

Wildlife & Safari Industry in Sri Lanka

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ABSTRACT

As a blooming industry in Sri Lanka, Tourism and Hospitality plays a major role while providing significant contribution to the society. This study has made a humble attempt to emphasize Safari and Wild life in Sri Lanka and how to uplift this industry while preserving both wildlife & environment of Sri Lanka with the recommendation from government authorities, Travel companies and people who are directly and indirectly beneficial. Hence, the study able to gain explicit view regarding the safari activities, upcoming events and how it impacts on the total tourism industry and uniqueness of Sri Lankan Safari experience that requires future developments to become world's best travel destination. I express my heartfelt gratitude to officers of the Department of Wildlife Conservation, Yala National Park in Sri Lanka and especially to the officers of Travel companies who are engaging in Safari Activities and all the other staff members of there for giving an opportunity to carry out this study.

KEYWORDS: *Wildlife, Tourism, Safari Industry*

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1. Tourism Industry of Sri Lanka

Sri Lanka is a priceless gift of Mother Nature and it is well known as pearl of the Indian Ocean and for some other countries it is a paradise on the planet earth. Since gaining independence from the British in 1948, Sri Lanka has continued to attract foreign investors and tourists to the island. Sri Lanka is an island which having different environmental conditions like beaches, hill and forests and also anyone can travel to those places within a short period of time. "Sri Lanka's tourist attractions show a regional breakdown the south coast for its beaches, the central hills for its scenery and cool climate, the north central area for historical and cultural heritage, and the western areas for more urban landscapes. Natural attractions such as wildlife parks or forest systems are also a part of Sri Lanka's tourism attractions and offer a rich diversity across the country. This diversity has allowed tourism opportunities to spread to different parts of the island, encouraging local economic development and opportunities for people to diversify their income sources" (Fernando. K., & Meedeniya. A., 2010).

According to the statistics of Central Bank Report 2012, now Tourism is the fifth highest income earning sector in Sri Lanka contributing to both development of the country and to provide employment opportunities. "Tourism is a growing sector that can play an important role, not just in increasing gross domestic product (GDP), but also in reducing poverty. It can offer income and employment through labor- intensive jobs and small-scale business opportunities while also reading opportunities to area that are not always economically dynamic, such as remote locations with esthetic or cultural value" (Yamakawa, R., 2007). Sri Lanka's Tourism

Development Authority supports to promote sustainable development of tourism as a key sector of the economy for the economic and social well-being of the people with the excellent positioning statement for Sri Lanka Tourism was developed as Asia's Most Diverse Compact and Authentic Island.

2. Wildlife Safari as a cluster of Tourism Industry

Sri Lanka has a growing tourism industry including sub clusters like cultural heritage, scenic beauty, botanical gardens, zoological gardens, museums, adventure and Wildlife tourism. Safari is a component of a tourism experience or product that is based on wildlife. Sri Lanka has a long-standing reputation as a popular "sun, sand, and sea holiday destination. But Sri Lanka is not a destination which offers just sand and beaches. Sri Lanka is rich in bio diversity and Sri Lanka is well-known for its natural beauty among tourists and travel journalists. Sri Lanka is one of top 25 bio diversity hot spots in the world" (Sri Lanka Tourism Development Authority, 2015).

"As a country with high rate of endemism it has many faunal groups including birds, mammals, reptiles and amphibians which you cannot find anywhere in the world. It is world renowned as one of the best places to watch elephants and leopards for nature enthusiastic and photographers. Sri Lanka has 113 species of mammals (16 species endemic, 41 of which are threatened), 496 species of bird (27 species endemic), 245 butterfly species (23 species endemic), 107 fish species (44 species endemic). Sri Lanka is having a rich biodiversity which compared to other Asian countries as an example largest gathering of Asian elephants (around 400 elephants) can see only in Sri

Lanka as well as Blue whales off the coast of Sri Lanka is make noises like “songs” which have not been seen in any other population in the world.” (Sri Lanka Tourism Development Authority, 2015)

1. Definition for Safari

“A Component of a tourism experience or product that is based on wildlife, which include trip to see, observe or photograph wild animals (mammals, birds, whales) in their own environment or in their natural habitat area”.

2. Objectives of the Research

Tourism plays an important role as one of the core source of Foreign Exchange Earners in the overall economy of Sri Lanka and the analysis of the tourism rank in the National Economy reveals that tourism was in the 5 position as one of the largest earners of Foreign Exchange in 2012 and also the employment generation due to the tourism industry has increased marginally. So I have decided to select the Tourism industry as a developing sector and also Wildlife safaris as the sub cluster to conduct the research procedures because wildlife is the most important one to attract lot of foreign researchers as well as photographers to our country. Followings are the major objectives of the research.

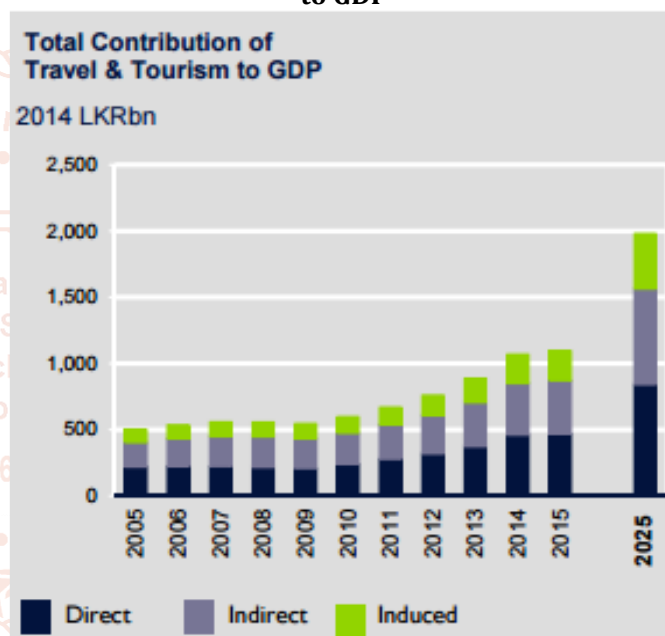
- To observe how safari industry impact on the Tourism Industry and uplift the economic and environmental aspects of Sri Lanka.
- To identify the mass contribution of the companies those are currently engaging in safari activities.
- To identify what facilities have to be further developed and what are the technological advances of this sector.
- To observe what are the well-known places/parks demanded by the visitors and packages they are willing to have.
- To know the importance of visiting Sri Lanka comparing to other countries by interacting with the Foreigners.
- To go through and identify how far Sri Lanka Tourism Authority strives to preserve the environment while encouraging the tourism industry around National Parks.
- To analyze the role of wildlife and safari activities in Tourism Industry and its implication comparing to

other sectors (visiting to see for historic and cultural places) in this same industry.

3. Significance of the selected Cluster

Tourism is a fast growing industry and it has emerged as an economically important industry after the civil war. During post war period tourists arrivals increased. In Sri Lanka, according to the Annual Statistical Report 2014 published by Sri Lanka Tourism Development Authority, service sector is the emerging sector which gives highest contribution to GDP and growth rate is higher with compared to agriculture and industry sectors. Tourism industry comes under the service sector in GDP calculations. Thus it also contributes to emerging service sector thereby growth of GDP. When we consider the other economic impacts of tourism, it directly and indirectly contributes to employment. Total employment from tourism has been increased over past few years. Thus tourism is an industry which has potential to grow.

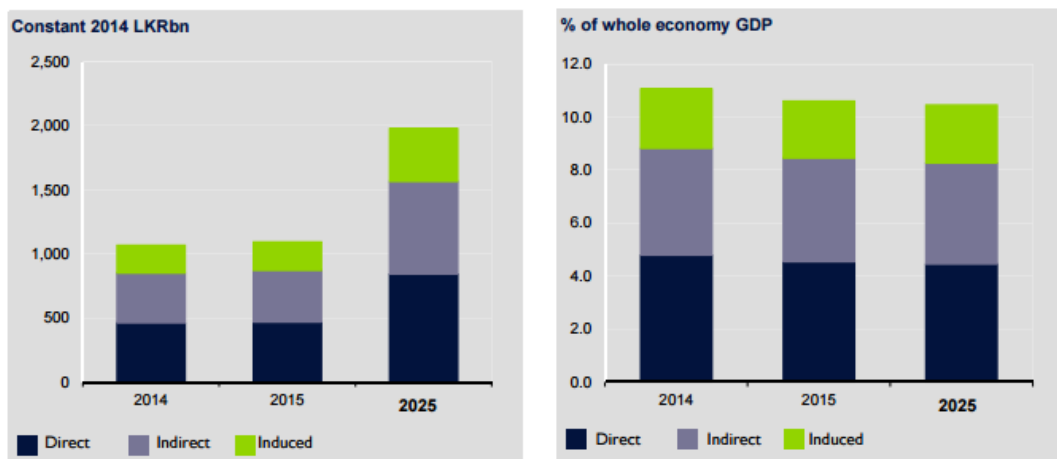
Figure 2.3.1 Total contribution of Travel & Tourism to GDP



(Source: sltda.lk, 2015)

Figure 2.3.2 The contribution of Travel & Tourism to the Sri Lanka Economy

SRI LANKA: TOTAL CONTRIBUTION OF TRAVEL & TOURISM TO GDP



¹ All values are in constant 2014 prices & exchange rates

(Source: sltda.lk, 2015)

The selected cluster of research is wild life based tourism under the tourism industry. Because of Sri Lanka's important placement in Indian Ocean and richness in natural endowment, Sri Lanka is renowned as a wonder of nature. Sri Lanka has much of environmental opportunities to promote eco-tourism. Sri Lanka has a long-standing reputation as a popular “sun, sand, and sea” holiday destination. But Sri Lanka is not a destination which offers just sand and beaches. Sri Lanka is rich in bio diversity and Sri Lanka is well-known for its natural beauty among tourists and travel journalists. Sri Lanka is one of top 25 bio diversity hot spots in the world. (Sri Lanka Tourism Development Authority, 2015)

All these facts leads to a conclusion that Sri Lanka needs to be promoted as a holiday destination which offer nature based tourism and also Sri Lankan tourism promotions more emphasize on the fact that Sri Lanka is a natural wonder. Thus focus is on eco-tourism. Because of this trend, wild life based tourism or safari tourism is in a significant position to reap the benefits of growing tourism industry.

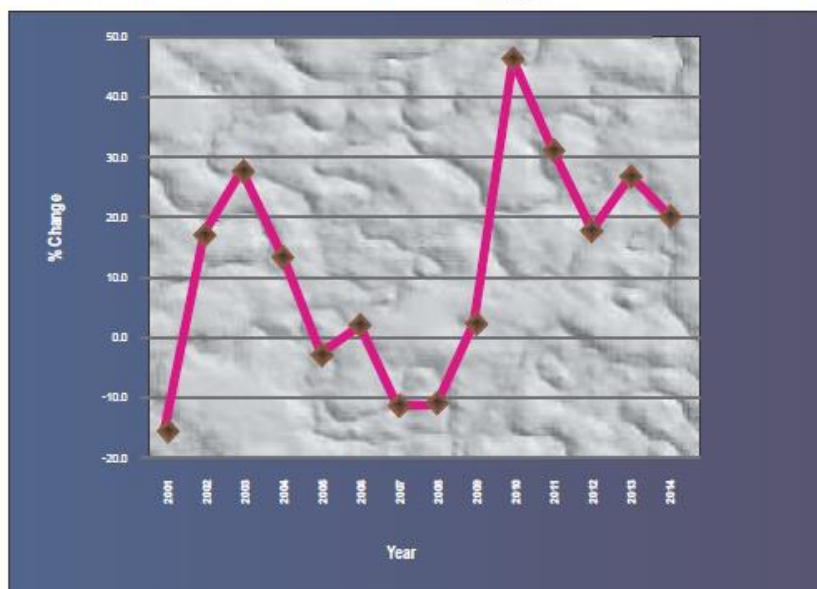
When it comes to nature based tourism, it heavily depends on the health of the natural resources on which tourism is built. Thus Sri Lanka need to focus on sustainable wild life based tourism.

4. Market Trend

Usually hearing the word safari it just feels like going through the jungle or forest by the safari jeep. But now a day's safari is more border concept than the past. Day by day it growing like other main sectors in the tourism industry. Most of the people are now tend to spend their time with natural environment or watching animals because it will help them to relax their mind by getting rid of their busier life styles. There are Safari proving companies and hotels which are providing required facilities for Safaris and their safari packages are different from one to another because of the competition. One of a special facility provided by the safari camp organizing companies is that they give different safari packages which travelers can select most suitable safari package for them. As example travelers can plan their safari within the one day two day more than that while they experiencing real wild life. Most of the safari camping sites are located in national parks like Yala, Udawalawe, Wilpattu, Sinharaja Rain Forest and Horton Plains. If the traveler wants to see **Leopards, Elephants, Sloth Bears Crocodiles and Birds they must visit to the Yala or Udawalawe but if they want to see Flora and Reptiles they must select Sinharaja Rain Forest as their safari camp site. Because of that** before arrive the place travelers can select which place they going to watch and which animals are there. That facility is provided by the safari camp organizing companies through their web sites. Travelers can do their reservation for the safari camp through the internet. It helps travelers to be comfortable within their journey. Those are the new market trends which identify through the background investigation under the topic market trends in tourism industry based on the wild life safari. According to the statistics provided by Sri Lankan Tourism Development Authority (Appendix 1), numbers of foreign visitors visiting to the wild life parks are growing annually. (Annual Statistical Report of Sri Lanka Tourism, 2014)

Figure 2.4.1 Tourists arrivals growth change

Tourist Arrivals Growth Change - 2001 to 2014



(Source: sltda.lk, 2015)

Safari campaigns organizing companies mainly provide two type of safari packages based on the requirements of the travelers. Those two types are standard safari camping and the luxury safari camping. Depending on those two categories Safari Providing Hotels and Companies arrange their meals and other accommodations. Accommodations for Safaris and safari camps are increasing using new technologies in order to avoid bad impacts to the nature as well as to provide best services to the visitors. Eco Tourism is a newly emerged and popular sector in Sri Lanka which includes all aspects related to wildlife and nature based tourism like site seen, natural trail, walking, hiking, animal watching and photographing.

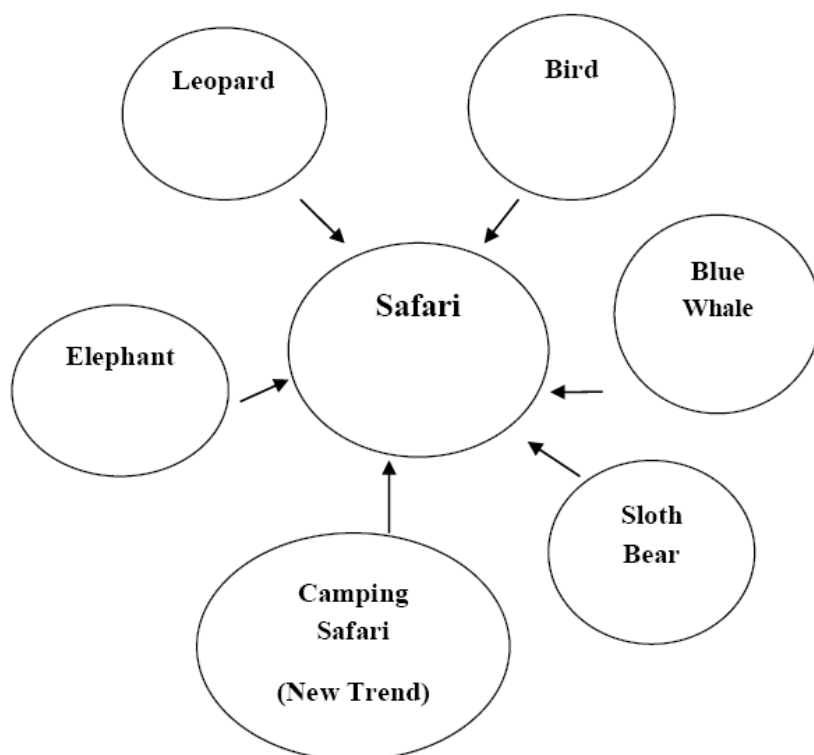
.5. Details of the National Parks in Sri Lanka**Figure 2.5.1 National Parks in Sri Lanka**Source: ceylonwildsafaris.com, 2015)**Table 2.5.1 Details of Sri Lankan National parks in brief**

Park Name	Location	Park office	Importance
Yala National Park	South eastern region(Monaragala District and Hambantota District)	Palatupana	Having one of the highest densities of leopards in the world.
Wilpattu National Park	Northwest coast-Anuradhapura District	Hunuwilagama	Oldest and most important of protected areas in Sri Lanka
Udawalawe National Park	Sabaragamuwa and Uva Provinces -	UdaWalawe reservoir	To see elephants, outstanding scenic beauty and wealth of faunal species, particularly mammals and birds
Wasgamuwa National Park	North Central and Central provinces – Kandy, Polonnaruwa and Matale Districts		large rivers, have lowest human disturbance areas
Minneriya National Park	Polonnaruwa District, and North Central Province	Ambagaswewa	this National Park is in an uninhabited area of the country's most diverse natural system
Maduru oya National Park	Polonnaruwa – Batticaloa road and Mahiyangana – Padiyatalawa road		The park area provides refuge for wildlife, particularly elephants
Gal Oya National Park	East of the central hills - Badulla district Ampara district		Have most scenically beautiful Landscapes
Horton Plains National Park	south of NuwaraEliya in the central High lands of central Province	Horton Plains	most of the habitats and endemic plants and animals representatives of the country's wet and montane zones
Bundala National Park	the southeastern coast in southern Province	Bundala	the most important wetlandfor birds in srilanka outside the Northern Province, being important for elephant and a variety of threatened reptiles
Lahugala Kithulana National park	lies in the Basin of the HedaOya	Lahugala	one of Sri Lanka's smallest but most valuable conservation areas for elephants and endemic birds.
Lunugamwehera National Park	Hambanthta District, Moneragala district and Kataragama	Lunugamvehera	the immediate catchment of Lunugamvehera reservoir, serves as a link between the yala Protected Area Complex on its east and Udawalawe National park to its west

• Classification of Sri Lankan Safari

Sri Lanka is a tropical country with diverse environmental conditions and diverse range of wildlife and a popular destination for researchers and photographers. We can categorize Sri Lankan safaris into five major clusters like Leopard Safaris, Elephant Safaris, Bird Safaris, Sloth bear Safaris and Whale watching Safaris based on the safari packages offered by companies, specialty of visiting to a specific wildlife park and these species are the mostly protected wildlife species recognized by the Department of Wildlife conservation of Sri Lanka.

Figure 3.1 Illustration of main classification of Sri Lanka Safari



.1. Leopard Safaris

According to the Statistical Report 2014 of Sri Lanka Tourism Development Authority Yala National Park has the highest tourist arrivals and it is a famous location for leopard safaris in Sri Lanka and then Wilpattu National park has the second place for Leopard Safaris. The Sri Lankan Leopard is a recognized subspecies of the Indian Leopard and is the largest leopard found in Asia. It is also endemic to the island. Around 200,000 foreign tourists (Annex 6) from various countries visit the island annually and go on a leopard safari, sometimes spending many days inside the national parks in order to increase their chances of a sighting. According to the research publications of Department of wildlife conservation, the leopard population density at Yala is as high as one leopard per square kilometer in Block 1, making it the highest in the world. It is estimated that there are between 300-350 leopards at Yala National Park.



.2. Elephant Safaris

According to the research publications of the Department of wildlife conservation regarding the seven mostly protected species in Sri Lanka, Minneriya National Park has the largest gathering of Asian wild elephants in the world and recently Minneriya national Park was listed as, Number 6 in the Lonely Planet's Guide to Natural Wildlife Spectacles of the World. It is estimated that around 400 individual elephants are gathering and visitors can watch it from the months of August to October at the Minneriya National Park. Udawalawe National Park is the only National Park in Sri Lanka where an elephant sighting is guaranteed on each and every safari drive. The Sri Lankan Department of Wildlife has taken steps to ensure the conservation of these magnificent giant, so that this priceless part of the eco system survives.

3. Bird Safaris

Sri Lanka is a fascinating birding destination for viewing a great variety of birds, according to the Wild Lanka journal of the Department of wildlife conservation(30th June 2015) there are over 427 recorded species of birds starting from wet zone to dry zone, forests to jungles and hill country to low land. Out of above 427 species 250 are resident and 23 are endemic to the country. Most of the endemic birds (such as the Sri Lankan grackle) are restricted to the wet zone, while birds such as the Sri Lanka whistling thrush and the yellow-eared bulbul reside in the hill country. Others, like the brilliantly plumaged jungle fowl, the striking red-faced malkoha and the shy brown-capped babbler can be found in forests and sanctuaries throughout the island. Among the best areas for sighting these birds are the Sinharaja rain forest, Bundala National Park and the Adam's peak wilderness sanctuary.



(Source:ceylonwildsafaris.com, 2015)

4. Sloth Bear Safaris

Sloth bears live in Southeast Asia, primarily in the forest areas of Sri Lanka and India and their future in Sri Lanka is precarious. According to the research publications of the Department of wildlife conservation of Sri Lanka, the highest concentration of Sloth bears is recorded in Wasgumuwa national park. Yala and Wilpattu National parks are also famous for Sloth Bear Safaris, visitors can see as they climb large Palu trees to feast on its sweet nourishing fruits and those National Parks gives a chance to the visitors to see Sloth Bears even outside of the Palu Season. The Sloth Bear is listed as vulnerable by the World Conservation Union (IUCN) and strictly protected under the Fauna and Flora protection Ordinance of Sri Lanka.



(Source: ceylonwildsafaris.com, 2015)

5. Blue Whales Safaris

Sri Lanka's waters are rich in marine life, and among them the Blue Whale is the most magnificent sea creatures. Sri Lanka's best place to see Blue Whales in their natural habitat is off the coast of the town of Mirissa in the southern coast. Whale watching is becoming a popular tourism activity in this region. The blue whale has been listed as "endangered" by World Conservation Union (IUCN). Sri Lanka's Department of Wildlife Conservation is giving their maximum contribution to ensure that these majestic Blue Whales will continue to grace Sri Lanka's shores. Department of Wildlife Conservation is strictly protecting these marine mammals under the Fauna and Flora Protection Ordinance of Sri Lanka.

6. Camping Safaris as an upcoming trend in the Safari sector

Sri Lanka's Safari providing companies are providing exciting wildlife experiences to the visitors with comfortable accommodations. There are Bungalows and Camps inside the forest under the maintenance of the Department of Wildlife conservation. Since, all the parties have to get the bookings done through the Department of Wildlife conservation's website and Safari providing companies can arrange in-door conditions according to the standards of the safari package without damaging to the nature. Everything from the food and toilet waste to every canvas sheet and tent peg should pack up and removed from the park when safari is finished. Safari camping providers are responsible for remove all the wastages of

their camping event and also they are responsible to conserving the nature reserves and protecting the wildlife within them.

Sri Lankan Safaris offers two choices as **Standard** and **Luxury** Safari Camping packages for the guests and guided by experienced professionals with basic knowledge on animals and plants. According to the Observations conducted by Department of Wildlife Conservation most of the visitors who coming to take this experience are locals including researchers and photographers. Visitors can feel the nature and wildlife in a safari camp within some days most probably more than three days based on their safari package. Accommodations of the camps are important because it is a competitive factor in order to attract customers and also it must be a unique experience. Considerable amount of camp tents are lit up with solar powered lanterns and washroom and shower facilities are located inside the tent. Even though one day safari jeep tours are popular now camping safaris are upcoming as a niche in the safari sector, because people can feel the nature and get a memorable experience by spending three or four days in a safari camp. (Sri Lanka Travel, 2015)

• Methodologies Used to Conduct the Survey

Primary data collection methods and Secondary data collection methods were used to collect relevant information regarding the safari sector.

.1. Primary Data Collection Methods

Basically questionnaires, interviews and observation methods were used to collect primary data.

➤ Questionnaires

It was the most convenient and suitable way to gather information about companies who are currently engaging in safari activities. Because throughout the questionnaires it was mainly considered of the packages they provide and where are the safari destinations visited to, their facilities providing and so on. These questions are attached in (Annexure 03)

➤ Interviews

Interview is a two way communication process especially we used interview method to collect information from the department of wildlife conservation & Yala national park as well. Mainly we interviewed head of the research and development department and three people who have better knowledge and details about the wildlife and park warden of National park. Interview process was very effective and efficient way to gather more information within short period of time.

➤ Observations

Participant observation is another best method to collect primary data & information. Therefore we decided to visit the Yala Park to have good knowledge regarding the safari. As we expected we were able to see what are the rules the drivers and guiders should follow within the park and the procedures they should follow during the given time period. It could be seen that how the rules and regulation implemented to protect visitors as well as the animals.



.2. Secondary Data Collection Methods

Not only primary data but also we went for information's from the secondary sources. Mainly we referred annual statistical report 2014 of Sri Lanka Tourism development Authority and the related books for an example top seven animals in Sri

Lanka, wildlife tourism impacts, management and planning. Annex 1 in the appendices shows the number of visitors' arrivals to the Sri Lanka to which particular parks and the revenue of those parks had.

Here are main secondary sources we obtained while we were implementing our research.

- Annual statistical reports of Sri Lanka Tourism Development Authority (Annex 01)
- Sri Lanka socio economic data- report of Central Bank 2014
- Publications of Department of wild life conservation
- Wild Lanka-Journal of Department of wild life conservation (Annex 02)

• "Yala National Park" as the Major Safari Destination

.1. Importance of the "Yala" National Park

Yala national park is called as the paradise of the leopard around the world. It is one and only place where visitors could see a number of leopards within minimum period of time. Nowhere in this world could experience that exciting moment. Since, both local and foreign visitors visit there to the Yala National Park.



According to our findings and the statistical data published by Tourism Authority it is well proved that the main priority is given to the Yala National park out of other four national parks in Sri Lanka. Once the research was carrying out, we could observe that Rural Community of Tissa depends on this safari industry. Moreover, one of Safari jeep owner Mr. Chaminda said that, "many people have their owned jeeps and they have linked with several travel companies as service suppliers to the customers and earn money from that".

Not only that but also, once we interviewed the Park warden of YNP, He said that "in October the park is closed in every year, there by some amount of earning to the park is lost, but the loss for the peripheral community is more than that".



Therefore the Yala National Park is a treasure to that Tissa area and for the people who totally depends on this park. Directly and indirectly Yala Park & safari industry are contributing to uplift the living standard of the community of that area because year by year the visitors' arrivals to the park are drastically decreasing.

As a well-known safari destination of the Sri Lanka, Yala is now facing a several problems with the fast arrivals of visitors to the park. The independency of animals is disturbed. Since, in collaboration with Wildlife conservation, the park has imposed some rules and regulations to the people who enter to the vast forest. Because the survival of the wild animals to be protected while ensuring its contribution to the safari activities as the world best safari destination for the leopards.

• Environmental Analysis

.1. PESTEL Analysis

Political

Sri Lankan Government has been promoting the tourism industry for recent years. Ministry of Economic Development has officially launched the Tourism Development Strategy for the next five years period of 2011-2016.

This document says that Sri Lanka Tourism focuses on eight product categories under the theme "8 wonderful experiences in 8 wonderful days" and they are Beaches (Pristine), Sports and Adventure (Thrills), Heritage sites (Heritage), Mind and Body wellness (Bliss), Scenic beauty (Scenic), Wild life and nature (Wild), People and Culture (Essence) and Year round festivals (Festive). Especially Sri Lankan tourism promotions emphasize on the fact that Sri Lanka is a wonder of nature which gives more attention on nature based tourism. Thus as a cluster of tourism industry, safari industry also receives political support and attention.

Economic

Changes in exchange rates are important since most of safari tourists are foreigners. And also fluctuating oil prices affects travelling expenses since airlines pass increased fuel prices on to passengers by increasing air ticket prices.

Safari tourism is facilitated in remote areas in the country. Thus it spreads developments to remote and rural areas of the country which may have not benefited from other types of economic developments. The development of tourism infrastructure can benefit the livelihood of the poor, through improvement in tourism linked sectors, such as transport, communication, water supply, health services and power.

Social

People are more conscious about the environment. Especially travelers have more interests on Eco-tourism. They want to feel the environment as it is.

Technological

Increasing internet usage and social media improves the accessibility of people all over the world to different destinations in anywhere. All most all tourist companies which provide safari packages maintain their own web sites which allow people to search the destinations, available tour packages, prices and facilities and facilitate online reservations. And most of companies reach their potential buyers through abroad agents.

Most of satisfied tourists post their comments on company website and social media. This also affects the popularity of the companies.

Environmental

Since safari industry heavily depends on the health of the natural resources on which it is built. Tourist companies more focus on sustainable wild life based tourism. They follow the regulations imposed by department of wild life conservation and guide their buyers and suppliers to act accordingly.

Companies have environmental friendly policies. For example Noel Rodrigo Leopard Safari Company contributes to leopard conservation projects and relevant researches.

Legal

Tourism was formerly recognized as an important industry in the 1960s and was formalized through the Sri Lanka Tourist Board (SLTB) Act No. 10 of 1966 to promote tourism in Sri Lanka, and subsequently augmented by the Tourist Development Act No. 14 of 1968. As a cluster of tourism industry, safari industry is also governed by above mentioned institute and Act. Safari industry is also under the supervision of Department of wild life conservation and department of forest.

.2. SWOT Analysis Strengths

- Sri Lanka is rich in bio diversity and Sri Lanka is well known for its natural beauty among tourists and travel journalists. According to conservational international (CI) organization, Sri Lanka is one of top 35 bio diversity hot spots in the world. This is strength for safari industry. Sri Lanka is renowned for its hospitality.
- Government support and Sri Lankan tourism promotions more emphasizes the nature based tourism." However, in tourism promotions the emphasis is more on the fact that Sri Lanka is a natural wonder. A lot of travel journalists have referred to Sri Lanka as the 'paradise on earth' or the 'jewel of Asia'. Sometime back Sri Lanka was known as 'pearl of the Indian Ocean'. All these lead to one conclusion, that Sri Lanka is a natural wonder."

According to the document of Tourism Development Strategy 2011-2016, Ministry of Economic Development, some of steps government hopes to implement are as follows,

- Strengthening the DWC's skills, which will enable them to manage protected areas effectively
- Improving wild life research which will contribute towards effective management decisions.
- Developing and improving infrastructure facilities within the protected areas, together with habitat management.
- Visitor facilities in national parks will be developed to cater to the satisfaction of tourists.

- Establishment of optimum protected area network in the Northern and Eastern Provinces that conserve the biological diversity while protecting important watersheds and opening up opportunities to facilitate ecotourism development activities.
- New safari parks, dry zone, botanical gardens and zoological gardens will be established to meet the increasing demand for public recreational facilities.
- Political stability during post war period

Weaknesses

- Poor infrastructure facilities in remote areas.

Basic infrastructure facilities such as road facilities, water supply and telecommunication facilities are not up to the standard conditions. According to Tourism development strategy, government plans to develop infrastructure facilities in order to promote tourism.

"Basic infrastructure Accommodation facilities will be increased with the construction of 22,500 hotel rooms to cater to the expected increase in tourist arrivals. Basic infrastructure such as road network, townships, telecommunication facilities, restaurants, resting facilities and water supply in all main cities and tourist sites will be developed to create a conducive environment to promote tourism." (Ministry of Economic Development, 2015)

Opportunities

- Increasing usage of internet and social media can improve the popularity of the industry.

"The most effective global communication medium in tourism today is the internet. Sri Lanka Tourism is currently developing an improved web portal for tourism promotions. The improved web portal is accessible to any potential tourist who needs information about the country, attractions, events, accommodation, tours organizers, transport etc. The latest version of the web portal will be highly interactive" (Ministry of Economic Development, 2015)

Tourists will be able to find better safari destinations and do online reservations through websites.

- Increasing awareness about environment.
- Tourists want to experience the nature as it is. Thus safari camping is the new trend.

Threats

- Some national parks are closed and restricted for outsiders for some periods. And whole areas of the national parks are not opened since it's harmful for animal gatherings.
- Some tourists want more time to experience the nature. But safari packages must be planned according to accepted time schedules given by Department of wild life conservation.
- Behaviors of some tourists harmfully affect the environment. It adversely affects the safari industry as a whole.

6.3. Suppliers of the Safari Industry

Suppliers of the safari industry includes,

Safari jeep drivers- Safari jeep drivers get together and form associations. Only the association is registered under Department of wild life conservation. Registered jeep drivers act as transport suppliers for tourists companies.

Trackers - They are government workers who are recruited from near residencies since they are the people who know the all about that area. They work under department of wild life conservation and accompanying a tracker with every tour is mandated.

Foreign agents- Through foreign agents, foreigners get connected with tourist companies.

6.4. Buyers of the Safari Industry

Buyers of safari industry divided into foreign tourists and local tourists. But most of tourist companies solely focus on foreigners. Major reason for this choice is that most of locals who want to go on safari personally arrange the tour and visit. They do not interact with tourists companies. When it comes to foreigners they connect with the tourists company through foreign agents. When foreign agents direct the tourists to the company, rest is arranged by Tourist Company. They offer mostly the tailor made luxury packages. But for tourist who have different interests, companies offer customized packages.

6.5. Intensity of Rivalry of the Safari Industry

Because of low switching cost and low level of product differentiation, rivalry of the safari industry is very high.

6.6. Threat from Substitutes

There are several emerging clusters under major industry of tourism. Few of them are as follows,

- Golf tourism
- Education tourism
- Luxury trains

- Medical tourism
- Weddings
- Sports tourism

Thus threat from substitutes is very high in the safari industry.

7. Data Analysis of the Safari Companies

Regarding safari industry, it consist a lot of companies that having both local and foreign customers who wish to experience safaris. Most of the foreign customers come through travel companies and these companies offer safari as an event. Then the agents of these companies in abroad make necessary arrangements according to foreign customers' requirements and direct them to companies in Sri Lanka. In Sri Lanka have famous leading travel companies that offer safari such as **Aitken Spence Travels, Jetwing Travels, Deithelm Travel, Vogue Tours, and Walkers Tours** (Annexure 07). These companies have recorded that more than its 80% of customers were experienced safari as follows.

Table 7.1 travel companies and its market share

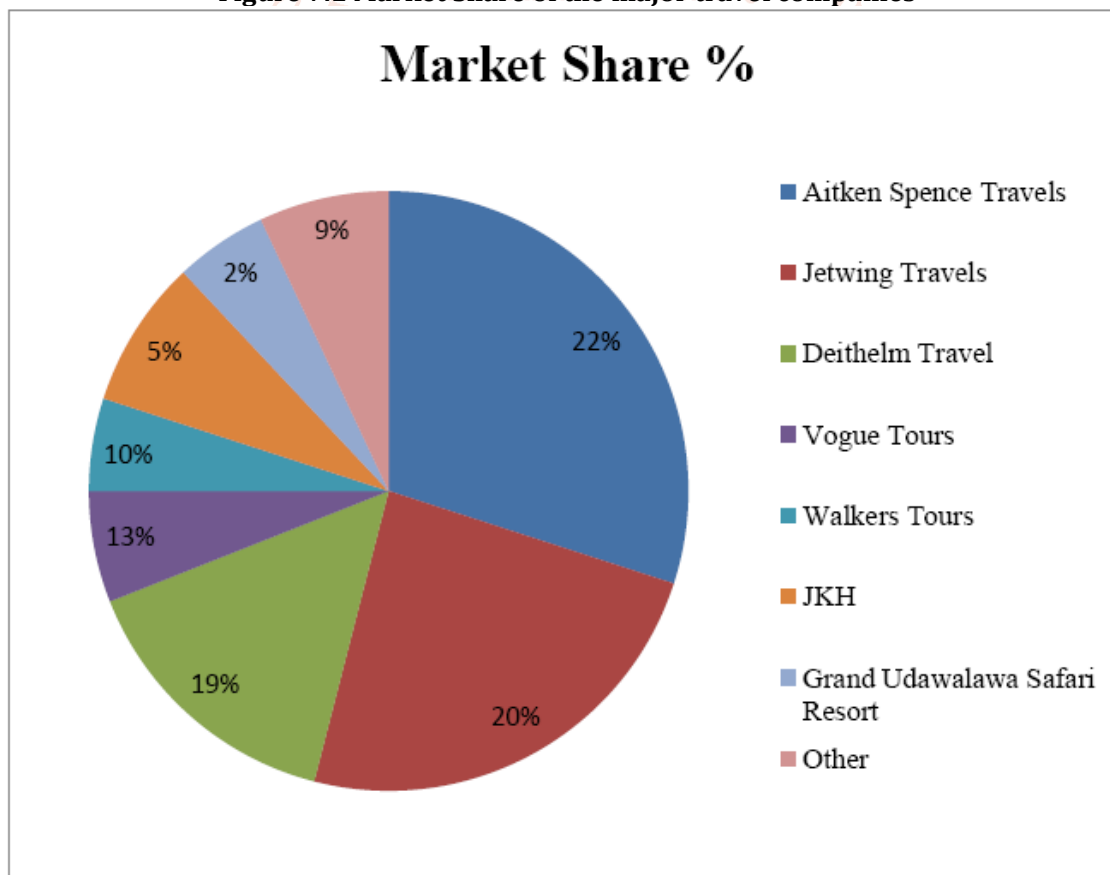
Travel Company Name	Customer % of safari experienced
Aitken Spence Travels	More than 90%
Jetwing Travels	More than 87%
Deithelm Travel	85%
Vogue Tours	80%- 85%
Walkers Tours	82%

(Source: IATA Agent Association of Sri Lanka, 2015)

➤ Market share of major companies

Most of the foreign customers are engaging with above mentioned travel companies while local customers famous with Cinnamon Wild Yala powered by JKH and Grand Udawalawa Safari Resort. We have gathered data regarding their market share in the safari industry and they have given an approximate value. Furthermore cumulative percentages of the mentioned companies are more than 90% of the industry therefore we can analyze our population based on these companies. (Annexure 08)

Figure 7.1 Market Share of the major travel companies



➤ Safari Destination requested by the customer

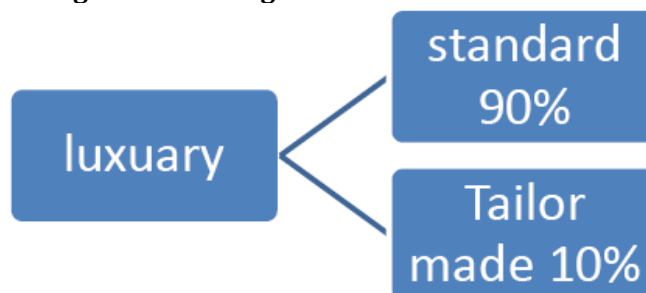
According to the survey findings there are famous locations that are giving expected experience requested by the customers. As an example some of the foreign customers who come to Sri Lanka for the intention of leopards watching and the travel company suggest Yala as the best place to experience that. After that the company contacts their suppliers in Yala and links customers with these suppliers. Here are famous places with respect to experience category.

Table 7.2 Safari destinations visited

Experience Category	Location
Leopards Watching	Yala
Elephant Watching	Udawalawa, Minneriya, wasgamuwa
Watching blue whales and dolphins	Mirissa, Bundala

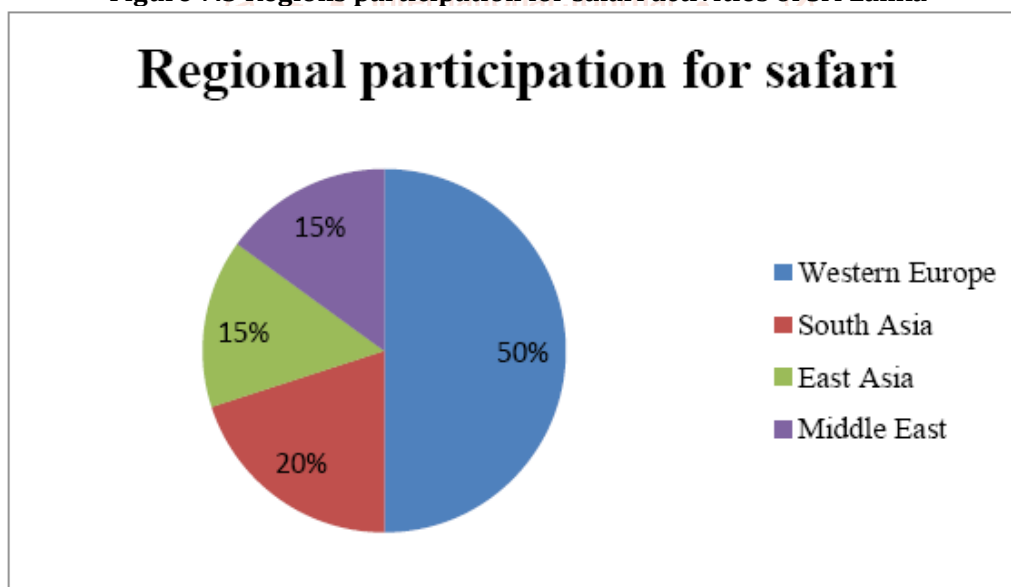
➤ Packages offered by the Companies

All of the companies offer luxury packages and to develop the packages they are using bases like price, duration of the tour, local or foreign and accommodation and other added facilities. The companies have both standard and tailor made packages. Most of the times customers agree with company prescribed package as standard and rarely go for tailor made packages that customize according to customer requirements.

Figure 7.2 Packages offered for the customer

➤ Regional participation to the Sri Lankan Safari

Sri Lankan tourism industry, safari is an emerging cluster nowadays and most of the companies said that Sri Lanka is better destination for eco –tourism and therefore they have more customers. Region wise safari participation analyzes as cumulatively to get clear idea about world awareness about Sri Lankan safari.

Figure 7.3 Regions participation for safari activities of Sri Lanka

➤ The special facilities that offer by the companies to enhance their service are;

- Luxury jeeps
- Language translators
- Professional guides
- Better driving conditions

➤ The community involvement is also very high such as suppliers, drivers, guides, language interpreters. Most of people near to national parks join with self-employment opportunities as mentioned above. The companies also conduct awareness programs and training to enhance their customer service and future recruitments.

➤ Companies pay sufficient attention to the natural environment therefore they have eco- friendly programs, eco-friendly company policies and sustainability programs. And also leopard conservation projects and beach cleaning programs are conducted by the companies.

8. Issues in Wildlife and Safari Industry

Tourism industry is recently one of the fastest-growing industries in Sri Lanka, contributing significantly to the economic development. Wild life and safari cluster play an important role in Sri Lankan tourism industry. As a main sub sector of the tourism industry wild life and safari is helpful to increase gross domestic product (GDP) of the country, reduce poverty, provide employment opportunities like small –scale business and labor intensive jobs and also it helpful to develop economically people who are in the remote locations with esthetic, cultural and environmental values. Those are few positive impacts of the wild life and safari industry.

If there are lots of positive impacts of the safari to the economic and social development of Sri Lanka but also are there considerable negative impact of the safari to the wild life and the environment. According to the gathered information from the wild life and conservation department there are five main negative impacts of the safari industry. The word safari simply describe as watching animals in their natural living places. When people are going to watch animals it may create damages to the natural habits and natural movements of the animals. Sometimes people may create unnecessary movement and unnecessary noises.

Another main negative impact of the safari tours is unnecessary sounds created by vehicles and people who travel in those vehicles. Specially Four wheel jeeps are used in safari tours, vehicle is not a natural thing because of that noise come from those manmade things create disturb to the natural habits of the animals who live in forest or any other habited areas of animals especially in a national park.

Sri Lanka has rich bio diversity than the other Asian countries. That specialty builds competitive advantage to the tourism industry and wild life safari in Sri Lanka. Main target of going on Safari is to watch animals but some travelers didn't understand that purpose of the safari clearly. Because some time travelers who going on safari may pollute environment in various ways. They pollute air, water and land by throwing plastics, garbage and other unnecessary things to the forest.

To overcome those negative impacts of the safari tours to the wild life and natural habits of the animals, The Wild Life Conservation Department builds and established rules and regulations regarding facilities that must have to be included in vehicles going on the safaris, rules for the jeep drivers, rules for the travelers and use technology to give durable solutions for that issues. As example The Wild Life Conservation Department uses mobile jeep service to guide and control vehicles going on safari tours in national parks. Those are the issues which created to the wild life and to the natural environment because of the safari.

Safari, one of the sub clusters of the tourism industry in Sri Lanka. It also faces some kind of social and economic issues like other industries. According to the gathered information from the wild life conservation department and safari providing organizations, they mention that promoting safari as a main sub sector of the tourism industry is not done by the government and the government didn't pay more attention on promoting wild life and safari tourism in the international context. Another issue is the government rules and regulations which create resistant to be innovative in the competitive wild life and safari cluster. As example national parks which are control by the wild life conservation department have to obey the rules and regulations which published by the department. Some time those rules are useful to protect wild life but those rules create resistant to the change and to develop wild life and safari as an effective and competitive field in Sri Lanka.

9. Limitations of the research

➤ Distance and companies' physical appearance

Most of the companies are situated far away from Colombo and also those companies situated near to the parks therefore I was unable to visit much more companies to gather their information. Further there was safari companies that are having no any physical places like a particular place for their head office but jut handling a website. Nature Paradise Safari Travellers are maintaining only a website and via website they attract its customers.

➤ Accuracy of the information

The visited some companies were reluctant to provide accurate and frank answers because the companies were not willing to give their correct information to other parties. And some companies are not following rational method to store their previous information. Once a question is raised they just answer it by not referring to any related document or reliable source.

10. Recommendation

10.1. Recommendations to protect wildlife

➤ Develop and train human resources who engage in safari field to do less harm to animals and the natural environment. Jeep drivers, guiders, safari providing organizations and their employers, hotel owners who build hotels near to the national parks and forests, staff of the national parks and people who live around the national parks are the human resources mainly engage in the wild life and safari. Government and the other institutions who engage in the safari must focus to train and develop those human resources to protect wildlife.

➤ Use new technology which has less damage to the wild life.

When using new technology to the wild life safari people must think about the impact of that technology to the animals and the natural environment. As an example use of the night lights when going on night safari. Another thing is when organizing safari camps in the national parks and forests it may also disturb to the natural habits of the animals.

- Build new rules and regulation for travelers who going on night safaris.

Government and other authorized institutions regarding wild life and safari must build new rules and modify existing rules to protect wildlife.

- Government must more focus on companies and institution that engage in wild life safari and must build system that create close relationship with government and private sector.
- Use new technology and information technology to inform travelers, guiders, jeep drivers and companies who engage in wild life safari regarding protecting animals and natural environment.

10.2. Recommendations to promote safaris

- Use Social Media as effective marketing tool

Social Media is an extremely effective form of marketing because it helpful to present specialty of the Sri Lankan safari to millions of people worldwide. Social media mainly helpful to increase brand awareness, brand loyalty, customer service, and lead to increase amount of travelers who come for get safari experience. Social media not only helpful to the large organizations but also small businesses can also reap the benefits of implementing a social media campaign. Safari industry is not a combination of large organizations there are small companies who engage in safari industry because of that using social media for the marketing purpose is more cost and time effective than the other marketing tools.

- Develop and Enhance Tourism Industry Professionalism under safari cluster

The government and the other authorized institutions must improve productivity of the wild life safari, through encouraging and developing Professionalism in the travel and hotel relating to the safari cluster. The private sector must encourage developing human resources which engage in wild life and they must train to maintaining the standards of services they provide. Another thing is licensing the safari tour guides in order to standardize their service.

- Improving Service Standards.

According to the data collected from The Wild Life Conservation Department, they mentioned that there have not any special security assurances for the travelers who going on safari. To promote Sri Lankan safari in world wild providing assurance for travelers is more important. Because Safety standards and security aspects of traveler is most important in wild life safari. Regulatory body must strengthen to ensure the quality standards of safari and security aspects of travelers.

- Pay more attention to improving the global image of Sri Lanka.

Sri Lankan Government and other authorized institution must make effective arrangements to use the resource for the wild life safari promotional work. "Visit Sri Lanka program" in 2011 is one of the successful promotional programs related to the tourism. Likewise promotional programs must be organized to promote wild life safari in Sri Lanka. To promote wild life safari as one of the main cluster of Sri Lankan tourism industry the institutions who are engage in safari must building a closer relationship with International media, Sri Lankan Airlines, BOI, EDB, Tea Board, Gem & Jewelers Authority and other line agencies who are involved in international marketing.

- Diversification of wild life safari in Sri Lanka

Wild life safari must be more diversified with special emphasis on natural beauty of Sri Lanka and eco-tourism. It must mainly focus on natural topography and the ecological values of the country. Providing underwater exploration activity with the safari package is best example. Improve exploring magnificent coral reefs, dolphin and whale watching and bird watching opportunities are some of the ways that can diversify the wild life safari.

11. Conclusion

Service sector of the Sri Lanka is giving an utmost contribution to the GDP of the country in which the tourism industry plays the major role to uplift the economy of the country. After the end of the civil war, arrival of foreigners is also going up. It leads to open up many business processes within the country. Other than that as the pearl of the Indian Ocean, Sri Lanka has its natural heredity like no other places around the world. Specially, European countries' people would like to get that fresh feeling. Since, the person who visits to this country is readily going to see our heritage and the nature that the mother Lanka holds. Safari industry is derived from this point. Nowadays it is widely expanded all over the country and with the emergence of various travel and safari companies, wildlife and the ecofriendly-ness of Sri Lankan culture is highly discussed. According to our findings the National Parks give a huge contribution to the Safari industry and to Sri Lankan tourism.

Based on the findings of the survey as well as the various statistics published by Wildlife conservation and the Tourism authority shows that year by year tourists both local and overseas tend to come and join safari activities as a way of adventure and spending their leisure with wild life inhabitants. By considering these dynamic inquiries there should be further improvement to safari industry like establishing infrastructure, more safety methods to travelers and necessary amendments in government authorities. Safari Industry highly concern about wild life while earns from it. Since, throughout the research it is well explained and justified that by following the great theme of eco-friendliness of safari sector in tourism industry, it could be developed the Sri Lanka further and achieve the individual, organizational and at last as one country the overall economic development thereby.

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