



Russia's Place in Global Nature Tourism: Where does it stand?



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Global

Nature tourism is truly international.



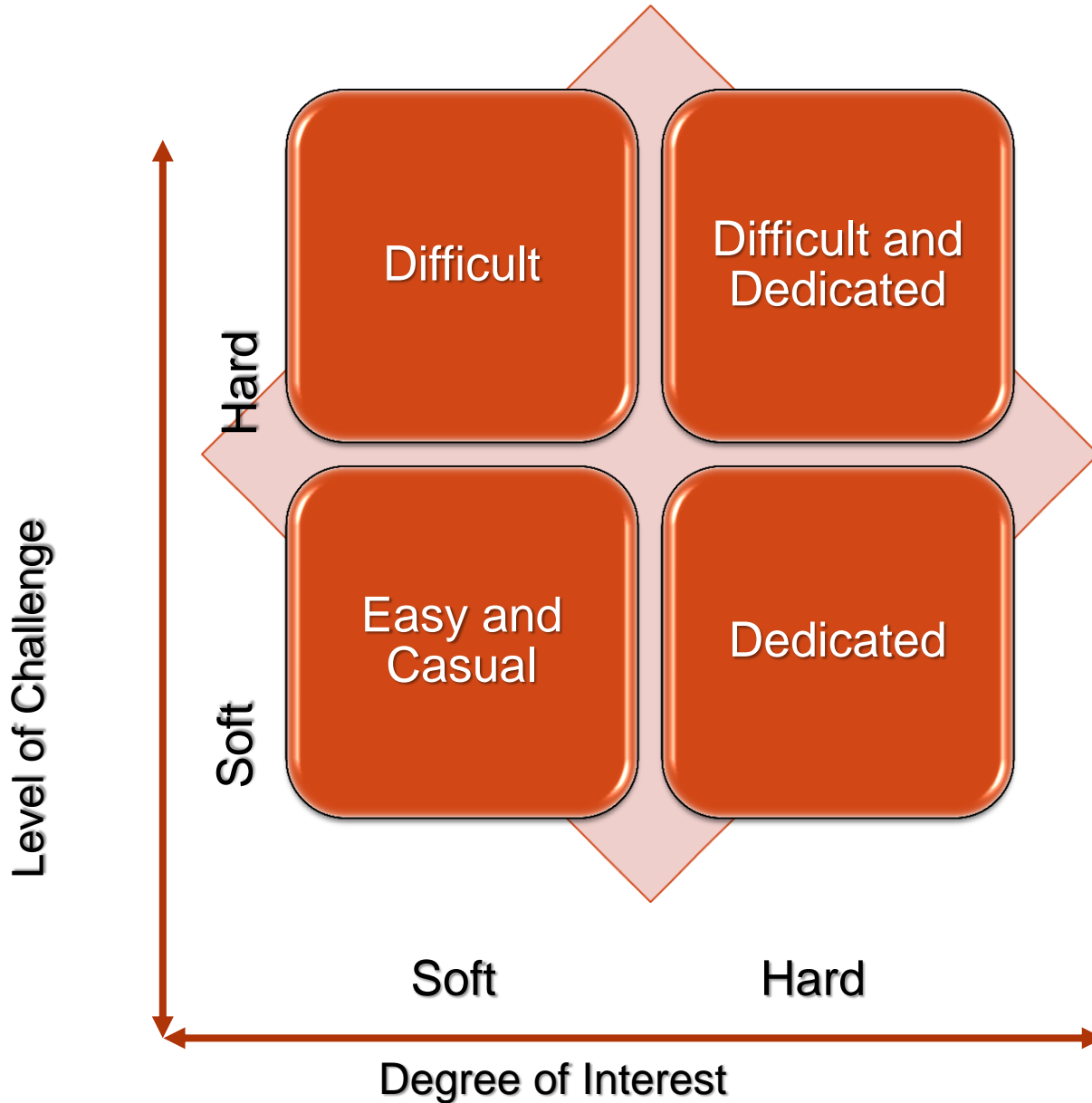
Ecotourism key elements:

- 1) nature-based attractions,
- 2) environmental education, and
- 3) sustainably managed (financially, culturally, environmentally)

Travel Motives (Canada)

- The ecotourist highly ranks **attraction features**: wilderness, lakes and streams, mountains, national and provincial parks, rural areas, wildlife, and oceanside.
- The average tourist highly ranks **social factors**: visiting friends and relatives, shopping, entertainment, amusement parks and resorts, being together as a family.
- Social factors can be fulfilled almost anywhere, but attraction features are highly specialized local attractants.

Hard and Soft Ecotourism



Ecotourists

- Highly educated.
- Frequent and experienced travellers.
- Want to learn about and experience nature.
- Adventuresome.
- All ages, but 20s professionals and recently retired prominent.
- No gender bias.
- Long trips.
- Global travellers.
- Utilize ecolodges.



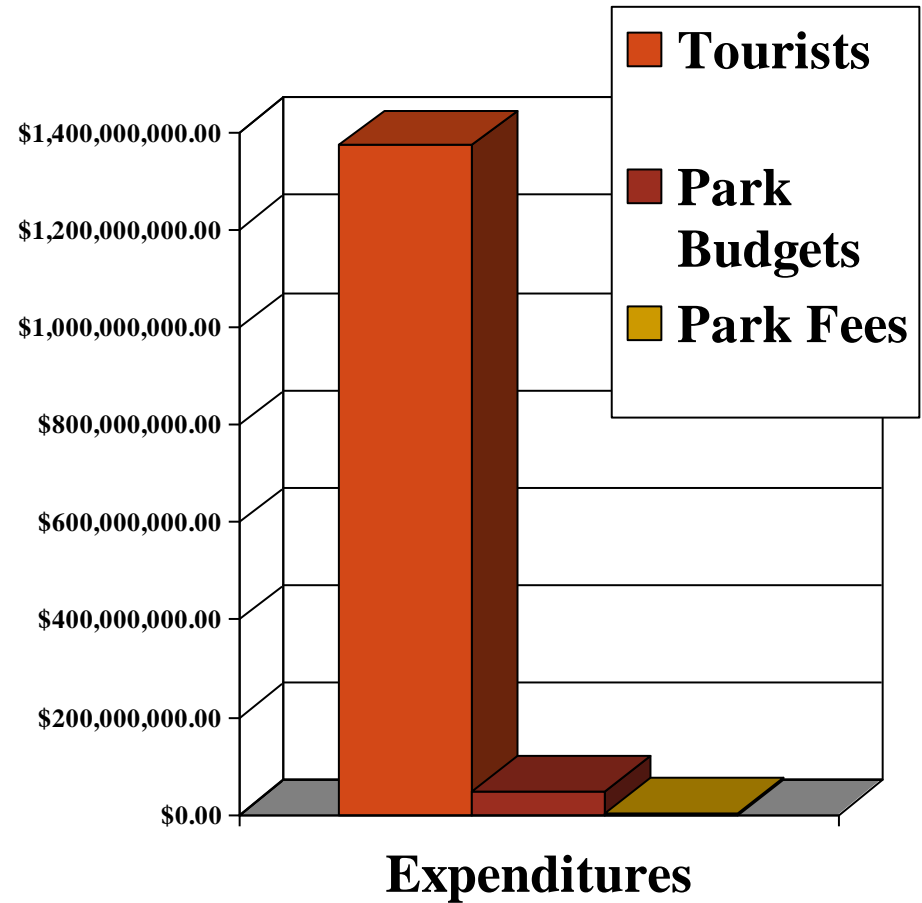
**Point Pelee National Park,
Ontario**

Ecotourism Components

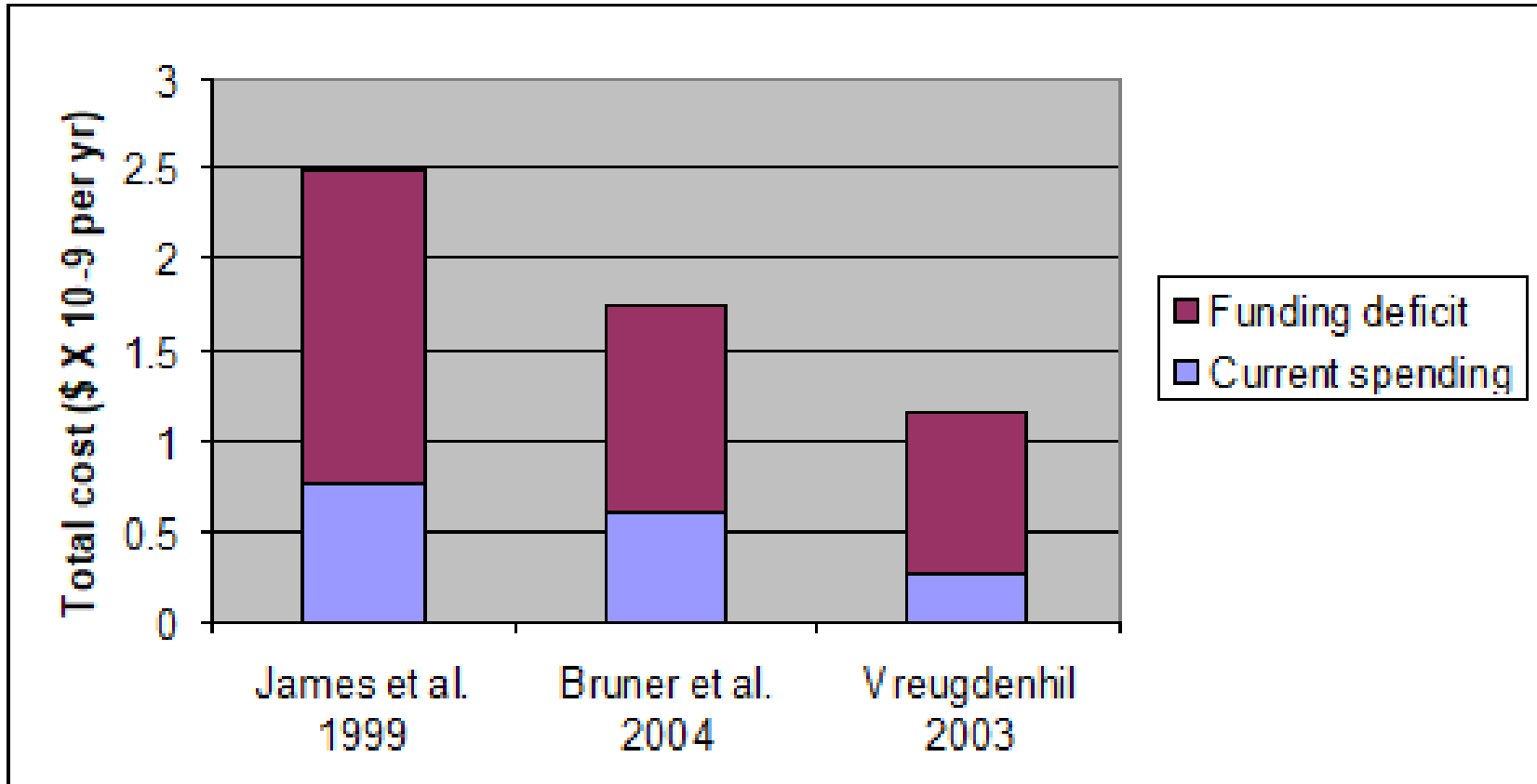
- Destinations: National Parks, Game Reserves, Ecolodges
- Ecotour companies and tour guides.
- Specialized accommodation (ecolodges).
- Specialized equipment (SLR cameras, GPS, video cameras, outdoor clothing, tablets, cell phones, RVs, 4X4 vehicles).
- Specialized travel operations (birding trails, long distance hiking trails, nature tours).
- Books (site guides, field guides, apps).

Economics of Australian World Heritage Sites

- \$1.3 billion spent by tourists at Australian World Heritage Sites.
- Governments spent only \$48.7 million on national park management at those sites.
- The parks earned \$4.6 million from tourism fees.
- Therefore, the national parks at the core of the World Heritage Sites earned only .3% of the total tourist expenditures.



Massive Funding Deficit in Parks



Trend: Oversupply of Destinations

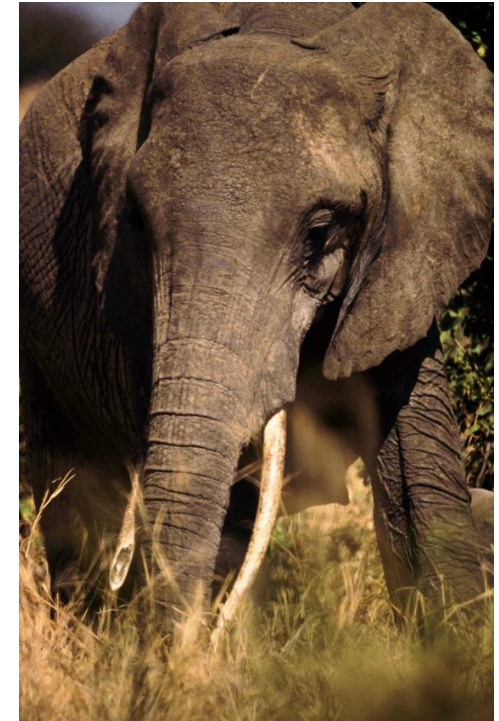
- Parks and protected areas cover over 13% of the world's surface.
- There are thousands of ecolodges.
- World Heritage designations reach 1092.
- There is a much larger supply of natural destinations than there is demand for the benefits that come from visiting these destinations.

Trend: Increase in Ecolodge Development

- Ecolodge development occurring in some countries: South Africa, Costa Rica, Australia.
- Combination of hotel, resort, ecology, education.
- Often located near national parks.
- Innovation and uniqueness.
- Undertaken by profit making and not-profit organizations.
- Weak brand development.
- What is driving ecolodge development? The next two slides give the answer.

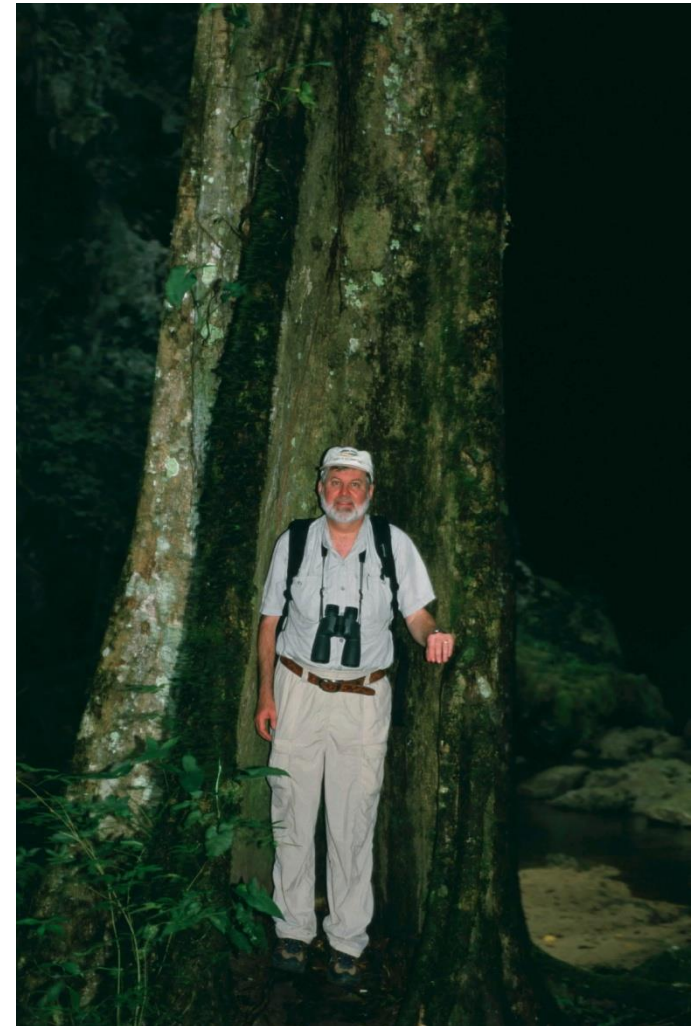
Service Quality Gaps in Serengeti National Park (Tanzania)

Service Quality Variable	Service Quality Gap (Mean Importance minus Mean Performance)
Washrooms	-1.29*
Quality of Roads	-1.10*
Availability of Information	-0.99*
Security from Theft	-0.82*
Visitor Centre	-0.46*
Low Level of Crowdedness	-0.41*
Knowledge of Guide	-0.25*
Group Harmony	-0.13
Friendliness of TANAPA Staff	-0.13
Attractiveness of Park	-0.09
Security from Wildlife Attack	-0.08
Friendliness of Guide	-0.08
Accommodation Chosen	+0.01
Good Weather	+0.54*



Service Quality Gaps in Ecolodges (Belize)

Service Quality Attributes	
Knowledgeable guides	+0.54
Availability of trees and wildflowers	+0.48
Staff provide efficient services	+0.43
Friendliness of staff	+0.41
Cleanliness	+0.40
Quality of the environment and landscape	+0.38
Scenery	+0.33
Design sensitive to natural and cultural environment	+0.33
Decent sanitary condition	+0.30
Availability of wildlife	+0.11
Price	+0.06
Value for money	+0.02



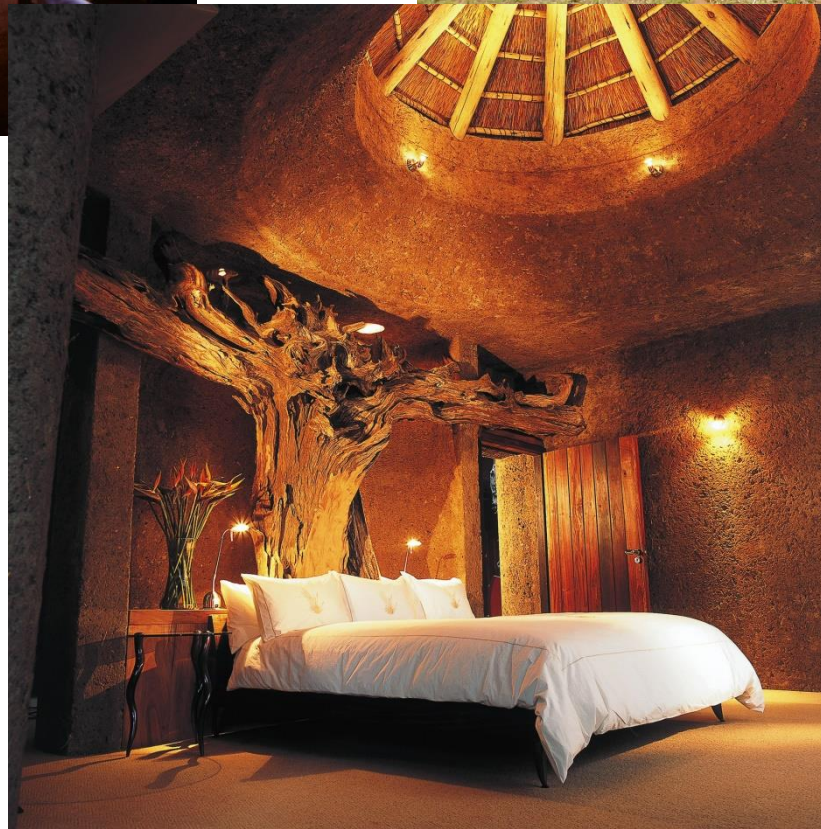
Trend: Diversification of Offerings

- South Africa is the world leader in providing a diversity of offerings in ecotourism.
- In the Kruger National Park tourist area there are 9 pricing levels for the same product: observation of wild nature.
- The price determines the quality of service.
- The bottom 6 levels are in the national park.
- Most of the top 3 levels are in nearby private game parks and ecolodges.
- The next 6 slides will show accommodation from 7 levels, 4 in a national park and 3 in private reserves.

Private ecolodges and game parks

- South Africa has over 500 private game parks and ecolodges.
- There are 27 private game reserves on the western edge of Kruger National Park.
- They specialize on high levels of service quality, including accommodation, food, wine, and game drives.
- A few specialize on a very specific target market: providing services to those who are too famous to travel in normal public venues, such as movie stars, professional sports personalities, royalty, and politicians.



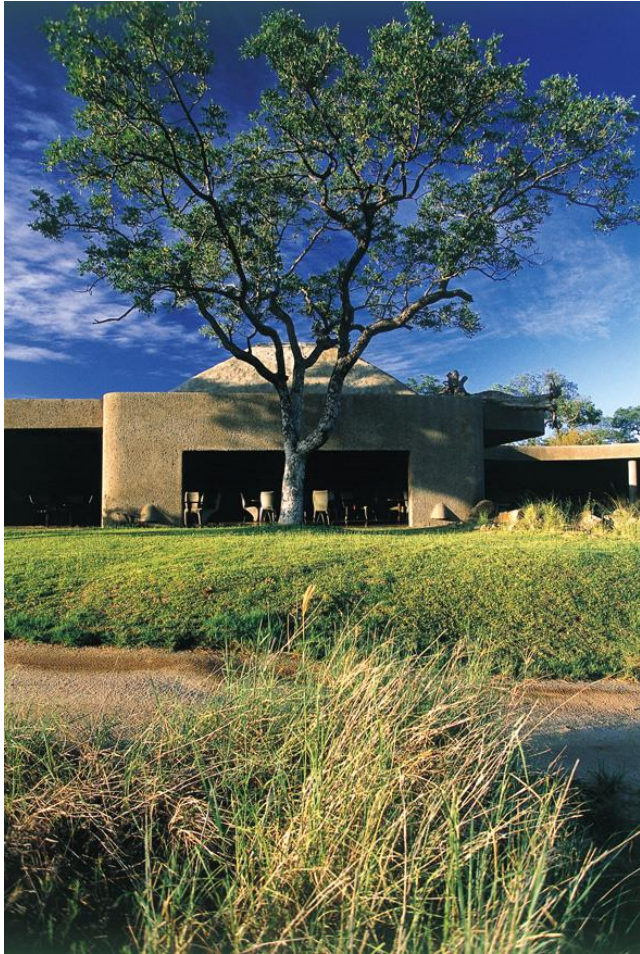






Ec lodges

- Occur at all price levels, from backpacker hostels to luxury resorts.
- Diversifying products through experimentation.
- Only one global brand, National Geographic Luxury Ec lodges.
- Highly variable in services and prices.
- Tending to move up scale as market profile develops.















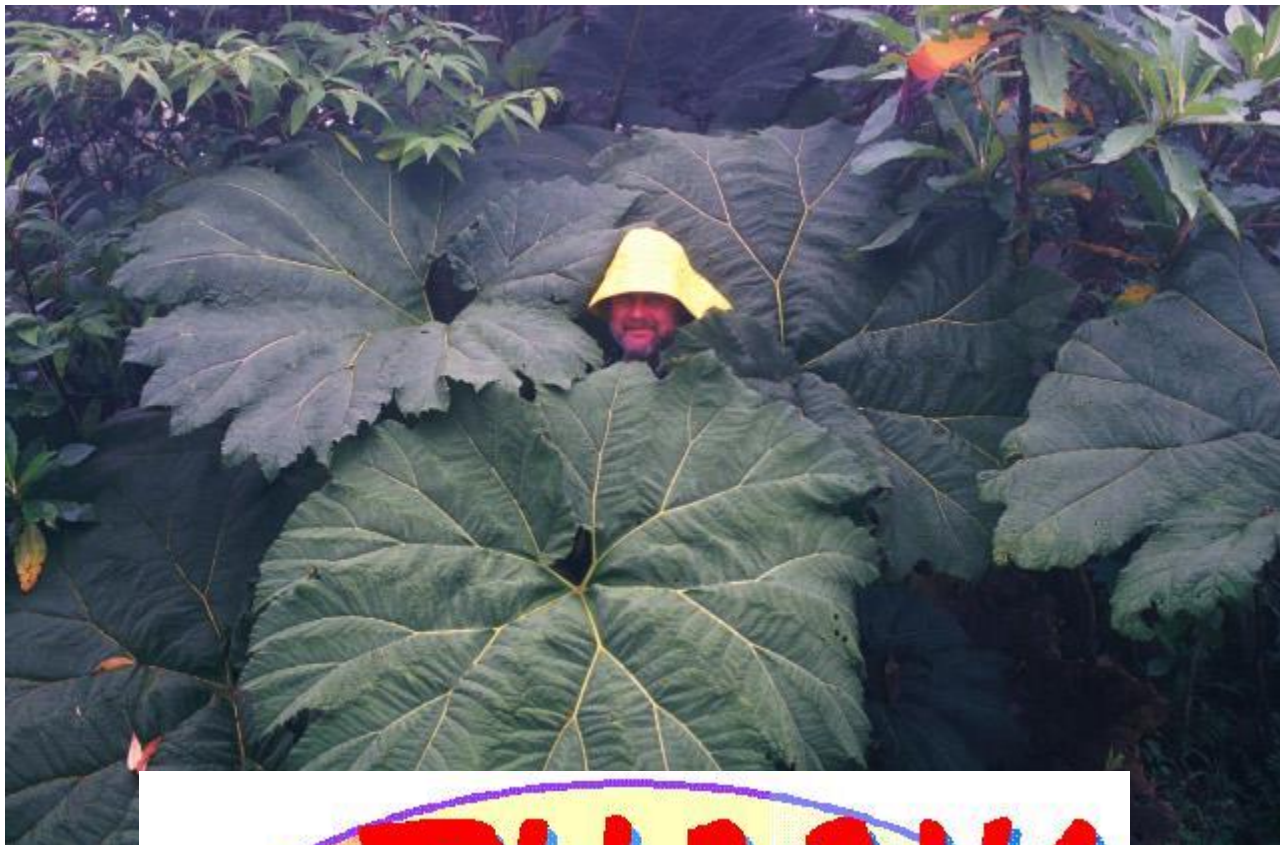






Challenge

- The next 25 years will see the greatest management challenges ever.
- Nature tourism managers must be increasingly skilled at hospitality delivery, political negotiation, community relations, finance, tourism, and regional ecological management.
- Research and management innovation is fundamental.



**THANK
YOU!**