



● SECOND QUARTER 2018 ●

TOURISM INDUSTRY REPORT

SRI LANKA TOURISM DEVELOPMENT AUTHORITY



www.sltda.lk

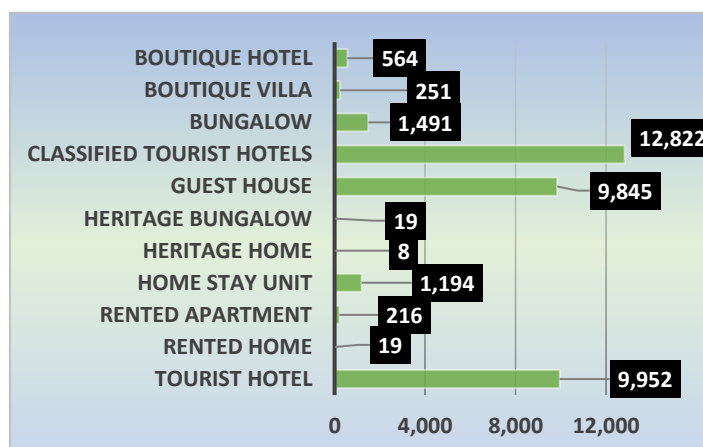
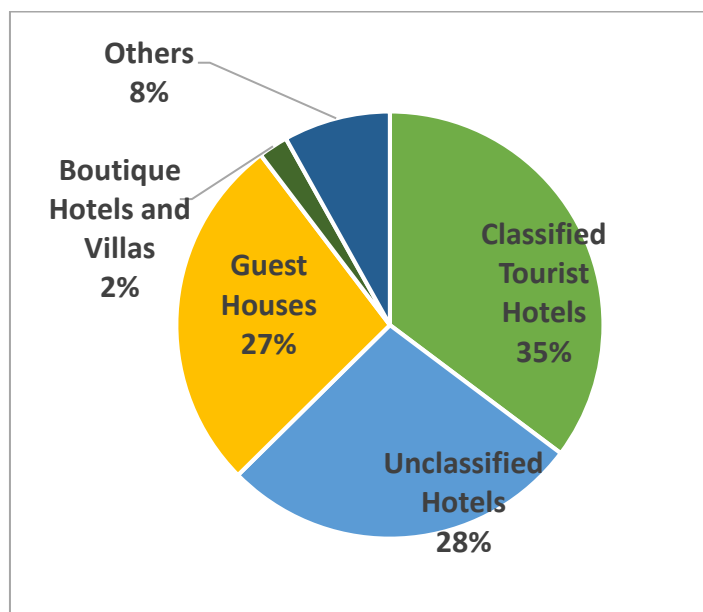
Photo courtesy of SLTDA, SLRC Lovingly Sri Lanka Programme



TOURIST ACCOMMODATION

Number of SLTDA Registered Accommodation Establishments as at end June 2018

Categorization	Number of Establishments	Number of Rooms
Classified Tourist Hotels	136	12,822
Five Star	22	4,950
Four Star	19	2,112
Three Star	23	2,364
Two Star	35	1,680
One Star	37	1,716
Tourist Hotels (Unclassified)	230	9,952
Boutique Hotels	28	564
Boutique Villas	38	251
Guest Houses	904	9,845
Bungalows	354	1,491
Heritage Bungalows	4	19
Heritage Homes	2	8
Home Stay Units	395	1,194
Rented Apartments	67	216
Rented Homes	6	19
Total	2,164	36,381



Classified Tourist Hotels: 1- 5-star hotels

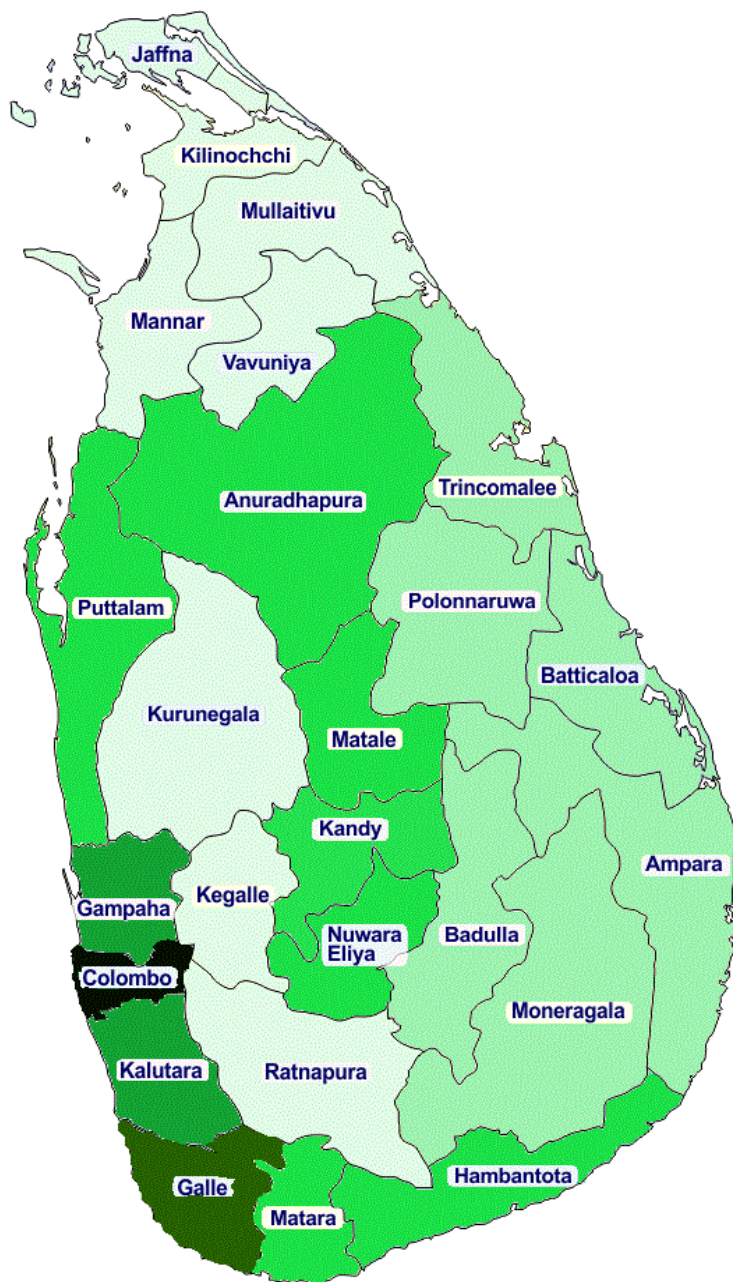
Unclassified Tourist Hotels: Tourist hotels to be classified after classification committee inspections

The total number of SLTDA registered accommodation establishments as at 30th June 2018 was 2,164. The number of classified tourist hotels was 136 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 904, 395 and 354 units respectively.

The total room inventory was 36,381. Classified tourist hotels (1-5 star) had the highest inventory of 12,822 rooms.

Geographical Distribution of Rooms in SLTDA Registered Tourist Establishments



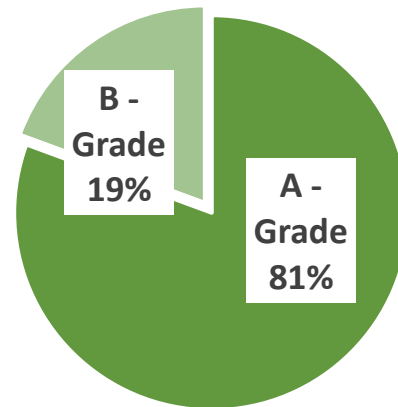
Number of Rooms Distribution (NRD)

7000> NRD	
7000>NRD >5000	
5000>NRD>3000	
3000>NRD>2000	
2000>NRD>1000	
1000>NRD>500	
500>NRD>0	

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 and Ratnapura districts (less than 500 rooms).

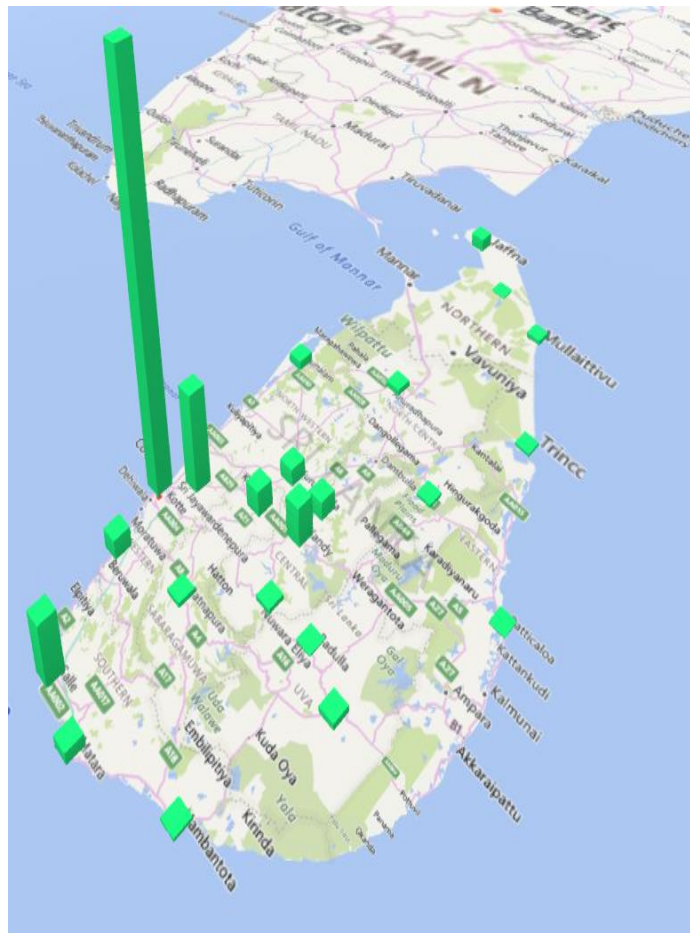
Number of SLTDA Registered Restaurants as at end June 2018

The total number of registered restaurants with SLTDA is 485. Among them 391 (81%) restaurants are Grade A, while 94 (19%) are Grade B restaurants.



Geographical Distribution of SLTDA Registered Restaurants

District	Number of Establishments
Anuradhapura	4
Badulla	1
Batticaloa	1
Colombo	260
Galle	38
Gampaha	63
Hambantota	2
Jaffna	9
Kalutara	12
Kandy	25
Kegalle	16
Kilinochchi	1
Kurunegala	11
Matale	12
Matara	7
Moneragala	4
Mullaitivu	3
Nuwara Eliya	3
Polonnaruwa	2
Puttalam	6
Ratnapura	3
Trincomalee	2



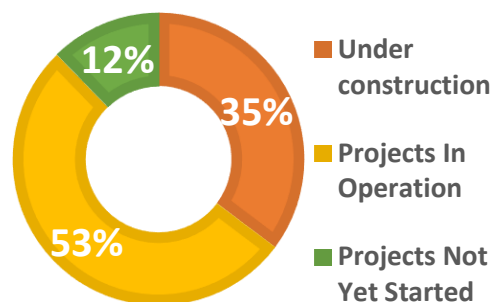
The map depicts the distribution of SLTDA registered restaurants within each district in Sri Lanka. Colombo district registered the highest number of SLTDA registered restaurants (260), while Badulla, Batticaloa and Kilinochchi recorded the lowest number with one restaurant in each district.

“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 June 2018*

Status of the Projects	No. of Projects	No. of Rooms	Investment Value (USD Mn)
Final approval granted	326	18,364	2,895.3
Under construction	115	7,460	1,044.2
Projects in operation	171	9,143	1,640.0
Projects not yet started	40	1,761	181.6



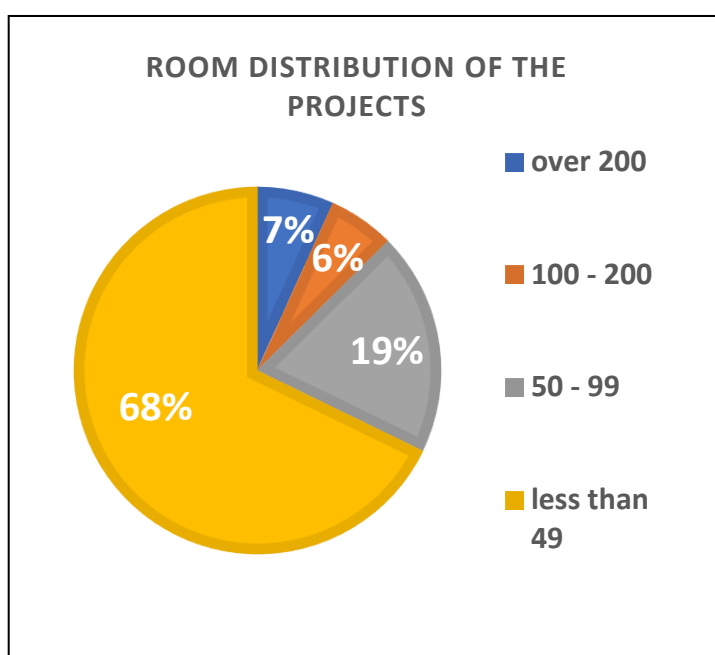
The above table and graph depict the number of investment projects handled by SLTDA up to end June 2018.

326 projects had been granted final approval while 115 are under construction and 171 are in operation. 40 tourism investments projects are yet to be commenced. The number of rooms of final approval granted projects are 18,364.

The total investment value of final approval granted projects is estimated at USD 2,895.3 million. The value of projects which are under construction is USD 1,044.2 million. The investment value of projects in operation is USD 1,640 million while the value of projects that have not commenced is USD 181.6 million.

Room Distribution of Final Approval Granted Projects*

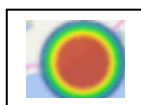
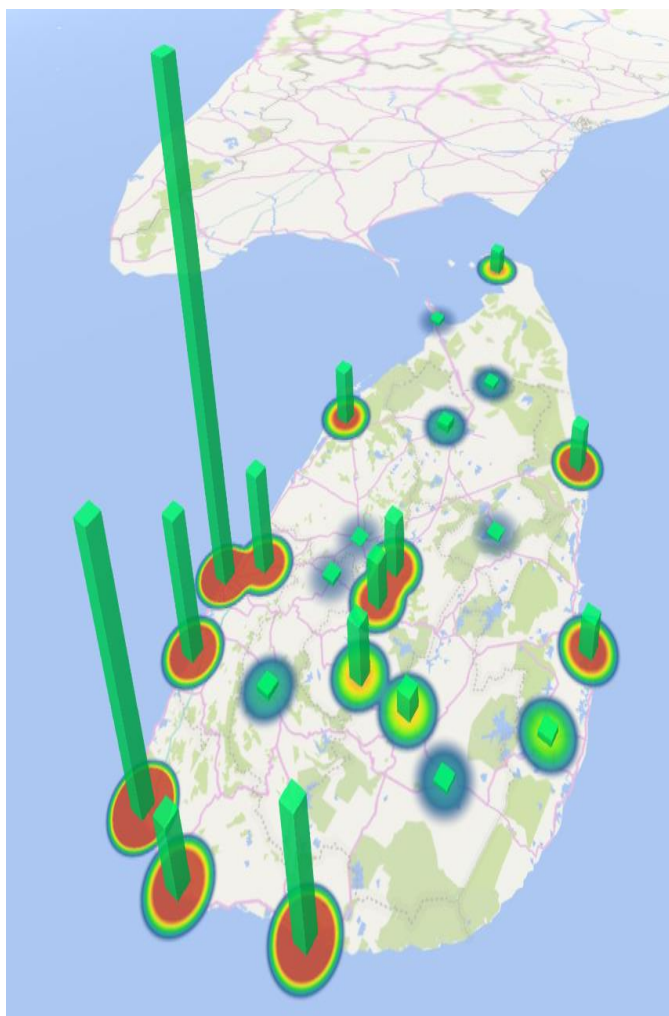
No. of Rooms	No. of Projects	Percentage (%)
Over 200	22	6.8
100 - 200	19	5.8
50 - 99	64	19.6
Less than 49	221	67.8
Total	326	100



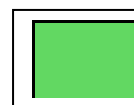
There are 22 tourism investment projects with accommodation of over 200 rooms. The highest number of projects (221) are those with less than 49 rooms.

Distribution of Tourism Projects and Number of Rooms by District

District	No. of Projects	No. of Rooms
Ampara	6	81
Anuradhapura	3	95
Batticaloa	16	439
Badulla	8	280
Colombo	43	5,340
Galle	54	3,090
Gampaha	21	1,171
Hambantota	30	1,600
Jaffna	10	351
Kalutara	26	1,650
Kandy	16	559
Kegalle	1	50
Kurunegala	1	16
Matale	17	656
Matara	22	861
Nuwara Eliya	9	714
Puttalam	14	665
Trincomalee	20	540
Monaragala	2	42
Mannar	1	52
Polonnaruwa	1	33
Ratnapura	3	66
Vavuniya	2	49
Total	326	18,364



No. of Projects



No. of Rooms

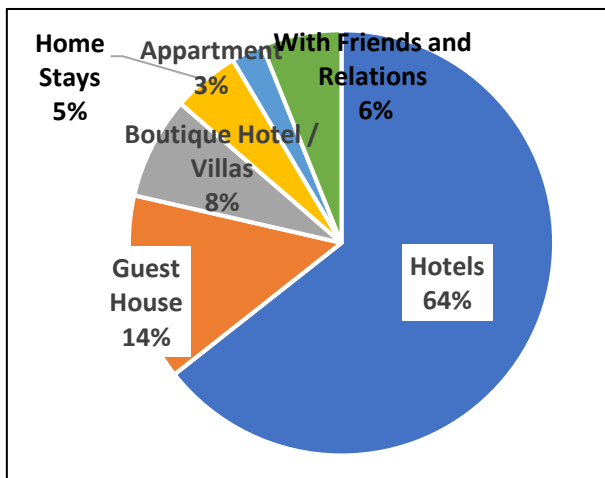
The map depicts the distribution of final approval granted projects and number of rooms by district. Accordingly, Galle district has the highest number of projects, while Colombo district has the highest number of rooms. Colombo, Hambantota, Kalutara, Gampaha and Matara have more than 20 projects. Kegalle,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

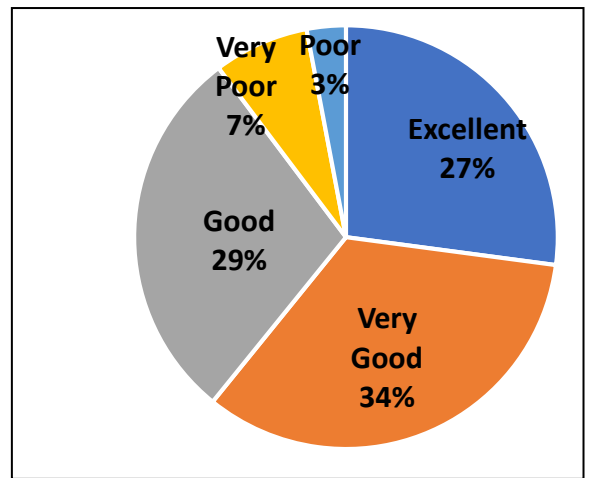
In mid-February 2018, SLTDA installed two touch-screen self-service kiosks at the pier and departure lounges at the Bandaranaike International Airport to obtain quick feedback of tourists departing Sri Lanka. The main objective of this initiative is to support visitor profiling and assessing satisfaction rates to improve services and facilities for tourists. As at 30th June, the total number of respondents via the kiosk was **2,190**. 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 (72%) of respondents were male (out of 1,637 respondents). Highlights of responses related to service satisfaction are shared as a sample.

Type of Accommodation Facilities Used



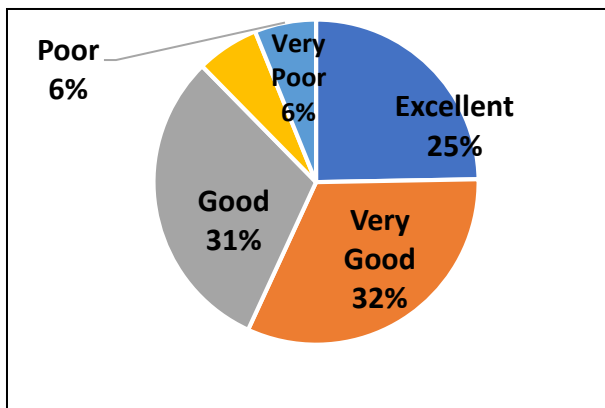
Out of 1,429 respondents, the majority (64%) had stayed in hotels for accommodation. Guest houses and rest houses were used by 14% while 8% had used boutique hotels and boutique villas.

Quality of Rooms



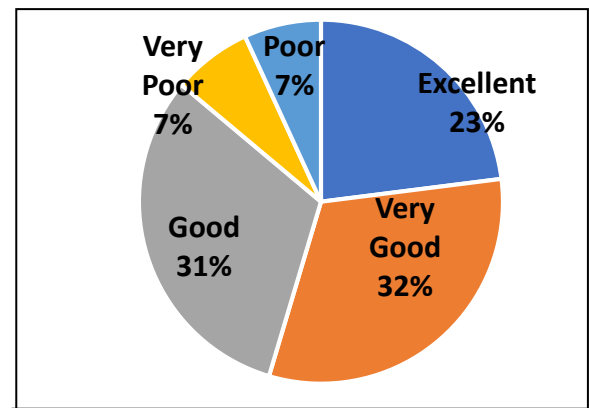
Out of 1,675 respondents, 61% of tourists had rated the accommodation facilities as excellent and very good. Only 10% of tourists had rated the quality of rooms as poor and very poor.

Quality of Food



Out of 1,667 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 were 12%.

Quality of Service



Out of 1,648 respondents, the majority (32%) 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.