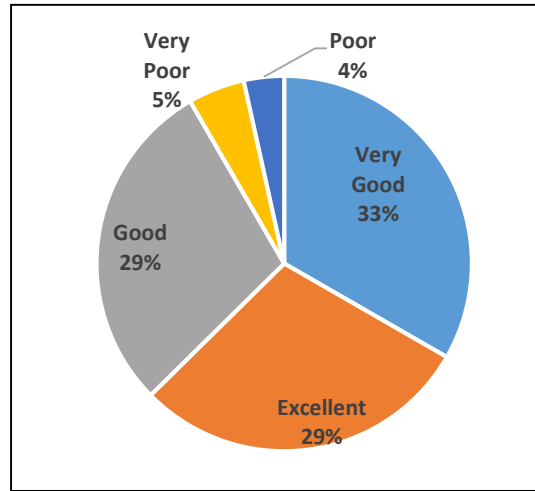
In mid-February 2018, SLTDA installed two touch-screen self-service kiosks at the pier and departure lounges at the Bandaranaike International Airport to obtain quick feedback of tourists departing Sri Lanka. The main objective of this initiative is to support visitor profiling and assessing satisfaction rates to improve services and facilities for tourists. As at 30th June, the total number of respondents via the kiosk was **8,175**. However, some questions may be missed. The highest number of respondents were by visitors from India, UK, Australia, Germany and UAE and in the 20- 29 age group. The majority (73.1%) of respondents were male. Highlights of responses related to service satisfaction are shared as a sample.

Type of Accommodation Facilities Used



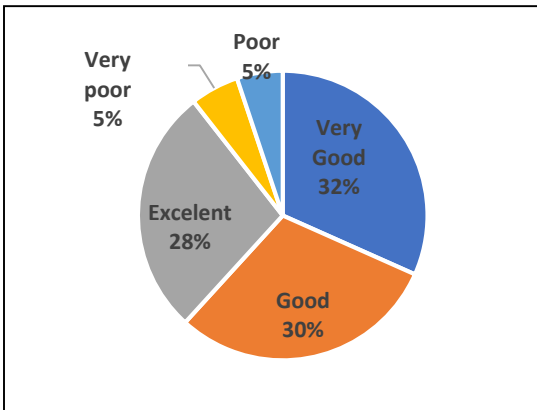
Out of 5,818 respondents, the majority (51%) had stayed in hotels for accommodation. Guest houses and rest houses were used by 19%, while 12% had used boutique hotels and boutique villas.

Quality of Rooms



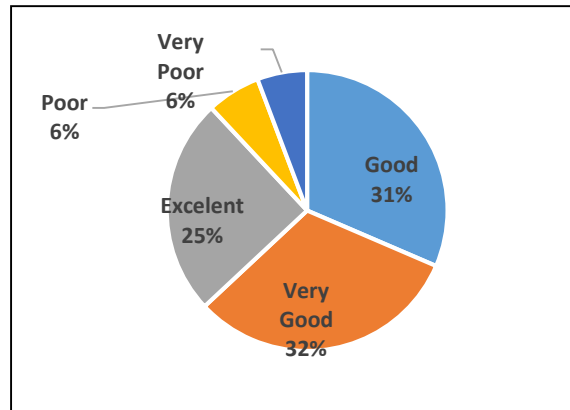
Out of 5,299 respondents, 62% of tourists had rated the accommodation facilities as excellent and very good. Only 9% of tourists had rated the quality of rooms as poor and very poor.

Quality of Food



Out of 5,255 respondents, 60% of tourists had rated the quality of food as excellent and very good. Tourists who had rated the quality of food as poor and very poor accounted for 10%.

Quality of Service



Out of 5,200 respondents, the majority (32%) of tourists had rated the general quality of service at bars, restaurants, laundry, spa and rooms as very good and 25% had rated the quality of service as excellent.

Places of Attraction Visited by Tourists

Place	No of Respondents	% Share
Colombo	3,353	41.0
Kandy	3,076	37.6
Galle	2,456	30.0
Sigiriya	2,046	25.0
Nuwara Eliya	2,018	24.7
Dambulla	1,805	22.1
Negombo	1,786	21.8
Unawatuna	1,243	15.2
Pinnawala	1,139	13.9
Polonnaruwa	1,119	13.7
Anuradhapura	1,115	13.6
Yala Park	1,079	13.2
Hikkaduwa	1,073	13.1
Adams Peak	967	11.8
Udawalawa Park	914	11.2
Minneriya Park	858	10.5
Nilaweli	729	8.9
Hortainplace	726	8.9
Jaffna	689	8.4
Rathnapura	545	6.7
Arugambay	543	6.6
Passikudah	509	6.2
Wilpaththu	467	5.7
Sinharaja_Forest	438	5.4
Kithulgala	224	2.7
Total Number of Respondents	8,175	100%



As per the feedback of 8,175 tourists, the most popular place of attraction within Sri Lanka was Colombo city (41%). Apart from Colombo city, the other top ten places of attraction in order of popularity were Kandy (37.6%), Galle (30%), Sigiriya (25%) Nuwara Eliya (24.7%), Dambulla (22.1%), Negambo (21.8%), Unawatuna (15.2%), Pinnawala (13.9%) Polonnaruwa (13.7%) and Anuradhapura (13.6%).

For the Indian (39.7% out of 2,482 respondents), Australian (51.4% out of 397 respondents) and UAE (37.5% out of 168 respondents) tourists, Colombo city was the most popular place of attraction while for the UK (51.7% out of 394 respondents) and Germany (58.9% out of 343 respondents) tourists, Kandy was the most popular place of attraction.