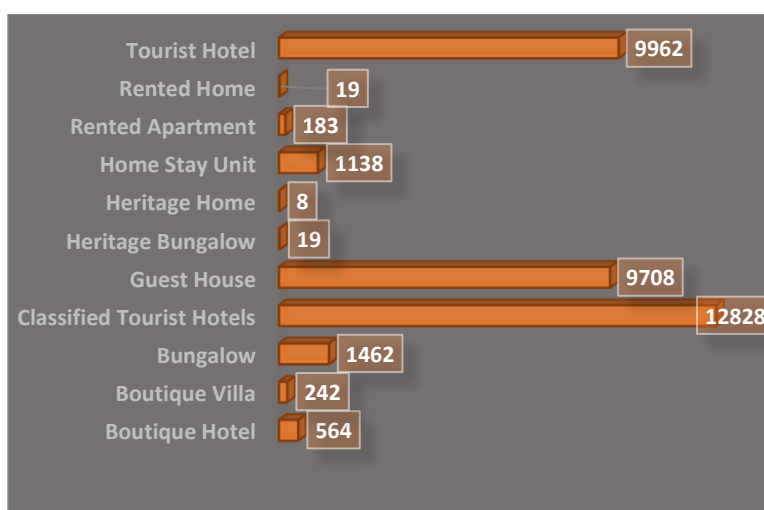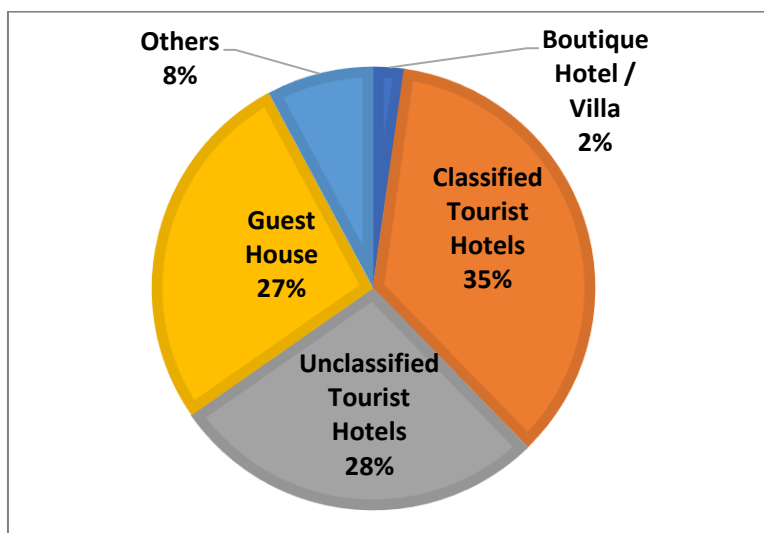**FIRST QUARTER 2018**

TOURISM INDUSTRY REPORT

SRI LANKA TOURISM DEVELOPMENT AUTHORITY

TOURIST ACCOMMODATION

Number of SLTDA Registered Accommodation Establishments as at end March 2018

Categorization	No. of Establishments	No. of Rooms
Classified Tourist Hotels	**141**	**12,828**
Five stars	20	4,217
Four Star	19	2,149
Three Star	25	2,957
Two Star	37	1,738
One Star	40	1,767
Tourist Hotels (Unclassified)	**229**	**9,962**
Boutique Hotel	**28**	**564**
Boutique Villa	**37**	**242**
Guest House	**895**	**9,708**
Bungalow	**348**	**1,462**
Heritage Bungalow	**4**	**19**
Heritage Home	**2**	**8**
Home Stay Unit	**378**	**1,138**
Rented Apartment	**63**	**183**
Rented Home	**6**	**19**
Total	**2,131**	**36,133**

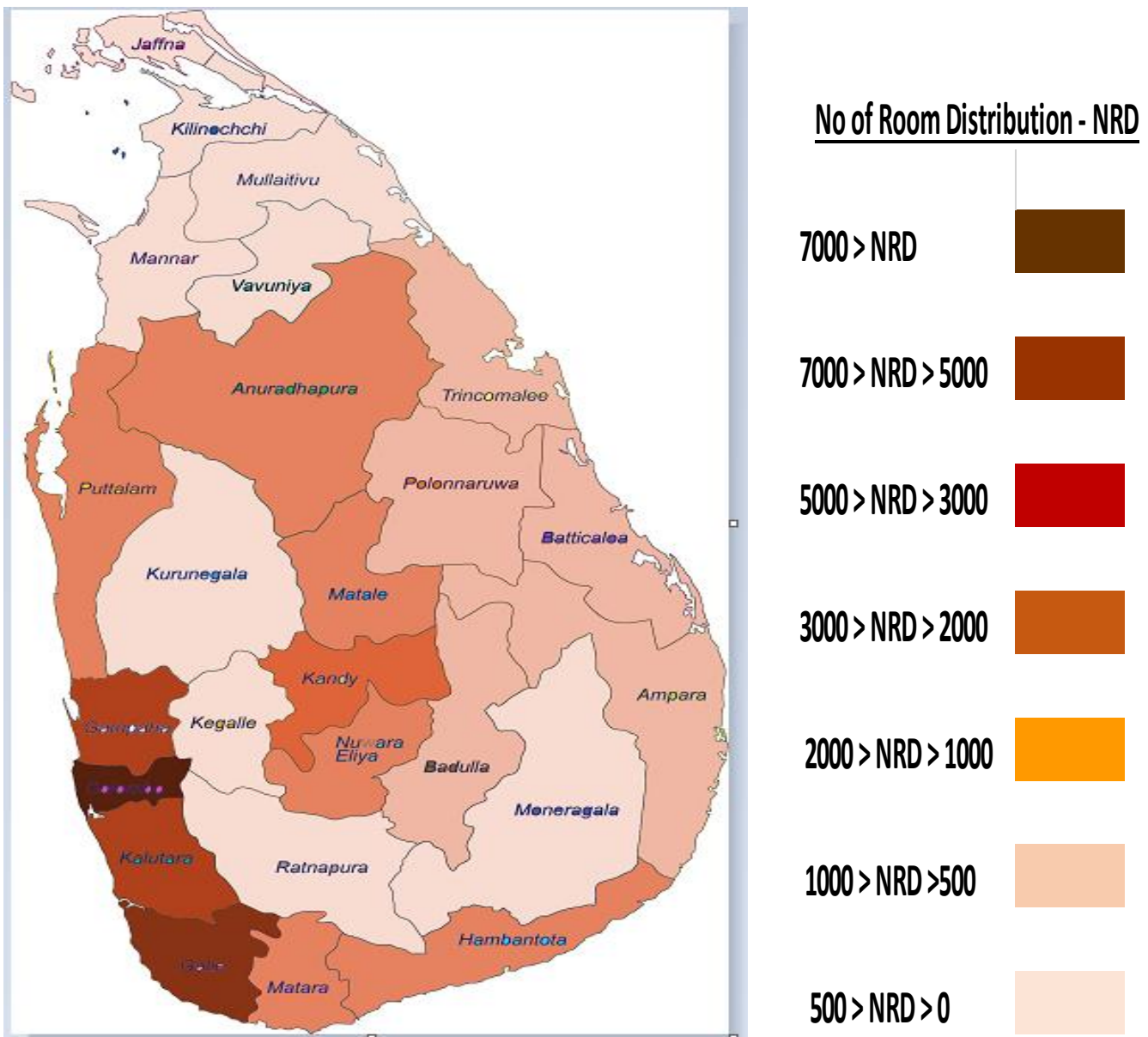Classified Tourist Hotels: 1- 5-star hotels
Unclassified Tourist Hotels: Tourist hotels to be classified after classification committee inspections

The total number of SLTDA registered accommodation establishments as at 31st March 2018 was 2,131.
The number of classified tourist hotels was 141 and among them, 20 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 895, 378 and 348 units respectively.

The total room inventory was 36,133. Classified tourist hotels (1-5 star) had the highest inventory of 12,828 rooms.

Geographical Distribution of Rooms in SLTDA Registered Tourist Establishments

No of Room Distribution - NRD

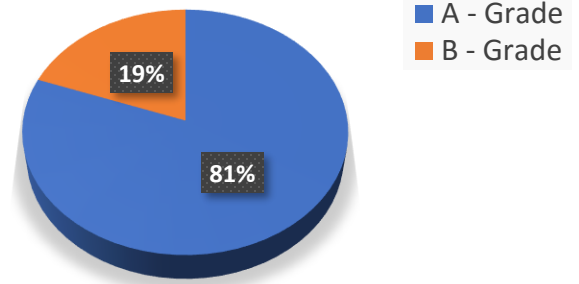| Range	Color
7000 > NRD	(dark brown)
7000 > NRD > 5000	(brown)
5000 > NRD > 3000	(red)
3000 > NRD > 2000	(orange-brown)
2000 > NRD > 1000	(orange)
1000 > NRD > 500	(light tan)
500 > NRD > 0	(pale cream)

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 rooms). The lowest number of rooms were recorded in the districts of Moneragala, Ratnapura Kegalle and Kurunegala districts (less than 500 rooms).

NRD: Number of rooms distribution

Number of SLTDA Registered Restaurants as at end March 2018

The total number of registered restaurants with SLTDA is 475. Among them 383 (81%) restaurants are Grade A, while 92 (19%) are Grade B restaurants.

- A - Grade
- B - Grade

19%

81%

Geographical Distribution of SLTDA Registered Restaurants

District	No. of Establishments
Anuradhapura	4
Badulla	1
Batticaloa	1
Colombo	254
Galle	37
Gampaha	62
Hambantota	2
Jaffna	9
Kalutara	12
Kandy	24
Kegalle	16
Kilinochchi	1
Kurunegala	11
Matale	12
Matara	7
Moneragala	4
Mullaitivu	3
Nuwara Eliya	3
Polonnaruwa	2
Puttalam	5
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 (254) while Badulla, Batticaloa and Killinochchi recorded the lowest number with one restaurant in each district.
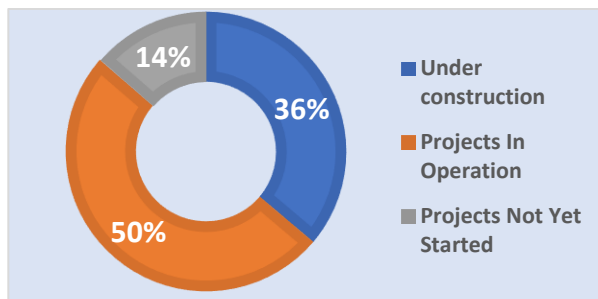
"A" Grade Restaurant : Obtain a minimum of 80% of the total marks given in the criteria for approval of tourist restaurants
"B" Grade Restaurant : Obtain a minimum of 60% of the total marks given in the criteria for approval of tourist restaurants Link for the Guideline : http://www.sltda.lk/sites/default/files/registration/Guidelines%20Restaurant.pdf

TOURISM ACCOMMODATION INVESTMENTS

Progress of Investment Projects - Up to end March 2018*

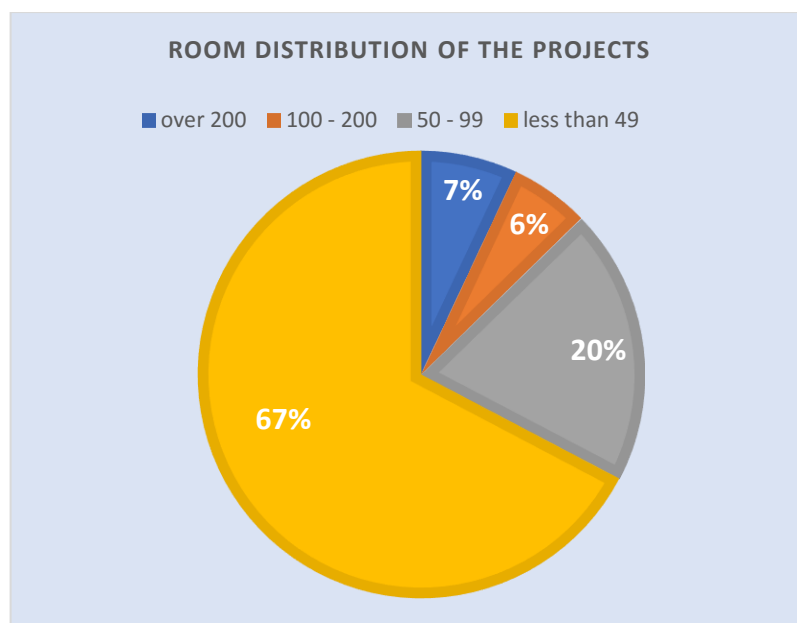| Status of the Projects	No. of Projects	No. of Rooms	Investment Value (USD Mn)
Final approval granted	**316**	**17,991**	**2,869.7**
Under construction	113	7,261	1,014.7
Projects in operation	161	8,932	1,651.1
Projects not yet started	42	1,798	204.0

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

316 projects had been granted final approval while 113 are under construction and 161 are in operation. 42 tourism investments projects are yet to be commenced. The number of rooms of final approval granted projects are 17,991.

The total investment value of final approval granted projects is estimated at USD 2,869.7 million. The value of projects which are under construction is USD 1,014.7 million. The investment value of projects in operation is USD 1,651.1 while the value of projects that have not commenced is USD 204 million.
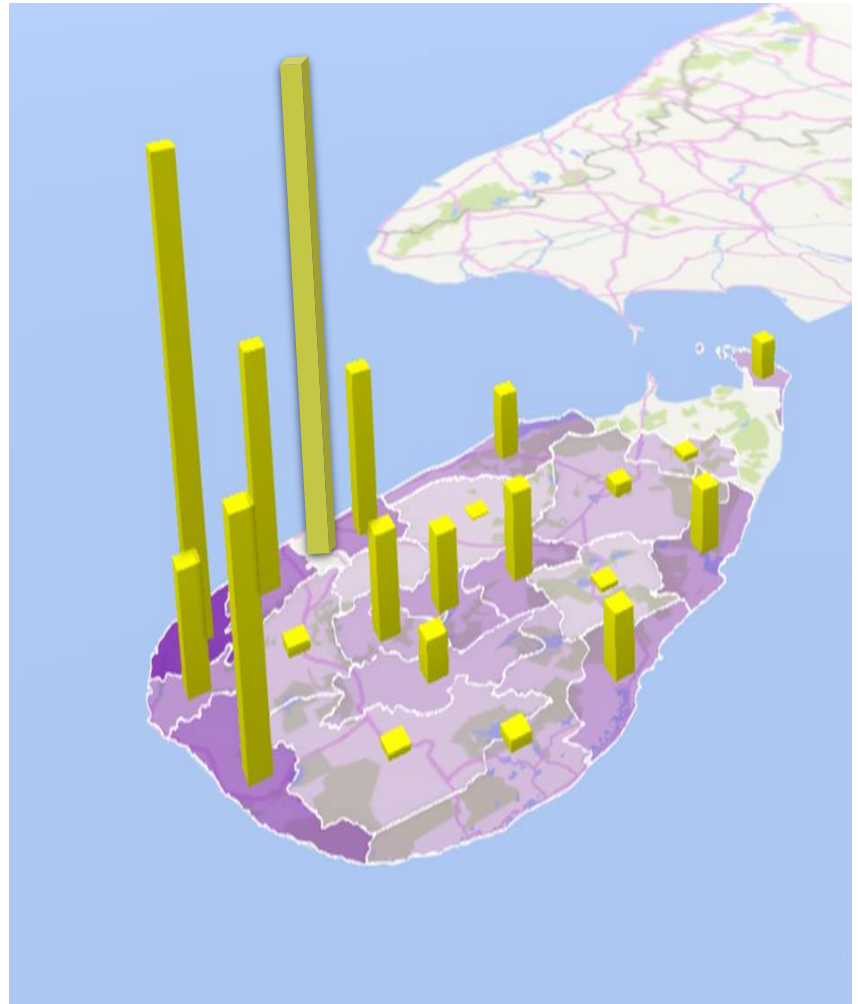
Room Distribution of Final Approval Granted Projects*

No. of Rooms	No. of Projects	Percentage (%)
Over 200	22	7
100 - 200	18	5.7
50 - 99	63	19.9
Less than 49	213	67.4
Total	**316**	**100**

There are 22 tourism investment projects with accommodation of over 200 rooms.
The highest number of projects (213) are those with less than 49 rooms.

ROOM DISTRIBUTION OF THE PROJECTS

Distribution of Tourism Projects and Number of Rooms by District

District	No. of Projects	No. of Rooms
Galle	54	3,090
Colombo	41	5,308
Hambantota	30	1,600
Kalutara	26	1,650
Gampaha	21	1,171
Matara	20	826
Trincomalee	18	463
Batticaloa	16	439
Matale	16	620
Kandy	15	539
Puttalam	13	500
Jaffna	10	315
Nuwara Eliya	9	714
Badulla	8	280
Ampara	5	73
Anuradhapura	3	95
Rathnapura	3	66
Monaragala	2	42
Vavuniya	2	49
Kegalle	1	50
Kurunegala	1	16
Manar	1	52
Polonnaruwa	1	33
Total	**316**	**17,991**

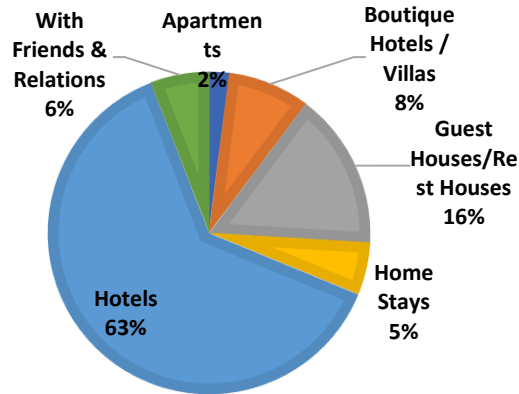

No. of Projects   No. of Rooms

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 and Gampaha have less than twenty 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 March 2018.
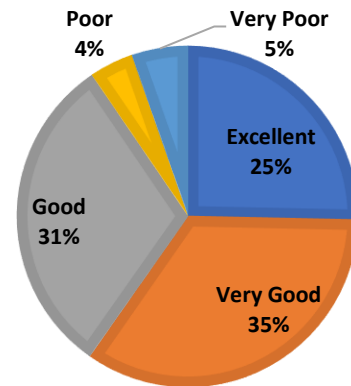
AIRPORT KIOSK SELF SURVEY 2018

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 the identification 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 were 1,173. However, some questions may be missed. The highest number of respondents were by visitors from India, Germany, UK, Australia and Russia, and in the 20- 29 age group. The majority (73%) of respondents were male. Highlights of responses related to service satisfaction are shared as a sample.

Type of Accommodation Facilities Used

With Friends & Relations 6%
Apartments 2%
Boutique Hotels / Villas 8%
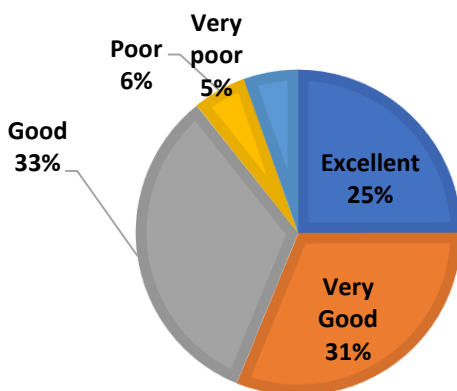Guest Houses/Rest Houses 16%
Home Stays 5%
Hotels 63%

Out of 1,044 respondents, the majority (63%) had stayed in hotels for accommodation. Guest houses and rest houses were used by 16% while 8% had used boutique hotels and boutique villas.

Quality of Rooms

Poor 4%
Very Poor 5%
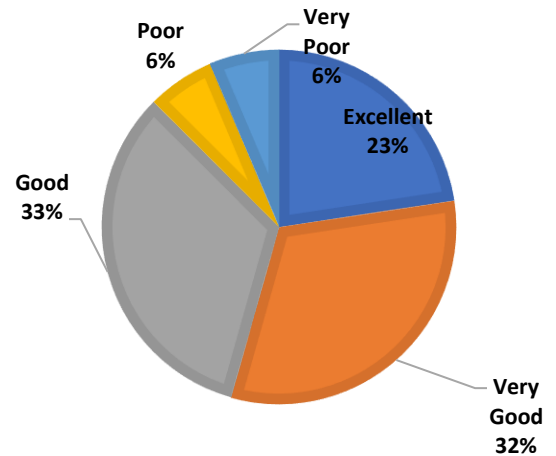Excellent 25%
Good 31%
Very Good 35%

Out of 1,192 respondents, 60% 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

Poor 6%
Very poor 5%
Good 33%
Excellent 25%
Very Good 31%

Out of 1,173 respondents, 56% 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 11%.

Quality of Service

Poor 6%
Very Poor 6%
Good 33%
Excellent 23%
Very Good 32%

Out of 1,168 respondents, the majority (33%) of tourists had rated the general quality of service at bars, restaurants, laundry, spa and rooms as good. 55% of tourists had rated them as very good and excellent.