

● FOURTH QUARTER 2018 ●

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# *TOURISM INDUSTRY REPORT*

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SRI LANKA TOURISM DEVELOPMENT AUTHORITY

[www.sltda.lk](http://www.sltda.lk)

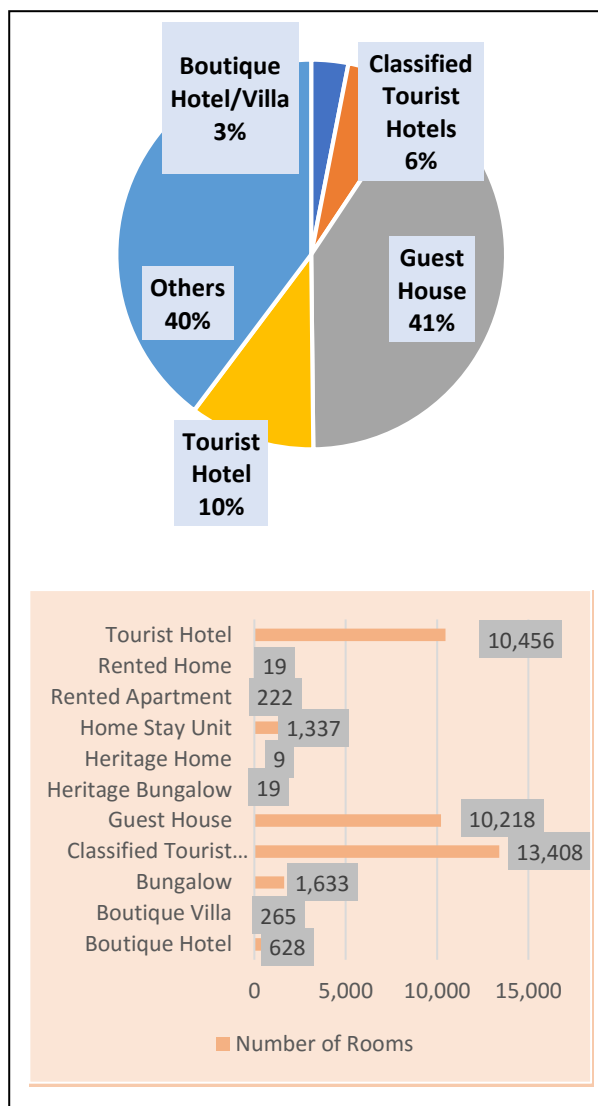
Photo courtesy of SLTDA, SLRC Lovingly Sri Lanka Programme



## TOURIST ACCOMMODATION

### Number of SLTDA Registered Accommodation Establishments as at end December 2018

Categorization	Number of Establishments	Number of Rooms
<b>Classified Tourist Hotels</b>	<b>145</b>	<b>13,408</b>
Five Star	23	5,150
Four Star	21	2,302
Three Star	24	2,416
Two Star	38	1,788
One Star	39	1,752
<b>Tourist Hotel (Unclassified)</b>	<b>241</b>	<b>10,456</b>
Boutique Hotel	31	628
Boutique Villa	40	265
<b>Guest House</b>	<b>936</b>	<b>10,218</b>
<b>Bungalow</b>	<b>395</b>	<b>1,633</b>
Heritage Bungalow	4	19
Heritage Home	3	9
Home Stay Unit	442	1,337
Rented Apartment	69	222
Rented Home	6	19
<b>Total</b>	<b>2,312</b>	<b>38,214</b>



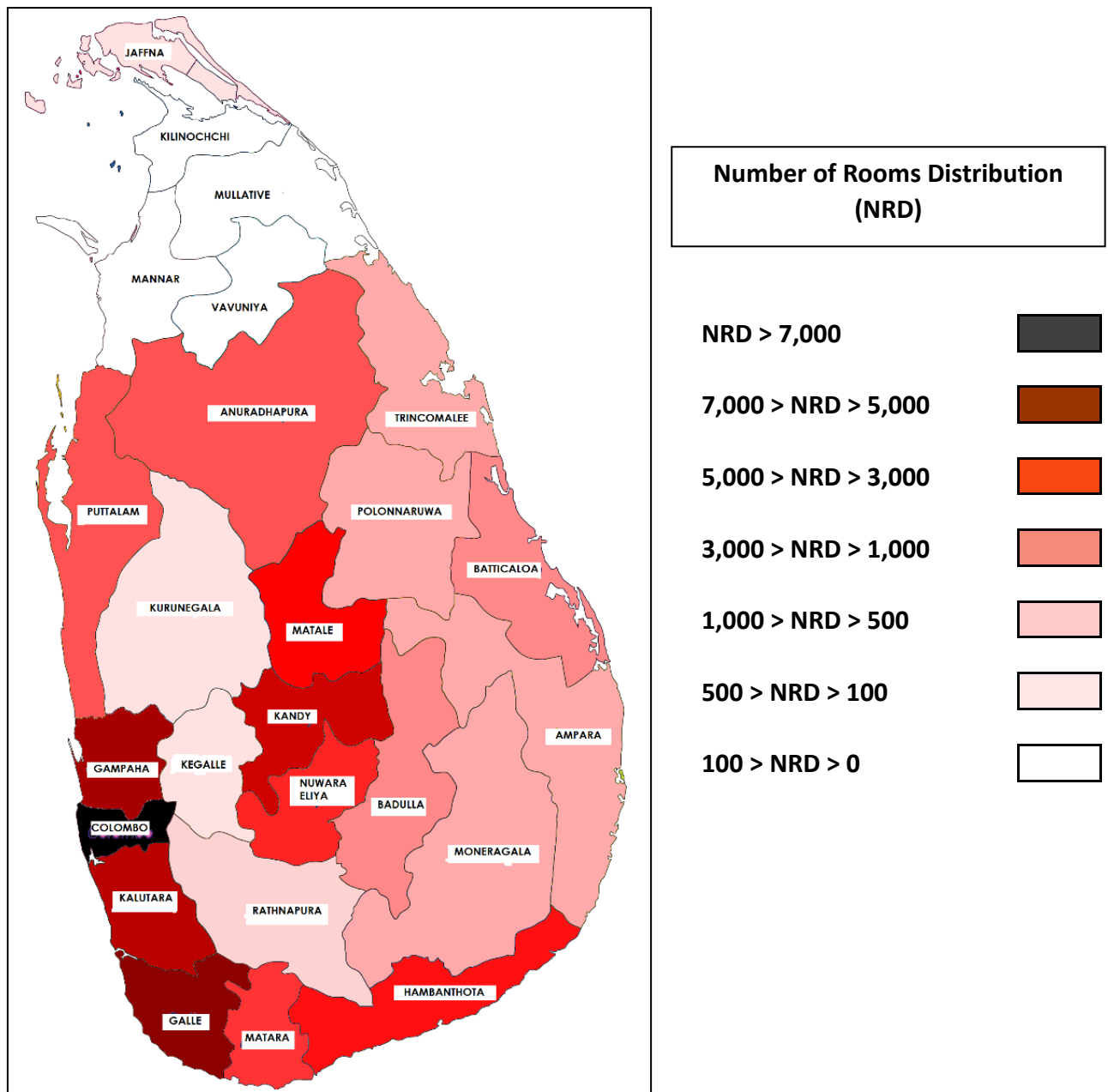
The total number of SLTDA registered accommodation establishments as at 31<sup>st</sup> December 2018 was 2,312.

The number of classified tourist hotels was 145 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 936, 442 and 395 units respectively.

The total room inventory was 38,214. Classified tourist hotels (1-5 star) had the highest inventory of 13,408 rooms.

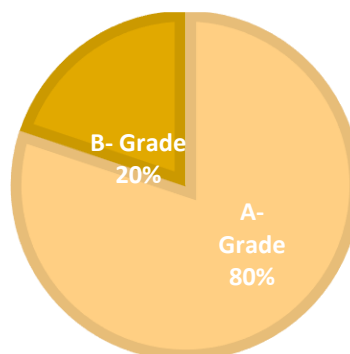
## Geographical Distribution of Rooms in SLTDA Registered Tourist Establishments



The map depicts the distribution of rooms in SLTDA registered tourist establishments within each district. Colombo district recorded the highest number of rooms (7,000 & over rooms). Less than 500 rooms were recorded in the districts of Kurunegala and Kegalle, Rathnapura and Jaffna while Mullaitivu, Killinochchi, Mannar and Vavuniya districts recorded the lowest number of rooms (less than 100 rooms).

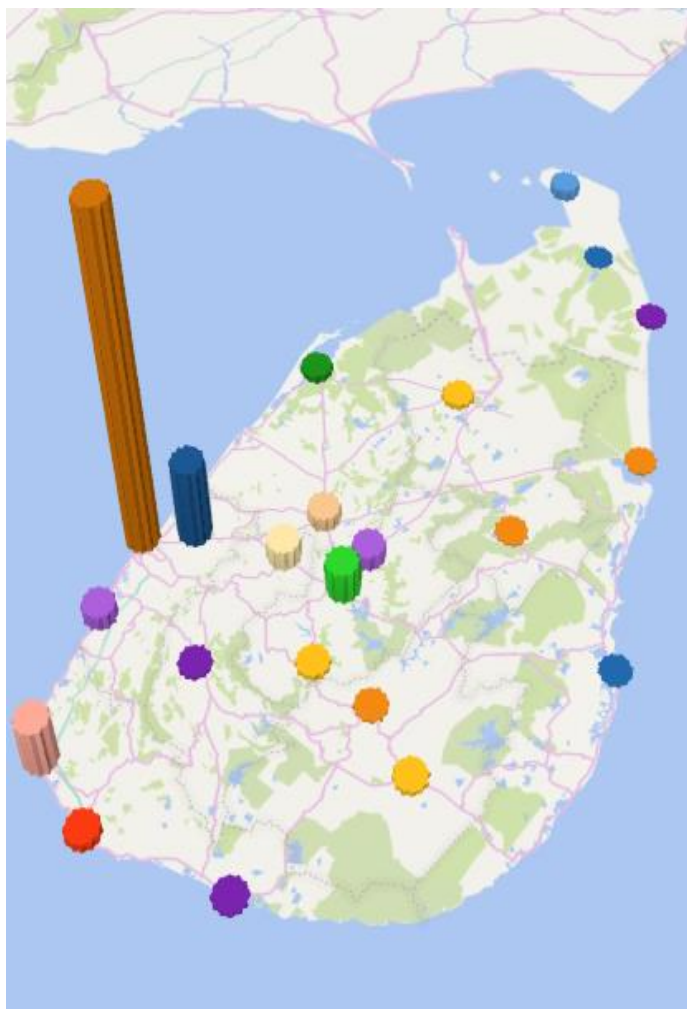
## Number of SLTDA Registered Restaurants as at end December 2018

The total number of registered restaurants with SLTDA is 498. Among them, 399 (80%) restaurants are Grade A, while 99 (20%) are Grade B restaurants.



## Geographical Distribution of SLTDA Registered Restaurants

District	Number of Restaurants
Anuradhapura	4
Badulla	2
Batticaloa	1
Colombo	268
Galle	39
Gampaha	64
Hambantota	3
Jaffna	9
Kalutara	12
Kandy	25
Kegalle	16
Kilinochchi	1
Kurunegala	11
Matale	12
Matara	7
Moneragala	4
Mullaitivu	3
Nuwara Eliya	4
Polonnaruwa	2
Puttalam	6
Ratnapura	3
Trincomalee	2



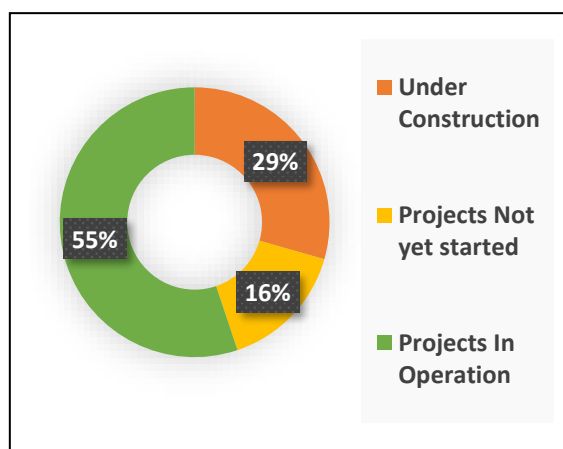
The map depicts the distribution of SLTDA registered restaurants within each district in Sri Lanka. Colombo district registered the highest number of SLTDA registered restaurants (268), while Batticaloa and Kilinochchi recorded the lowest number with one restaurant in each district.

“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.sltida.lk/sites/default/files/registration/Guidelines%20Restaurant.pdf>

## TOURISM ACCOMMODATION INVESTMENTS

### Progress of Investment Projects - Up to end December 2018\*

Status of the Project	Number of Projects	Number of Rooms	Investment Value (USD Mn)
<b>Final approval granted</b>	<b>350</b>	<b>18,760</b>	<b>2,954.8</b>
Projects in operation	193	9,903	1,754.5
Under construction	103	6,815	962.7
Projects not yet started	54	2,042	237.5



The above table and graph depict the number of investment projects handled by SLTDA up to end December 2018.

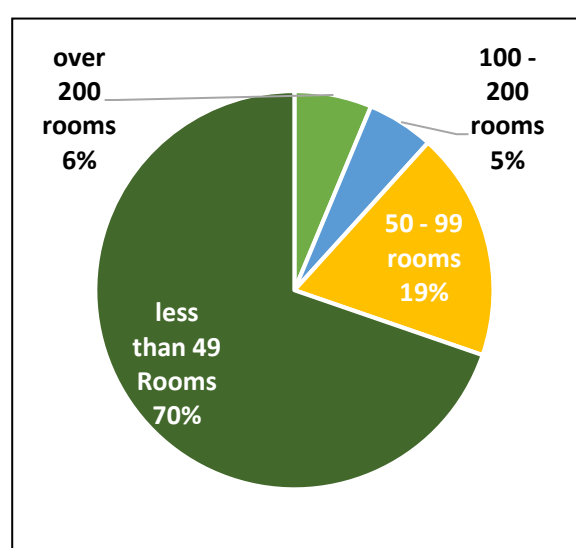
350 projects had been granted final approval while 103 are under construction and 193 are in operation. 54 tourism investment projects are yet to be commenced. The number of rooms of final approval granted projects are 18,760.

The total investment value of final approval granted projects is estimated at USD 2,954.8 million. The value of projects which are under construction is USD 962.7 million. The investment value of projects in operation is USD 1,754.5 million while the value of projects that have not commenced is USD 237.5 million.

### Room Distribution of Final Approval Granted Projects\*

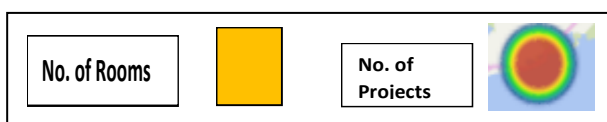
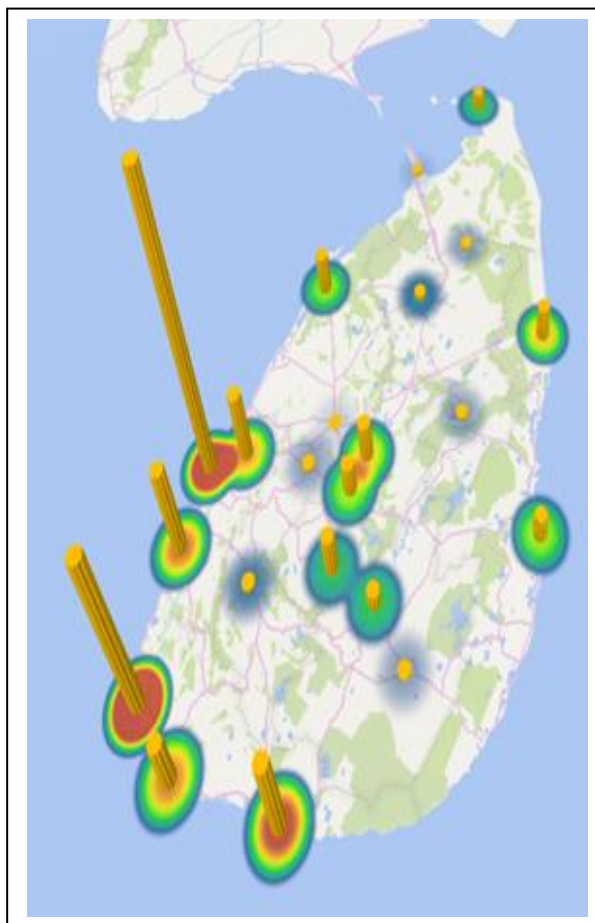
No. of Rooms	No. of Projects	Percentage
over 200	22	6.3
100 - 200	19	5.4
50 - 99	65	18.6
less than 49	244	69.7
<b>Total</b>	<b>350</b>	<b>100</b>

There are 22 tourism investment projects with accommodation of over 200 rooms. The highest number of projects (244) 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	16	439
Badulla	10	300
Colombo	44	5357
Galle	61	3177
Gampaha	23	1245
Hambantota	31	1610
Jaffna	10	315
Kalutara	26	1650
Kandy	16	559
Kegalle	2	60
Kurunegala	1	16
Matale	19	677
Matara	25	897
Nuwara Eliya	9	714
Puttalam	15	685
Trincomalee	21	590
Monaragala	2	42
Mannar	1	52
Polonnaruwa	2	54
Ratnapura	3	66
Vavuniya	2	49
<b>Total</b>	<b>350</b>	<b>18,760</b>



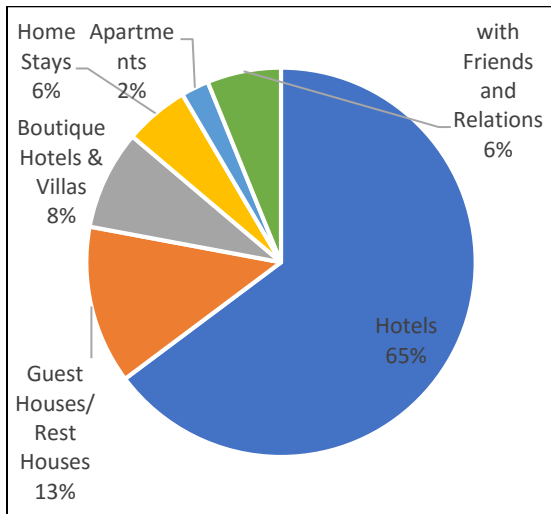
The map depicts the distribution of final approval granted projects and number of rooms by district. Accordingly, Galle district has the highest number of projects, while Colombo district has the highest number of rooms. Galle, Colombo, Hambantota, Kalutara, Gampaha, Trincomalee and Matara have more than 20 projects. Kurunegala 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 December 2018.

## AIRPORT KIOSK SELF SURVEY 2018

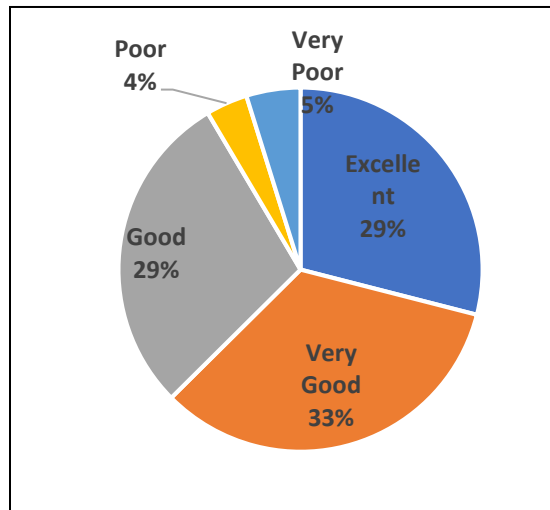
In mid-February 2018, SLTDA installed two touch-screen self-service kiosks at the pier and departure lounges at the Bandaranaike International Airport to obtain quick feedback from tourists departing Sri Lanka. The main objective is to support visitor profiling and assessing satisfaction rates to improve services and facilities for tourists. As at 31<sup>st</sup> December, the total number of respondents via the kiosk was **4,297**. However, all questions were not always answered. The highest number of respondents were by visitors from India, UK, Australia, Germany and China, and in the 20- 29 age group. The majority (72.8%) of respondents were male. Highlights of responses related to service satisfaction are shared as a sample.

### Type of Accommodation



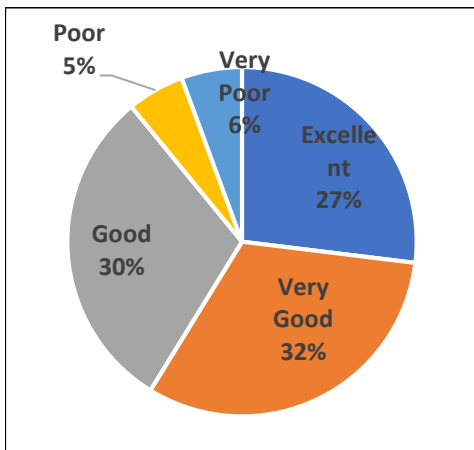
Out of 3,893 respondents, the majority (65%) had stayed in hotels for accommodation. Guest houses and rest houses were used by 13%, while 8% had used boutique hotels and boutique villas.

### Quality of Rooms



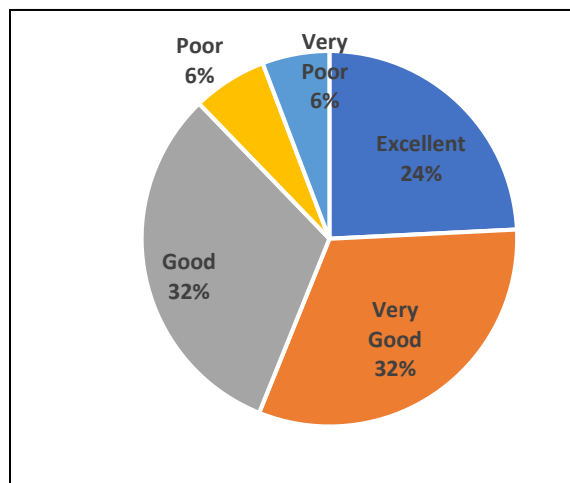
Out of 4,429 respondents, 62% of tourists had rated the accommodation facilities as excellent and very good. Only 9% of tourists had rated the quality of rooms as poor and very poor.

### Quality of Food



Out of 4,395 respondents, 59% 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 9%.

### Quality of Service



Out of 4,340 respondents, the majority (32%) of tourists had rated the general quality of service at bars, restaurants, laundry, spa and rooms as very good and 24% had rated the quality of service as excellent.