



TOURISM INDUSTRY FORECASTS 2016 - 2020

TOGETHER WITH DINESH WEERAKKODY AND THE
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ABSTRACT

The report provides a forecast of employment generation and training for the rapid growth of the hospitality and tourism industry targeting 4 million tourist arrivals in Sri Lanka by 2020 along with an assessment of infrastructure currently available and upcoming in the next three years (Ver. 1 Nov 15, Ver. 2 Feb 2016)

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TOURISM INDUSTRY FORECASTS

FOR INFRASTRUCTURE AND TRAINING

Dr. Chandra Embuldeniya

PURPOSE: TO PROVIDE A REPORT ON THE FOLLOWING OBJECTIVES

- To forecast tourist arrivals up to 2020
- To estimate the likely additions of hotels and rooms
- To estimate the tourism industry staff requirements based on the additions of hotel infrastructure
- To forecast employment generation based on the forecast of tourist arrivals
- To identify the regulated training programs conducted by training institutes and estimate capacity; resource people and annual student intake
- To identify the location and distribution of training programs

SECTION 1

An Executive Summary.

SECTION 2

Forecast employment generation in the tourism sector along with the analysis of the upcoming new hotel infrastructure facilities.

SECTION 3

Analysis of the distribution of regulated training programs island wide along with the institutions and estimated capacity

DATA SOURCES

- SLTDA Annual Report 2014
- SLTDA Monthly Bulletin of Nov 2015
- Data on Hotels under development by SLTDA
- Data on Operating Hotels provided by Srilal Miththapala
- Data on training programs registered with TVEC by NHRDC

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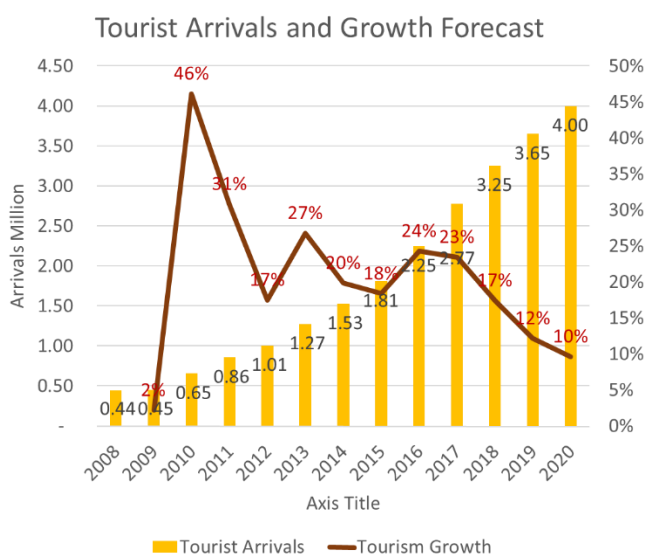
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SECTION 1 - EXECUTIVE SUMMARY

TOURISM INDUSTRY FORECASTS FOR INFRASTRUCTURE AND TRAINING

Dr. Chandra Embuldeniya

1. The **PURPOSE** of this Executive Summary is twofold. To present a summary of the analysis carried out on employment generation in the tourism sector along with the analysis of the upcoming new hotel infrastructure facilities and on the distribution of regulated training programs island wide along with the institutions conducting them to give a better view of the training needs for the growing tourism sector. The report also presents recommendations for action in this sector.
2. **FORECAST:** We target 4.00 million tourist arrivals by 2020 and the forecasts are based on this expectation. The forecasts are shown in Figure with the chart and in the Table.



3. In 2009 India, UK and Other Western Europe countries dominated the arrivals. By 2015, order has changed to India, Asia Other (Excluding China, India, Japan & Maldives) and Western Europe Other (Excluding France, Germany & UK) and UK. Indian share has dropped from 20% to 16% while UK has reduced from 18% to 10%.

Year	Tourist Arrivals	Tourism Growth
2008	0.44	
2009	0.45	2%
2010	0.65	46%
2011	0.86	31%
2012	1.01	17%
2013	1.27	27%
2014	1.53	20%
2015	1.81	18%
2016	2.25	24%
2017	2.77	23%
2018	3.25	17%
2019	3.65	12%
2020	4.00	10%

4. 81% of visitors are seeking hotel accommodation.
5. **Seasonality** of arrivals is profound and has a great impact on planning. Quarterly variation is Jan-Mar 8%, Apr-Jun -21%, Jul-Sep 3%, and Oct-Dec 9% from the mean. The arrivals peak in December, July and Feb and bottoming in May and September. Employment in this sector can carry about 30% **float** from outsourced services.
6. About 11% tourists spend less than 3 **nights** while 65% spend up to two weeks in the country, while 23% spend up to one month.
7. **UPCOMING HOTELS BY 2018:** The data shows 197 facilities under development that will add 11,645 rooms understandably by 2018 ready for operations. Of these facilities 179 facilities have reported class level of rooms 1,2,3,4,5 & B while 18 facilities have not reported. Most facilities are developing a single class but there are 2 facilities reporting a mix of two classes. The facilities reporting class levels add up to 179 with 10,973 rooms, which is 94.2% of the total number.

8. **TRAINING REQUIRED FOR UPCOMING HOTELS:** This requires training 23,360 employees before the end of 2017 since these hotels will be in operation by 2018. The total requirement of Managerial employees at 2,035, Supervisory at 3,135 and 'Other' categories at 18,190. The respective average percentages are 9%, 13% and 78%.
9. **SITUATION IN 2014:** In 2014 the tourist hotels and restaurants employed 105,000. The directly related businesses, Travel Agents and Tour Operators, Airlines, Agencies Providing Recreational Facilities, Tourist Shops, Guides, National Tourist Organization and State Sector employed another 24,790. The total employed was 129,790.
10. Around 4 to 5 **Guides** work for every 1,000 guests. The ratio of Managerial: Technical: Operative jobs is entire 15%: 52%: 33% (This ratio is from published data). It implies that for every 1,000 jobs added in the tourism industry 150: 520: 330 jobs are added in these three categories of jobs. The jobs created in the Hotels and Restaurants are 142: 484: 374 in these categories for every 1,000 jobs. Hotels and Restaurants employ 81% of the total employed in the tourism industry.
11. **ARRIVALS BASED FORECAST OF EMPLOYMENT:** The arrivals based forecast supersedes all other forecasts and hence presented in a tabulated form below.

EMPLOYMENT IN HOSPITALITY AND TOURISM SECTOR FORECAST

ARRIVALS BASED FORECAST: The arrivals based forecast supersedes all other forecasts and hence presented in a tabulated form below

Year	2015	2016	2017	2018	2019	2020
Total Arrivals Million (E)	1.81	2.25	2.77	3.25	3.65	4.00
Total Using Hotels etc (81%)	1.46	1.82	2.25	2.64	2.96	3.24
Employed Directly in Hotels and Restaurants (R)	132,442	162,520	191,818	214,146	230,076	242,852
Travel Agents and Tour Operators (R)	9,691	11,046	12,130	13,049	13,847	14,552
Airlines (R)	6,327	6,660	7,072	7,511	7,976	8,470
Agencies Providing Recreational Facilities (R)	872	1,173	1,504	1,928	2,472	3,169
Tourist Shops (R)	1,791	2,605	3,522	4,762	6,438	8,704
Guides (R)	4,711	5,224	5,767	6,366	7,028	7,759
National Tourist Organization (R)	637	846	1,068	1,349	1,704	2,153
State Sector (R)	2,393	2,470	2,590	2,716	2,848	2,987
Non Hotel Direct (S)	26,422	30,023	33,653	37,681	42,313	47,794
Indirect Employment (R)	191,226	231,549	264,886	290,291	308,417	322,954
Total Employment in Tourism Industry (S)	350,090	424,092	490,357	542,117	580,807	613,600

E – Realistic Estimate, R – Regression, S – Sum

12. **INTAKE FORECAST:** The forecast of intake trainees based on these figures is also tabulated below

TRAINEE INTAKES IN HOSPITALITY AND TOURISM SECTOR FORECAST						
ARRIVALS BASED FORECAST: The arrivals based forecast supersedes all other forecasts and hence presented in a tabulated form below						
Year	2015	2016	2017	2018	2019	2020
Total Arrivals Mil (E)	1.81	2.25	2.77	3.25	3.65	4.00
Total Using Hotels etc. (81%)	1.46	1.82	2.25	2.64	2.96	3.24
Directly in Hotels and Restaurants (R)	27,441	30,078	29,298	22,328	15,930	12,775
Travel Agents and Tour Operators (R)	599	1,355	1,083	919	798	705
Airlines (R)	391	333	413	438	465	494
Agencies Providing Recreational Facilities (R)	54	301	331	424	544	697
Tourist Shops (R)	111	814	917	1,240	1,676	2,266
Guides (R)	291	513	543	599	662	731
National Tourist Organization (R)	39	208	223	281	355	449
State Sector (R)	148	77	120	126	132	139
Non Hotel Direct (S)	1,633	3,601	3,630	4,028	4,633	5,481
Indirect Employment (R)	21,126	40,323	33,337	25,405	18,126	14,536
Total Employment in Tourism Industry (S)	50,200	74,002	66,265	51,761	38,690	32,793

E – Realistic Estimate, R – Regression, S – Sum

13. **TRAINING INSTITUTIONS:** There are 59 names of institutions registered. Colombo 23, Gampaha 10, Galle 4, Trincomalee 4, Kandy 3, Jaffna 3, Hambantota 2, Kalutara 2, Kurunegala 2, Ratnapura 2, Matara 2, Ampara 1, Anuradhapura 1, Batticaloa 1, Mathale 1, Nuwara Eliya 1, and Puttalam 1.

14. **REGISTERED TRAINING COURSES:**

Count of Courses Per Annum		
Number of repetitions		Total
Not NVQ		118
1		27
2		43
3		14
4		23
5		8
6		3
NVQ L3		11
2		8
3		2
4		1
NVQ L4		12
1		1
2		6
3		5
Grand Total		141

There are 98 registered training courses with 141 replications around the country. Table here shows the number of courses having high repetitions in a year. Non NVQ has 3 course that gets repeated six times in a year.

15. The training programs have key words to determine core interest and these programs have 24 programs with Cook in it, 17 with Cookery , 14 with Baker , 13 with Food , 12 with Beverage , 10 with Management , 10 with Bakery , 9 with Steward , 8 with Food and Beverage , 8 with Pastry , 8 with Front Office , 7 with House Keeping , 6 with Housekeeping , 5 with Bar , 5 with Waiter , 4 with Hospitality Management, 4 with Food & Beverage , 3 with Restaurant , 3 with Reception , 2 with Hotel Management, 2 with Room Attendant , 2 with Catering , 1 with Tourism Management , 1 with Accommodation , 1 with House Keeper , and 1 with Receptionist,

16. THE DISTRICTS NEEDING SPECIAL ATTENTION

Namely Killinochchi, Mannar, Mullativu, Vavuniya, Polonnaruwa, Badulla, Moneragala, Kegalle, Nuwara Eliya, Anuradhapura, and Ampara are the districts that need facilities to develop training opportunities for youth. These are Districts rich in touristic resources and thus will yield a clear benefit.

17. Institutions registered with TVEC have got programs with only two levels of certification out of possible seven levels. These are NVQ Level 4, Level 3 and the majority are non NVQ programs.
18. The total capacity for training in hospitality related disciplines is 8,599 in a year if all course repeats are counted. This is distributed among 7,574 for non NVQ, 520 NVQ 3 and 505 NVQ 4 places.
19. The high level of non NVQ courses is particularly a threat to the industry progress.
20. There are 88 unique (names) courses not NVQ certified 7 are NVQ 3 and 7 are NVQ 4 that have annual repetitions ranging from 1 to 6.
21. The courses with repeats add up to 359 of which 305 are non NVQ, 26 are NVQ 3 and 28 are NVQ 4.
22. The distribution of courses shows on average Cookery/Cook/Baker taking 43%, Food & Beverage taking 22%, Housekeeping taking 15%, Management/Operations taking 13%, Front Office taking 6% and Tourism and Travel taking only 1% of the course resources.
23. The top institutes having the at least two different programs constitute 70% of the total capacity with 6,043 students per year. These institutes present a promising opportunity to expand outputs.

END OF EXECUTIVE SUMMARY

SECTION 2 – FORECASTS OF EMPLOYMENT

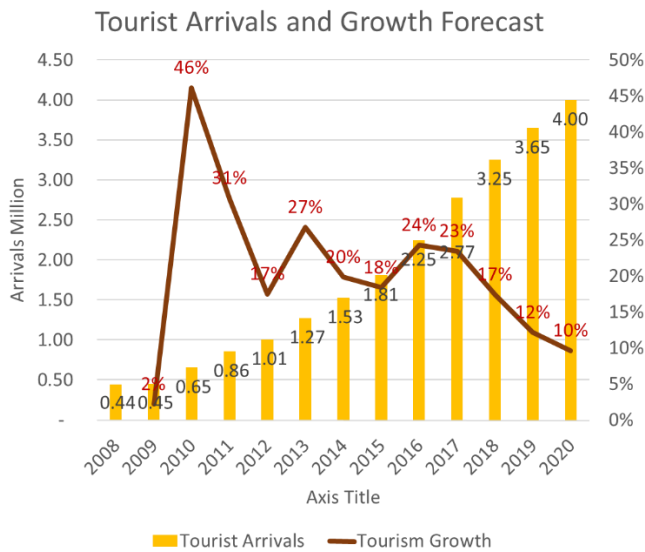
1 FORECAST OF TOURIST ARRIVALS UP TO 2020

It is assumed that by 2020 the tourist inflow will reach 4 million. Therefore, it is necessary to strategize to deliver this outcome. The forecast here provides a scientifically analyzed estimation of the arrivals in the period 2015 to 2020

1.1 Arrivals Forecast

The Table 1 and the Fig 1 shows the growth rates, justifiably at a reducing pace and the arrivals

Figure 1 Tourist Arrivals Forecast and Growth



increasing annually to reach 4 million by 2020. In the current year December figure was estimated and added to the realized figures up to November, to reach 1.81 million.

1.2 Arrivals by Country - Changing Pattern

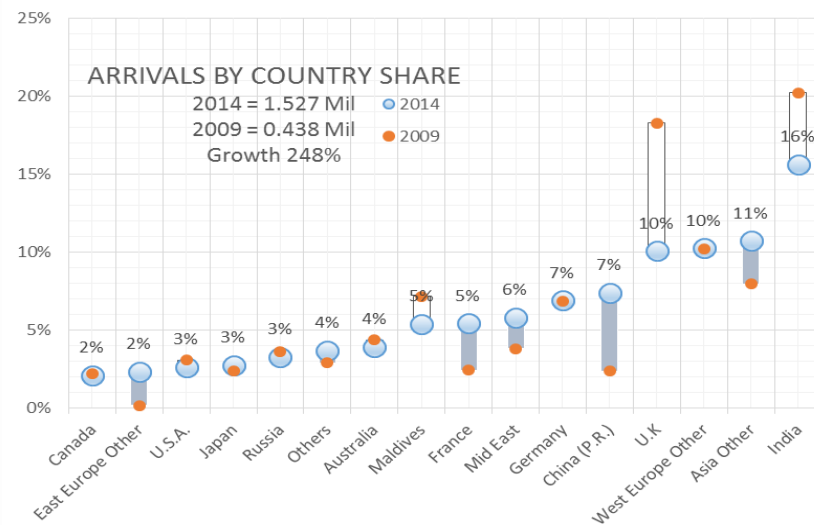
The tourists' predominant nationalities in 2009

were from India, UK and Other Western Europe countries. The proportions occupied by those countries have diminished by 2015 and the current order is India, Asia Other (Excluding China, India, Japan & Maldives) and Western Europe Other (Excluding France, Germany & UK) and UK. Indian share has dropped from 20% to 16% while UK has reduced from 18% to 10%.

Table 1 Tourist Arrivals and Growth Forecast

Year	Tourist Arrivals	Tourism Growth
2008	0.44	
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2015	1.81	18%
2016	2.25	24%
2017	2.77	23%
2018	3.25	17%
2019	3.65	12%
2020	4.00	10%

Figure 2 Arrivals by Country



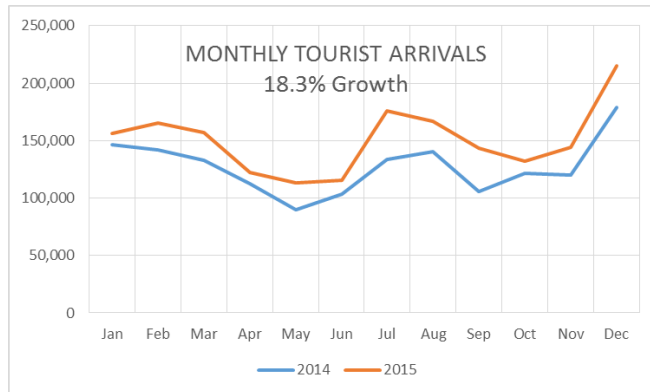
The Figure 2 illustrates that Canada, US, Japan, Russia, Australia, Germany along with ‘East Europe Other’ and ‘West Europe Other’ have kept the same share after five years.

The countries shown in Figure 2 have retained a market share of over 2% each and the other countries have retained lesser individual shares.

1.3 Seasonality of Arrivals

The tourism sector is heavily seasonal and the monthly comparisons for 2014 and 2015 show the general picture

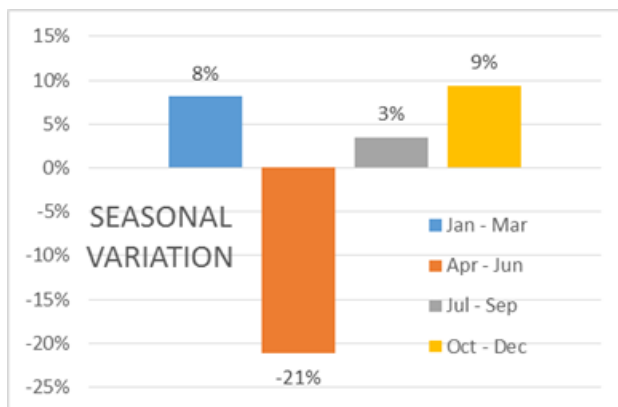
Figure 3 Monthly Tourist Arrivals



Accordingly, arrivals peak in December, July and Feb and bottoming in May and September. The quarterly analysis brings out a firm seasonal variation of arrivals from the mean.

The seasonality is an essential element in planning accommodation and managing a staff float, which would be a great opportunity as an outsourced service industry. **The industry appears to need a 30% float over and above the fulltime regulars.** This provides the opportunity for the industrial trainees as well as outsourced service industry.

Figure 4 Seasonal Variation Quarterly



1.4 Period of Stay

Table 2 Period of Stay in Hotels

PERIOD OF STAY - SHEET 3	2013-14
Period	Average
1-3 nights	11%
4-7 nights	29%
8-14 nights	36%
15-21 nights	12%
22-30 nights	5%
31 nights & Over	6%
	100%

About 11% tourists spend less than 3 nights while 65% spend up to two weeks in the country, while 23% spend up to one month.

1.5 Visitors Staying at Hotels

The analysis has shown that 81% of visitors are seeking accommodation in hotels and guest houses. This estimate comes from all visitors to Sri Lanka on Pleasure, Business, Religious & Cultural, Health, Sports, Official, MICE, Visiting Friends & Relations, Education, Others, and those visiting Friends & Relatives etc.

2 ESTIMATE OF NEW HOTELS AND ROOMS FROM 2015 TO 2020 AND NEW EMPLOYEES

The data shows 197 facilities under development that will add 11,645 rooms understandably by 2018 ready for operations. Of these facilities 179 facilities have reported class level of rooms 1,2,3,4,5 & B while 18 facilities have not reported. Most facilities are developing a single class but there are 2 facilities reporting a mix of two classes. The facilities reporting class levels add up to 179 with 10,973 rooms, which is 94.2% of the total number.

2.1 Hotels Under Construction - The Classification and Required Staff

Table 3 Hotels under Construction and Staff Required

Under Construction		Hotels	Rooms	Staff/ Room Ratio	Staff Required	
Class 5	10%	5	1,063	3	3,189	The forecast of staff required for each class is based on a variable 'staff to room' ratio. The total number of rooms under construction is 11,645 for 197 facilities. This
Class 4	28%	22	3,080	2.2	6,776	
Class 3	44%	68	4,807	1.8	8,653	
Class 2	13%	50	1,418	1.3	1,843	
Class 1	1%	7	103	1.3	134	
Boutique	5%	27	502	3.5	1,757	
Hotels providing class	94%	179	10,973	2.04	22,352	
Hotels not reporting class	6%	18	672	1.5	1,008	
Total Hotels	100%	197	11,645	2.01	23,360	

requires to train 23,360 employees before the end of 2017 since these hotels will be in operation by 2018.

Table 4 Managerial, Supervisory & Other Staff Required for Upcoming Hotels

Under Construction	Rooms	Hotels	Managerial		Supervisory		Other		Total
Class 5	1,063	5	12%	383	20%	638	68%	2,169	3,189
Class 4	3,080	22	9%	610	14%	949	77%	5,218	6,776
Class 3	4,807	68	9%	779	13%	1,125	78%	6,749	8,653
Class 2	1,418	50	7%	129	11%	203	82%	1,512	1,843
Class 1	103	7	7%	9	11%	15	82%	110	134
Boutique	502	27	6%	105	10%	176	84%	1,476	1,757
Hotels providing class	10,973	179	9%	2,015	14%	3,104	77%	17,232	22,352
Hotels not reporting class	672	18	2%	20	3%	30	95%	958	1,008
Total Hotels	11,645	197	9%	2,035	13%	3,135	78%	18,190	23,360

The table shows the total requirement of Managerial employees at 2,035, Supervisory at 3,135 and Other categories 18,190. The respective average percentages are 9%, 13% and 78%. It is clear that Managerial and Supervisory human capital is higher in 5 and 4-star class hotels.

3 ESTIMATE OF TOURISM EMPLOYMENT BASED ON EXISTING HOTEL INFRASTRUCTURE

Table 5 Current Employment Compared with Arrivals

	2012	2013	2014
Emoloyed	47,761	90,444	105,001
Arrivals	1,005,605	1,274,593	1,527,153
% Employment	4.7%	7%	6.9%
Growth in Employment		89%	16%

The statistics available on the employment in the industry are summarized in the table below

During 2013 and 2014 the employment directly in the hotels and restaurants were 7% of the number of arrivals and growth in employment capacity will see

great variation due to introduction of new facilities.

3.1 Tourism Industry Employment – Immediate Past

The tourism industry employment is analyzed more in detail below.

Table 6 Direct Employment in Tourism

	No of Establishments			Total Employed		
	2012	2013	2014	2012	2013	2014
Hotels and Restaurants	1,306	1,745	2,040	47,761	90,444	105,001
Travel Agents and Tour Operators	533	592	678	6,409	7,011	9,092
Airlines	29	31	29	5,630	5,862	5,936
Agencies Providing Recreational Facilities	48	62	71	552	712	818
Tourist Shops	52	58	63	1,012	1,490	1,680
Guides				3,896	4,295	4,420
National Tourist Organization	4	4	4	410	544	598
State Sector	18	18	18	2,192	2,192	2,245
Total	1,990	2,510	2,903	67,862	112,550	129,790

Accordingly, it shows the employment with Travel Agents and Tour Operators, Airlines, Agencies Providing Recreational Facilities, Tourist Shops, Guides, National Tourist Organization and State Sector has kept on growing from 20,101 in 2012 to 24,789 in 2014. It reflects a significant growth in the Travel and Tour operators and recreational facilities.

The guides are an independent group of professionals and the ratio of Guides to Guests in Hotels is between 4 to 5 for every 1,000 guests in hotels. This is an important area of concern in developing tourism.

Table 7 Tourism Related Industries

Tourism Related Industries 2014	Managerial/ Professional/ Scientific	Technical/ Clerical/ Supervisory	Manual/ Operative
Hotels and Restaurants	14,889	50,853	39,259
Travel Agents and Tour Operators	2,394	5,830	868
Airlines	896	3,826	1,214
Agencies Providing Recreational Facilities	179	372	267
Tourist Shops	224	1,287	169
Guides		4,420	
National Tourist Organization	190	212	196
State Sector	673	708	864
Category Totals	19,445	67,508	42,837

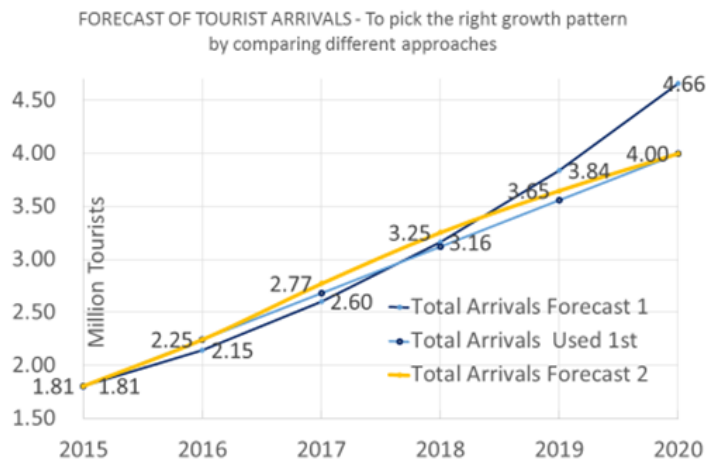
industry.

The distribution of employment in areas connected with tourism has created 24,789 jobs in the year 2014. The ratio of Managerial: Technical: Operative jobs is 15%: 52%: 33% which implies that for every 1,000 jobs added in the entire tourism industry 150: 520: 330 jobs are added in these three categories of jobs. The jobs created in the Hotels and Restaurants are 142: 484: 374 in these categories for every 1,000 jobs. Hotels and Restaurants employ 81% of the total employed in the tourism

4 FORECAST OF EMPLOYMENT IN TOURISM INDUSTRY BASED ON THE ARRIVALS

The basis of the forecast is a reasonable estimate of the tourist arrivals during the period 2016-2020. Three possibilities were considered. The first is based on a regression of the past four years of arrivals, which leads to 4.66 million arrivals by 2020. This may eventually happen though it was not preferred. A linear forecast was considered but since it is unlikely to have equal increments each year it was also disregarded. Finally, a reasonable forecast emerged that leads us to 4.00 million arrivals in 2020 with diminishing growth rates as time moves towards 2020. The three options are illustrated in the Chart below.

Figure 5 Selection of a Reasonable Arrivals Estimate

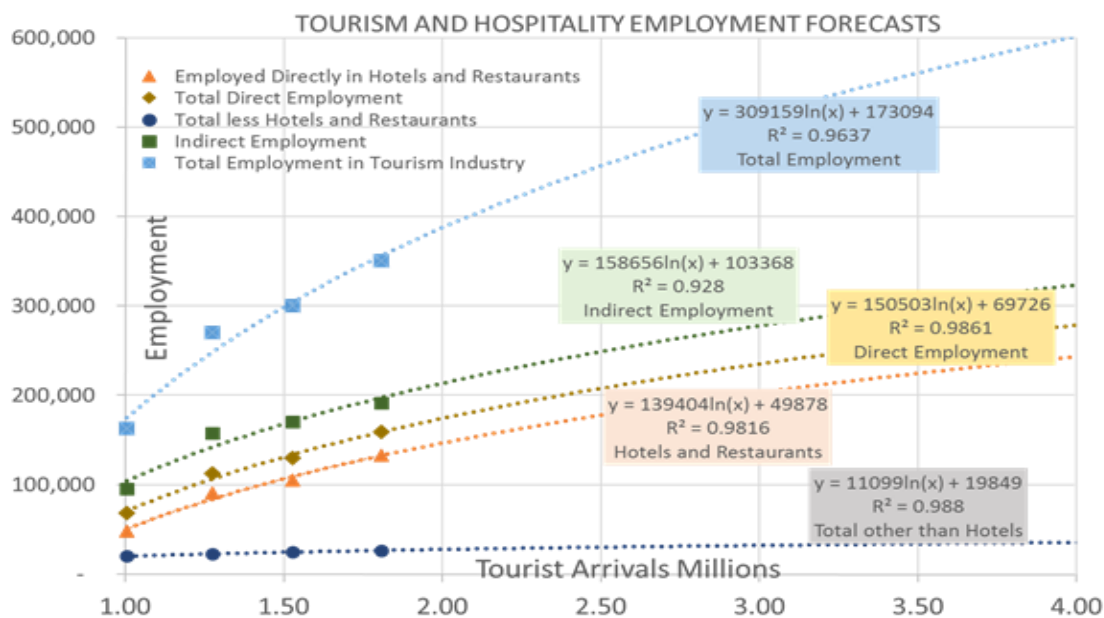


The estimate shown in yellow was picked.

The forecasts of employment have been worked out with several regressions of historical data from 2012 to 2015 for the Total Direct Employment, Indirect Employment, Employment in Hotels and Restaurants, Employment other than Hotels and Restaurants, Total Employment in Tourism Industry, and other areas such as Travel Agents, Airlines, Guides, etc. were correlated to arrivals of the past four years and the

best decisions were taken to fit the data. Five of the regressions are shown in the Figure 6. The significance of the correlations is proven.

Figure 6 Tourism and Hospitality Employment Forecasts



The Blue line (top line) in Fig 6 is the best fit for the total of both direct and indirect job opportunities. Total has to add up to the components of the total such as the direct and indirect employment. In order to avoid adjustments for forecasting errors it has been simplified by taking the forecasts of the components and adding up to the total.

The Figure 7 gives the direct employment other than the hotels and restaurants. The forecasts have been tabulated and presented below in the table 8.

Accordingly, in the year 2016, there would be around 162,500 people directly employed in the Hotels and Restaurants while there would be around 30,000 employed in directly related industries such as Travel, etc. There would be 231,500 indirectly employed in the industry. Little is known about where, what and how are these indirect employment is created?

When it gets to 2020, jobs in the Hotel and Restaurants will be around 243,000, with Total Direct Employment 291,000, Direct employment without the hotels and restaurant 48,000, Indirect Employment 323,000 adding up to a total job generation in the market for Tourism Industry yielding 614,000. This figure is quite close to the regression in the total industry job forecast, which has yielded 572,000 (Error factor is 6.8%).

Figure 7 Employment other than Hotels & Restaurants

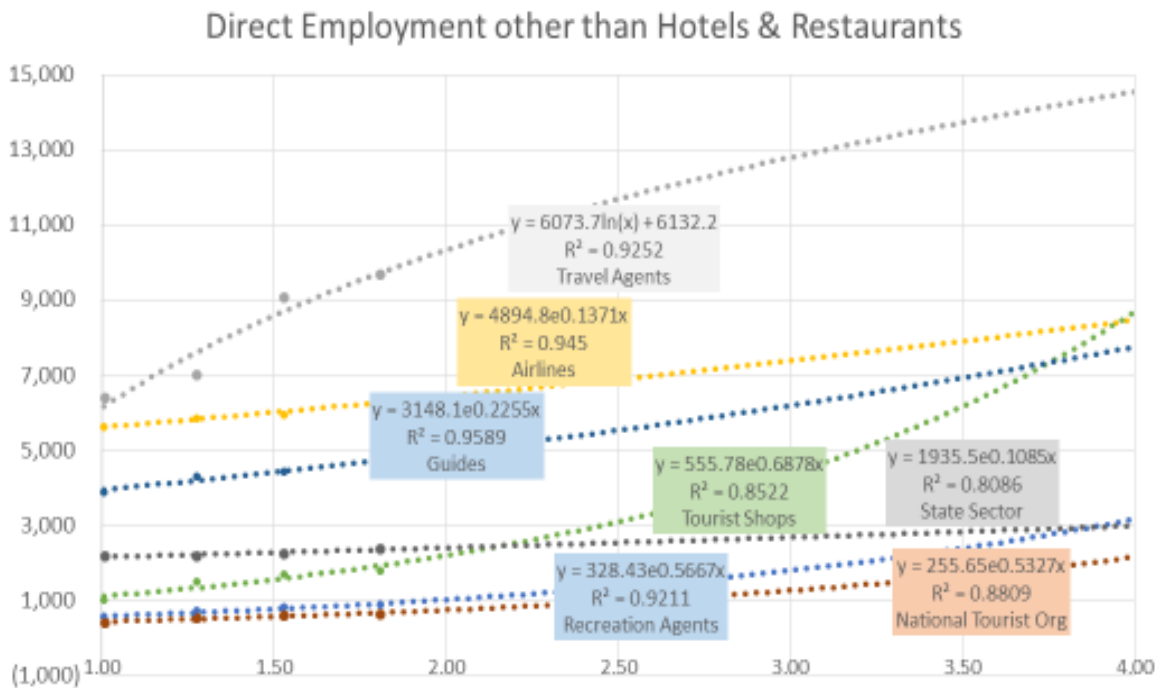


Table 8 Employment in Hospitality & Tourism Forecast

ARRIVALS BASED FORECAST: The arrivals based forecast supersedes all other forecasts and hence presented in a tabulated form below

Year	2015	2016	2017	2018	2019	2020
Total Arrivals Million (E)	1.81	2.25	2.77	3.25	3.65	4.00
Total Using Hotels etc (81%)	1.46	1.82	2.25	2.64	2.96	3.24
Employed Directly in Hotels and Restaurants (R)	132,442	162,520	191,818	214,146	230,076	242,852
Travel Agents and Tour Operators (R)	9,691	11,046	12,130	13,049	13,847	14,552
Airlines (R)	6,327	6,660	7,072	7,511	7,976	8,470
Agencies Providing Recreational Facilities (R)	872	1,173	1,504	1,928	2,472	3,169
Tourist Shops (R)	1,791	2,605	3,522	4,762	6,438	8,704
Guides (R)	4,711	5,224	5,767	6,366	7,028	7,759
National Tourist Organization (R)	637	846	1,068	1,349	1,704	2,153
State Sector (R)	2,393	2,470	2,590	2,716	2,848	2,987
Non Hotel Direct (S)	26,422	30,023	33,653	37,681	42,313	47,794
Indirect Employment (R)	191,226	231,549	264,886	290,291	308,417	322,954
Total Employment in Tourism Industry (S)	350,090	424,092	490,357	542,117	580,807	613,600

E – Realistic Estimate, R – Regression, S – Sum

5 INTAKE TRAINEES

The number of intake trainees each year for each category is given below from the forecast. The table 9 presents the gap to be filled with new recruitments.

There are existing training institutions conducting training in each of these areas. Therefore, the computation of setting up additional facilities have to be commissioned with careful planning by working out the gap.

Table 9 Intake Trainees (New Jobs)

TRAINEE INTAKES IN HOSPITALITY AND TOURISM SECTOR FORECAST						
ARRIVALS BASED FORECAST: The arrivals based forecast supersedes all other forecasts and hence presented in a tabulated form below						
Year	2015	2016	2017	2018	2019	2020
Total Arrivals Mil (E)	1.81	2.25	2.77	3.25	3.65	4.00
Total Using Hotels etc. (81%)	1.46	1.82	2.25	2.64	2.96	3.24
Directly in Hotels and Restaurants (R)	27,441	30,078	29,298	22,328	15,930	12,775
Travel Agents and Tour Operators (R)	599	1,355	1,083	919	798	705
Airlines (R)	391	333	413	438	465	494
Agencies Providing Recreational Facilities (R)	54	301	331	424	544	697
Tourist Shops (R)	111	814	917	1,240	1,676	2,266
Guides (R)	291	513	543	599	662	731
National Tourist Organization (R)	39	208	223	281	355	449
State Sector (R)	148	77	120	126	132	139
Non Hotel Direct (S)	1,633	3,601	3,630	4,028	4,633	5,481
Indirect Employment (R)	21,126	40,323	33,337	25,405	18,126	14,536
Total Employment in Tourism Industry (S)	50,200	74,002	66,265	51,761	38,690	32,793
E – Realistic Estimate, R – Regression, S – Sum						

6 MANAGERIAL, SUPERVISORY AND OPERATIVES TRAINING

There are several ratios that can be used to estimate the Managerial: Supervisory: Operative staff requirement. It depends on the definition of the classification. In one such classification Managerial/Professional/Scientific, Technical/Clerical/Supervisory, and Manual/Operative staff members are pooled together. This results in an average ratio of 15%: 52%: 33% in 2014. In another classification carried out recently it has resulted in a ratio of for Managerial: Supervisory: Operative as 11%:10%:79% with Front Office: Back Office at 48%:52% where Front Office is FO/HK/F&B/SPA and Back Office is Kitchen/Eng./HR/Admin/Finance.

Table 10 Employee Ratios (i)

	Assumed Staff to room ratio	Managerial %	Supervisor %	Operative %	Front Line % (FO/HK/F&B/SPA)	Back of House % (Kitchen/Eng./HR/Admin/Finance)
AVANI Kalutara 4*	1.80	10%	7%	83%	46%	54%
AVANI Bentota 4*	2.20	14%	11%	75%	55%	45%
Hotel Sigiriya 4*	1.65	8%	4%	88%	42%	58%
Club Hotel Dolphins 4*	1.80	12%	10%	78%	52%	48%
Anantara Tangalle(UC)	1.20	6%	11%	84%	56%	44%
Anantara Kalutara(UC)	1.67	15%	16%	69%	56%	44%
Average		11%	10%	79%	52%	48%

Another classification that came up is given below.

Table 11 Employee Ratios (ii)

	Managerial	Supervisory	Operative
5 star	12%	20%	68%
4 star	9%	14%	77%
3 star	9%	13%	78%
2 star	7%	11%	82%
1 star	7%	11%	82%
Boutique hotels	6%	10%	84%
unclassified	2%	3%	95%
Supplementary	2%	3%	95%

The intake numbers are given in the forecast in table 9 to be used with suitable ratios for division of labour. We use the ratios indicated by table 10.

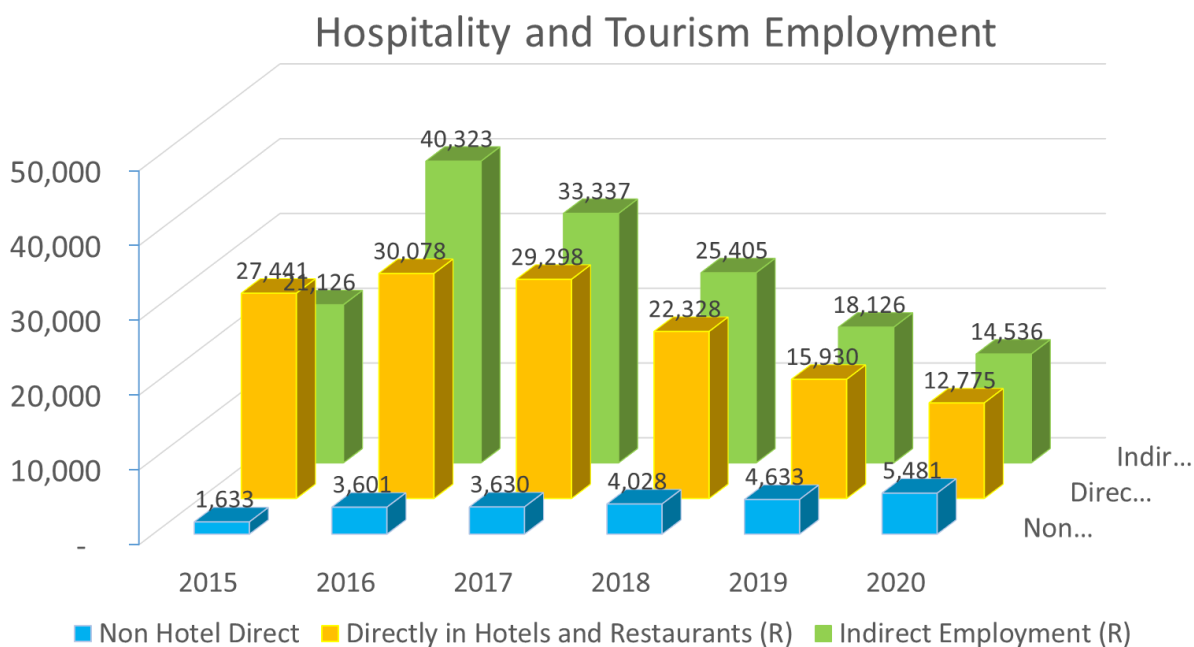
Thus our forecast for training managers, supervisors and operative employee categories is given in table 12 and shows 2016 requirement of training. The same concept can be extended with more accurate percentages as numbers get updated in the years ahead.

Table 12 Training Requirement Detail 2016

2016 Forecast for training managers, supervisors and operative employee categories	Managerial	Supervisor	Operative	Front Line FO/HK/FB/SPA	Back of House Kit/Eng/HR /Adm/Fin	Total Employment
Ratio of Respective Category	11%	10%	79%	52%	48%	2016
Employed Directly in Hotels and Restaurants	3,309	3,008	23,762	15,641	14,438	30,078
Travel Agents and Tour Operators	149	136	1,071	705	651	1,355
Airlines	37	33	263	173	160	333
Agencies Providing Recreational Facilities	33	30	238	156	144	301
Tourist Shops	90	81	643	423	391	814
Guides	56	51	405	267	246	513
National Tourist Organization	23	21	165	108	100	208
State Sector	8	8	61	40	37	77
Total Direct Employment	3,705	3,368	26,606	17,513	16,166	33,679
Total less Hotels and Restaurants	396	360	2,845	1,872	1,728	3,601
Indirect Employment	4,435	4,032	31,855	20,968	19,355	40,323
Total of Direct and Indirect Employment	8,140	7,400	58,461	38,481	35,521	74,002

6.1 A 3D Vision of Training Needs

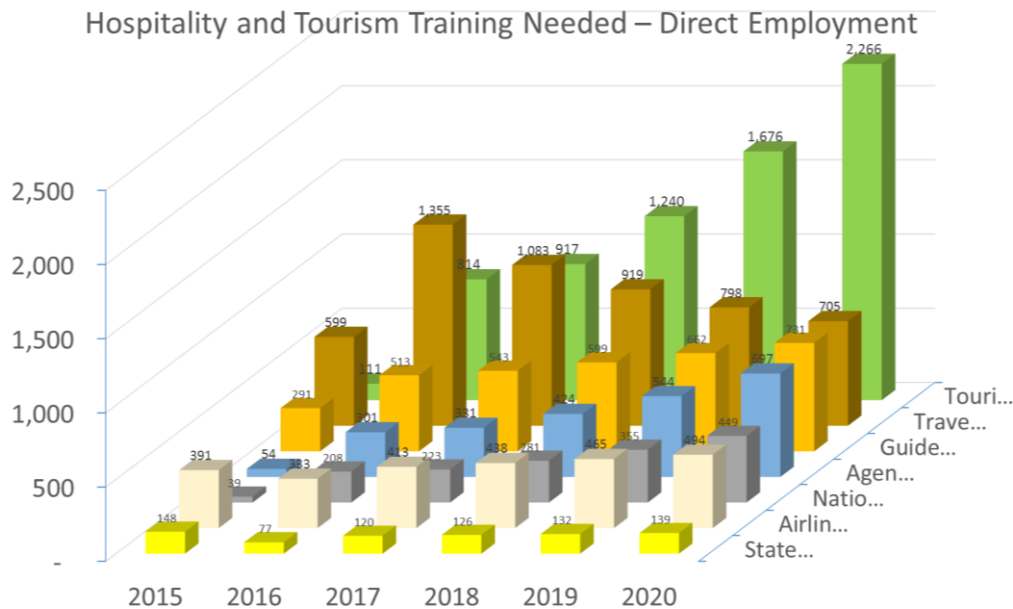
Figure 8 Employment in Hospitality and Tourism Industry



The Figure 8 shows the training required for new positions at entry level in the hotels, restaurants and related industries and indirectly in the industry. Each pillar indicates the new numbers needed to get trained to fill up new positions.

Similarly, the Figure 9 shows the new direct employment training needed in the hospitality and tourism industry other than hotels and restaurants.

Figure 9 Direct Employment Training other than Hotels and Restaurants



7 POINTS TO NOTE

- The estimate of employment in the upcoming hotels are clearly a subset of the forecasts based on the arrivals.** For example, the employment generated in the projects underway by 2017 would be 23,360 (Table 4). It is seen that 33,679 (Table 12) will be the training requirement in 2016 and 32,928 in 2017 (Table 9). Please note that the hotel sector training requirement is the sum total of direct employment in Hotels and related areas such as Travel trade. Therefore, quite evidently the new hotels will find the necessary numbers of employees by progressing this plan of action.
- The turnover of employees** in hotels due to retirement, employment overseas, casualties, etc., are presumably compensated in the actual employed. These are the historical numbers considered for the forecast. Hence the forecast itself would have compensated for attrition.
- Direct employment in running hotels and Indirect employment are increasing in magnitude as a result of the increasing arrivals. The newly trained will fill up the vacancies in new hotels and existing hotels as well as places falling vacant due to employee migration and turnover.
- The Indirect Employment is a grey area that needs investigation to understand the present status and to provide for training needs.

SECTION 3 – TRAINING INSTITUTIONS AND PROGRAMS

8 REGISTERED TRAINING INSTITUTIONS

Tourism and hospitality training institutions in Sri Lanka have to be registered under the Tertiary and Vocational Education Commission (TVEC) and the institutes have to be accredited as institutions awarding national vocational qualifications. This applies to institutions other than those registered under the University Grants Commission. A two-year grace period is given to all institutions to get accreditation from the registration date by completing the procedure for quality and establishment.

8.1 District-wise Distribution of Training Institutions:

There are 59 unique institutions registered. These institutions have registered in the districts as follows; Colombo 23, Gampaha 10, Galle 4, Trincomalee 4, Kandy 3, Jaffna 3, Hambantota 2, Kalutara 2, Kurunegala 2, Ratnapura 2, Matara 2, Ampara 1, Anuradhapura 1, Batticaloa 1, Mathale 1, Nuwara Eliya 1, and Puttalam 1.

9 TRAINING PROGRAMS

There are 95 Unique training programs conducted by different institutes. The identical names under different institutions are assumed to be same in content for this analysis. Many courses are repeated each year. Courses with repeats add up to 141. The table here shows, there are only 27 out of 95 courses that does not have a repeat in a year.

Table 13 Repeat Course Frequency

No of Repeats	Sum of Repeat Courses	Unique Course Count
1	28	27
2	57	32
3	21	16
4	24	22
5	8	7
6	3	3
Total	141	95

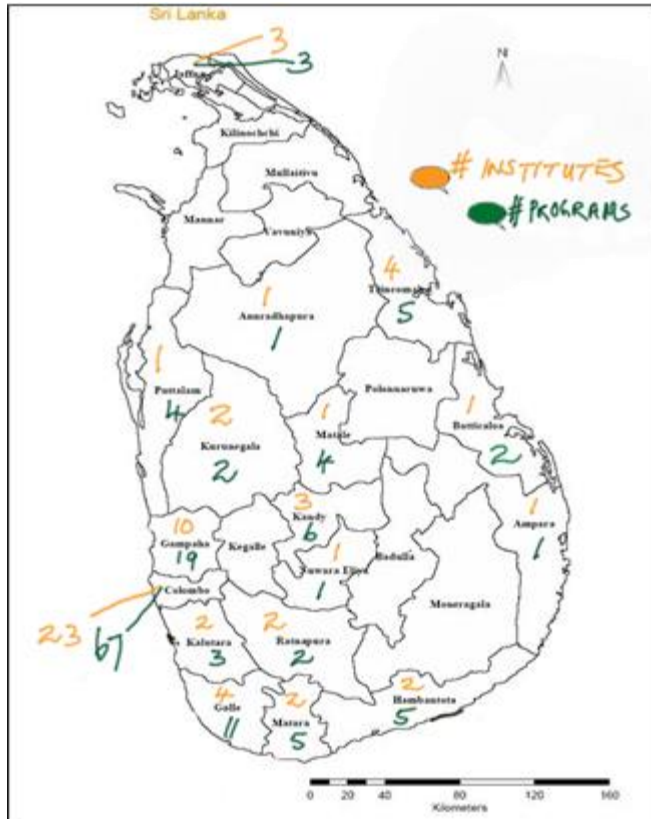
9.1 District-wise Training Institutions and Programs:

The District wise distribution of training becomes clear by examining the map overlaid with the numbers of Institutes and Programs running in a year. This map speaks for itself and it is possible to identify where training could be strengthened to create employment for youth.

Inset 1 Explanation of Course Frequency
 courses it is clear that there are 28 such courses as opposed to 27 unique names against one repeat. The reason is there are two courses with the same name under two different institutions. (Hambantota, Vocational Training Centre under the Social Services Department, Thelambuyaya, Agunakolapelessa conduct Certificate in Bakery and Pastry (Not NVQ) with a course duration of 1200 hours and in Colombo Public Assistant Department Training Centre, 79, Ven. Baddegama Wimalawansa Thero Mawatha, Maradana, conducts Certificate in Bakery and Pastry (Not NVQ) but with a duration of 1848 hours). Likewise courses that gets duplicated either by the name or different locations but each having the same number of repeats each year (column 1) are shown under the Sum of Repeat Courses column.

As expected Colombo and Gampaha scores the highest numbers but a large number of districts are

Figure 10 District-wise Training



having no access to Tourism and Hospitality sector training. When you consider that those districts really provide the eco touristic locations with many possible adventures and the amazing possibilities of investments, it is seriously an important and urgent need to establish such training in those districts. The youth from those unexploited areas are the best to have inside knowledge and experience to help in the tourism thrust.

9.2 Districts Requiring Training Facilities:

Namely Killinochchi, Mannar, Mullativu, Vavuniya, Polonnaruwa, Badulla, Moneragala, Kegalle, Nuwara Eliya, Anuradhapura, and Ampara are the districts that need facilities to develop training opportunities for youth. These are Districts rich in touristic resources and thus will yield a clear benefit.

9.3 NVQ Status of Hospitality Training

The training programs are certified by the TVEC for the levels of competence. Sri Lanka has vocational skill levels ranging from NVQ Level 1 to Level 7 and even higher. The QCF (Qualification Credit Framework) connects up the Vocational Training with the national system where NVQ Level 7 equates an undergraduate level degree. For our purpose these seven levels would suffice. Hospitality and Tourism programs registered with TVEC have got only two levels of certification. These are NVQ Level 4, Level 3 and the majority are non NVQ programs.

9.4 Training Programs Conducted and Their Status

Table 14 Summary of Program Status and Capacity

Count of Course Name	Sum of Courses Per Annum	Sum of Student Per Batch	Sum of Annual Training Capacity	Sum of Student Present	
Not NVQ	118	305	3050	7574	1864
NVQ L3	11	26	220	520	147
NVQ L4	12	28	205	505	151
Grand Total	141	359	3475	8599	2162

The summary table here shows that there are 141 courses conduct 359 iterations per year. The annual capacity is for 8599 students but currently the data is not up to date for the present number of students. The vast majority of programs and non NVQ and as a result produces students who have no internationally recognized qualification. In particular, 85% of the programs are not certified and 88% of

capacity is for producing un certified students. This is a critical situation that requires immediate attention.

The status of each program conducted in Sri Lanka are given below.

Table 15 Training Programs and Status

Row Labels	Count of Course Name	Sum of Courses Per Annum	Sum of Student Per Batch	Sum of Annual Training Capacity	Sum of Student Present
Not NVQ	118	305	3050	7574	1864
Basic Certificate in Food & Beverage	1	2	25	50	5
Basic Certificate in Front Office Management	1	2	25	50	5
Basic Certificate in Hotel Housekeeping	1	5	20	100	0
Basic Certificate in Hotel management	1	2	6	12	25
Basic Certificate in Hotel Reception & Front Office Operation	1	3	20	60	0
Basic Certificate in International Cookery	2	10	50	250	39
Basic Certificate in International Cookery	1	4	15	60	0
Basic Certificate in Restaurant and Bar Service	1	4	25	100	17
Basic Certificate Pastry & Bakery	1	5	20	100	6
Certificate for Baker	3	7	95	215	46
Certificate for Cook	7	15	178	386	92
Certificate for Cook (Basic Vocational Skills)	1	2	10	20	10
Certificate for Mess Steward (Basic/ Advance)	1	1	40	40	10
Certificate for Room Attendant	3	8	95	250	15
Certificate for Steward	3	7	115	255	93

Certificate for Waiter / Steward	1	2	25	50	15
Certificate for Waiter/ Steward	1	2	20	40	23
Certificate in Bakery	1	1	15	15	9
Certificate in Bakery and Pastry	2	2	45	45	33
Certificate in Bakery Industry Level 11 and 111	1	2	30	60	32
Certificate in Bakery Products Technology (Skills Upgrading)	1	6	25	150	0
Certificate in Bread Making	1	3	6	18	0
Certificate in Cookery	1	2	20	40	20
Certificate in Cookery (Basic Vocational Skills)	2	10	30	150	32
Certificate in Food & Beverage	1	4	20	80	18
Certificate in Food & Beverage (Basic Vocational Skills)	2	8	30	120	12
Certificate in Food and Beverage	3	8	85	210	45
Certificate in Food and Beverage (Basic Vocational Skills)	1	1	15	15	20
Certificate in Food and Beverage Operation	1	2	25	50	22
Certificate in Food and Beverage Services	1	4	30	120	5
Certificate in Food Preparation and Culinary Arts	1	2	10	20	9
Certificate in Front Office	1	4	20	80	0
Certificate in Front Office & Reception	1	3	25	75	18
Certificate in Front Office Operation	1	2	15	30	8
Certificate in Front Office Operation (Basic Vocational Skills)	1	4	20	80	3
Certificate in Front Office Operation (Basic Vocational Skills)	1	1	15	15	20
Certificate in General Cookery	1	1	20	20	20
Certificate in General Cookery	1	1	15	15	14
Certificate in Hospitality Management	3	6	275	550	252
Certificate in Hotel House Keeping	1	4	15	60	15
Certificate in Hotel Housekeeping	2	6	40	120	21
Certificate in Hotel Management	3	10	165	620	104
Certificate in Hotel Operations	1	6	20	120	20
Certificate in House Keeping	3	8	80	190	35
Certificate in House Keeping	1	2	25	50	25
Certificate in House Keeping (Basic Vocational Skills)	1	1	15	15	20
Certificate in Housekeeping	1	4	20	80	0
Certificate in Housekeeping (Basic Vocational Skills)	1	4	15	60	6
Certificate in Housekeeping and Waiter	2	4	35	70	14
Certificate in International Cookery	5	17	101	355	69
Certificate in International Cookery	1	2	50	100	25
Certificate in International Cookery (Basic Vocational Skills)	1	4	24	96	12

Certificate in Pastry & Bakery (Basic Vocational Skills)	1	4	15	60	6
Certificate in Pastry, Bakery & Desserts (Basic Vocational Skills)	1	4	20	80	13
Certificate in Pastry Making	1	3	6	18	0
Certificate in Restaurant and Bar	1	4	15	60	15
Diploma in Baking	1	1	30	30	0
Diploma in Hospitality and Tourism Management	1	1	20	20	12
Diploma in Hotel Operations	1	2	20	40	54
Diploma in Hotel Operations and Catering	1	3	25	75	25
Diploma in Tourism and Travel Flight Service	1	3	25	75	5
Higher National Diploma in Engineering (Tourism and Hospitality Management)	1	1	14	14	45
Higher National Diploma in Tourism and Hospitality Management	1	1	50	50	0
National Diploma in Hospitality Management	1	1	30	30	27
Qualified Catering Rating (Cook / Steward)	1	5	25	125	25
Craft Level-Cookery	1	1	30	30	30
Craft Level-Restaurant and Bar Services	1	1	30	30	30
Advanced Level-Food & Beverage	1	2	30	60	0
Certificate Level-Food and Beverage	1	2	30	60	30
Intermediate Level-Food and Beverage	1	1	30	30	0
Certificate Level-Reception	1	1	30	30	30
Intermediate Level-Front Office	1	1	15	15	0
Advanced Level-Accommodation Operation	1	1	30	30	0
Certificate Level-House Keeping	1	1	30	30	16
Craft Level-House Keeping	1	1	30	30	30
Intermediate Level-House Keeping	1	2	15	30	0
3 Year Management Diploma-Specialized in Food and Beverage Operations	1	1	30	30	30
Advanced Level-Professional Cookery	1	1	30	30	0
Certificate Level-Professional Cookery	1	1	30	30	30
Intermediate Level-Professional Cookery	1	1	30	30	0
Certificate in Cookery-Basic	1	4	5	20	0
Basic Certificate in Pastry and Bakery	1	5	30	150	21
Basic Certificate in Restaurant & Bar Service	1	5	20	100	0
Certificate in Pastry and Bakery	1	2	20	40	11
Certificate in General Cookery (Basic Vocational Skills)	1	2	15	30	14
3 Year Management Diploma-Specialized in Accommodation Operations	1	1	20	20	0
Certificate in Restaurant and Bar Service	1	3	20	60	5
Basic Certificate in Cookery	1	2	25	50	1
NVQ L3	11	26	220	520	147

Certificate for Baker	2	4	65	130	15
Certificate for Cook	4	8	65	130	67
Certificate for General Cook	1	2	20	40	0
Certificate for House Keeper	1	3	15	45	15
Certificate for Receptionist	1	3	15	45	15
Certificate for Steward	1	2	15	30	15
Certificate in Pastry & Bakery	1	4	25	100	20
NVQ L4	12	28	205	505	151
Certificate for Baker	3	8	50	135	44
Certificate for Cook	4	8	60	140	59
Certificate for Food and Beverage	1	3	25	75	25
Certificate for Room Attendant	1	2	20	40	0
Certificate for Steward	1	2	20	40	0
Certificate for Waiter and Steward	1	3	15	45	10
Certificate Cook	1	2	15	30	13
Grand Total	141	359	3475	8599	2162

9.5 Tourism and Hospitality Training Capacity (Students)

Our aim is to understand the capacity for training with the present training institutions. The total capacity for training in hospitality related disciplines is 8,599 in a year if all course repeats are counted. This is distributed among 7,574 for non NVQ, 520 NVQ 3 and 505 NVQ 4 places. The total Sum of Students per Batch is 3,475, and several courses have up to 6 annual intakes. Currently the total Sum of Students under training are shown as 2,162, which should improve on receiving updated information. Under full capacity use there would be 3,050 students without NVQ certification in each batch while NVQ 3 has 220 and NVQ 4 has 205. (Same issue was referred to in section 9.4)

9.6 District-wise Training Capacities:

With course repetitions, Ampara: 120; Anuradhapura: 30; Batticaloa: 80; Colombo: 3,792; Galle: 555; Gampaha: 1,449; Hambantota: 180; Jaffna: 204; Kalutara: 82; Kandy: 305; Kurunegala: 560; Mathale: 400; Matara: 202; Nuwara Eliya: 120; Puttalam: 130; Ratnapura: 190; Trincomalee: 200; Grand Total: 8,599.

Inset 2 Count of Courses and NVQ Status

IDENTITY

There are 141 courses of which 118 are not NVQ certified, 11 are NVQ 3, and 12 are NVQ 4 that have annual repetitions ranging from 1 to 6.

OPPORTUNITY

The courses with repeats add up to 359 of which 305 are non NVQ, 26 are NVQ 3 and 28 are NVQ 4.

Inset 3 Threat to Hospitality Training Development

Non certified programs are a serious impediment in comparing the efficacy of programs to produce the expected high level of competence required from trained people engaged in the industry. This may also explain the reason for dissatisfaction of the hotel managers with trained people.

9.7 Course Repetition in Institutes:

There are 59 registered training institutes in Sri Lanka for hospitality and tourism related programs. Out of these 14 institutes have 1 repeat course per year, 32 institutes have 2 repeats, 11 institutes have 3 repeats, 12 institutes have 4 repeats, 3 institutes have 5

repeats and 3 institutes have 6 repeats. Therefore 61 institutes conduct repeat courses.

Table 16 NVQ Status and Repetitions of Courses

Count of Courses Per Annum	
Number of repetitions	Total
Not NVQ	118
1	27
2	43
3	14
4	23
5	8
6	3
NVQ L3	11
2	8
3	2
4	1
NVQ L4	12
1	1
2	6
3	5
Grand Total	141

There are 98 registered training courses with 141 replications around the country. Table below shows the number of courses having high repetitions in a year. Non NVQ has 3 courses that gets repeated six times in a year.

9.8 Particular Emphasis of Courses

There are 95 registered training course names. The same name is used by different institutes with different parameters such as training hours. This adds up to 141 replications totaling 359 year around repetitions.

One way to understand the core purpose of the course is to use relevant keywords to count the number of courses that contains the keyword.

One such analysis is given below.

Table 17 Keywords and Phrases in Courses

All Courses	Total	Non NVQ	NVQ Level 3	NVQ Level 4
Hospitality Management	4	4		
Hotel Management	2	2		
Management	10	10		
Tourism Management	1	1		
Accommodation	1	1		
House Keeping	7	7		

Housekeeping	6	6		
House Keeper	1		1	
Room Attendant	2	1		1
Bar	5	5		
Beverage	12	11		1
Catering	2	2		
Food	13	12		1
Food & Beverage	4	4		
Food and Beverage	8	7		1
Restaurant	3	3		
Steward	9	6	1	2
Waiter	5	4		1
Bakery	10	9	1	
Baker	14	11	2	1
Cook	24	20	2	2
Cookery	17	17		
Pastry	8	7	1	
Front Office	8	8		
Receptionist	1		1	
Reception	3	3		
Total	180	161	9	10

9.9 Courses Conducted by Name and their Count

A crisp analysis categorizing the programs into key areas of the hospitality sector has resulted in the following table

Table 18 Key Areas of Hospitality Training

Training Area	Count of Training Area	Sum of Courses Per Annum	Sum of Annual Training Capacity
Cookery/Cook/Baker	61	160	3,433
Food & Beverage	31	81	1,830
Housekeeping	22	56	1,200
Management/Operations	16	35	1,581
Front Office	10	24	480
Tourism and Travel	1	3	75
Grand Total	141	359	8,599

This distribution of courses shows on average Cookery/Cook/Baker taking 43%, Food & Beverage taking 22%, Housekeeping taking 15%, Management/Operations taking 13%, Front Office taking 6% and Tourism and Travel taking only 1% of the course resources.

10 TOP TRAINING INSTITUTES

The student capacity and the number of course provisions are criteria for selecting top training providers assuming they have sufficient space. Based on the capacity to provide a broad selection of training programs as indicated by their repeats, a list is worked out. Accordingly, the top providers among the training institutes are listed below.

Table 19 Top Providers from Repeat Course Provision

TOP PROVIDERS AMONG TRAINING INSTITUTES BASED ON REPEAT COURSE PROVISION	Sum of Annual Training Capacity	Sum of Repeat Courses per Annum					
		1	2	3	4	5	Tot
NAME OF INSTITUTE	860						
Asia Ceylon International Hotel School	555			3	4	30	37
Swiss Lanka Hotel School	515			6	12	5	23
Sri Lanka Institute of Tourism and Hotel Management	270	13	6				19
Colombo International Hotel School	316		2		16		18
Negombo International Hotel School	300				16		16
London College of Higher Studies (Pvt) Ltd.	91				16		16
Frills Baking, Cooking and Confectionaries Training Centre	180	1		9	4		14
Hotel School-Vocational Training Center	300		6	6			12
Win Stone School of Culinary Art	220			12			12
National Apprentice and Industrial Training Authority	165		4		8		12
Vocational Training Center	193		4	3	4		11
Sunray Hotel and Chefs Training Academy	3,965			6	4		10

These top players have Sum of Annual Training Capacity of 3,965 and it is 46% of the total. Therefore, if an expansion is considered these institutions also can be targeted.

ALTERNATIVELY

While the top players with courses run during a year are given above the top players conducting at least two different programs are as given below while the remaining providers run one each. They constitute 70% of the total capacity with 6,043 students per year. Therefore, these 24 institutes present a realistic option for expansion out of the 59 institutes running hospitality programs in Sri Lanka.

Inset 4 Who Does Major Training?

24 Institutions have 70% of the Training capacity in Sri Lanka for the Hospitality Industry

Table 20 Top Providers with Capacity to Run at least Two Programs

TOP RANKING INSTITUTES BASED ON CAPACITY FOR PROVIDING AT LEAST TWO DIFFERENT PROGRAMS	Count of Course Name	Sum of Courses Per Annum	Sum of Annual Training Capacity
Sri Lanka Institute of Tourism and Hotel Management	16	19	515
Asia Ceylon International Hotel School	8	37	860
Swiss Lanka Hotel School	6	23	555
Frills Baking, Cooking and Confectionaries Training Centre	5	14	91
Colombo International Hotel School	5	18	270
Hotel School-Vocational Training Center	5	12	180
Dutch Academy (Pvt) Ltd.	4	9	135
Negombo International Hotel School	4	16	316
Dailies Lanka International Hotel School	4	8	162
Vocational Training Centre	4	7	251
District Vocational Training Centre	4	8	130
London College of Higher Studies (Pvt) Ltd.	4	16	300
Vocational Training Center	4	11	165
Win Stone School of Culinary Art	4	12	300
National Youth Corp Training Centre	4	8	400
National Apprentice and Industrial Training Authority	4	12	220
Sunray Hotel and Chefs Training Academy	3	10	193
ISF Hotel School	3	6	130
Clarion Hospitality Institute (Pvt) Ltd	3	9	240
International Hotel School of Ceylon Ltd	3	6	120
London College of Higher Studies (Pvt) Ltd	3	6	300
Southern Lakma Hotel School and Beauty Hair Academy	2	4	40
Miani Technical Institute	2	4	80
Prima Ceylon Ltd	2	3	90

This list needs to be further understood for provision of NVQ certified courses and it is shown below.

Table 21 NVQ Status of Top Providers of Training

NON NVQ INSTITUTES AMONG TOP RANKING INSTITUTES BASED ON CAPACITY FOR PROVIDING AT LEAST TWO DIFFERENT PROGRAMS	Sum of Courses Per Annum	Sum of Annual Training Capacity	Count of Course Name
Sri Lanka Institute of Tourism and Hotel Management	19	515	16
Asia Ceylon International Hotel School	37	860	8
Colombo International Hotel School	18	270	5
Swiss Lanka Hotel School	19	455	5

Dailies Lanka International Hotel School	8	162	4
National Apprentice and Industrial Training Authority	12	220	4
London College of Higher Studies (Pvt) Ltd.	16	300	4
District Vocational Training Centre	8	130	4
Negombo International Hotel School	16	316	4
Dutch Academy (Pvt) Ltd.	9	135	4
Vocational Training Centre	7	251	4
Clarion Hospitality Institute (Pvt) Ltd	9	240	3
London College of Higher Studies (Pvt) Ltd	6	300	3
Sunray Hotel and Chefs Training Academy	10	193	3
ISF Hotel School	6	130	3
Frills Baking, Cooking and Confectionaries Training Centre	10	56	3
International Hotel School of Ceylon Ltd	6	120	3
National Youth Corp Training Centre	6	300	3
Southern Lakma Hotel School and Beauty Hair Academy	4	40	2
Prima Ceylon Ltd	3	90	2
NVQ LEVEL 3 INSTITUTES AMONG TOP RANKING INSTITUTES BASED ON CAPACITY FOR PROVIDING AT LEAST TWO DIFFERENT PROGRAMS			
Hotel School-Vocational Training Center	12	180	5
NVQ LEVEL 4 INSTITUTES TOP RANKING INSTITUTES BASED ON CAPACITY FOR PROVIDING AT LEAST TWO DIFFERENT PROGRAMS			
Win Stone School of Culinary Art	9	225	3
Vocational Training Center	5	75	2
Frills Baking, Cooking and Confectionaries Training Centre	4	35	2
Miani Technical Institute	4	80	2

12 FINDINGS

THE PURPOSE OF THIS REPORT WAS TO PROVIDE THE FOLLOWING FORECASTS

- a) To forecast tourist arrivals up to 2020
Please refer the table 1
- b) To estimate the likely additions of hotels and rooms up to 2018
Please refer the table 3
- c) To estimate the tourism industry staff requirements based on the additions of hotel infrastructure
Please refer the table 4
- d) To estimate the employment based on the forecast of tourist arrivals
Please refer the table 8 and for employment generation table 9.
- e) To identify the regulated training programs conducted by registered training institutes
Please refer table 15
- f) To identify the location and distribution of training programs
Please refer figure 10
- g) To identify the training providers who have the necessary capacity for expansion
Please refer table 20 and table 21
- h) To provide an action plan for short term actions
Please refer table 22

13 ACTION TO BE TAKEN TO MEET CHALLENGES IN 2016-2018

Table 22 Action Summary

SUMMARY OF ACTION PROGRAM (near future)	Dec 15	Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16
TRAINING							
Get consensus of institutions	Green			Yellow			Yellow
Identify programs from the list	Green	Yellow					
Modify and develop programs	Yellow	Yellow	Yellow				
Fit numbers from forecast to training		Green	Yellow	Yellow			Yellow
Invite applications		Yellow	Red	Yellow			Yellow
Finalize financial support scheme		Yellow	Red				
Do we have enough trainers?	Yellow	Red		Yellow			Yellow
If not enough, then identify and enroll	Yellow		Red		Yellow		
If necessary, train the trainers		Yellow	Yellow	Yellow			
Industry placement plan		Yellow	Red	Yellow		Yellow	
INFRASTRUCTURE							
Are there more hotels, rooms planned?		Yellow	Red				Yellow
What support – Banks, Land, Govt.		Yellow	Red				
MARKETING							
Strategy		Yellow	Red				
HOSPITALITY, TOURISM AND EVENTS							
Strategy	Yellow	Yellow	Red				

COLOUR KEY	
Yellow	Planned
Green	Actioned
Red	Backlog

14 ANNEXES

Table 23 Annual Training Capacity of Institutes by NVQ Levels

14.1 NVQ Status and Capacity of Training Institutes NVQ Level: NOT NVQ	(SEE BELOW FOR INSTITUTES WITH NVQ CERTIFIED COURSES)		
INSTITUTE	Sum of Courses Per Annum	Sum of Annual Training Capacity	Count of Course Name
Asia Ceylon International Hotel School	37	860	8
Sri Lanka Institute of Tourism and Hotel Management	19	515	16
Wayamba Development Authority	4	480	1
Swiss Lanka Hotel School	19	455	5
Pembroke International (Private) Ltd.	2	360	1
Negombo International Hotel School	16	316	4
London College of Higher Studies (Pvt) Ltd.	16	300	4
London College of Higher Studies (Pvt) Ltd	6	300	3
National Youth Corp Training Centre	6	300	3
Colombo International Hotel School	18	270	5
Vocational Training Centre	7	251	4
Clarion Hospitality Institute (Pvt) Ltd	9	240	3
National Apprentice and Industrial Training Authority	12	220	4
Sunray Hotel and Chefs Training Academy	10	193	3
Dailies Lanka International Hotel School	8	162	4
Cathy Rich Memorial Food Processing Center (Guarantee) Ltd.	6	150	1
Dutch Academy (Pvt) Ltd.	9	135	4
District Vocational Training Centre	8	130	4
ISF Hotel School	6	130	3
Mercantile Seamen Training Institute Ltd.	5	125	1
International Hotel School of Ceylon Ltd	6	120	3
Western Lanka Hotel School	4	120	1
Don Bosco Technical Institute	2	120	1
National Youth Services Council	4	120	1
Saumyamoorthi Thondaman Memorial Foundation	6	120	1
Prima Ceylon Ltd	3	90	2
Wayamba Technical College	2	80	1
American College of Higher Education	3	75	1
Win Stone School of Culinary Art	3	75	1
Vocational Training Center	4	60	1
Raffles Institute of Catering and Hotel Management (Pvt) Ltd	3	60	1
Frills Baking, Cooking and Confectionaries Training Centre	10	56	3

Advanced Technological Institute-Kandy	1	50	1
Larousse	3	42	1
Southern Lakma Hotel School and Beauty Hair Academy	4	40	2
Trade Training School	1	40	1
Apprenticeship Training Centre	2	40	1
National Vocational Training Institute	2	40	1
Somaratana Nahimi Vocational Training Centre	2	40	1
Sri Lanka Foundation Institute	2	40	1
Siri Jayanthi Maha Karuna Vocational Training Centre	2	30	1
Muslim Ladies Study Circle	2	30	1
Apprentice Training Centre	2	30	1
University College of Jaffna	1	30	1
Public Assistant Department Training Centre	1	30	1
International Hospitality Management Academy (Pvt) Ltd.	2	20	1
Pearl Hobby Craft	1	20	1
Management & Science Institute MSI (Private) Ltd.	1	20	1
The School for the Deaf	1	15	1
Shanaas Wonder for Needle and Home Economics	1	15	1
Advanced Technological Institute (ATI)	1	14	1
SUB Total	305	7,574	118
NVQ Level: NVQ L3			
Hotel School-Vocational Training Center	12	180	5
Swiss Lanka Hotel School	4	100	1
National Youth Corp Training Centre	2	100	1
Bodiraja Vocational Training Center	2	40	1
Seth Sevana	2	40	1
Sri Lanka NESEC Vocational Training Centre	2	30	1
Vocational Training Center	2	30	1
SUB Total	26	520	11
NVQ Level NVQ L4			
Win Stone School of Culinary Art	9	225	3
Miani Technical Institute	4	80	2
Vocational Training Center	5	75	2
Frills Baking, Cooking and Confectionaries Training Centre	4	35	2
Lakviru Sevana Vocational Training Centre	2	30	1
Don Bosco Vocational Training Centre	2	30	1
Vocational Training Centre (Hotel School)	2	30	1
Sub Total	28	505	12

14.2 Number of Resource Persons in Training Institutions and Count of Courses

Table 24 Availability of Resource Persons at Institutes

Row Labels	COUNT OF COURSES
ONE RESOURCE PERSON	34
Vocational Training Centre	4
Advanced Technological Institute (ATI)	1
Advanced Technological Institute-Kandy	1
American College of Higher Education	1
Bodiraja Vocational Training Center	1
Cathy Rich Memorial Food Processing Center (Guarantee) Ltd.	1
Don Bosco Technical Institute	1
Don Bosco Vocational Training Centre	1
Frills Baking, Cooking and Confectionaries Training Centre	1
International Hospitality Management Academy (Pvt) Ltd.	1
Lakviru Sevena Vocational Training Centre	1
Larousse	1
Mercantile Seamen Training Institute Ltd.	1
Muslim Ladies Study Circle	1
National Vocational Training Institute	1
National Youth Services Council	1
Pearl Hobby Craft	1
Pembrooke International (Private) Ltd.	1
Public Assistant Department Training Centre	1
Raffles Institute of Catering and Hotel Management (Pvt) Ltd	1
Saamyamoorthi Thondaman Memorial Foundation	1
Seth Sevana	1
Shanaas Wonder for Needle and Home Economics	1
Siri Jayanthi Maha Karuna Vocational Training Centre	1
Somarataka Nahimi Vocational Training Centre	1
Sri Lanka NESEC Vocational Training Centre	1
The School for the Deaf	1
University College of Jaffna	1
Vocational Training Center	1
Vocational Training Centre (Hotel School)	1
Western Lanka Hotel School	1
TWO RESOURCE PERSONS	8
National Apprentice and Industrial Training Authority	2

Apprenticeship Training Centre	1
Miani Technical Institute	1
Southern Lakma Hotel School and Beauty Hair Academy	1
Sri Lanka Foundation Institute	1
Sunray Hotel and Chefs Training Academy	1
Wayamba Technical College	1
THREE RESOURCE PERSONS	7
Clarion Hospitality Institute (Pvt) Ltd	1
Dailies Lanka International Hotel School	1
ISF Hotel School	1
Management & Science Institute MSI (Private) Ltd.	1
Negombo International Hotel School	1
Vocational Training Center	1
Win Stone School of Culinary Art	1
FOUR RESOURCE PERSONS	6
Asia Ceylon International Hotel School	2
Colombo International Hotel School	1
District Vocational Training Centre	1
Dutch Academy (Pvt) Ltd.	1
National Youth Corp Training Centre	1
FIVE RESOURCE PERSONS	3
Hotel School - Vocational Training Center	1
London College of Higher Studies (Pvt) Ltd	1
Swiss Lanka Hotel School	1
SIX RESOURCE PERSONS	1
London College of Higher Studies (Pvt) Ltd.	1
SEVEN RESOURCE PERSONS	2
International Hotel School of Ceylon Ltd	1
Prima Ceylon Ltd	1
NINE RESOURCE PERSONS	1
Wayamba Development Authority	1
TWENTYFIVE RESOURCE PERSONS	1
Sri Lanka Institute of Tourism and Hotel Management	1
CENTER CLOSED	
Hotel School - Vocational Training Center	1
CENTERS NOT REPORTING RESOURCE CAPACITY	77
Sunray Hotel and Chefs Training Academy	15
Clarion Hospitality Institute (Pvt) Ltd	6
Trade Training School	5
Dailies Lanka International Hotel School	4
Hotel School - Vocational Training Center	4

District Vocational Training Centre	3
Dutch Academy (Pvt) Ltd.	3
Frills Baking, Cooking and Confectionaries Training Centre	3
International Hotel School of Ceylon Ltd	3
Miani Technical Institute	3
Negombo International Hotel School	3
Prima Ceylon Ltd	3
Colombo International Hotel School	2
ISF Hotel School	2
London College of Higher Studies (Pvt) Ltd	2
London College of Higher Studies (Pvt) Ltd.	2
National Youth Corp Training Centre	2
Swiss Lanka Hotel School	2
Apprentice Training Centre	1
Asia Ceylon International Hotel School	1
National Apprentice and Industrial Training Authority	1
Southern Lakma Hotel School and Beauty Hair Academy	1
Sri Lanka Institute of Tourism and Hotel Management	1
Vocational Training Center	1
Win Stone School of Culinary Art	1

14.3 Average Floor Area of Training Institutions

Table 25 Floor Area (sq. ft.) of Hospitality Training Institutes

AVERAGE OF TOTAL FLOOR AREA	SQ FT
Institute	Total
Trade Training School	116,358
National Youth Corp Training Centre	83,627
Sri Lanka Institute of Tourism and Hotel Management	45,164
Sri Lanka Foundation Institute	30,000
Advanced Technological Institute-Kandy	28,185
International Hospitality Management Academy (Pvt) Ltd.	26,858
University College of Jaffna	20,100
Saumyamoorthi Thondaman Memorial Foundation	19,413
Advanced Technological Institute (ATI)	18,063
National Vocational Training Institute	16,920
Don Bosco Technical Institute	14,695
Miani Technical Institute	13,361
Don Bosco Vocational Training Centre	12,437
Hotel School - Vocational Training Center	12,000

Wayamba Technical College	10,257
American College of Higher Education	10,150
Management & Science Institute MSI (Private) Ltd.	9,990
Win Stone School of Culinary Art	8,500
Vocational Training Centre	8,467
Sri Lanka NESEC Vocational Training Centre	8,327
District Vocational Training Centre	7,834
Bodiraja Vocational Training Center	7,280
Clarion Hospitality Institute (Pvt) Ltd	5,750
Mercantile Seamen Training Institute Ltd.	5,180
Muslim Ladies Study Circle	4,705
Seth Sevana	4,605
Prima Ceylon Ltd	4,200
International Hotel School of Ceylon Ltd	3,660
Public Assistant Department Training Centre	3,646
Raffles Institute of Catering and Hotel Management (Pvt) Ltd	3,480
Cathy Rich Memorial Food Processing Center (Guarantee) Ltd.	3,454
Wayamba Development Authority	3,200
Lakviru Sevana Vocational Training Centre	2,824
Swiss Lanka Hotel School	2,747
National Apprentice and Industrial Training Authority	2,735
Somaratana Nahimi Vocational Training Centre	2,554
ISF Hotel School	2,288
National Youth Services Council	2,220
London College of Higher Studies (Pvt) Ltd	1,900
The School for the Deaf	1,881
Pembrooke International (Private) Ltd.	1,787
Frills Baking, Cooking and Confectionaries Training Centre	1,724
Asia Ceylon International Hotel School	1,628
Negombo International Hotel School	1,421
Vocational Training Center	1,300
Colombo International Hotel School	1,258
Western Lanka Hotel School	1,110
Sunray Hotel and Chefs Training Academy	1,055
Southern Lakma Hotel School and Beauty Hair Academy	983
Vocational Training Centre (Hotel School)	980
Larousse	935
Shanaas Wonder for Needle and Home Economics	814
Apprenticeship Training Centre	660
Dutch Academy (Pvt) Ltd.	614
Pearl Hobby Craft	598

Dailies Lanka International Hotel School	577
Apprentice Training Centre	0
London College of Higher Studies (Pvt) Ltd.	0
Siri Jayanthi Maha Karuna Vocational Training Centre	0
AVERAGE SPACE AT INSTITUTES FOR HOSPITALITY TRAINING	12,497

14.4 Institutes' Capacity for Students and Count of Courses

Table 26 Institutes Capacity by Sum of Annual Students

Institute	Data		
	Sum of Students Per Batch	Sum of Annual Students	Sum of Courses Per Annum
Asia Ceylon International Hotel School	185	860	37
Swiss Lanka Hotel School	145	555	23
Sri Lanka Institute of Tourism and Hotel Management	440	515	19
Wayamba Development Authority	120	480	4
National Youth Corp Training Centre	200	400	8
Pembroke International (Private) Ltd.	180	360	2
Negombo International Hotel School	79	316	16
London College of Higher Studies (Pvt) Ltd	150	300	6
Win Stone School of Culinary Art	100	300	12
London College of Higher Studies (Pvt) Ltd.	75	300	16
Colombo International Hotel School	75	270	18
Vocational Training Centre	133	251	7
Clarion Hospitality Institute (Pvt) Ltd	80	240	9
National Apprentice and Industrial Training Authority	80	220	12
Sunray Hotel and Chefs Training Academy	57	193	10
Hotel School - Vocational Training Center	75	180	12
Vocational Training Center	60	165	11
Dailies Lanka International Hotel School	81	162	8
Cathy Rich Memorial Food Processing Center (Guarantee) Ltd.	25	150	6
Dutch Academy (Pvt) Ltd.	60	135	9
ISF Hotel School	65	130	6
District Vocational Training Centre	65	130	8
Mercantile Seamen Training Institute Ltd.	25	125	5
Don Bosco Technical Institute	60	120	2
National Youth Services Council	30	120	4

Western Lanka Hotel School	30	120	4
International Hotel School of Ceylon Ltd	60	120	6
Saumyamoorthi Thondaman Memorial Foundation	20	120	6
Frills Baking, Cooking and Confectionaries Training Centre	32	91	14
Prima Ceylon Ltd	60	90	3
Wayamba Technical College	40	80	2
Miani Technical Institute	40	80	4
American College of Higher Education	25	75	3
Raffles Institute of Catering and Hotel Management (Pvt) Ltd	20	60	3
Advanced Technological Institute-Kandy	50	50	1
Larousse	14	42	3
Trade Training School	40	40	1
Apprenticeship Training Centre	20	40	2
Bodiraja Vocational Training Center	20	40	2
National Vocational Training Institute	20	40	2
Seth Sevana	20	40	2
Somaratana Nahimi Vocational Training Centre	20	40	2
Sri Lanka Foundation Institute	20	40	2
Southern Lakma Hotel School and Beauty Hair Academy	20	40	4
Public Assistant Department Training Centre	30	30	1
University College of Jaffna	30	30	1
Apprentice Training Centre	15	30	2
Don Bosco Vocational Training Centre	15	30	2
Lakviru Sevena Vocational Training Centre	15	30	2
Muslim Ladies Study Circle	15	30	2
Siri Jayanthi Maha Karuna Vocational Training Centre	15	30	2
Sri Lanka NESEC Vocational Training Centre	15	30	2
Vocational Training Centre (Hotel School)	15	30	2
Management & Science Institute MSI (Private) Ltd.	20	20	1
Pearl Hobby Craft	20	20	1
International Hospitality Management Academy (Pvt) Ltd.	10	20	2
Shanaas Wonder for Needle and Home Economics	15	15	1
The School for the Deaf	15	15	1
Advanced Technological Institute (ATI)	14	14	1
Grand Total	3,475	8,599	359

15 VOCATIONAL TRAINING AUTHORITY (VTA) COURSES (Nov 2015)

VTA has provided their training courses in Tourism and Hospitality related programs. The analysis is given below.

15.1 Count of Course Name

The following table will help to understand the NVQ level of Full time and Part time courses.

Table 27 VTA Course Names Count with NVQ Status

Count of Course Name			
	NVQ	NON NVQ	Grand Total
Fulltime	60	4	64
NVQ 4	20		20
National Certificate – Baker	6		6
National Certificate – Cook	8		8
National Certificate - Waiter / Steward	6		6
NVQ 3	40		40
National Certificate – Baker	9		9
National Certificate – Cook	21		21
National Certificate - Fruit & Vegetable Processer	2		2
National Certificate - Room Attendant	5		5
National Certificate - Waiter / Steward	3		3
NON NVQ		4	4
Introduction - Hotel and Tourism		2	2
National Certificate – Cook		2	2
Part-time		2	2
NON NVQ		2	2
Baker (Part Time)		2	2
Grand Total	60	6	66

15.2 Count of Accredited Level by Districts of VTA Courses

Table 28 Accredited Level of VTA Courses by Districts

	NON NVQ	NVQ 3	NVQ 4	Grand Total
Colombo	4	4	4	12
Galle		3	3	6
Gampaha		4	1	5
Kalutara		5		5
Mathale		4	1	5
Hambantota		1	3	4
Kandy		2	2	4
Anuradhapura		3		3

Nuwara Eliya		1	2	3
Puttalam		1	2	3 continued
Ratnapura		3		3 continuations
Ampara		2		2
Badulla		2		2
Matara		1	1	2
Moneragala	1	1		2
Jaffna	1			1
Kegalle			1	1
Kurunegala		1		1
Polonnaruwa		1		1
Trincomalee		1		1
Grand Total	6	40	20	66

15.3 Intake of Full Time or Part Time Students

Table 29 Intake of Part Time or Full Time Students at VTA

	Sum of Total Intake	Sum of Male Intake	Sum of Female Intake
Full Time	1,843	1,655	188
NVQ4	638	602	36
NVQ3	1,074	950	124
NON NVQ	131	103	28
Part Time	30	20	10
NON NVQ	30	20	10
Grand Total	1,873	1,675	198

There are NVQ4 level 638 and NVQ3 level 1,074 students. Non NVQ students 131 will have to be groomed to NVQ standards while Non NVQ courses running part time also will have to be brought up to NVQ level.

15.4 VTA Intake in Districts and Gender

Table 30 Intake in Districts and Gender at VTA

	Sum of Total Intake	Sum of Male Intake	Sum of Female Intake
Colombo	280	256	24
Galle	205	174	31
Gampaha	179	166	13
Kandy	155	149	6
Kalutara	141	102	39
Mathale	132	122	10

Hambantota	116	112	4
Jaffna	73	50	23
Matara	65	64	1
Puttalam	65	63	2
Kegalle	60	58	2
Badulla	58	53	5
Moneragala	55	47	8
Ratnapura	53	42	11
Nuwara Eliya	52	44	8
Anuradhapura	48	47	1
Kurunegala	41	41	0
Ampara	40	39	1
Polonnaruwa	38	33	5
Trincomalee	17	13	4
Grand Total	1,873	1,675	198

Intake of females in the tourism hospitality related programs in every district is way below the male intake numbers. No females are studying in Kurunegala while only one female student has enrolled in Anuradhapura and Ampara.

THE TWO WORKING COMMITTEES			
Committee for Infrastructure Audit in Tourism and Hospitality Industry in Sri Lanka			
No	Name	Designation	Institution
1	Mr. Sunil Dissanayake (Leader)	Director/ CEO	BMICH
2	Mrs. Ishara Naufal	Head of HR	Keels Hotel and Mgt.
3	Mr. Chandana Vidanapatana	Asst. Director	VTA
4	Mr. Sanjiva Wijeyasinghe	Director HR	Serendib Group
5	Dr. D.A.C. Suranga Silva	Senior Lecturer	University of Colombo
6	Mr. Dhaitiya Krawage	Executive Chef	Taj Samudra Hotel.
7	Ms. Chathuska Seniviratne	AGM HR	Aitken Spence
8	Mr. K.A. Lalithadheera	Director	NHRDC
9	Ms. Amali Rathnayake	Research Officer	NHRDC
10	Mr. Yohan Stephen	General Manager HR	Eskimo Fashion Knitwear
11	Mr. Ranjan Amarasinghe	Chairman – ATPA:	Director of Prima Hotel School
12	Dr. Chandra Embuldeniya	Former Chairman	TVEC
Committee for Skills and Jobs Audit in Tourism and Hospitality Industry in Sri Lanka			
No	Name	Designation	Institution
1	Mr. Srilal Mithapala (Chairman)	Past President	SLTHA
2	Mr. Jayantissa Kehelpannala	Sector Head, Resort Hotels	JKH Group
4	Mr. Chamin Wickramasinghe	Director / CEO	Malu Malu Resort and Spa
5	Mr. Dhaitiya Krawage	Executive Chef	Taj
6	Ms. Chaushla Senevirathne	AGM HR	Aitken Spence Hotel Management
7	Ms. Viranthi Cooray	Senior Lecturer	University of Colombo
8	Ms. Kawshi Amarasinghe	Head of Research	Tourism Sector, Vallibel
9	Mr. Deshan Devasagayam	HR Manager	Shangri-la Hotels Lanka Pvt Ltd.
10	Ms. Kanchana Nanayakkara	Head of HR:	Jetwing Hotel
11	Rohan Pandithakorralage	Director- CHRO	Aitken Spence
	Mr. Mahdi Serrour	General Manager	Shangri -La
	Mrs. S. Ruwani Weerasekera	LTC Holding	