

● FIRST QUARTER 2019 ●

TOURISM INDUSTRY REPORT

SRI LANKA TOURISM DEVELOPMENT AUTHORITY

www.sltda.lk

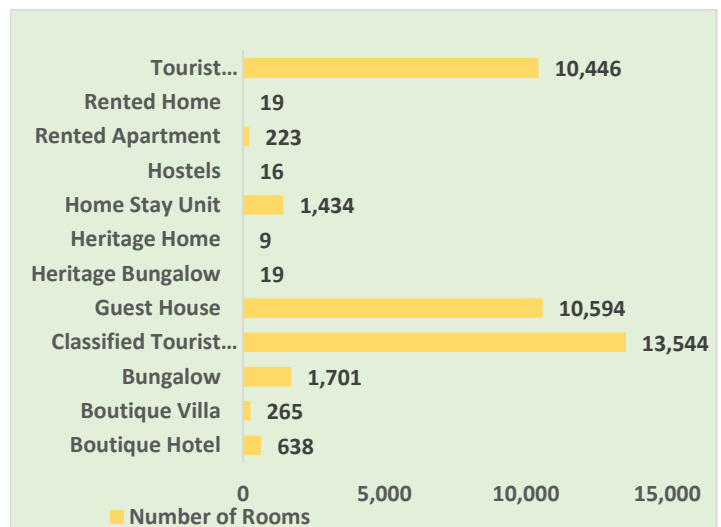
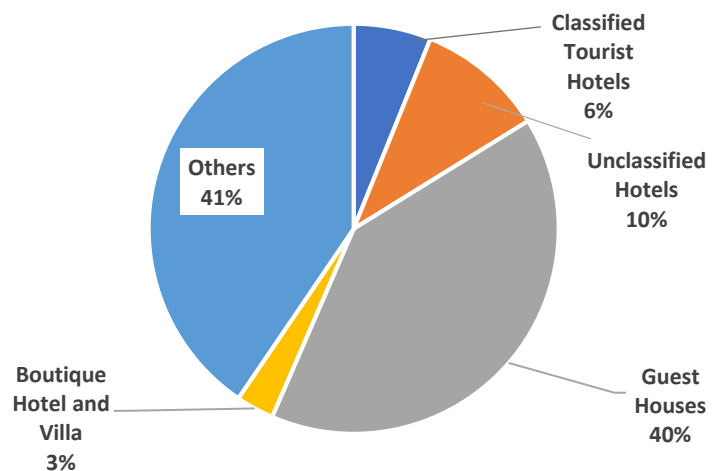
Photo courtesy of SLTDA, SLRC Lovingly Sri Lanka Programme



Tourist Accommodation

Number of SLTDA Registered Accommodation Establishments as at end March 2019

Categorization	Number of Establishments	Number of Rooms
Classified Tourist Hotels	147	13,544
Five star	23	5,150
Four Star	23	2,438
Three Star	24	2,416
Two Star	39	1,878
One Star	38	1,662
Tourist Hotel (Unclassified)	242	10,446
Boutique Hotel	32	638
Boutique Villa	40	265
Guest House	969	10,594
Bungalow	412	1,701
Heritage Bungalow	4	19
Heritage Home	3	9
Home Stay Unit	476	1,434
Hostels	2	16
Rented Apartment	70	223
Rented Home	6	19
Total	2,403	38,908



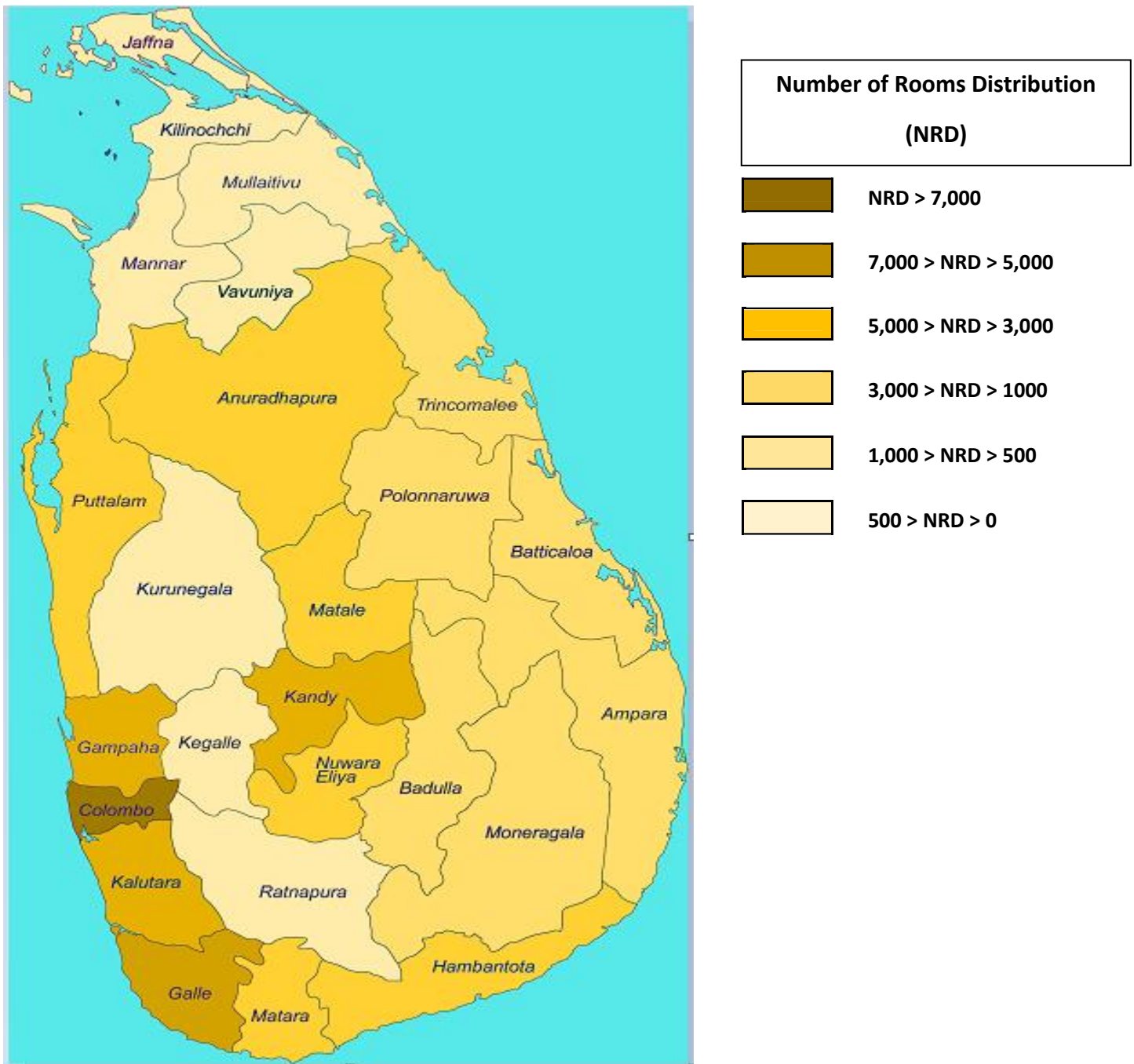
The total number of SLTDA registered accommodation establishments as at 31st March 2019 was 2,403.

The number of classified tourist Hotels was 147 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 969, 476 and 412 respectively.

The total room inventory was 38,908. Classified tourist hotels (1-5 star) had the highest inventory of 13,544 rooms.

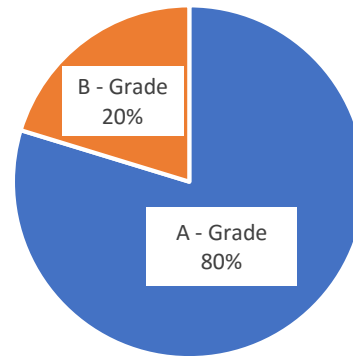
Geographical Distribution of Rooms of SLTDA Registered Tourist Establishments



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, Ratnapura, Mannar, Vavuniya, Mullaitivu, Killinochchi and Jaffna.

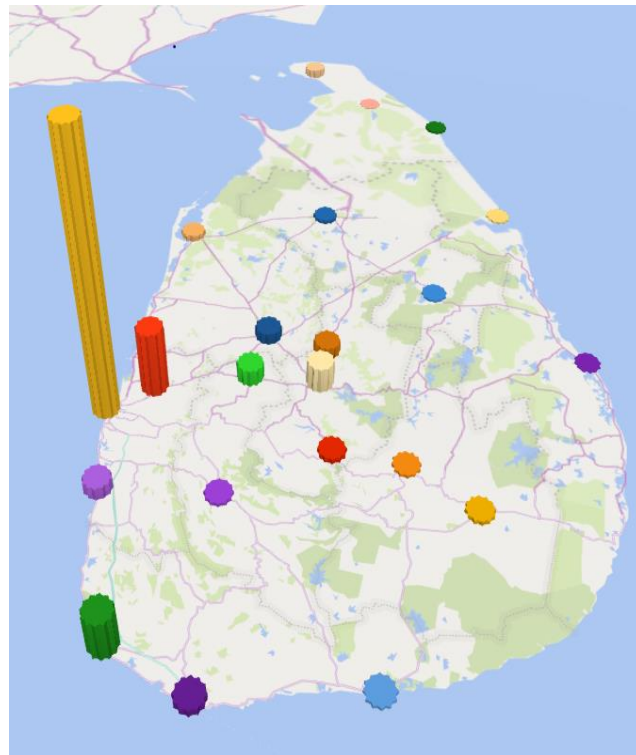
Number of SLTDA Registered Restaurants with SLTDA as at end March 2019

The total number of registered restaurants with SLTDA is 503. Among them, 401 (80%) restaurants are Grade A, while 102 (20%) are grade B restaurants.



Geographical Distribution of SLTDA Registered Restaurants

District	Number of Restaurants
Anuradhapura	4
Badulla	3
Batticaloa	1
Colombo	270
Galle	39
Gampaha	65
Hambantota	3
Jaffna	9
Kalutara	12
Kandy	25
Kegalle	16
Kilinochchi	1
Kurunegala	11
Matale	12
Matara	7
Moneragala	4
Mullaitivu	3
Nuwara Eliya	5
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 (270), 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

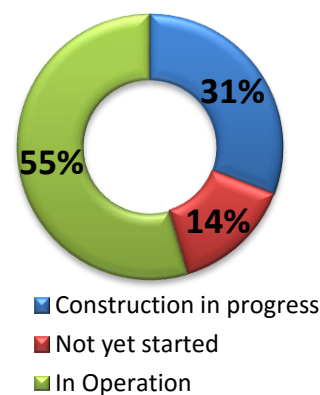
"B" Grade Restaurant: Obtain a minimum of 80% of the total marks given in the criteria for approval of tourist restaurants

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

TOURISM ACCOMADATION INVESTMENTS

Progress of Investment Projects – Up to end March 2019*

Status of the Project	Number of Projects	Number of Rooms	Investment Value (USD Mn)	Percentage
Under construction	113	6,919	968.92	31
Projects not yet started	53	1,957	225.74	14
Projects in operation	200	10,071	1,763.00	55
Final approval granted	366	18,947	2,957.66	100%



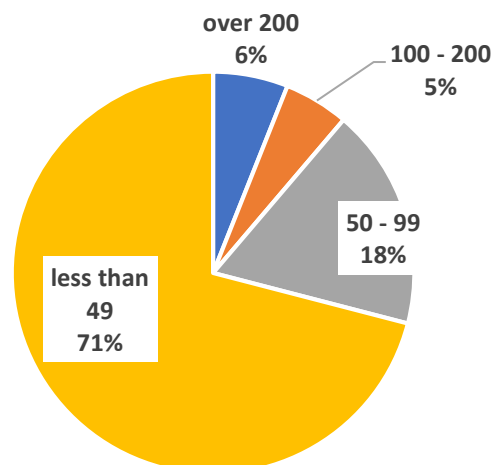
The above table and graph depict the number of investment projects handled by SLTDA up to end March 2019.

366 projects had been granted final approval while 113 are under construction and 200 are in operation. 53 tourism investment projects are yet to be commenced. The number of rooms of final approval granted projects 18,947.

The total investment value of final approval granted projects is estimated at USD 2,957.66 million. The value of projects which are under construction is USD 968.92 million. The investment value of projects in operation is 1,763 USD Million while the value of projects that have not commenced is USD 225.74 million.

Room Distribution of Final Approval Granted Projects*

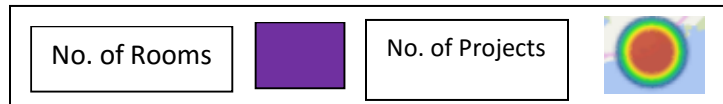
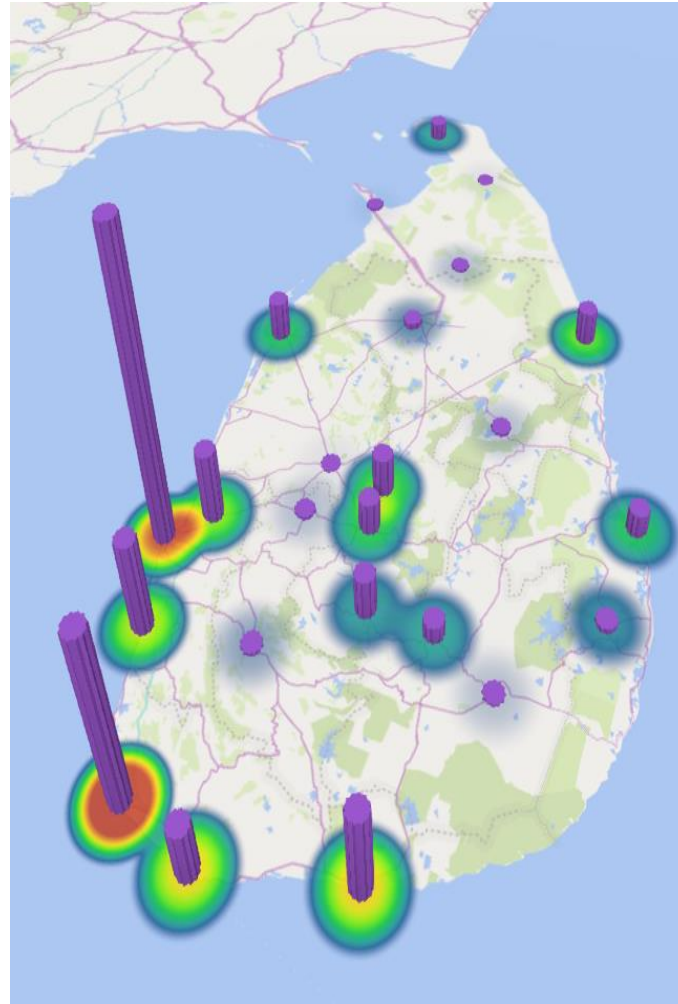
Number of Rooms	Number of Projects	Percentage
Over 200	22	6.0
100 - 200	19	5.2
50 - 99	65	17.8
Less than 49	259	71.0
Total	365	100.0



There are 22 tourism investment projects with accommodation of over 200 rooms. The highest number of projects (259) 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	15	413
Badulla	10	300
Colombo	45	5,353
Galle	68	3,263
Gampaha	23	1,245
Hambantota	32	1,622
Jaffna	10	315
Kalutara	27	1,672
Kandy	16	559
Kegalle	2	60
Kurunegala	1	16
Kilinochchi	1	15
Matale	19	677
Matara	31	979
Nuwara Eliya	9	714
Puttalam	15	685
Trincomalee	21	590
Monaragala	2	42
Mannar	1	52
Polonnaruwa	2	54
Rathnapura	3	66
Vavunia	2	49
	366	18,947



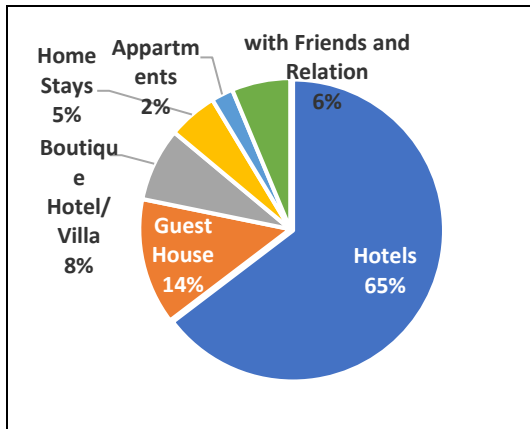
The map depicts the distribution of final approval granted projects and number of rooms by district. Accordingly, Galle district has the highest number of projects, while Colombo district has the highest number of rooms. Colombo, Galle, Gampaha, Hambantota, Kalutara, Matara and Trincomalee have more than 20 projects. Kurunegala, Kilinochchi 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 March 2019

AIRPORT KIOSK SELF SURVEY

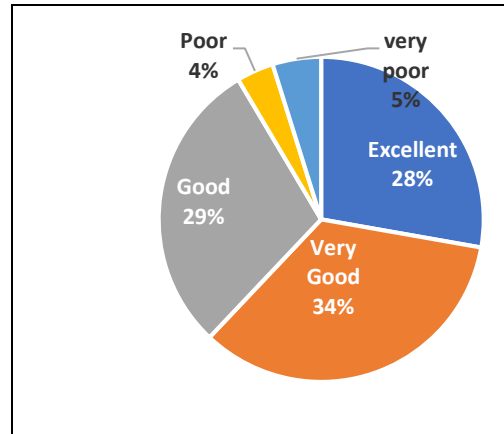
In mid-February 2018, SLTDA installed two touch-screen self-service kiosks at the pier and departure lounges at the Bandaranaike International Airport to obtain quick feedback of tourists departing Sri Lanka. The main objective of this initiative is to support visitor profiling and assessing satisfaction rates to improve services and facilities for tourists. As at 31st March, the total number of respondents via the kiosk was **5,963**. 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 (73.5%) of respondents were male. Highlights of responses related to service satisfaction are shared as a sample.

Type of Accommodation



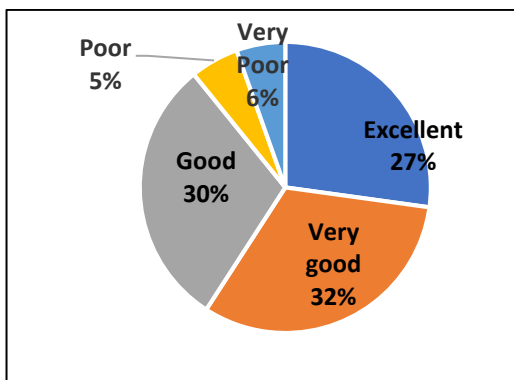
Out of 4,298 respondents, the majority (65%) had stayed in hotels for accommodation. Guest houses and rest houses were used by 14%, while 8% had used boutique hotels and boutique villas.

Quality of Rooms



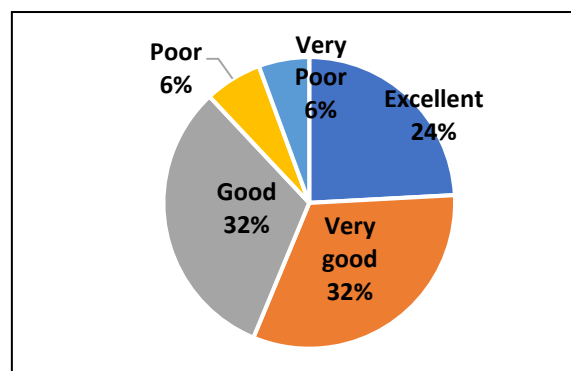
Out of 4,821 respondents, 62% of tourists had rated the accommodation facilities as excellent and very good. Only 9% of tourists had rated the quality of rooms as poor and very poor.

Quality of Food



Out of 4,841 respondents, the majority (59%) 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 11%.

Quality of Service



Out of 4,787 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.

Places of Attractions Visited by Tourists

Rank	Place of Attraction	Number of Visitors	% Share
1	Colombo city	3,125	52.4
2	Kandy	2,876	48.2
3	Galle	2,349	39.4
4	Sigiriya	1,892	31.7
5	Nuwara Eliya	1,888	31.7
6	Dambulla	1,671	28.0
7	Negombo	1,656	27.8
8	Unawatuna	1,186	19.9
9	Pinnawala	1,071	18.0
10	Polonnaruwa	1,040	17.4
11	Hikkaduwa	1,026	17.2
12	Anuradhapura	1,025	17.2
13	Yala Park	981	16.5
14	Adams Peak	891	14.9
15	Udawalawa Park	869	14.6
16	Minneriya Park	776	13.0
17	Horton Place	679	11.4
18	Nilaweli	633	10.6
19	Jaffna	632	10.6
20	Ratnapura	507	8.5
21	Arugambay	474	7.9
22	Passikudah	459	7.7
23	Wilpaththu	422	7.1
24	Sinharaja Forest	394	6.6
25	Kithulgala	383	6.4
Total number of respondents		5,963	100.0



As per the feedback of 5,963 tourists, the most popular place of attraction within Sri Lanka was Colombo city (52.4%). Apart from Colombo city, the other top ten places of attraction in order of popularity were Kandy (48.2%), Galle (39.4%), Sigiriya (31.7%), Nuwara Eliya (31.7%), Dambulla (28%), Negombo (27.8%), Unawatuna (19.9%), Pinnawala (18%), Polonnaruwa (17.4%) and Hikkaduwa (17.2%).

For the Indian (47.5% out of 1529 respondents), Australian (51.9% out of 377 respondents) and UAE (38% out of 180 respondents) tourists, Colombo city was the most popular place of attraction while for the UK (50.4% out of 444 respondents) and Germany (59.8% out of 376 respondents) tourists, Kandy was the most popular place of attraction.