

Research Article

Economic sustainability in safari tourism in Southeast Asia: the case of Minneriya National Park Sri Lanka

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Abstract

Safari Tourism in Sri Lanka is a key selling factor for Sri Lanka tourism. However, less attention has been paid to the economic sustainability of the service and driving them to the long-term survival, particularly the extent which the safari tourism is creating value and delivering value to the customer sustainably. Therefore, aim of this paper is to consider about the existing status of the safari tourism operators in Sri Lanka and redeveloping the business model to drive and promote the economic sustainability. This paper is a case study for Minneriya National park. One safari operator has selected based on the level of experience to collect the evidence. Interview guides were prepared using the key model of this paper that is business model canvas. Later, coding was applied to derive the emerging themes and patterns to redevelop the business model. Drawing the research in Minneriya National Park and with the case study operator it reveals the way in how to operate the safari tourism to an economic sustainability. Proposed business model was further explained with the implementation advice with the willingness to implementation of those elements.

Keywords: Safari Tourism, Economic Sustainability, Business model, Minneriya National Park

1 Introduction

Wildlife tourism is an important element and has played a significant role in the Sri Lankan tourism after the end of the ethnic war in 2009 (Gnanapala & Jayalath, 2020). Wildlife tourism has become an essential element in South Asian countries for the development of the tourism sector. This is the case of Sri Lanka tourism as well. With the end of the 30 years of ethnic war there was a rapid growth in incoming tourists to Sri Lanka coincided with the boom of tourism facilities, tourism services and tourism stakeholders (Perera et al., 2015). Total of Rs. 2,138 million in 2018 was generated from the Wildlife tourism in Sri Lanka (Lugoda, 2020). This is driven the economy toward a dependency on tourism and tourism related income.

The level of dependency of the wildlife tourism sector in Sri Lanka with the incoming international tourists is extremely high. There is a question between the economic sustainability of the wildlife tourism in Sri Lanka and long term survival of the wild life tourism. Substantial literature now discuss about this economic sustainability of wildlife tourism. The characteristics of the wild life tourism was able to attract the international tourists with a significant number and was able to generate a high incomes by providing the expected wild life tourism experience. However, critics argues that this delivery should be economically sustainable to drive the tourism sector to long term survival because this dependency is equal to each other. In the Sri Lankan context it is evidence that the wild life tour operators are driving the business activities to a crisis in economic sustainability in long term with the activities they are performing now. In short, the economic sustainability in wild life tourism operational activities in National park in Sri Lanka remains unfulfilled.

Importantly, this failure of wild life tourism is one of the dominant themes in the Sri Lankan tourism literature as this is directly relates to the long term survival of the tourism industry. Lack of economic sustainability in wild life tourism is visible in most of

the national parks in Sri Lanka as well as in the other South Asian countries. In other words, there will not be a wild life tourism in Sri Lanka if this underdevelopment approach and progress maintained throughout delivery process (Prakash et al., 2019). Wild life tourism in Sri Lanka in particular to this domain is rarely considered from this perspective as attention as given to low level (Sumanapala, 2018).

The selected case study for this research is Minneriya national park in Sri Lanka. This national park is world famous for the wild elephant and elephant gatherings at lakes (Oriol et al., 2021). Minneriya national park has received a consistent growth in terms of number of visitors over the last decades (Ranasinghe et al., 2019). However park and related stakeholders has received limited attention for the development aspects (Jeremy et al, 2017). The purpose of this paper is to pay the attention to driving the wild-life tourism operators (Safari) who are serving Minneriya National Park to the economic sustainability to have a long-term survival with their service delivery. Paper aim to develop long-term survival recommendation through a business model redevelopment to the safari operators in Minneriya National Park as that is the only option for the safari operators in Sri Lanka to look forward in long-term. Furthermore, the directions for the tour operators to make the delivery long term survival were restricted. Therefore, this paper not only filling the literature gap, but also develop the necessary directives for the wild life tour operators on how to make their business economically survive in long term. In addition to that, businesses that opt for economic sustainability are the best contributors for the economic and social sustainability (Zadek & Tuppen, 2000).

To achieve these key objectives, first task is reviewing the economic sustainability and then discussing the Wild life tourism in Minneriya national park with the application of the economic sustainability.

2 Literature Review

2.1 Economic Sustainability in Safari Tourism: Vulnerabilities

According to the UNWTO (2021) wild life tourism is known as interactions and observations a tourist or a viewer maintain with local animals and plant life in their natural habitats. Further UNWTO (2021) indicated wild life tourism is includes eco-tourism, safari tourism, mountain tourism etc... Safari tourism or the wild life tourism occurs with the nature, national parks and the wild life in those areas. 7% of the world tourism represented by the wild life tourism as mentioned by the UNWTO (2021) and it is predicted to grow 3% annually. Market size of the wild life tourism estimated to 12 million trips annually.

Safari is the most accepted and common wording for the tourism based on wildlife watching. Same as the other destinations safaris are taking place by using four-wheel drive vehicles and observing the wildlife either by staying inside the parks or by travelling throughout the parks.

Key challenges the wild life is facing nowadays are poaching, illicit trade of wildlife products, wild life crimes and increasing loss of habitat and loss of range. As mentioned by World Tourism Organization (2014) the wild life crimes are getting increased due to poverty, lack of law enforcement, political influence and changes in the consumer behavioural patterns. However, the wild life tourism is getting increased with the development of the social media channels and other communication methods (Prakash et al., 2019). Nevertheless, this has resulted in rising number of tourists and challenging further to the conservation issues (Prakash et al., 2019).

Economic value of the safari tourism can be defined as the economic impact of the activities performed by the safari tourism. These economic impacts could be positive either negative or it could be direct, indirect. World Tourism Organization (2014) mentioned economic impact as creation of employment opportunities, positive and negative externalities to the stakeholders, revenues from taxes and other public charges, foreign exchange earnings from the inbound tourists and the related multiplier effects. In Sri Lankan perspective only few studies gathered the economic figures and the economic values of the safari tourism that discuss based on the location and the national park. However, the available studies indicating economic value of the safari tourism is underestimated in Sri Lanka and performing without having a clear meaning of the economic value (Perera et al., 2015; Prakash et al., 2019).

2.2 Safari Tourism Development in Sri Lanka

Given the attractions of the Sri Lanka wildlife tourism, Sri Lankan tourism industry is attracting many international tourists to the safari tourism during December to April and July to September. Nevertheless, the best time for safari tourism is the dry season as most of the wild animals are gathering around the waterholes (Lugoda, 2020). In 2019 Sri Lanka was awarded as Asia's Best Destination for Wildlife Tourism at the Top Asia Corporate Ball (Lugoda, 2020).

Sri Lanka got nearly 26 national parks and can observe more than 400 species which includes mammals, birds, butterflies etc... Most preferred big animals are elephants, leopards, whales and bears and they are getting attracted large crowd of international tourists annually (Suresh et al., 2021). However, Safari tourism in Sri Lanka has given the attention to only few national parks and few species that considered an unfortunate incident. Apart from that, this attention to few national parks has developed congestions in the national parks, unlawful behavior in the national parks and disturbance to the wildlife.

Figures reveal increases in revenue for wildlife tourism industry in Sri Lanka. Sri Lanka Tourism Development Authority (SLTDA) indicated revenue from the national parks are getting increased (prior to the Easter Sunday attack and COVID-19 pandemic pressure) and number of arrivals are getting increased. Among all the national parks in Sri Lanka Yala National Park is the highest revenue generating national park and which was able to generate nearly Rs 684,661,000 in 2018 (Lugoda, 2020). According to the

Department of wildlife conservation following figure 1 depicts a summary of national parks in Sri Lanka.

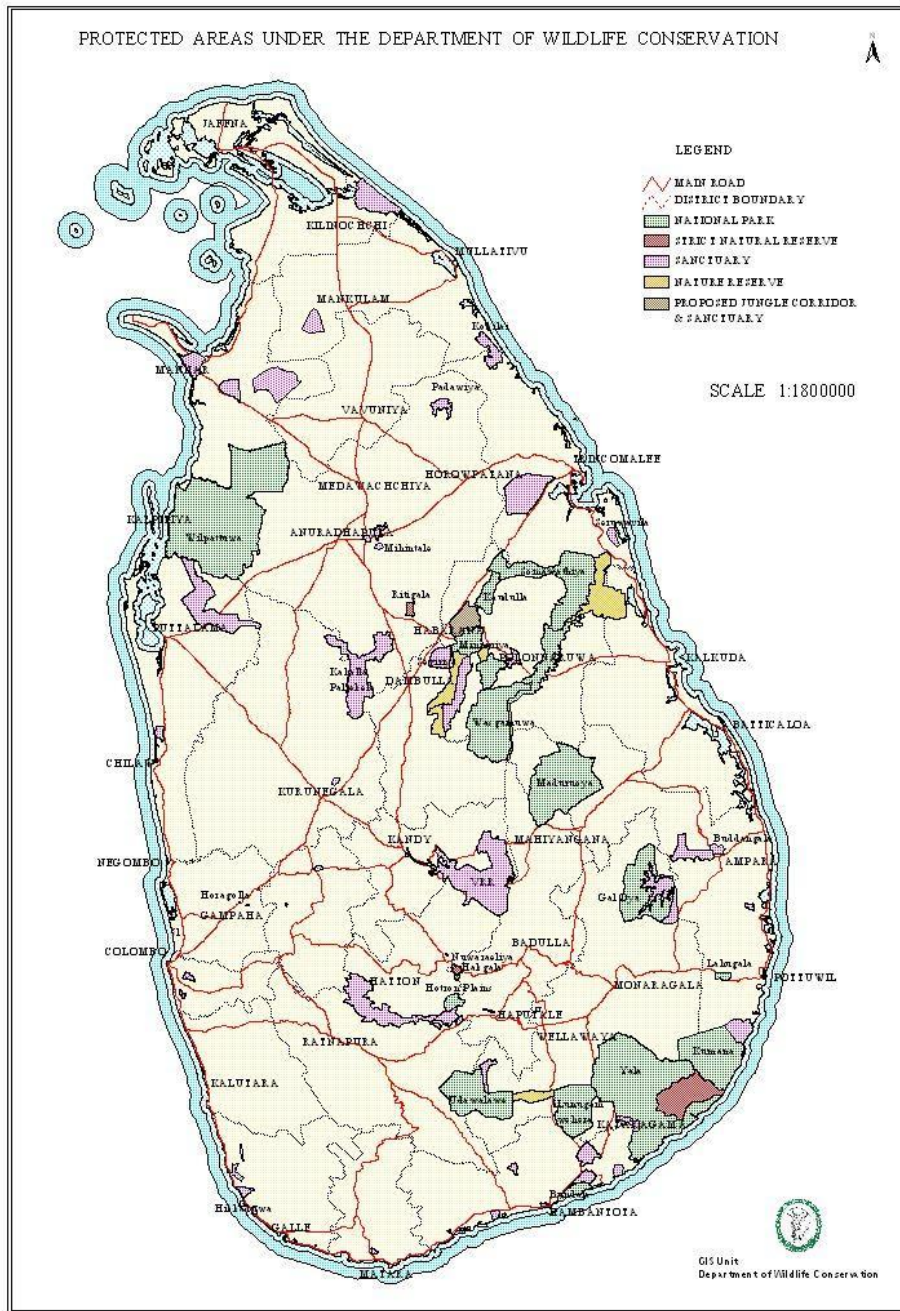


Figure 1: Map of protected areas in Sri Lanka
Source: Department of Wildlife Conservation (2012)

2.3 Minneriya National Park

Minneriya National park designated as a national park in August 1997. Park is a world famous national park for wild life gatherings in Sri Lanka. Park lies in Polonnaruwa District in the North Central Province Sri Lanka. The main entrance located in Habarana to Polonnaruwa main road. Minneriya National park exist with a 9,411 hectares. Moreover, the park is lies within the Minneriya- Giritale Nature Reserve (Blocks I, II, III and IV) and Sigiriya Sanctuary. Adding more, this is the catchment of the three main lakes as mentioned earlier Minneriya lake and Giritale lake and Prakram Samudra lake.

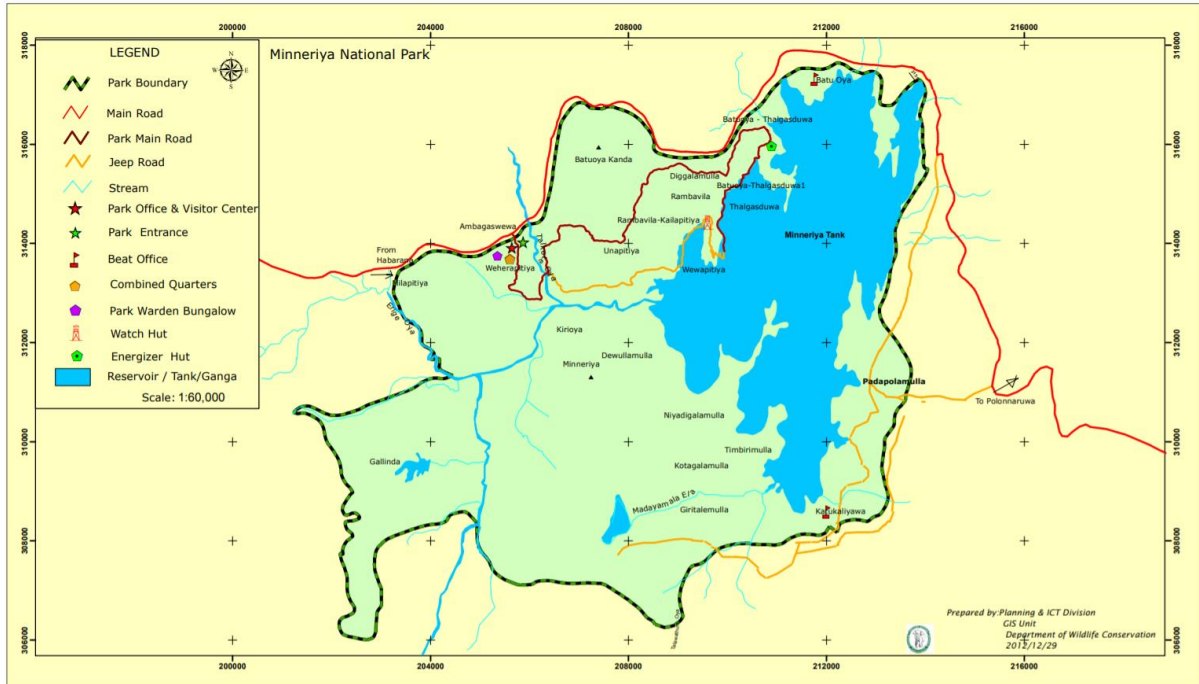


Figure 2: Map of Minneriya National Park
Source: Department of wildlife conservation Sri Lanka (DWC) (2012)

During the season more than hundreds of elephants gathering to the reservoirs that are located inside the park. This is recognized as the largest Asian elephant gathering in the world (DWC, 2008). However, even during the off season hundreds of those wild elephants are roaming around the park and around the Minneriya Lake (DWC, 2008). Season is known as the dry season that make the elephants to gather to lakes which is July to September. During the evening the elephants are more active and walking toward the lakes especially between 2pm to 6pm. Not only about the Asian elephant, there is a possibility of viewing deer, peacocks, monkeys etc... which make a visitor thrilled with the wild life viewing and unforgettable journey. In addition to the species, Minneriya Park associated with flora and fauna that are specific the park (DWC, 2008).

There is always a competition for the selection of the best parks to view the animals in Sri Lanka (Rathnayake, 2016). Nevertheless, Minneriya remains some degree of independence for the above mentioned elephant gathering (DWC, 2008). However,

with the political and economic challenges park is able to generate more than LKR 10 million revenue each year. Most significant features are the physical characteristics of the park. Since the park is located in a dry zone the average rainfall is between 1500-2000 millimetres annually (DWC, 2008). Temperature stays between 21°C to 34°C. Main rain fall is experience from the eastern monsoon between the January to May (DWC, 2008).

Though all these key characteristics are getting highlighted, park having range of threats for its conservations. Especially unlawful behavior of the tourists and operators, clearing the forest, water pollution, illegal agricultural practices, poaching, fishing, spread of livestock and spread of invasive plants (Ranaweerage et al., 2015). However, Department of Wild life conservation of Sri Lanka controlling and maintaining this park with the objective of ensuring the maximum protection of wildlife and habitats in the park (Kariyawasam & Sooriyagoda, 2017).

Like other national parks Minneriya not an exception for the tourism supply chain. This is also surrounded with the accommodation providers, tour operators, safari operators, restaurants and other shops. There is also debate same like other national parks of the world about the sustainability aspects of all the aspects.

2.4 Challenges in Safari Tourism in Minneriya National Park

Although the figures are revealing the development of the national parks in Sri Lanka most of all the national parks including the Minneriya National Park suffering due to overcrowding (Prakash et al., 2019). Moreover, Minneriya was passing the carrying capacity of the national park (Ranasinghe et al., 2019). This is mainly due to the lack of attractiveness in other national parks in Sri Lanka (Nillegoda et al., 2013).

Lack of rules and regulations including the implementation of the existing rules and regulations are leading to many challenges including above-mentioned overcrowding (Rathnayake & Gunawardena, 2014; Rathnayake, 2015).). For example, there are some guidelines that explain the process of operating the safari inside the national park (Prakash et al., 2019). However, proper and specific guidelines are missing to guide the operators regarding minimizing the challenges (Prakash et al., 2019). There is also an activity by the safari operators that harassing the wild animals and endangering species by entering the animal and species territories. These unregulated wildlife tourism activities are polluting the environment in a range of ways. Although parks generate high revenue, they do not use the income to the conservation of the parks adequately. Nevertheless, activities and initiatives were taken place to conservation up to a certain level (Prakash et al., 2019).

As a result of all the above challenges the economic sustainability of the safari operators has gone down and that has led to less competitiveness comparing to other regional national parks and other substitutes (Aththanayaka et al., 2019). To drive the Minneriya Safari operators are economically sustainable as an attractive and sustainable tourism activity, proper guidelines should develop (Weerasingha, 2018).

2.5 Economic Sustainability

Sustainability is all about the long-term survival of the business operations. As mentioned by Harris et al. (2012) sustainability is included with environmentally, socially, and economically. These should work together with any firm to drive to long-term survival. The long-term economic sustainability of any business should impact in positively to society and to the environment (Becker et al., 2015).

Economic sustainability refers to the continued success in the business operations over long-term objectives (Becker et al., 2015). Or in other terms how a business stays in a business for the long term. All the activities that are performing for economic sustainability should be indefinite for sustainability (Becker et al., 2015). Economic sustainability is covering up the internal financial aspects, the performance of the business, how it manages all the tangible and intangible aspects, how the business is impacting the social and other environmental elements. In order to manage these, Osterwalder and Pigneur (2010) suggested the business model canvas as the structured process of implementing the business.

Business Model Canvas by its definition was a rationale on how to create value, how to deliver those values, and how to capture those values (Osterwalder and Pigneur, 2010). Business Model Canvas by Osterwalder and Pigneur was an alternative to the traditional business models which the firms were adopting (Osterwalder & Pigneur, 2010). Business Model Canvas includes nine elements as the below diagram indicates. As mentioned by Osterwalder and Pigneur (2010) combined implementation of the nine essential elements in the Business Model Canvas will be leading to the achievement of the company's aims and objectives.

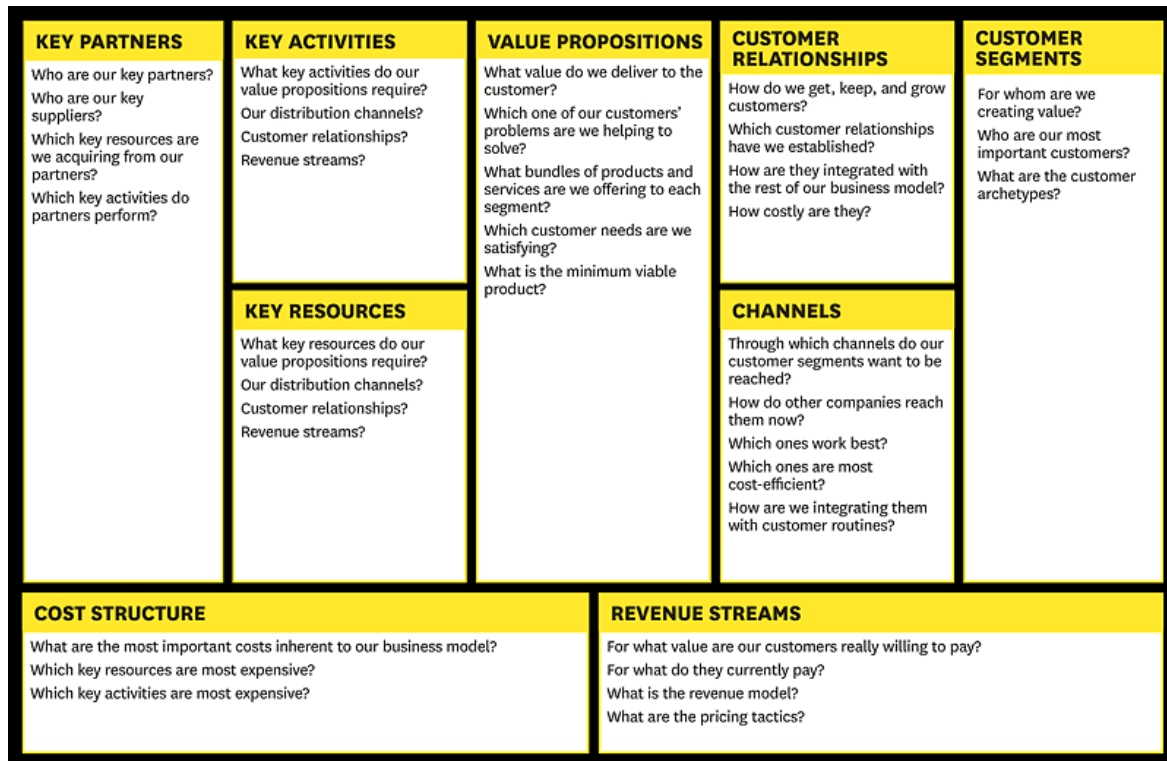


Figure 3: *Business Model Canvas*
Source: Osterwalder and Pigneur (2010)

3 Methodology

Methodology of the paper is structured around a literature review of publications, case studies and other publications related to wildlife tourism in Sri Lanka and a qualitative exploratory study from a case study which is a safari operator in Minneriya national park. Economic sustainability of safari operation was first conceptualized with the literature review and safari operator was used as the case study to measure and explore the economic sustainability of safari operation. The case study Minneriya national park is one of the national parks that got highest visitor arrival and revenue and selected operator is one of most experienced safari operator in the Minneriya national park (Ranasinghe et al., 2019).

The desk research was initially initiated in August 2020 and followed by a case study research by visiting the Minneriya national park in December 2020. Key questions of the survey were presented to the case study safari operator during the visit. Validation of the findings was further completed by the safari operators association in January 2021.

Case study questions were developed using the key elements in the Business model canvas to understand the existing status of the service operations and its capacity to drive the business to economic sustainability. Coding was applied to the interview evidence to determine the emerging themes and patterns. Further, it was aimed to understand the emerging themes through the patterns of the answer to redevelop the business model canvas to an applicable model to drive the business to economic sustainability.

3.1 Assumptions

The first assumption made for this paper is consideration of economic sustainability as the most important element to long-term survival and to implement the initiatives to the social and environmental sustainability. The second assumption is the lack of awareness about the economic sustainability of the existing safari operators to drive them to long-term survival. The third assumption is the selected case study operators is the most desired safari operator among the park and considered as a representation of the operators to know about the existing aspects.

4 FINDINGS

4.1 Minneriya Safari tourism operation status with the application of the Business Model Canvas

4.1.1 Key Partners

Key partners for the safari operators are the destination management companies (DMCs) in Sri Lanka and in international markets, online travel agents, and accommodation providers in the surrounding area. They are the key partners who acting as the source for the sales for the safari operators. These partners are handling the wildlife tourists. However, these partnerships are not fixed and volatile with the market conditions. The partnership is depending on the day-to-day activities and the profit share of the partner. This has driven safari operators to wait till they get business on daily basis rather than having confirmed businesses.

“I do have partners who give me businesses. Most are the hotels nearby. I work with them to get more guests. We work as an association and tour companies are known to us. So they call us day before they comes here as they know our numbers. They know our price. I work in Trip advisor to get more customers” (Thilaka – Safari Operator Minneriya).

“But, those are not confirmed incomes. I have to wait till I get telephone calls from someone every day or I have to call all the tour guides of those companies as they are the people who represent the companies though the companies known to me.... So I do not say that they are confirmed business partners (Thilaka – Safari Operator Minneriya).

4.1.2 Key Activities

In terms of activities, what they do is parking the safari jeeps at safari jeep parks are waiting till a guest arrives assuming that will be able to earn something to survive the day. Some operators are maintaining relationships with the accommodation options nearby to sell their packages to the guests who stay with them. So whenever there is an inquiry from a guest the accommodation partner is calling the safari operator.

There are no proper activities taking place to locate or to operate the safari inside the national park and it is all about the mobile phone which the safari operator is using to talk to each other while they are in the safari inside the national park.

In addition to the activities, operators having their associations as the key distributional channel. Though the association works for the well-being of them by organizing annual meetings and holding industry talks. However, industry alliances between those associations are lacking and political influence is very high with the negative effects.

“The only key activity that we perform is waiting till a guest arrives at the jeep park and taking the safari. In addition to that, we have connections with the

hotels in nearby to get more guests. While in the safari we talk to each other using the mobile phones as that is the only way to talk to each other to locate elephants, otherwise we have go around the park wasting fuel”.

“Our association is there, that is also having limited work for wellbeing and most of the time involved with political activities”

4.1.3 Key Resources

To deliver the values each Safari operators is required with a comfortable automobile with the required facilities and equipment. However, due to the rising import taxes safari operators are unable to purchase a high quality safari jeeps with the high end equipment. Most of them are operating with the Indian made automobiles converted to safari jeeps and locally manufactured equipment.

“Most of us, including myself we all are using Indian made Mahindra Bolero trucks to convert to safari jeeps. Because Japanese or Europe made trucks are very expensive and we are unable to purchase such expensive jeeps to operate as safari jeeps. Most of those are trucks and we have converted those with the locally made facilities to make it and looks as a safari jeep. There are no modern facilities and it is all about the mobile phone we use to talk to each other jeep operator to know where are the animals are located” (Thilaka – Safari Operator Minneriya).

4.1.4 Value Propositions

The key value the wildlife tourist is expecting is viewing the wildlife inside the park and that is specifically the wild elephant gatherings. There are few packages which the safari operators are available to the guests to purchase base on their requirements. They are the early morning tour, evening tour, and full-day tour. However, most of the guests are preferring the evening package as most of the elephants are gathering at the lake in the evening. However, there are no value additions available for this, it is only about getting into a jeep and traveling to view the elephants. There is no proper information available for the guest to view or read and understand.

In terms of the amount the guest has paid as for the entrance tickets, there are no proper sanitary facilities available, no emergency care facilities available, no guidance maps unless a forest guide joined with a fee.

“We are delivering the wild elephant viewing by travelling to the park. There are morning, evening and full day packages that a guest can purchase from us. What we do is picking up them and travelling until they see elephants. Yes, no other information available rather I explain what I know about the elephants”

‘No other facilities available and we are advising the guests to be prepared with all of those from the departure of their accommodation unit as inside the park nothing is available’.

4.1.5 Customer Relationships

Customer relationships are not that strong when it comes to the most of the operators as they cannot handle the English language or other languages most cases. Most of the time, the B2C relationship ends with the safari that happened. Some operators are able to collect the social media details of the guests to maintain a relationships for the future activities, however that is also very limited as the knowledge about such activities are very low among the safari operator.

“We talk with the guest as much as possible if I am the one in the jeep as the sight guide, if a paid and authorized site guide is there I am not talking. After the safari we do not talk to the guest, however sometime we are getting to know to loyal guests who like the park and Sri Lanka who talk to us regularly over the phone. I do not have the social media or emails, however there are young operators who got social media and emails”

4.1.6 Channels

The key channel which the safari operators are using to distribute the safari services are major in offline methods and there are few online methods. In terms of service delivery, there are no virtual platforms developed by these operators to deliver an enhanced service delivery and the only method is visiting the park physically. This physical service delivery also needs to be reserved by visiting the site as there are no prior reservation facilities are available for free independent travellers. If the guest is visiting the park through an intermediary then a reservation is available as the intermediaries are known to each other. Few safari operators got their own websites and social media platforms to get the attention of the target guests. However, most of

these platforms are information sites only and real-time reservations are not available. There are many digital platforms that got all the facilities to reserve the safaris, nevertheless, these are intermediaries and not the operator.

However, these distributional channels led to overcrowding the park with a number of jeeps are entering the park without having control. Due to the lack of consistency and proper way of operations guests getting disturbed most of the time when it comes to reserving a jeep to have the safari. In another way, since there is no proper distribution channel revenue is not confirmed for the safari operators.

“..most of us wait till the guest comes here. Then the guest can do the reservation. Most of us has given our numbers to tour operators. So they also can reserve us by calling. That is the only option. I do not have online platforms as I cannot bare such cost with this amount I operate. Some young operators have their website as I have seen. Whoever get the business go the tour on that day, no any other limitation or requirement”

4.1.7 Customer Segments

Key customer segments are international tourists and local tourists. Both these segments are getting further divided into walk-in tourists, tourists through intermediaries, and tourists through the direct selling channel. However, the most important value is created for the international tourists as the amount they pay is high comparing to the local tourists. Therefore, the most important customer segment is the international tourists. There were cases that these safari operators were ignoring the local tourists due to the amount they receive from international tourists and focusing only on them. However the manipulations safari operators have done when selling the packages, lack of professionalism, lack of language skills, and lack of knowledge and experience led to losing the familiarity and favorability toward these operators from international tourists. This has led to purchase the packages for the local tourists rather than paying a high amount.

During the post-Easter Sunday attack and post COVID-19 local tourists was the only survival for them. However, they have not accepted the local tourist as a customer segment during the peak with the international tourist and it was a challenging time for those operators to survive without international tourists.

“Most of the packages are to the international tourists. We accept the local tourists as well. But not in the most cases as we are able to earn more money from the international tourists. However, now later on international tourists

arrive with the knowledge about those and bargaining to go for the amount of local tourist. They do not buy expensive packages now”

“With the Easter Sunday attack and the COVID-19 pressure, we survived from the local tourists only, however since most of the operators never had a good relationship that is also not possible for some of them”.

4.1.8 Cost structure

The major which is involved with the business operation is maintaining the jeep. This is generating extraordinary cost as most of the jeeps are more than 10 years old if it is from Japan and if it is from India those are low in quality. Apart from that, due to the congestion in the park and rushing to the sights the wastage of the jeeps are high. In addition to that, the jeep is the most expensive asset to them as automobiles are very expensive in Sri Lanka. All these led to safari operator to operate with an old jeep as the only option.

Second major cost is the hidden payments which the operator should pay to the intermediary if there is such between the guest and the operator. This depends on the guest, type of the package and the type of the tour operator.

All above are the reason for the existing struggle the safari operators facing now with the low economic sustainability which need to be answered soon with a proper solution.

“Most expensive cost is maintaining this jeep. Now my one is an Indian one. This is also 5 years old and need repairs as Indian ones are not long lasting. Long lasting Japanese jeeps are expensive and only few can buy those. With the way we operate in the parks, I mean rushing to the sight, waiting in the traffic etc... generating additional wastages. The amount we gain is not enough for us to maintain a jeep in this way, as revenue is unpredictable”.

“Other payment is the payment to the tour operators, as they get the most out of the amount the guest pay and we get only LKR 4500 as the maximum payment for a 4 hour trip”.

4.1.9 Revenue Streams

The only revenue model the safari operators have is delivering the promised package as promised by them or by the tour operators and accepting the promised amount. Other than this, they do not have any other revenue stream to remain in this industry as a safari operator. There are no special pricing techniques available. The amount for the packages is having an LKR 500 difference if the jeep is Japanese. Japanese jeeps are expensive as it considers comfortable to Indian jeeps.

This revenue stream also not confirmed as there are more than 500 jeep operators to serve the Minneriya national park. Furthermore, as they do not use any technology to predict the weather pattern or animal behavior it is always dependable.

“Only revenue is going a safari in the morning, day time or in the evening. We charge bit more, if it is Japanese and Indian jeeps are cheaper. There are more than 500 jeep operators and what all does is waiting till someone walks or someone calls them. Again, that also depend on the weather and the animal behaviour as we do not have any system to predict those”.

4.1.10 Key Themes and Patterns of the Findings

Following key themes and patterns were derived from the evidences. These themes led to develop the proposed business model for safari operators to drive to the economic sustainability. Moreover, table demonstrate the coding evidences for the each theme.

Table 1: Coding evidences and Derived Themes

	Strategic Intentions	Value creation	Value Delivery	Value Drivers	Vale capture
Need a proper model	10	9	5	6	3
Need to satisfy the guest more than existing level	7	8	3	7	1
Need more knowledge	9	9	4	6	2
Need more non-financial support	10	3	5	7	1
Need formalized process and guidelines	6	6	5	8	3

Need to make this industry economically sustainable	16	8	7	6	2
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Source: Author's work adopted from the interview findings

5 Discussion and Recommendation

Propose changes for the existing business model would like propose based on **"Differentiation strategic aspect"** to drive this operation to the economic sustainability. Adding more, this is suggested based on the value caption, value delivery, value drivers, strategic intention and value capture (Zott et al., 2011).

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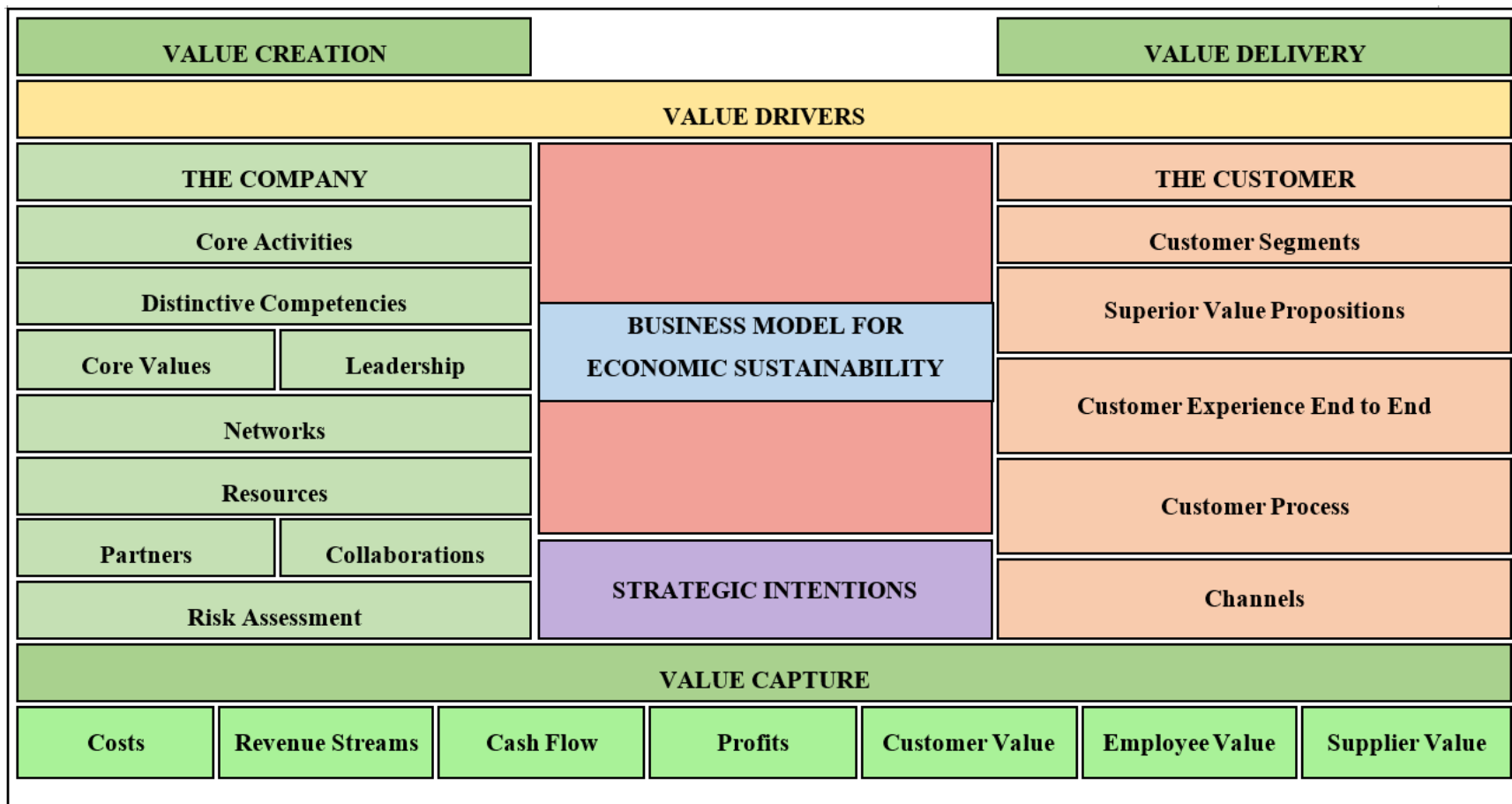


Figure 1: Proposed model for the Economic Recovery
 Source: Author's work adopted from Primary research

5.1 Strategic Intentions

Existing intention is creating revenue and this should be changed to make the safari operation economically sustainable as findings indicate that all the operators are focusing only on earning money to survive with their daily requirements.

The proposed strategic intention that each and every safari operator should have is creating a superior safari experience to the guests who visit the Minneriya national park and making that experience as memorable. Because as mentioned by Barnes et al. (2016) creating a positive affect is a powerful psychological driver for tourism behavior to have revisit intention for the safari parks.

5.2 Value Creation and Delivery

Value creation and delivery should be a new memory formation for the visitor as they visit the park for a memory creation. In order to do create the value in this way there should be a novel situation for the visitor with different experiences, sighting unfamiliar sights, hearing to unusual sounds, viewing wild animals which they have seen in other formats etc... (Barnes et al., 2016). Further the creation and the delivery should follow by the drivers as suggested below (Moore & Newsome, 2016; Newsome et al., 2013).

5.3 Value Drivers

Value drivers are the key components that the safari operators should develop to create the value to achieve the strategic intentions. These are considered as recommendations to the existing business model elements of the safari operators. Furthermore, these were recommended based on the evidence of interview findings. Following table 1 and 2 discussed about the value drivers to the safari operator and to the customer.

Table 2: Value drivers from the Safari Operator

	Value drivers from the Safari Operator	Evidence
Core activities	Core activity of safari experience need to formalize with a proper operational guideline and with a map of operations.	“...safari operation need to operate with a proper guideline and centralized reservation should be there at least from the association or from the park authorities”
	The core activities should include proper reservation system of the safari jeeps through their own associations would be beneficial for both parties.	
	Language barriers of the safari operators need to fix with complete awareness about communication importance.	

Distinctive Competencies	<p>Developing the competencies such as social awareness, relationship skills, and responsible decision-making for the safari operations with the success stories and following those while making those available to the guests.</p>	<p>“...Yes, I know only how to drive a jeep and how to find an Elephant, nothing else. We all need those”.</p>
Core values	<p>Maintaining the international quality standards throughout the service delivery is essential.</p> <p>Working with the association as a team is essential to drive toward the economic sustainability as a team.</p> <p>Awareness about all the sustainability elements among all the operators is important to have a long-term sustainability.</p> <p>Ethical business operation needs to achieve to win the international tourists by avoiding all the existing unethical activities.</p> <p>Superior value customer relationship is adding an extra ordinary value for the service delivery that the safari operator should learn.</p>	<p>“...as I said earlier, entire team of us should know how to deliver a proper safari experience. Government authorities take the fees and even the park, however no one help us the improve values. Though I talk about those there are many who doesn't even talk about those and manipulate the entire system”.</p>
Leaderships	<p>Government authority-based leadership to control this industry is essential to make this service delivery as an accepted process.</p> <p>Rather having politically appointed associations, trade association or an alliance between all the associations should establish to work for the same strategic intention.</p>	<p>“..the only leadership is politically controlled association and those are not professional associations”</p> <p>“A proper leadership should be there to drive all of us to the theme of survival rather talking about the daily encountered problems that should have a sound among all stakeholders”.</p>
Networks	<p>Proper network with the destination management companies need to establish with a clear path of process.</p> <p>Official links between the other service providers and safari operators should established rather having unofficial networks to serve the guests.</p>	<p>“I have been in the industry for more than 10 years, and I have a few connection of tour companies in Sri Lanka who can give me business and that's all I have as network”</p> <p>“I am confused sometime to whom I should talk in</p>

		the government authorities”
Resources	<p>The key resource is the automobile and these should maintain at the pre specific quality and standards to make sure the safety of the guest.</p> <p>Knowledge should make available through the associations to improve the knowledge about the superior customer service.</p>	<p>“Minimum standards of the jeeps need to establish as no one knows about those</p> <p>“We as operators, we do not have any other resource as long as it is self-funded”</p> <p>“I would say knowledge is very important that should make available to us any time”</p>
Partners	<p>Local and international partners need to introduce to the safari operators through the association to generate more confirmed revenue streams.</p>	<p>“..to be honest I do not have official partnership with any operator or any service provider, and that is same to other jeep owners as well I guess. No one got a proper partnership and no one encouraging such to have even”.</p>
Collaborations	<p>Associations should be able to sign collaborations between the industry partners to maintain a long-lasting relationship to attract more visitors to the Minneriya National park.</p>	<p>“No collaboration with any one even after many years of operations”</p> <p>“I highly believe such will be able to generate more revenue, but I do not know how to do such”.</p>
Risk assessment	<p>Risk assessment need to establish and recovery plan prepare accordingly.</p> <p>Especially during the Easter Sunday attack and COVID-19 pandemic pressure there was no such recovery plan was established as this was missing.</p>	<p>“There is no recovery plan to us or to me. If I have my savings, I can do something, or else nothing”</p> <p>“I would like to see such risk and recovery plan to make us surviving”</p>

Table 3: Value drivers through the customer

Value drivers through the customer		Evidence
Customer segments	Key customer segments need to identify by the safari operators to know their expectations. This can establish through the association.	“...what I do is, whoever the guest taking the safari. I do not know about the customer groups or their characteristics. Once they are with me only I ask from them about them”.
Superior value propositions and Customer experience	Superior value propositions should be established as a standard to deliver an enhanced customer experience. These should be comfort, wider safari experience, convenience and high quality.	“What I do is, accepting the guest and taking the safari to the best I know with what I have. That is all”.
Customer process	A proper process of service delivery should be established as an industry context, and this should make available to the customer to know about the process.	“No one knows about how to do we deliver the safari experience and guests are inquiring about the process and that is also differs from one guest to another guest and location of the elephants” “Good if we have a defined process about the safari experience to share with the guest, and they will be knowing what to expect”
Channels	Adding selling channels with a established methods is essential and making those available with proper awareness is important to have a secured revenue. Such as selling through individual websites and social media channels, linking those to the association main page, government list, tour operators and other service providers.	“As I have mentioned we have only few methods to get business, those are waiting in the park till a tour guide or a client walks to us or waiting till we get a call from a known contact” “This is the main reason why we have lost a secured income and why we do not have a proper future”

Source: Author’s work

5.4 Value Capture

Value capturing could be divided to two main parts as financial value capturing and non-financial value capturing. Evidence from the interview indicated that the existing safari operators

have only one value capturing option that is calculation of the revenue and the cost to identify the take home amount. However, Shafer et al. (2005) mentioned value capturing is a fundamental requirement to determine the viability of any business. Based on the suggestions by Shafer et al. (2005) and the interview evidences following the recommended value capturing elements for the proposed business model.

Table 4: Value capturing elements

Value Capturing initiative	Implementation	Interview evidence
Profit and cash flow	Through a self-prepared profit and loss and cash flow statement account or through a support from an accountant need to prepare for the given time period.	<p>“I do not do any financial calculations rather listing down what I have spent on earned, just to identify how much I have earned”.</p> <p>“Better if I have knowledge or the capacity to do such so, I can save more money”.</p>
Revenue	Revenue should be not only the jeep ride. For this experience, proper guided tour, virtual reality options, digital presence of the safari operator and souvenir selling should be added.	“The only revenue is the amount I earn by taking the guest to the park”
Customer Value	A customer experience survey need to distribute to the guest through the association and through the individual safari operator to understand the overall satisfaction level.	“I do not do any customer survey and what I do is talking to the customer at the end of the tour to understand how he feels”
Employee Value	Creating an encouraging a positive working environment by providing a value to the member.	“If I need to drive the jeep whenever I am busy, I just ask someone to take my jeep, no any other relationship as an employee”.
Supplier Value	Long lasting sustainable relationships need to establish with a proper awareness.	“I do not know how to maintain such good relationship with the suppliers, it is just a relationship to get the work done”
Other stakeholders	Identifying the objectives and expectations of the other stakeholders and driving the business for the achievement of those.	“I do not have any government relationship or any other company. It is all about me. This might be the reason

why we do not have a proper value to our
job and we have low income”.

Source: Author's work

In order to implement the proposed value capturing aspects following key performance indicators were suggested as measurements.

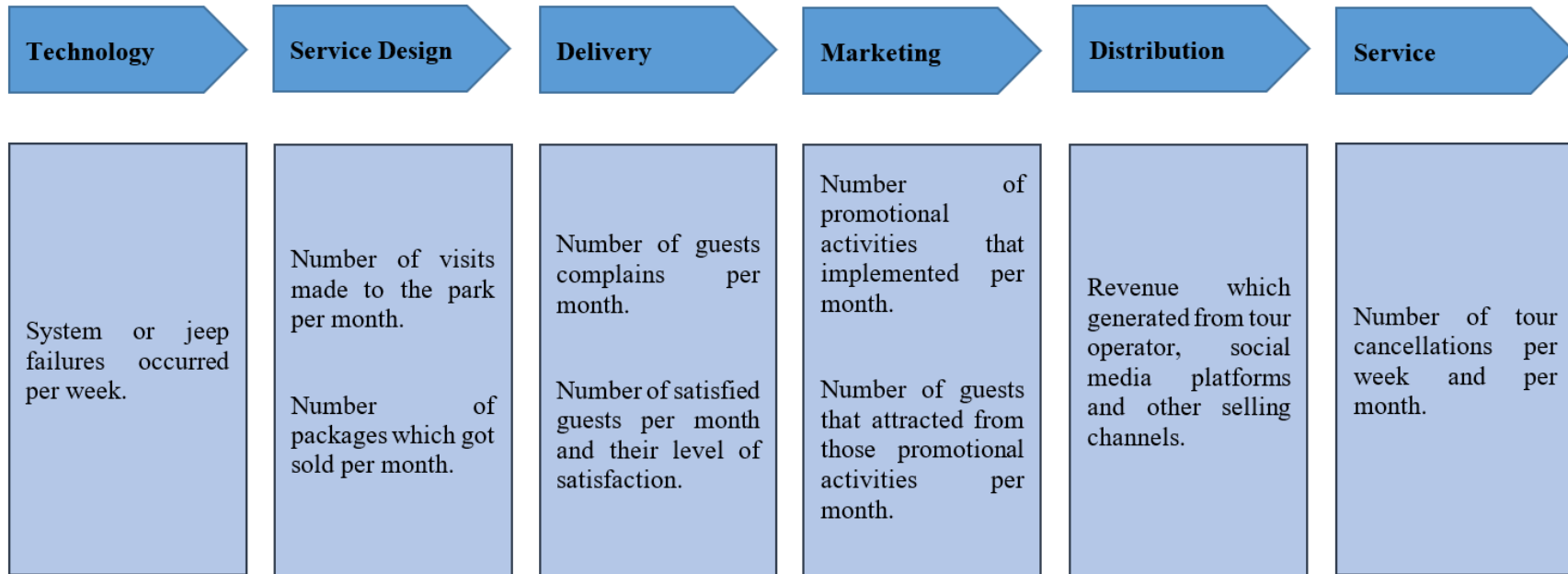


Figure 2: *Key Performance Indicators*
 Source: Author's work adopted from Kaplan et al (2004)

6 Conclusions

As explained in the introduction section, economic sustainability of the safari operators in the Minneriya National Park is limited not only to revenue opportunities, but also failure to achieve the other sustainable elements as well. This has led many operators to leave the industry and defined as a less competitive status. Most of the tour operators are lack of knowledge about the economic sustainability and this identified as the barrier for the development of the industry. Inappropriate business model is the operational barrier to stimulate this sustainable development and long-survival. This is not, of course, always the case. Some of the tour operators were observed with developments.

Nevertheless, the evidence from the case study reveals that operators were failed to operate an economically sustainable business model including proper elements to lay the foundation for their business to drive to long-term survival. Partnerships, alliances, customer relationships management, value creation, value generation etc... largely excluded from safari operators' activities. Limited awareness about the value delivery is the key reason for this level of low level activities planning. Delivery of this safari experience is largely dominate by the DMCs.

In other words, although the Sri Lanka tourism is developing, the opportunities were not grabbed by the safari operators in Sri Lanka. Therefore, it is recommended to follow up the proposed business model as most of the operators are willing to implement for greater benefits in long-term with the economic sustainability. Application, measuring the results and successfulness need to explore in a future research agenda.

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