

● THIRD QUARTER 2018 ●

TOURISM INDUSTRY REPORT

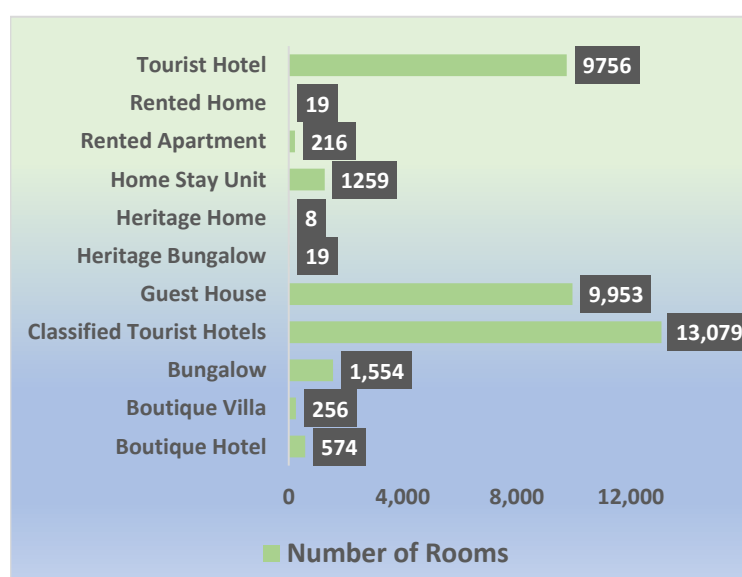
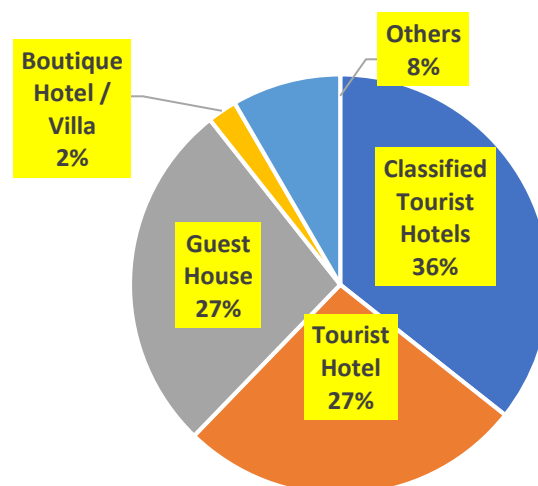
SRI LANKA TOURISM DEVELOPMENT AUTHORITY



TOURIST ACCOMMODATION

Number of SLTDA Registered Accommodation Establishments as at end September 2018

Categorization	Number of Establishments	Number of Rooms
Classified Tourist Hotels	138	13,079
Five Star	22	4,950
Four Star	21	2,369
Three Star	23	2,364
Two Star	35	1,680
One Star	37	1,716
Tourist Hotel (Unclassified)	229	9,756
Boutique Hotel	29	574
Boutique Villa	39	256
Guest House	914	9,953
Bungalow	372	1,554
Heritage Bungalow	4	19
Heritage Home	2	8
Home Stay Unit	415	1,259
Rented Apartment	67	216
Rented Home	6	19
Total	2,215	36,693



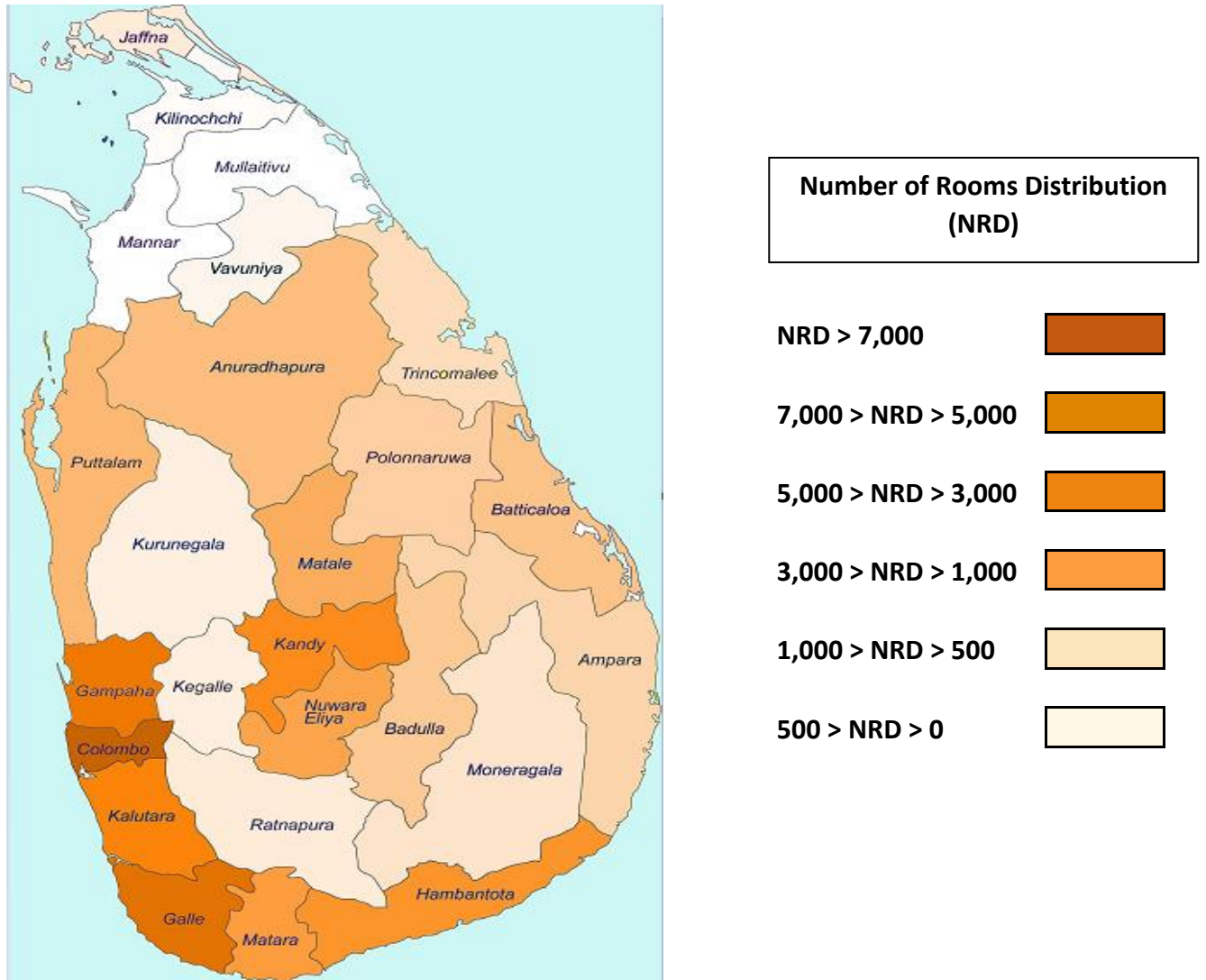
The total number of SLTDA registered accommodation establishments as at 30th September 2018 was 2,215.

The number of classified tourist hotels was 138 and among them, 22 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 914, 415 and 372 units respectively.

The total room inventory was 36,693. Classified tourist hotels (1-5 star) had the highest inventory of 13,079 rooms.

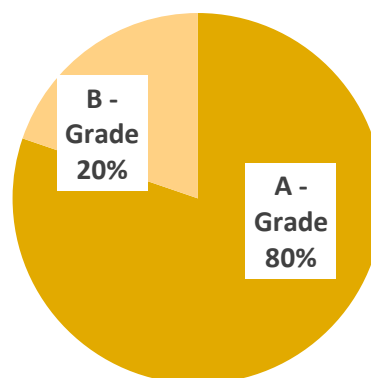
Geographical Distribution of Rooms in SLTDA Registered Tourist Establishments



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

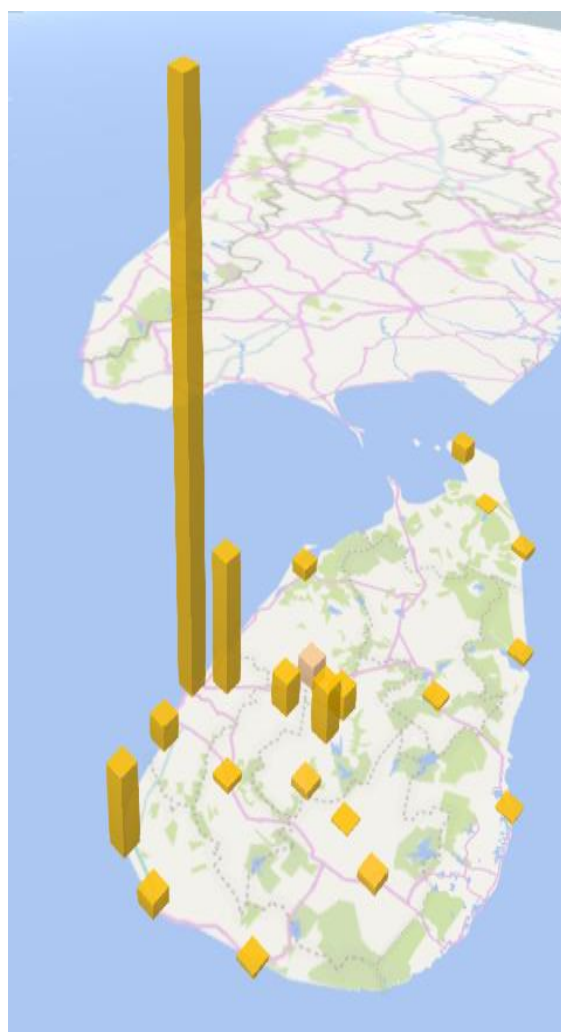
Number of SLTDA Registered Restaurants as at end September 2018

The total number of registered restaurants with SLTDA is 491. Among them, 394 (80%) restaurants are Grade A, while 97 (20%) are Grade B restaurants.



Geographical Distribution of SLTDA Registered Restaurants

District	Number of Restaurants
Anuradhapura	4
Badulla	1
Batticaloa	1
Colombo	265
Galle	38
Gampaha	64
Hambantota	2
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



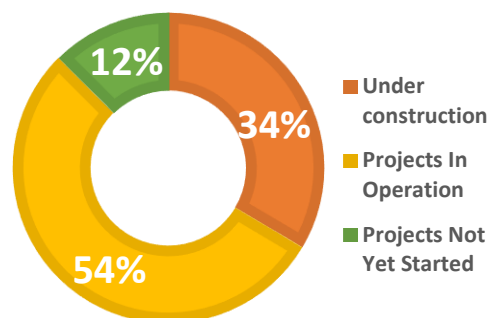
The map depicts the distribution of SLTDA registered restaurants within each district in Sri Lanka. Colombo district registered the highest number of SLTDA registered restaurants (265), while Badulla, Batticaloa and Kilinochchi recorded the lowest number with one restaurant in each district.

“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.slt-da.lk/sites/default/files/registration/Guidelines%20Restaurant.pdf>

TOURISM ACCOMMODATION INVESTMENTS

Progress of Investment Projects - Up to end September 2018*

Status of the Projects	No. of Projects	No. of Rooms	Investment Value (USD Mn)
Final approval granted	337	18,496	2,900.1
Under construction	113	7,053	977.5
Projects in operation	182	9,656	1,739.7
Projects not yet started	42	1,787	182.9



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

337 projects had been granted final approval while 113 are under construction and 182 are in operation. 42 tourism investment projects are yet to be commenced. The number of rooms of final approval granted projects are 18,496.

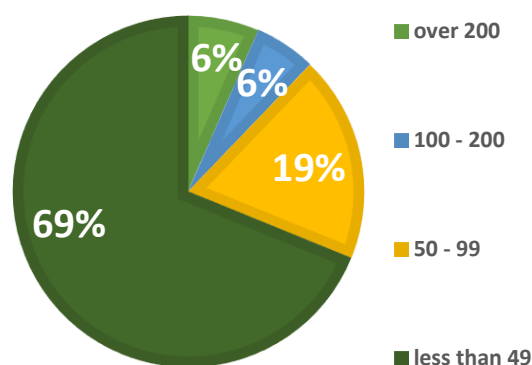
The total investment value of final approval granted projects is estimated at USD 2,900.1 million. The value of projects which are under construction is USD 977.5 million. The investment value of projects in operation is USD 1,739.7 million while the value of projects that have not commenced is USD 182.9 million.

Room Distribution of Final Approval Granted Projects*

No. of Rooms	No. of Projects	Percentage (%)
Over 200	22	6.5
100 - 200	19	5.7
50 - 99	64	19.0
Less than 49	232	68.8
Total	337	100

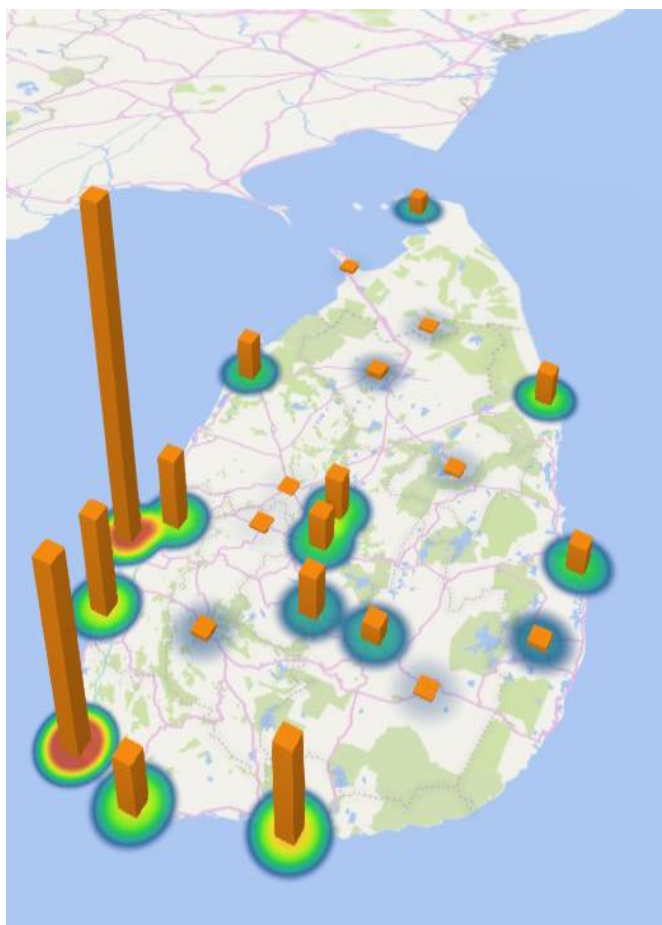
There are 22 tourism investment projects with accommodation of over 200 rooms. The highest number of projects (232) are those with less than 49 rooms.

ROOM DISTRIBUTION OF THE PROJECTS



Distribution of Tourism Projects and Number of Rooms by District

Districts	Number of Projects	Number of Rooms
Ampara	6	81
Anuradhapura	3	95
Batticaloa	16	439
Badulla	10	300
Colombo	44	5,357
Galle	57	3,113
Gampaha	21	1,171
Hambantota	30	1,600
Jaffna	10	315
Kalutara	26	1,650
Kandy	16	559
Kegalle	1	50
Kurunegala	1	16
Matale	18	671
Matara	25	897
Nuwara Eliya	9	714
Puttalam	14	665
Trincomalee	20	540
Monaragala	2	42
Mannar	1	52
Polonnaruwa	2	54
Rathnapura	3	66
Vavunia	2	49
Total	337	18,496



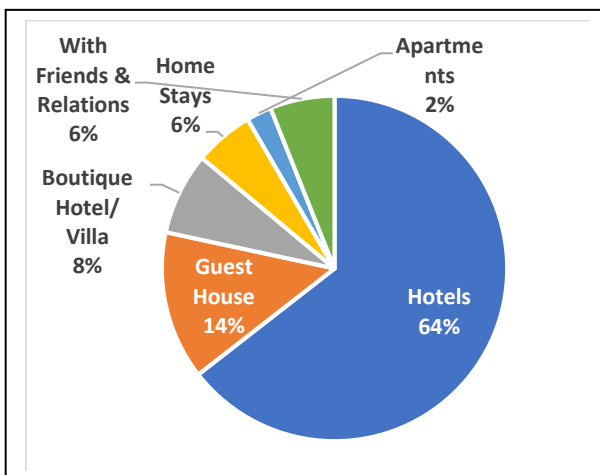
The map depicts the distribution of final approval granted projects and number of rooms by district. Accordingly, Galle district has the highest number of projects, while Colombo district has the highest number of rooms. Galle, Colombo, Hambantota, Kalutara, Gampaha and Matara have more than 20 projects.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

AIRPORT KIOSK SELF SURVEY 2018

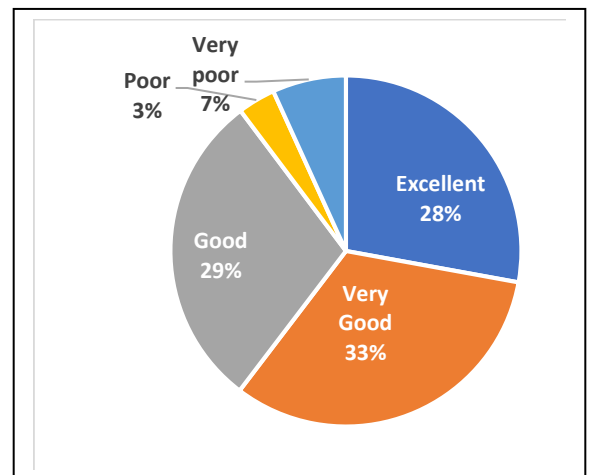
In mid-February 2018, SLTDA installed two touch-screen self-service kiosks at the pier and departure lounges at the Bandaranaike International Airport to obtain quick feedback of tourists departing Sri Lanka. The main objective of this initiative is to support visitor profiling and assessing satisfaction rates to improve services and facilities for tourists. As at 30th September, the total number of respondents via the kiosk was **3,339**. However, some questions may be missed. The highest number of respondents were by visitors from India, UK, Germany, Australia and France and in the 20- 29 age group. The majority (73.3%) of respondents were male. Highlights of responses related to service satisfaction are shared as a sample.

Type of Accommodation Facilities Used



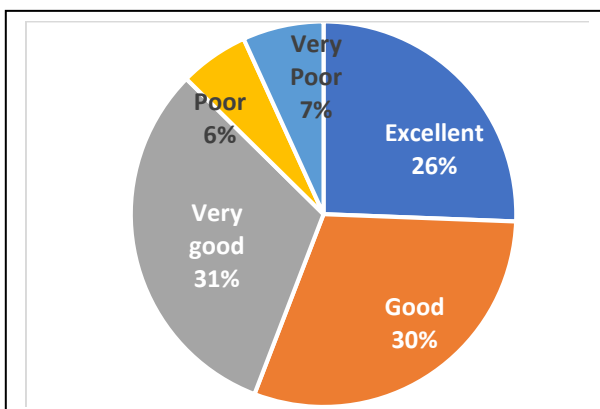
Out of 2,978 respondents, the majority (64%) had stayed in hotels for accommodation. Guest houses and rest houses were used by 14%, while 8% had used boutique hotels and boutique villas.

Quality of Rooms



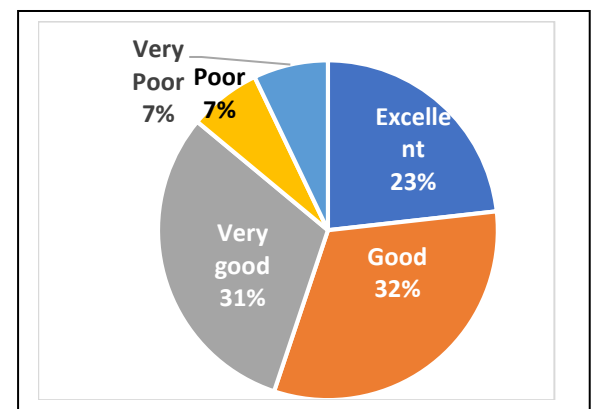
Out of 3,431 respondents, 61% of tourists had rated the accommodation facilities as excellent and very good. Only 10% of tourists had rated the quality of rooms as poor and very poor.

Quality of Food



Out of 3,394 respondents, 57% 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 13%.

Quality of Service



Out of 3,350 respondents, the majority (31%) of tourists had rated the general quality of service at bars, restaurants, laundry, spa and rooms as very good and 23% had rated the quality of service as excellent.