THIRD QUARTER 2019

TOURISM INDUSTRY REPORT

SRI LANKA TOURISM DEVELOPMENT AUTHORITY

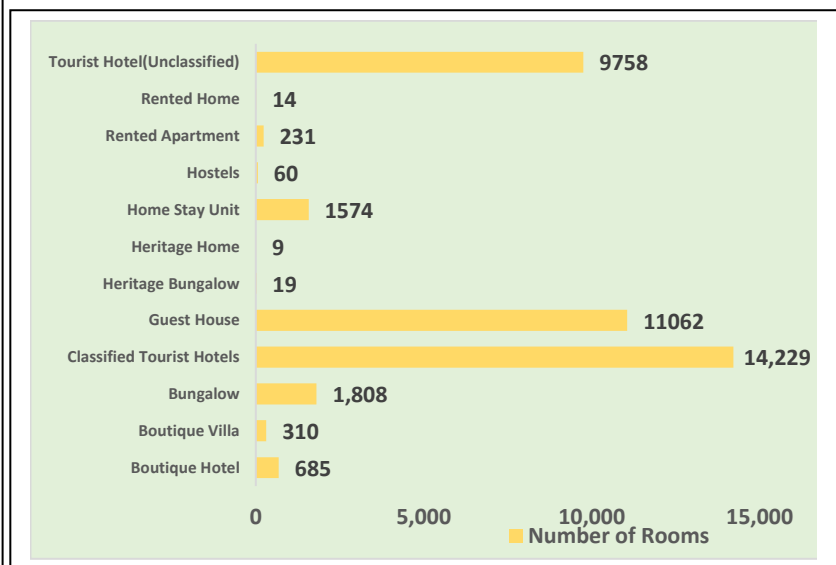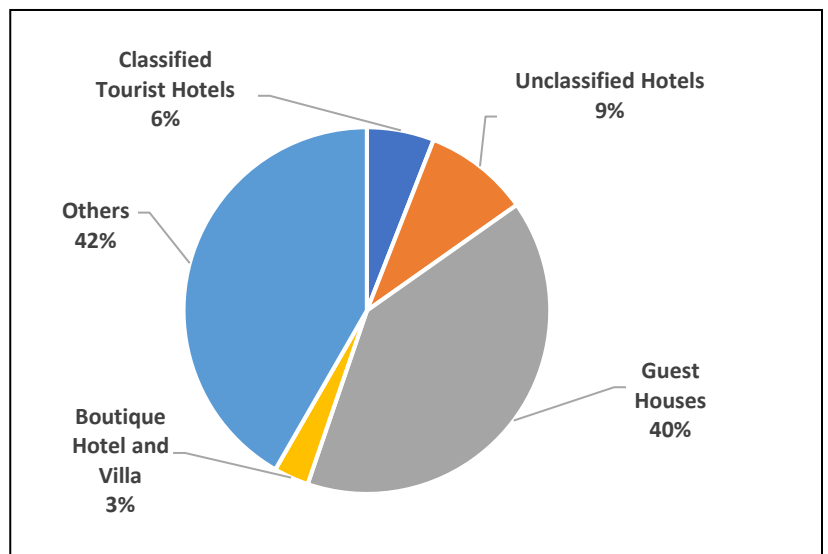## Tourist Accommodation

Number of SLTDA Registered Accommodation Establishments as at end September 2019

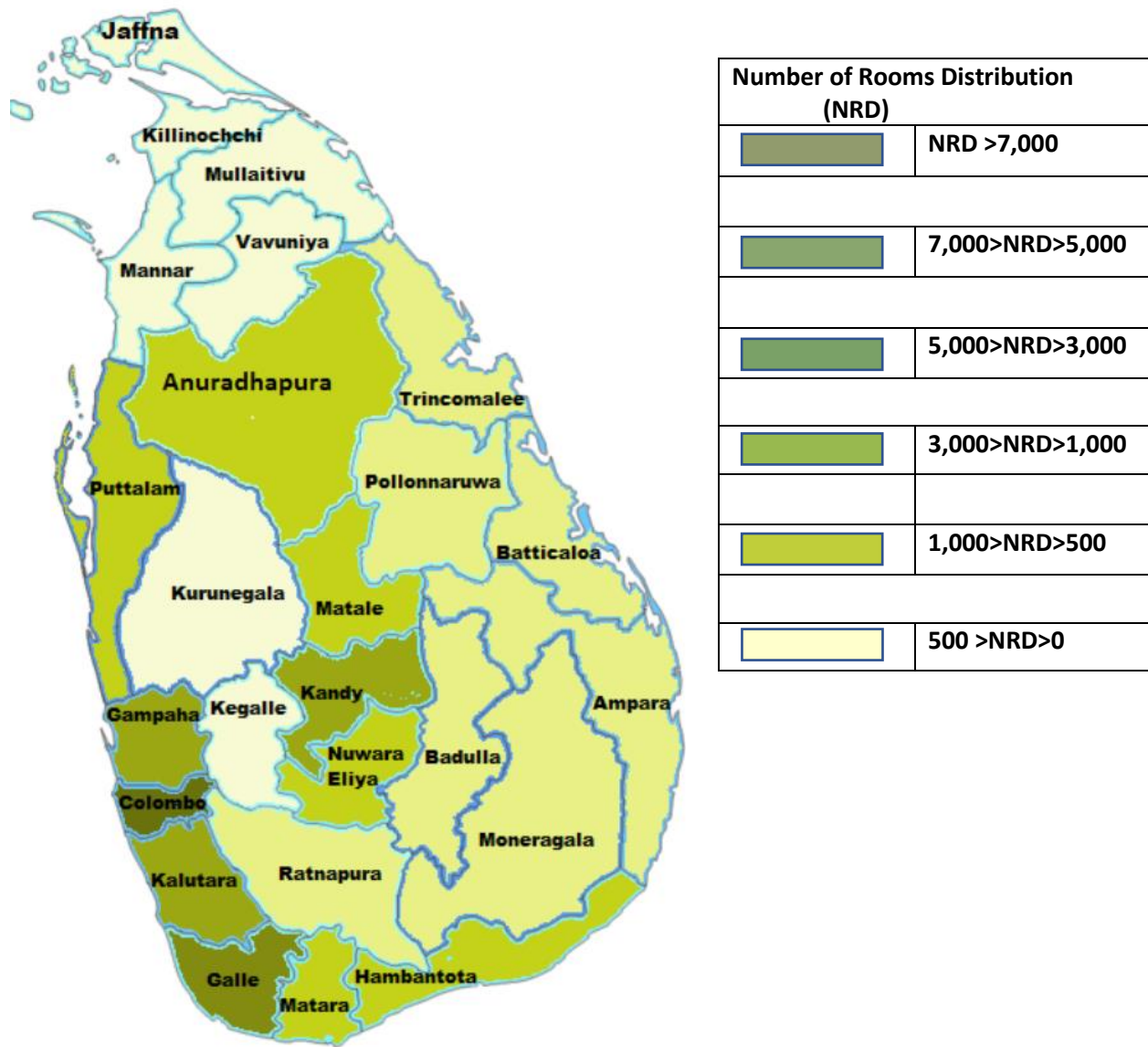| Categorization	Number of Establishments	Number of Rooms
Classified Tourist Hotels	**150**	**14,229**
Five star	24	5,213
Four star	25	3,065
Three star	24	2,411
Two star	39	1,878
One star	38	1,662
Tourist Hotel (unclassified)	**235**	**9,758**
Boutique Hotel	**34**	**685**
Boutique Villa	**44**	**310**
Guest House	**1,012**	**11,062**
Bungalow	**443**	**1,808**
Heritage Bungalow	**4**	**19**
Heritage Home	**3**	**9**
Home Stay Unit	**520**	**1,574**
Hostels	**6**	**60**
Rented Apartment	**73**	**231**
Rented Home	**5**	**14**
Total	**2,529**	**39,759**

The total number of SLTDA registered accommodation establishments as at 30th September 2019 was 2,529.

The number of classified tourist hotels was 150 and among them 24 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 1,012, 520 and 443 respectively.

The total room inventory was 39,759. Classified tourist hotels (1-5 star) had the highest inventory of 14,229 rooms.
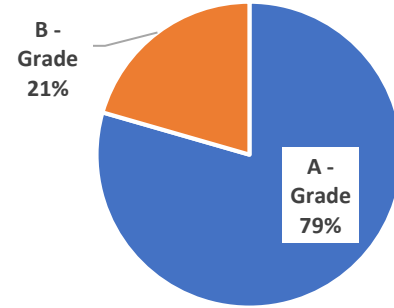
Geographical Distribution of Rooms of SLTDA Registered Tourist Establishments

Number of Rooms Distribution (NRD)	
	NRD >7,000
	7,000>NRD>5,000
	5,000>NRD>3,000
	3,000>NRD>1,000
	1,000>NRD>500
	500 >NRD>0

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). Less than 500 rooms were recorded in the districts of Kurunegala, Kegalle, Mannar, Vavunia, Mullativu, Killinochcchi and Jaffna.
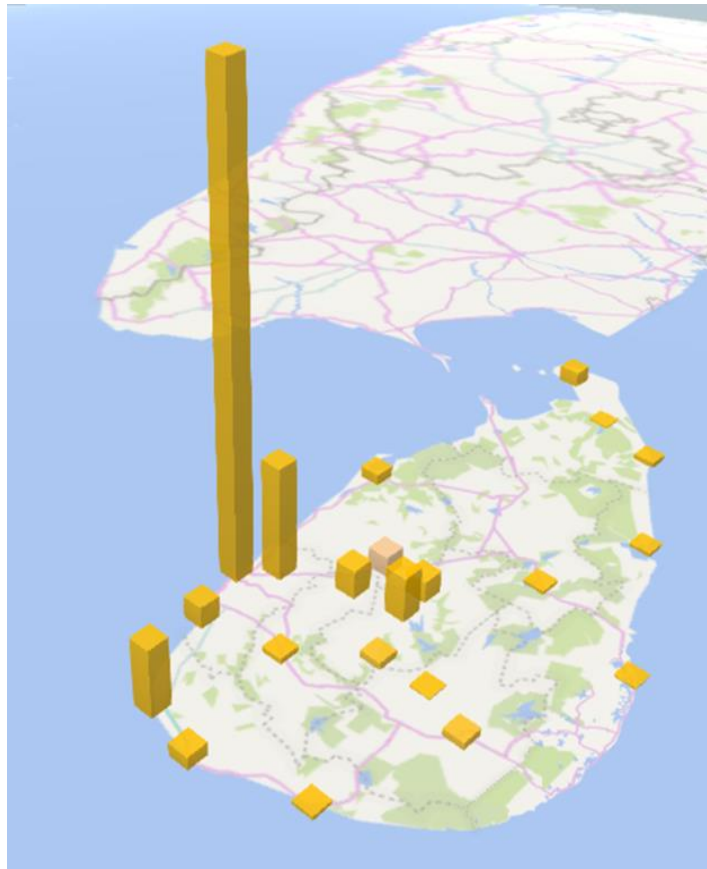
Number of SLTDA Registered Restaurants as at end September 2019

The total number of registered restaurants with SLTDA is 516. Among them 410 (79%) restaurants are Grade A, while 106 (21%) are Grade B restaurants.

Geographical Distribution of SLTDA Registered Restaurants

District	No of Restaurants
Anuradhapura	4
Badulla	3
Batticaloa	1
Colombo	281
Galle	38
Gampaha	68
Hambantota	3
Jaffna	9
Kalutara	12
Kandy	25
Kegalle	16
Killinochchi	1
Kurunegala	11
Matale	12
Matara	7
Moneragala	4
Mullaitivu	3
Nuwara Eliya	5
Polonnaruwa	2
Puttalam	6
Ratnapura	3
Trincomalee	2
Total	**516**

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 (281), while 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
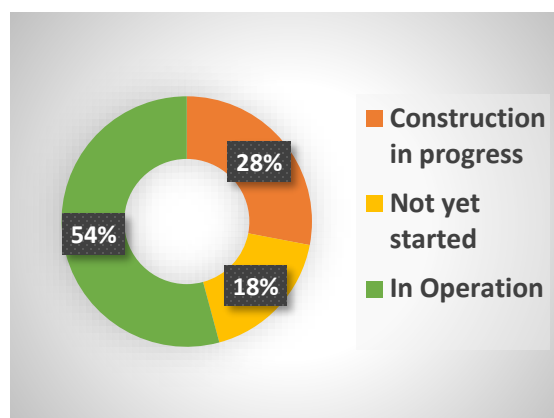"B" Grade Restaurant: Obtain a minimum of 60% of the total marks given in the criteria for approval of tourist restaurants
Link to the Guideline: http://www.sltda.lk/sites/default/files/registration/Guidelines%20Restaurant.pdf

TOURISM ACCOMADATION INVESTMENTS

Progress of Investment Projects – Up to end June 2019*

Status of the project	Number of Projects	Number of Rooms	Investment US $ million
Construction in progress	107	6,797	957.998
Not yet started	68	2,210	248.97
In Operation	207	10,211	1,774.00
Final Approval Granted	**382**	**19,218**	**2,980.96**

- Construction in progress **28%**
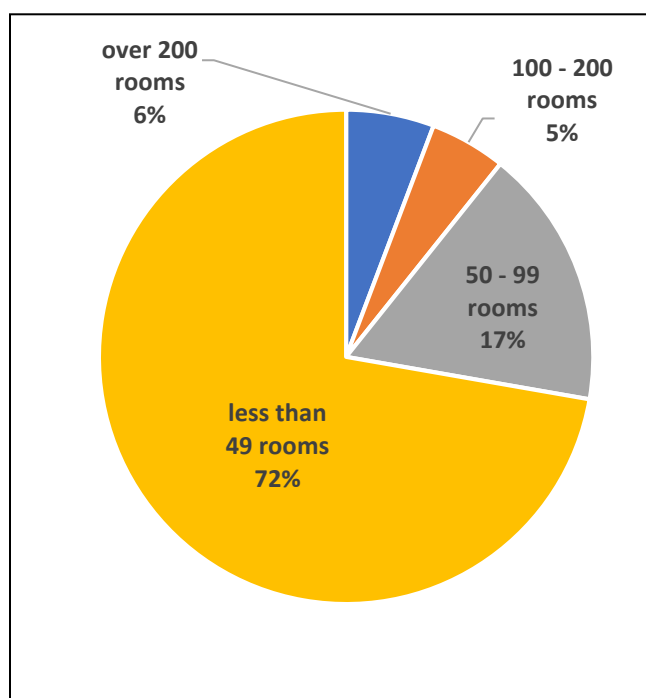- Not yet started **18%**
- In Operation **54%**

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

382 projects had been granted final approval while 107 are under construction and 207 are in operation. 68 tourism investment projects are yet to be commenced. The number of rooms of final approval granted projects are 19,218.

The total investment value of final approval granted projects is estimated at USD 2,980.96 million. The value of projects which are under construction is USD 957.998 million. The investment value of projects in operation is USD 1,774 million while the value of projects that have not commenced is USD 248.97 million.

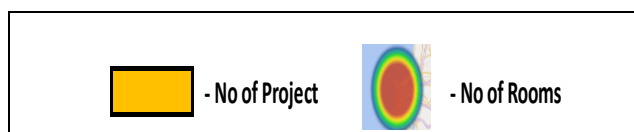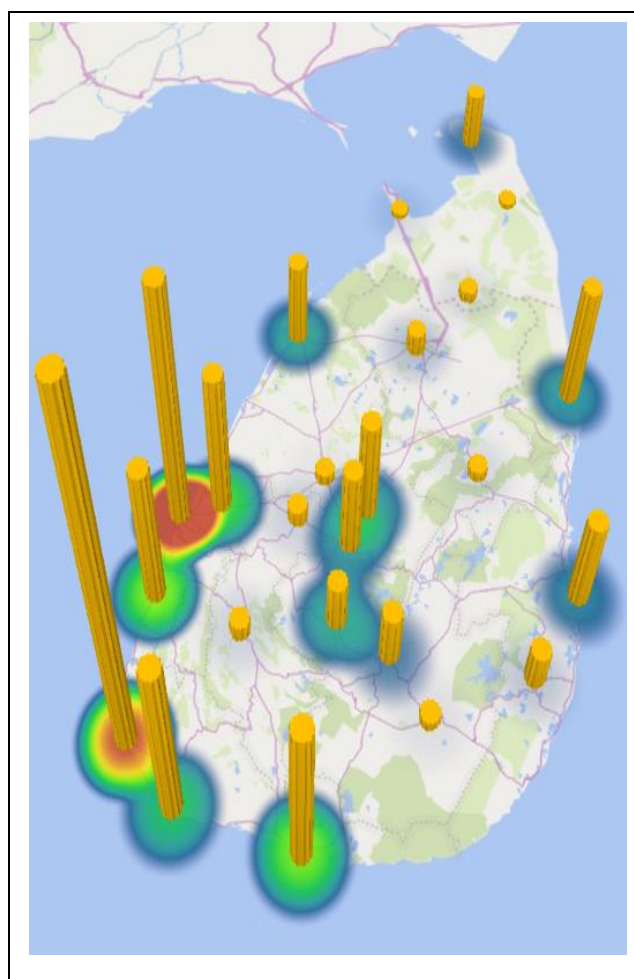## Room Distribution of Final Approval Granted Projects

Number of Rooms	Number of Projects	Percentage
over 200	22	5.8
100 - 200	19	5.0
50 - 99	65	17.0
less than 49	276	72.3
Total	**382**	**100.0**

- over 200 rooms 6%
- 100 - 200 rooms 5%
- 50 - 99 rooms 17%
- less than 49 rooms 72%

There are 22 tourism investment projects with accommodation of over 200 rooms. The highest number of projects (276) 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	17	438
Badulla	10	300
Colombo	46	5,384
Galle	71	3,310
Gampaha	27	1,316
Hambantota	32	1,622
Jaffna	10	315
Kalutara	27	1,672
Kandy	16	559
Kegalle	3	70
Kurunegala	2	27
Kilinochchi	1	15
Matale	19	677
Matara	34	1,030
Nuwara Eliya	9	714
Puttalam	15	685
Trincomalee	22	615
Monaragala	2	42
Mannar	1	52
Polonnaruwa	2	54
Rathnapura	3	66
Vavunia	2	49
Total	**382**	**19,218**

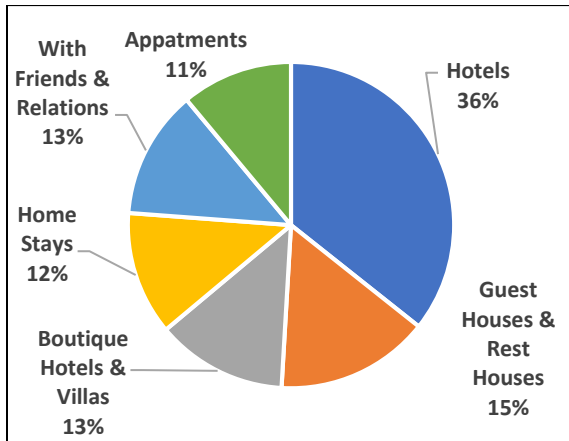- No of Project   - No of Rooms

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. Galle, Colombo, Hambantota, Kalutara, Gampaha, Trincomalee and Matara have more than 20 projects. Killinochchi 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 2019.
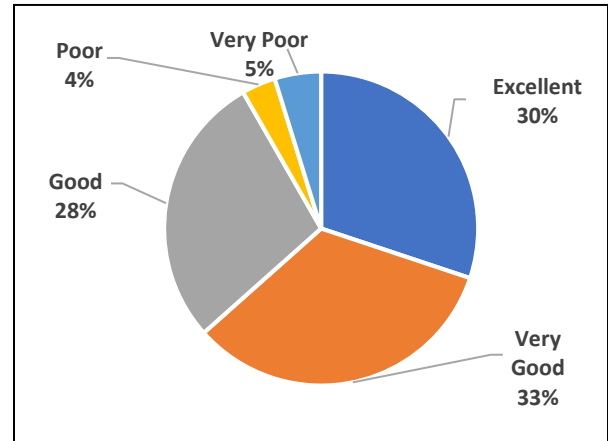
AIRPORT KIOSK SELF SURVEY 2019

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 **9,348**. 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 (73.3%) of respondents were male. Highlights of responses related to service satisfaction are shared as a sample.

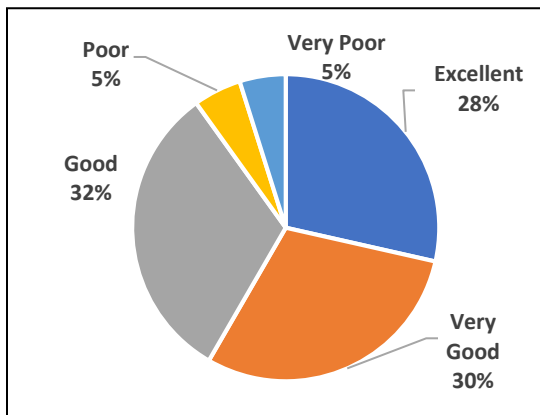## Type of Accommodation Facilities Used

Out of 6,986 respondents, the majority (36%) had stayed in hotels for accommodation. Guest houses and rest houses were used by 15%, while 13% had used boutique hotels and boutique villas.
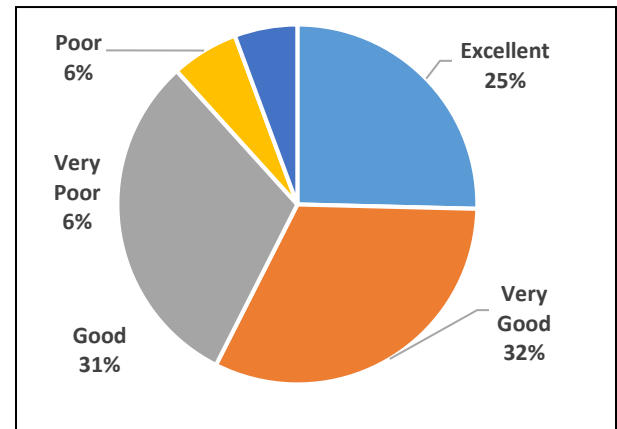
Quality of Rooms

Out of 6,402 respondents, 63% 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 6,337 respondents, 58 % 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 10%.

Quality of Service

Out of 6,283 respondents, the majority (32%) of tourists had rated the general quality of service at bars, restaurants, laundry, spa and rooms as very good and 25% had rated the quality of service as excellent.

Places of Attraction Visited by Tourists

location	Number of respondents	% Share
Colombo city	3,857	41.3
Kandy	3,485	37.3
Galle	2,768	29.6
Sigiriya	2,319	24.8
Nuwara Eliya	2,290	24.5
Dambulla	2,054	22.0
Negambo	2,050	21.9
Unawatuna	1,400	15.0
Pinnawala	1,324	14.2
Polonnaruwa	1,289	13.8
Hikkaduwa	1,199	12.8
Anuradhapura	1,318	14.1
Yala park	1,216	13.0
Adams Peak	1,133	12.1
Udawalawa Park	1,058	11.3
Minneriya Park	1,001	10.7
Horton Plains	833	8.9
Nilaweli	854	9.1
Jaffna	840	9.0
Rathnapura	651	7.0
Arugambay	655	7.0
Passikudah	612	6.5
Vilpaththu	564	6.0
Sinharaja Forest	538	5.8
Kithulgala	535	5.7
Total number of Respondents	**9,348**	**100%**

As per the feedback of 9,348 tourists, the most popular place of attraction within Sri Lanka was Colombo city (41%). Apart from Colombo city, the other top ten places of attraction in order of popularity were Kandy (37%), Galle (30%), Sigiriya (25%) Nuwara Eliya (24%), Dambulla (22%), Negambo (22%), Unawatuna (15%), Pinnawala (14%) Polonnaruwa (14%) and Hikkaduwa (13%).

For the Indian (25.2% out of 3,068 respondents), Australian (43.2% out of 420respondents) and UAE (37.4% out of 198 respondents) tourists, Colombo city was the most popular place of attraction while for the UK (45.8% out of 465 respondents) and Germany (53.0% out of 411 respondents) tourists, Kandy was the most popular place of attraction.