Programme “Protected Areas for Nature and People” (PA4NP) in the Balkan Peninsula

MARKETING FOR BEAR WATCHING PROJECT in Biogradska gora National Park, Montenegro

Author: Kirsi Hyvaerinen
December 2018
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Foreword

When I was first time in February contacted about this project, for the development of bear watching tourism in the National Park (NP) Biogradska gora, I first checked back to my roots in Finland, where the bear has been for hundreds of years a holy animal with a mythical status: Even today the Finnish language has over 200 names showing respect for the beautiful beast.\footnote{Pentikäinen, J.: Karhun kannoilla – metsänpitäjä ja mies, Helsinki 2005} Today, the majority of European bear watching and photography trips take place in Finland. Coincidence? I don’t think so. Because what you know and respect, you protect. And what you protect and manage well, is apt to be a cornerstone of today’s understanding of sustainable development. In Montenegro, the topic of wildlife tourism is new, and the development of the National Parks as places of truly responsible ecotourism has only started. It is an honour, pleasure and an interesting task to help pave the way to better information, conservation and new nature-based experiences for engaged and caring visitors.

If Parks Dinarides, together with the National Parks of Montenegro (JPNPCG) and the NP Biogradska gora decide to follow the recommendations in this report, they need to

- Gain commitment and participation in the new topic, from national and local levels, public institutions, the local communities and business side alike,
- Spend time and money for the raising of awareness that a bear alive is worth much more money than a dead bear,
- Build new, professional visitor information and activity services and manage them sustainably,
- Promote and put these services on the market in a smart manner,
- Put qualified human resources first, with education, exchange and rewards,
- Support their work by adequate infrastructure,
- Introduce new sources of financing for conservation, product development and marketing,
- Follow the global trends of tourism development, to study and understand the relevant trends,
- Keep up the communication and build better linkages between each other, the municipalities, the National Tourism Organisation (NTOCG) and the Ministry of Sustainable Development and Tourism (MORT),
- Identify and strengthen links and concrete cooperation with partners in the region and internationally,
- Reach measurable improvements in all this in 3-4 years – and keep measuring those to justify further investment and funding.

For any of the above fields, I will be happy to stay at the disposal of Parks Dinarides’ decision makers and partners as required, and provide assistance in the further efforts to make it happen. Today, I would like to thank all local, national and international partners and supporters, above all the project management of Parks Dinarides, for the informative contributions and dedicated cooperation.

Sincerely,

Kirsi Hyvaerinen
## Abbreviations and Acronyms

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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<tbody>
<tr>
<td>ATCF</td>
<td>Adventure Travel Conservation Fund</td>
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<tr>
<td>ATTA</td>
<td>Adventure Travel Trade Association</td>
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<tr>
<td>B2B</td>
<td>Business-to-Business</td>
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<tr>
<td>B2C</td>
<td>Business-to-Consumer</td>
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<tr>
<td>CTU</td>
<td>Crnogorsko turističko udruženje</td>
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<tr>
<td>CZIP</td>
<td>Centar za zaštitu i proučavanje ptica Crne Gore/Center for Protection and Research of Birds of Montenegro</td>
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<tr>
<td>EEN</td>
<td>European Ecotourism Network</td>
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<td>EOCA</td>
<td>European Outdoor Conservation Association</td>
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<tr>
<td>ETC</td>
<td>European Travel Commission</td>
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<td>ETIS</td>
<td>European Tourism Indicators System</td>
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<tr>
<td>EU</td>
<td>European Union</td>
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<tr>
<td>FTI</td>
<td>Foreign Independent/Individual Travel</td>
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<tr>
<td>GEN</td>
<td>Global Ecotourism Network</td>
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<tr>
<td>GSTC</td>
<td>Global Sustainable Tourism Council / Criteria</td>
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<tr>
<td>IUCN</td>
<td>The International Union for Conservation of Nature</td>
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<tr>
<td>JPNPCG</td>
<td>Public Enterprise for National Parks of Montenegro</td>
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<td>LTO</td>
<td>Local Tourism Organisation</td>
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<td>MNE</td>
<td>Montenegro</td>
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<td>MORT</td>
<td>Ministry of Sustainable Development and Tourism</td>
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<td>NGO</td>
<td>Non-Governmental Organisation</td>
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<td>NP</td>
<td>National Park</td>
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<td>NTOCG</td>
<td>National Tourism Organisation of Montenegro</td>
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<tr>
<td>PA</td>
<td>Protected Area</td>
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<tr>
<td>PA4NP</td>
<td>Protected Areas for Nature and People</td>
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<tr>
<td>RCC</td>
<td>Regional Cooperation Council</td>
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<tr>
<td>RDA</td>
<td>Regional Development Agency of Bjelasica, Komovi and Prokletije</td>
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<tr>
<td>SME</td>
<td>Small- and Medium-sized Enterprise</td>
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<tr>
<td>SWOT</td>
<td>Strengths, Weaknesses, Opportunities, Threats</td>
</tr>
<tr>
<td>TTCI</td>
<td>Travel &amp; Tourism Competitiveness Index</td>
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<tr>
<td>UNWTO</td>
<td>United Nations World Tourism Organization</td>
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<tr>
<td>USP</td>
<td>Unique Selling Proposition</td>
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<tr>
<td>WEF</td>
<td>World Economic Forum</td>
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<tr>
<td>WTTC</td>
<td>World Travel and Tourism Council</td>
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<tr>
<td>WWF</td>
<td>World Wildlife Fund</td>
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1. Background and scope

1.1 Rationale and objective

Although the primary goal of Protected Areas (PA) is biodiversity and ecosystem conservation, they typically can leave a substantial economic and social footprint, locally, nationally and globally. For Montenegro, they should play a major role as sustainable tourism cornerstones. Coming with the history of „old style“ focus on exclusive conservation, they are today on way to an integrated offer, with stronger cooperation at national level, local community involvement and their own ecotourism products. While focussing on the special educational and conservation aspects of PAs, they should serve special interest, high value, authentic and sustainable travel experiences as well.

Parks Dinarides, WWF Adria and other partners are working on the four-year programme “Protected Areas for Nature and People” (PA4NP) in the Balkan Peninsula. The programme aims at contributing to the better engagement of local communities in the management of terrestrial PAs and strengthening the constituency for influencing and monitoring national policies for the conservation of natural environment. PAs will be used as “natural laboratories” to develop model solutions for sustainable development safeguarding the natural capital. The programme is helping PAs increase their role in local social and economic development and become more valued and supported by their constituents. The program is also aiming to build a strong constituency for influencing and monitoring national policies for the protection of the natural environment.

In order to ensure that PAs demonstrate tangible examples of economic and social benefits to local communities, WWF and local partners are implementing six field projects in nine protected areas from the region.

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Figure 1: The Economic and Social Footprint of Protected Areas

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2 GEF/UNDP PIMS 4279 / Emerton, L.: The Economic Value of Protected Areas in Montenegro, 2011
Through the field project “Bear Watching in National Park Tara and National Park Biogradska gora”, both parks will benefit from bear-watching related tourism activities. Furthermore, public support to the PAs and economic benefit for local communities will be increased through sustainable bear-watching tourism offer. The project seeks to develop bear watching as a nature-based tourism product in PAs, in addition to the measures for brown bear protection and habitat improvement.

Results of the Protected Areas Benefits Assessment in six PAs in Serbia and five in Montenegro reveal that biodiversity, tourism and education are the overall economic potentials recognized by the stakeholder groups. Both NPs have good potentials for wildlife tourism development, with a special emphasis on the brown bear, as they represent important habitats for this species. In the light of emerging nature-based tourism market, development of commercial wildlife and bear watching tourism proved to be a win-win solution for the local population.

The project will build an effective system of monitoring brown bear with the standardized monitoring methods, in order to contribute to the conservation of the species in the area of the NP Biogradska gora and NP Tara.  

An important component is the local community awareness and participation, concerning bear co-habitation, as well as promotion and highlighting potential economic benefits of living near wildlife-rich habitats. The local community has been invited to engage in measures to protect brown bear, but also to take part in the creation of attractive tourism offers, in the role of wildlife guides, providers of accommodation, gastronomy and new souvenirs – inspired by brown bear – as well as other nature-focused tourist services (ANNEX D).

**Project vision**
Sustainable use of natural capital in countries of the Balkan Peninsula forms a basis for social and economic development and is safeguarded through enhanced environmental responsibility among the public, governments, civil society organisations and the business sector.

**Purpose of the marketing plan**
Long-term, the aim is to establish an attractive tourist product “bear watching”, that would bring benefit for both NP Biogradska Gora and local communities. The main purpose of this plan, with the NP Biogradska gora in focus, is therefore to assist this PA, its partners and stakeholders in development of wildlife tourism products and services which meet the needs of the targeted markets in a planful and realistic manner. It shall also serve as a roadmap for the NP management, local and national tourism organisations and local businesses for implementation, evaluation and control of marketing activities, based on brown bear and wildlife as a unique selling proposition (USP).

**1.2 Methodology and activities**
In order to implement a sustainable product development and marketing program, with the local communities and partners of NP Biogradska gora, we are using the „AIDA“ funnel concept of a potential customer: The model is used in marketing to describe stages that occur from the time when
a consumer first becomes aware of a product or brand, through to making a purchase decision. On the side of the service providers, facing a new market need as to create wildlife tourism offers, the steps are similar: The first need is to simply raise **Awareness** by generally introducing the idea, the opportunities and needs, which should lead to more **Interest**. For this, it is necessary also to inform and motivate multipliers (NGOs, media, national and international partners) and final target groups (in the 1st phase, wildlife tourism specialised tour operators), so that awareness and interest can grow to conviction and **Desire**. Then the concrete **Action** of both sides should come together: On the one side there are **wildlife tourism products created**, communicated and delivered for profit – and on the side of the target markets, waterproof information is received, and buying those products and services is enabled.

In tourism of developing destinations, these steps on both sides take at least 3-4 years: From the first stages of awareness raising until good quality products are sold and reliably delivered. Therefore, the activities within this project can be seen only as the very first steps from „**Awareness**“ towards „**Interest**“:

Since February, the consultant has initiated, reported back and/or participated in

- 11 internal coordination and consultation meetings with the Parks Dinarides, JPNPCG, NP Biogradska gora, local stakeholders and the NP Tara + Durmitor project consultants and supporters (Feb-Dec)
- 6 individual business meetings with potential incoming agencies for wildlife programs in Montenegro and cross borders (Jun-Nov)
- 2 terrain working days in NP Biogradska gora, 2 days in NP Durmitor (Sept)
- 2 full-day trainings for basic skills of wildlife guiding and “Leave No Trace” principles, to rangers and local guides from the PAs of Biogradska gora, Durmitor, Piva and Dragišnica-Komarnica (Oct-Nov; posted on social media)
- the IV International Conference of Parks Dinarides (Nov)
- 1 full-day workshop in Kolašin with Parks Dinarides, NP Biogradska gora and local stakeholders (Nov): [https://www.facebook.com/kirsij.hyvaerinen/posts/497016397470846](https://www.facebook.com/kirsij.hyvaerinen/posts/497016397470846)

**Figure 2: Ranger Trainings in the NP Biogradska gora and NP Durmitor, Oct-Nov 2018**
2. Definitions and demand

The major change on the side of PAs in the past 50-60 years is the understanding of their meaning and legacy. The role of people and the way of management has changed: While in the 1960’s people were supposed to be excluded and the management of PAs was exclusive, today the man has to be involved, and the management must be not only participatory, but inclusive.\(^4\) Parallel to this shift, also tourism has become diversified and the travellers’ values, expectations and mindsets are quite different from those in the 1960s. Most tourism themes today are either culture or nature-based. They express the underlying aspirations of travellers, and their motivation to travel. The following definitions are relevant for the understanding of the new products, which in the case of NP Biogradska goraj will include elements of these four:

2.1 Definitions and requirements for competitiveness

1) “Ecotourism is responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education” (Global Ecotourism Network, GEN, 2015).\(^5\)

2) What to promote in PAs is not just any kind of tourism, but sustainable tourism: “Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities”.\(^6\) For tourism in PAs to be sustainable, it must, first and foremost, contribute to the conservation of nature over the long term, not just briefly or sporadically, and ensure that conservation is not compromised by inappropriate or poorly managed visitor use.

This follows directly the basic definition of Protected Area: A clearly defined geographical space, recognised, dedicated and managed, through legal or other effective means, to achieve the long-term conservation of nature with associated ecosystem services and cultural values.

With this fundamental principle, sustainable tourism in PAs should, in all its phases from policy to planning to management:

- Safeguard the environmental qualities that attract visitors by maintaining essential ecological processes and aesthetic qualities, and by helping to conserve natural heritage and biodiversity
- Respect the rights of local communities and their sociocultural authenticity, conserve their built and living cultural heritage and traditional values
- Ensure viable, long-term economic operations, providing fairly distributed socioeconomic benefits to all rights-holders and stakeholders that are affected by tourism, including stable

\(^4\) Gugić, G., presentation at the 4th International Conference of Parks Dinarides, Budva, Montenegro, 7th Nov 2018
\(^5\) https://www.globalecotourismnetwork.org/
\(^6\) http://sdt.unwto.org/content/about-us-5
employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation

- Provide appropriate opportunities to facilitate meaningful and high-quality visitor experience that will contribute to an increased sense of stewardship for nature and protected areas.

| All those involved in developing and managing tourism in Protected Areas should aim for these basic goals. Tourism that does not meet these goals - that is not sustainable - should not be allowed in Protected Areas. |

3) “Wildlife watching tourism is a type of tourism that is organized and undertaken in order to watch or encounter wildlife. Wildlife watching tourism exclusively relates to non-consumptive forms of wildlife-based activities as observing and sometimes touching or feeding of animals, in contrast to consumptive forms like hunting and fishing.”\(^8\) The main places where wildlife tourism can be developed are in and around PAs - where the product and the demand potentials exist.

4) Adventure travel, based on Adventure Travel Trade Association’s (ATTA) research conducted in 2005-2006 and updated in 2016, the current definition is “any tourist activity that includes at least two of the following: physical activity; a cultural exchange or interaction; engagement with nature.” This definition describes the key ingredients of an adventure travel trip from the external, delivery perspective.\(^9\) An in-depth look at adventure travellers’ most important elements (with net agree scores higher than 80%) and how they should be translated into the specific context of wildlife tourism, are:

- being in a natural environment \(\rightarrow\) Protected Areas
- learning \(\rightarrow\) About wildlife, co-habitation, nature’s seasons
- meaningful human experiences \(\rightarrow\) With local communities, incl. rangers
- experiencing a new culture\(^10\) \(\rightarrow\) Montenegro, Balkans, mountain lifestyle, katuns

![Figure 3: Definition of Adventure Travel – External Perspective](image)

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\(^9\) Adventure Travel Trade Association (ATTA, various authors): *North American Adventure Travelers*, October 2017 Update, p.3 ff.

\(^10\) ibid.
A second conclusion and recommendation follows the latest enlargement of the picture of what adventure travel is. Today, this is the more refined understanding:

"Adventures travel describes trips that provide experiences (both mental and physical) to places which are novel or unique to the traveler, emphasize the natural environment, and provide challenge through experiences of culture, activities that promote physical health, and excitement/fun."  

2.2 Facts & figures

There is no globally comparable, up-to-date data on specific numbers, source markets, or visitor behaviour of wildlife tourism, but several studies deliver a picture of a growing and lucrative market segment.\textsuperscript{12} Generally, the demand for all types of nature tourism, particularly adventure tourism and wildlife tourism, is predicted to expand rapidly over the next two decades.\textsuperscript{13}

A 2009 study by the University of Cambridge of visitor trends at 280 natural PAs in 20 countries found that visitation is increasing about 4% yearly, in line with the current global GDP growth from international tourism.

Figure 4: Annual Growth of Global and Direct GDP from Travel & Tourism\textsuperscript{14}

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\includegraphics[width=\textwidth]{annual_growth.png}
\caption{Annual Growth of Global and Direct GDP from Travel & Tourism}
\end{figure}

\textsuperscript{11} ATTA, various authors: North American American Adventure Travelers, October 2017 Update, p.21
\textsuperscript{14} World Travel & Tourism Council (WTTC): Travel & Tourism Global Economic Impact & Issues 2017, p. 2
As the demand for tourism grows, so does the potential for wildlife tourism.

- In 2015 PAs were estimated to globally receive eight billion visits a year, generating as much as 526 billion € of tourism expenditure annually. In contrast, less than 9 billion € a year is spent on protecting these sites.  

- 2018 American Express study shows that people are booking trips with a specific purpose in mind. 68% of consumers say they prefer travel experiences that offer a deeper sense of meaning: From voluntourism to learning a new language, or to immersing oneself in culinary and cultural moments.

- The number of (registered) visitors to Montenegro grew in 2017 by 10%, to nearly 12 million. The average length of stay was six overnights. Over 90% of both visitors and overnights were induced by foreigners.

**Figure 5: Montenegro: Registered Visitors & Overnights 2014-2017**

![Graph showing Montenegro: Registered Visitors & Overnights 2014-2017](image)

- The visitor number growth rates in Montenegro’s National Parks in the past years have been double-digit. In summer 2018, NP Biogradska gora expected for the year a record visitor number: At the end it was 58,091, which means a growth by 27% (2017: 45,637 visitors).

- NTOCG and MORT monitoring from the financial crisis period 2008-2010 proved that the demand for nature-based tourism was not affected: Even in challenging times, these high-value, higher educated and financially better off tourists do not give up on travelling.

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16 Statistical data sheets provided by the National Tourism Organisation of Montenegro


18 NTOCG and MORT: *Progress Monitoring – Wilderness Hiking & Biking Project, Start 2008 – Results by 2010, with updates September 2011*
2.3 Travellers’ mindset and profile

“Feel-good, less is more, and leaving a positive local impact”

Drivers of wildlife tourism demand include people’s interest in wildlife, urbanites’ wish to escape cities and relax in natural settings, and a desire of tourists—particularly Millennials—to seek new and authentic experiences.\(^{19}\)

2019 will see a more conscious traveller become evident, with even more questions being asked around social, political and environmental issues in potential travel destinations before deciding on where to visit.\(^{20}\)

The Millennials feel it is important to get “under the skin” of their travel destination: Living like a local and creating memories as a result of these experiences are amongst the strongest motivations for them.\(^{21}\) Not only learning about new places or visiting a community but the importance of, in some way, during the travel experience. Seeking out farmers’ markets, learning about nature and people’s lives, enjoying local food, paying attention to waste, and sharing the experiences with others are signs of this mentality.\(^{22}\)

Increasingly, people are using travel experiences to unplug, focus inward, and regain a sense of control over their daily lives. More trips are being offered as restoration, recovery, digital detox, back-to-nature, which seek to offset the intensity of modern life. This increased focus on “mindfulness” links travellers to having a greater interest on their personal impact on the places and people they visit.\(^{23}\)

What we are seeing today is a search for the authentic and natural in a world that too often seems homogenous, hectic, and already discovered. This movement is creating more opportunities to destinations for visitors without forcing the places to mimic the charms of others. Our new “hipster” destinations in the Balkans are joining this “boutique destination game” – with a unique cultural mix and nature’s qualities that have become rare in the more crowded parts of Europe. But as soon as places start to feel “over-touristy” or spoiled, travellers are turning to alternatives.

In 2019 environmental concerns will turn into greater environmental action. Travellers will look for sustainable experiences in their destination, while service providers must look to increase their sustainable credentials. An overwhelming majority of global travellers (86%) say they would be willing to spend some time on activities that offset the environmental impact of their stay, with over a third (37%) willing to clear plastic and litter from a tourist attraction.\(^{24}\)

\(^{19}\) https://travel.usnews.com/features/why-ecotourism-is-booming
\(^{21}\) World Youth Student and Educational Travel Confederation: Millennial Traveller, Executive Summary 2014
\(^{23}\) ibid.
\(^{24}\) ibid.
Wildlife tourists’ profile and expectations

Wildlife tourists are predominantly an equal mix of males and females, aged 35+, with a majority in the high disposable income and early-retired bracket. Due to increased interest in the natural world, the family market is also a growth area, as is the link between adventure travel and wildlife.

Once the only markets interested in travelling to the world’s key wildlife destinations were bird-watchers and “hard-core” naturalists. This has changed. Today, the market is diverse and embodies several types of activity: specialist mammal watching, habitat specific tours, tours around flora, especially herbs, adventure seeking activities, conservation or research orientated trips, and opportunities for direct embodied experiences such as feeding, conservation-orientated activity holidays, with recording sightings and helping PA rangers.25

In December 2018, the popularity and character of both wildlife (volun)tourism as well as rangers as local “tourism brand ambassadors” became obvious in TV series in Germany, in the main public stations ARD and ZDF: “Travel and help” https://www.zdf.de/gesellschaft/re/arte-re-reisen-und-helfen-100.html – and “The Ranger”: https://www.mdr.de/sachsen/dresden/dippoldiswalde-sebnitz/ranger-saechsische-schweiz-100.html

The satisfaction with wildlife tourism experiences, which should help “urbanites” reconnect with nature, depend on factors found across several studies:

- Being able to get close to the wildlife in their natural environment (not zoo-like)
- The number and variety of animals seen
- Seeing large, rare or new species
- The natural setting itself
- Features of the animals
- Being able to learn about the wildlife or the setting26

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2.4 New potentials for NP Biogradska gora

To sharpen the image of NP Biogradska gora with new offers, it is important not to try to please everybody - because when you try this, no one will be happy at the end! The new offer is not something to be sold as a simple and consumptive day excursion from the coast, or it will be soon marginalised to a mass tourism idea the way that rafting Tara partly has become – a cheap afternoon experience. It will be best to concentrate on the true enthusiasts, wildlife watchers, photographers, and on other park visitors who come for hiking, stay overnight in the NP, or on the mountains of Bjelasica and Komovi.

Main target group: Nature enthusiasts / serious wildlife tourists

The best suitable target group are typically “visitors who enjoy exploring natural areas and have limited requirements beyond experiencing nature. They are prepared to pay extra for high probabilities of seeing wildlife. All nature enthusiasts also take pictures and all have cameras/mobiles.”\(^28\) They are primarily people who enjoy combining a love of wildlife with a holiday experience. They can be classified as “serious” wildlife tourists as their level of involvement is greater than those who book wildlife experiences as a day trip or as a one-off „tourist attraction“.\(^29\)

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Early stage of the new product is good for “Innovators” and “Early adopters”
At the same time, the target groups will belong to two stages of customer adoption, „Innovators“ and „Early Adopters“. Customer adoption patterns are important to understanding how to market new product or innovation like the bear watching will be.

**Innovators** are the first customers to try a new product. They are, by nature, risk takers and are excited by the possibilities of new ideas and new ways of doing things. Generally, innovators are wealthier than other types of adopters. They will often have some connection to the *scientific* discipline in which a new product is generated from and will tend to socialize with other innovators in their chosen product categories. Innovators are comfortable with the “risks” that they take. They are aware that some products that they buy will not deliver the full benefits that are promised.

**Early adopters** are the second phase of product purchasers following innovators. These tend to be the most influential people within any market space and they will often have a degree of “thought leadership” for other potential adopters. They may be very active in *social media* and often create *reviews* and other materials around new products that they strongly like or dislike.

Early adopters will normally have a reasonably high social status (which in turn enables thought leadership), reasonable access to finances (beyond those of later adopters), high levels of education and a reasonable approach to risk. However, they tend to make more reasoned decisions as to whether to buy a product or service. They will try to obtain *more information* than an innovator in the decision-making process.

**Organised group sizes**
The report of 2018 *Market research and potentials for sustainable Brown bear watching in Tara National Park* has 32 tours studied in detail, and the group tour sizes vary between 4-12 guests, with an average of 10 people and 20 as the maximum number. Smaller groups command the highest

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30 [https://www.researchgate.net](https://www.researchgate.net)
prices – if exclusivity is promoted as a USP as it should. The optimum group size for income generation (number of guests vs. per person price) is 8 persons.31

“The tour operator should respect the animals first—and the clients second.”
www.onegreenplanet.org/animalsandnature/ecotourism-always-good-choice-animals-environment/

3. Competitor analysis

First, the general destination level comparison only with Slovenia, a small and competitive country in the region, successfully branded and multiple times awarded as a “green destination”, which has also started developing and selling wildlife tourism programs, reveals the pattern of challenges and development needs (Figure 8, next page).

There are significant differences between the two countries. In Montenegro, the Prioritisation of Travel & Tourism, i.e. the extent to which the government actively promotes the development of the travel and tourism sector is ranked 62nd, in Slovenia 47th. Montenegro must become better also in International openness. In this category, the country is ranked 105th out of 136 countries, Slovenia 54th.

Further, in order to grow nature-based tourism in general, Montenegro’s should focus on:

- **Natural resources**, measuring the available natural capital as well as the development of outdoor tourism activities. Natural capital is defined in terms of landscape, natural parks and richness of the fauna (*Montenegro ranked 90th, while Slovenia is positioned 42nd*)

- **Environmental sustainability** (*Montenegro 49th, Slovenia 10th*). This pillar measures the extent of environmental protection, limited to those aspects that impact tourists directly.32

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31 Delf, J.: Market research and potentials for sustainable Brown bear watching in Tara National Park, Serbia, 2018
32 World Economic Forum: Travel and Tourism Competitiveness Index 2017
Figure 8: Performance Overview Montenegro vs. Slovenia in TTCI 2017

Montenegro, position 72 / 136

Slovenia, position 41 / 136

Source: World Economic Forum: Travel and Tourism Competitiveness Index 2017
In the above-mentioned NP Tara market report of 2018 there is an overview of bear watching / conservation tourism offer and pricing examples from Europe, which can be directly referred to when considering the competition in the region and in Europe. Altogether, the Balkans are still rather unknown, especially among wildlife tourists. First customers have started to book tours which are offered so far.

- in Slovenia, photography tours are becoming more popular. Apart from the offers in the Notranjska region, by https://slovenianbears.com/ bears can be found in the Kočevska region. “Slovenianbears” manages a network of 8 locations and 20 photo hides, that fit 2-4 persons each. The hides have been tailored to the needs of photographers, hence they have been selected carefully regarding location and light availability, they are approximately at eye level with the bears, and they are equipped with bean bags and offer options to fix tripod heads. Promotional/educational video shows the practice: https://vimeo.com/242938734
- All hides are in the Notranjska region, which together with the adjacent Kočevska region holds one of the world’s richest densities of brown bears. An estimated number of 560 bears can be found here.
- The season is between April and October. Hide sessions usually start between 14:00 and 15:00h and last until sunset. Depending on the location it takes about 10 to 20 minutes of driving plus 100 to 700 meters of walking to reach the hides. All guests will be briefed to a code of conduct before starting the hide sessions.
- Daily departures to a hunter watchtower are advertised by the Ljubljana Tourism Board: https://www.visitljubljana.com/en/visitors/tours-and-trips/bear-watching - page leading further to an easily online bookable offer of 195€ per adult and with a “90% chance of seeing the bear, for the other 10% we give a 40% discount.” https://slovenia4seasons.com/tours/bear-watching-safari/
- In Macedonia the offer was created in 2016. Here a week’s travel package, including flights from UK, includes three days of activities in and with the National Parks of Mavrovo and Pelister: https://www.regent-holidays.co.uk/tour/bear-watching-in-macedonia/
- In Serbia the bear watching offers are an embedded activity in packages of 3-4 days, with other outdoor experiences such as survival training and paddling: http://www.panacomp.net/bear-watching-serbia-outdoor-adventures/. In the so far second offer in Serbia the bear watching is “wrapped” inside other nature and culture experiences: https://taratours.rs/en/programi/tara-np-bear-watching/
- In the NP Tara, less than 50 guests have paid to visit the bear viewing hides so far. This is also due to the limited offer, with 4 feeding areas and a maximum of 3 persons, where a NP guide can be present at one area. However, the probability to see a bear is 70%.
- Further in Europe, Finland is the European benchmark, for having the best developed and diversified offer. The forests are home to an estimated 2,000 brown bears. Bear-watching trips are run between April and September in several locations. Finland’s eastern borderlands offer some of the best opportunities anywhere in the world to view wild brown bears safely at close quarters. Sightings can be almost guaranteed although big game seekers are recommended “to

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33 Delf, J., p.22 ff.
35 https://slovenianbears.com/bear-photo-hides/
36 Delf, J., p.6
spend at least a couple of nights out in the woods”. The companies are highly specialised, e.g. http://www.wildbrownbear.fi/ with very diversified offers around wildlife, but also culture and culinary experiences, year-round: https://wildtaiga.fi/en/company/arola-farm/, also with concentration on photography: http://finnature.com/

- Very importantly, Finnish National Tourism Board is promoting the clearly “bear branded” offers with a dedicated site, https://www.visitfinland.com/article/encounter-with-a-bear/. This is also the case for Sweden, but with less concentration on the bear, and more on the moose: https://visitsweden.com/wildlife-sweden/
- On a typical trip, bear-watchers are taken out to a fairly comfortable cabin-like hide in the forest in the late afternoon. On bear-watching trips photographers can enjoy almost “alarmingly close” encounters with the animals. Bears are unaware of the photographer’s presence because the scent travels up the chimney and is carried away.

Further countries from the Mediterranean offering bear watching trips are Greece, Spain and Italy, with one tour in each country. Of the Eastern European countries Poland, Romania, Slovakia, Bulgaria offer two tours in each destination, in Estonia there is one offer.37

In the UNWTO survey of 2014, 23 National tourism authorities were asked about the opportunities to combine wildlife watching with other activities in their countries as well as about the types of activities that are normally combined with wildlife watching. 90% indicated that wildlife watching tourism is being combined with other activities. Most commonly it is combined with nature-related activities (85%), followed by cultural heritage (70%) and resort/beach holidays (65%). Depending on the total length of stay, all such combinations are easily possible to organise in Montenegro.

Conclusions for NP Biogradska gora

- Combined travel experiences will be preferred and more realistic to pure wildlife trips – which might be hard to deliver as well, as long as Montenegro’s bear population is not fully known and well tracked, but planned.38 With the mountain culture, especially the katun lifestyle of the Bjelasica and Komovi areas, this is a naturally attractive combination.
- Montenegro is becoming better accessible by air, with affordable connections from the European source markets. The so far visitors are not yet informed of the potential for bear watching. This may rather be an opportunity to steer the demand towards true wildlife lovers who prefer unknown places.
- The later promotion, after the phase of “innovators” and “first adopters”, and especially towards more individual bookings (Business-to-Consumer, B2C) is a sensitive phase – any mass tourism style promotions must be avoided and done in close cooperation with the NTOCG and JPNPCG.
- As there is talent for photography, filming and guiding in Montenegro, a combined trip with photography, filming and wildlife education can be a way to further diversify the offer.

37 Delf, J., p.22 ff.
4. Current offer of NP Biogradska gora

High biodiversity & first bear management measures

Biogradska gora has been continuously under protection since 1878. It was proclaimed National Park in 1952 and belongs today to the IUCN Category II PAs. These are “large natural or near natural areas set aside to protect large-scale ecological processes, along with the complement of species and ecosystems characteristic of the area, which also provide a foundation for environmentally and culturally compatible spiritual, scientific, educational, recreational and visitor opportunities.” In 2010, the NP was proposed to become a UNESCO Natural Heritage Site – it is on the tentative list.

The park occupies the main part of Bjelasica mountain massif between the rivers Tara and Lim. The area is 5,650 ha, with the municipalities of Kolašin, Mojkovac and Berane around. The best-known attractions with the highest protection are Biogradsko lake and the river Biogradska, with the surrounding primeval rainforest reserve of 1,600 ha. Hydrologically the area is marked by numerous mountain springs and apart from the largest lake of Biogradsko, there are five more glacial lakes: Pešića, Veliko and Malo Ursulovačko, Ševarine and Šiško Jezero. The lakes are located at various levels above sea between 1,094 and 1,895 m. Characteristic for the Bjelasica massif is both limestone and primary rock.

According to current research around 2,000 different plant species are registered, 20% of which are endemic to the Balkans. More than 700 species of fungi have been identified so far. The fauna is rich and diverse with around 200 bird species, 350 species of insects including 80 species of butterflies. As for mammals, 38 species have been confirmed, including wolf, bear, fox, deer, otter, marten, squirrel and dormouse.

The so far tourism offer in the NP has a high concentration on walks on the educational 3,3km trail around the lake. There are more marked trails for hiking up the forest, to three lookouts and mountain pastures (katuns), and a 2,5 km thematic circular trail "Katun summers - Where do our traditional products come from?" Further activities in the NP are boating and kayaking, two (rather demanding) mountain biking trails, “catch and release” fly fishing, and a 35 km long organised circular jeep ride. The infrastructure in the park includes the visitor center and souvenir shop, bungalows to rent (which will be rebuilt in 2019), camping, parking for mobile homes and a newly privatised restaurant. The pricing structure 2017 was the following:

Figure 9: NP Biogradska gora Trail Impressions, Sept 2018

39 https://www.protectedplanet.net/c/wdpa-lookup-tables
40 https://whc.unesco.org/en/tentativelists/5569/
41 http://nparkovi.me/en/, JPNPCG Brochure: Active Experience National Parks of Montenegro
• Ticket (including visits to the Visitor Center and Educational Trails) – except for children up to 7 years: 3,00 €
• Ticket for organized groups of pupils, students, pensioners, trade union organizations and hiking associations (including visits to the Visitor Center and Educational trails) – with a written request and approval from the Park Director: € 1,50
• Rent a boat on Biogradsko jezero: 8,00 € / 1h
• Use of guide services 60,00 € / 4 h
• Usage of guide services 100,00 € / 8 h
• Bicycle rental 3,00 € / 1h
• Bicycle rental 10,00 € / day
• Kayaking rental (single-seater) 3,00 € / 1 h
• Kayak rental (two-seater) 5,00 € / 1 h
• Rental of snowshoes42 4,00 € / day
• Rental of walking poles 3,00 € / day
• Rent a tent 8,00 € / day
• Accommodation (bungalow) – per person 10,00 € / day
• Camping
  – Use of the space for setting the tent 3,00 € / day
  – Camper trailer 10,00 € / day
• Using well-kept camping space (Kraljevo kolo) 10,00 € / day
• Fire fighting43 in specially arranged places (the required amount of wood is included) 5,00 € / day
• Jeep tours 20,00 € / day (these do not appear anymore in the new DRAFT price list 2019)44
• Short jeep tours 10,00 € / day
• Daily sports fishing permit (Biogradsko jezero) 20,00 €
• Daily sports fishing permit (Rijeka Tara) 20,00 €

Through the PA4NP project activities (camera traps since 2016, capturing the 255kg-bear “Nikola” 2017, DNA and ranger trainings 2018) some basics for bear watching as a new activity in the NP have been set.

Figure 10: Initial Project Activities in the NP for Bear Watching Programs, 2016-2018

42 The NP Biogradska gora is officially closed over the winter months, but snowshoes could be rented.
43 “Fire fighting” is surely not the offer but using a fire place, including the firewood.
44 JPNPCG: Odluku o visini I načinu plaćanja naknada za korišćenje dobara nacionalnih parkova, obavljanje djelatnosti I pružanje usluga, Podgorica, 21.09.2018
4.1 Strengths, competitive advantage

The own assessment of the NP was not used for this SWOT, but it is describing well and in more depth and detail the situation of the NP Biogradska gora and should be additionally referred to.\(^45\)

The strengths of the NP Biogradska gora are connected with its position and history.

- Good accessibility from the main road via Kolašin and Mojkovac
- Bears do not care about administrative borders, and so do not tourists either. Therefore, the fact that Montenegro’s National Parks of Biogradska gora, Durmitor and Skadar lake are not too far away from each other, are very diverse, and now also getting zoned and linked with the Nature Parks (Komovi next to Biogradska gora, Durmitor between Nature Parks Piva and Dragišnica-Komarnica), gives excellent opportunities to design attractive tours. In case one area fails to “deliver” the wildlife that lives there - another one on the tour may make up for it.
- Small park, but high biodiversity with its impressive, old forest.
- For protection positive: open only 6 months a year - peaceful over the winter period.
- Basic infrastructure for nature-based tourism, cleanliness and general organisation in the park.
- A long “support history” with international organisations has created some man-made advantages that other parks do not have. Today, the functioning Regional Development Agency of Bjelasica, Komovi and Prokletije (RDA) is such a partner, working with the surrounding municipalities.
- Good visitor satisfaction. On TripAdvisor, No.1 of recommended “things to do” in Kolašin, with positive reviews (although divided between several entries that should be pulled together – this is a task for the marketing management.)

![Figure 11: TripAdvisor Reviews of NP Biogradska gora, Dec 2018](image)

4.2 Weaknesses

- The relatively small size vs. growing human activity in and around the park\(^46\)
- High seasonality with over 50% of visitors in July-August
- Chaotic parking situation (buses, private cars, mobile homes) next to the lake


\(^{46}\) In many other countries Biogradska gora could not be a NP because it is rather small; many animals cannot successfully reproduce in such a small NP.
● Motorized activities (jeep tours, quads, private cars, snow scooters) - with entry through the most protected areas and without controlled limits on tour. These activities are illegal.

Figure 12: Against Stewardship for Nature: Motorized Activities Across the NP

● Perception of too many electric bright light spots at night in the core area of the park (could be reduced and replaced with much smaller ones, in nearer to the ground)
● (Mostly domestic) visitors’ behaviour, especially on national holidays (noise, drinking, littering)
● Weak financing with only centralized marketing from Podgorica
● Low wages of NP staff and no rewarding mechanisms for better qualification or engagement
● No reliable statistics yet on the size and movements of the brown bear population; “we know that we don’t know”
● No wildlife observation hides in place yet
● Very little and partly outdated information about brown-bear in the NP (see Fig. 28)
● High quality wildlife interpretation still must be developed
● Far too little money is spent on nature conservation

4.3 Opportunities

● To brand the NP stronger through its biodiversity – flora and fauna
● Listen to the markets: The interest of the international markets is much stronger than of the national market. This is not recognized in Montenegro
● To support the rangers’ interest to work also as nature and wildlife guides for the NP
● For younger generations from the surrounding municipalities, show new job opportunities in wildlife tourism (also as independent guides, if language skills and expertise are good)
● To connect the park better with the basics for community-based development such as the functioning local tourism organisations (LTOs) in Kolašin and Mojkovac and local community initiatives e.g. “Pokrenimo Kolašin” and the Beekeepers’ Association
● To work with reputable, sustainability focused private businesses and steer others who are not. A new study has found that, with the right kind of companies, the positive influence in tourism could be expected in two key areas: (1) quality standards and (2) marketing and promotion. The

47 http://www.explorer.co.me/our-offer/summer/quad-safari-eng/off-road-3-days
48 Law on National Parks 26 June 2014 / Zakon o nacionalnim parkovima, Zabrane, Član 16
49 https://www.iucnredlist.org/species/41688/121229971
50 In the short text about brown bear in the book that is on sale in the NP souvenir shop
impact on conservation are in three main areas of influence: (1) wildlife re-introductions, (2) environmentally sensitive tourism, and (3) financial contributions.\footnote{Spenceley, A., Snyman, S. (2017): *Can a Wildlife Tourism Company Influence Conservation and the Development of Tourism in a Specific Destination?* in: Tourism and Hospitality Research 17(1):52 ff.}

- To follow the UNESCO-process and to support Natura 2000 (although this area is not among the sites yet, but should be included with the EU accession)
- To follow the EU full compensation policy in favour of large carnivores\footnote{https://www.bbc.com/news/science-environment-46153727}
- All in all, a sustainable development strategy which includes the belt (zones) around the NP is necessary
- In cooperation with Parks Dinarides, to introduce new Key Performance: Indicators (KPI): The “Value not Volume” approach to Key Performance Indicators in tourism is essential for the long term prosperity of every offer, and especially critical for PAs. This could be introduced by adoption of the EUROPARCS or the Global Sustainable Tourism Criteria (GSTC) and following the certification process (Chapter 5.7).

### 4.4 Threats

The key threats for brown bears in Europe are identified by IUCN as “Habitat loss due to infrastructure development, disturbance, low acceptance, poor management structures, intrinsic factors, accidental mortality and persecution.” The following are current or near future threats for the bear population in and around NP Biogradska gora:

- Illegal hunting and trapping
- Residential and commercial development
- Planned and significant degradation of numerous watercourses in the North of Montenegro, caused by the construction of hydroelectric facilities
- New roads (e.g. highway construction and the Tara riverbed devastation)
- More traffic
- Utility and service lines
- Logging and wood harvesting
- Recreational activities
- Other human activities
- Too much private motorization in NPs works against the core task of conservation and causes
  - Biodiversity damage and erosion
  - Fauna disturbed, starts to move elsewhere
  - Level of noise where peace is expected as a core quality
  - Visitor group conflicts
  - Safety (hiking/cycling/horseback trails crossed by adrenalin pumped jeep or quadbike drivers; the nature experience is secondary - should be shown to alternative places (fixed trails elsewhere; like for motocross)
  - Credibility losses to a PA and eco-minded service providers
Overcrowding, \textit{overtourism}, “loving the places to death” can happen anywhere\textsuperscript{55}! Today, the time between initial development and overtourism is significantly shortened.

At Montenegro destination level, there are already periods and places with alarming signs, and they are by far not limited to the coast. The double digit growth rates of NP visitor numbers are not only a good sign – their management has become a serious challenge.

Overtourism consequences are
\begin{itemize}
\item damage to nature
\item alienation of residents
\item degradation of tourist experiences
\item overloaded infrastructure
\item threats to culture and heritage
\end{itemize}

In PAs the problems have started to show in the peak months of July-August in bad parking situations, too many people on same trails, not enough quality infrastructure (like clean public toilets)...

Preventing this should become now a core part of the discussions for the future of Parks Dinarides. The latest report of the World Travel and Tourism Council (WTTC)\textsuperscript{56} “\textit{Coping with Success: Managing Overtouring in Tourist Destinations}” includes good insights.

\begin{itemize}
\item \textsuperscript{54}https://www.facebook.com/kirsi.j.hyvaerinen/posts/383846312121189
\item \textsuperscript{55}https://www.theguardian.com/environment/2018/nov/20/national-parks-america-overcrowding-crisis-tourism-visitation-solutions
\end{itemize}
Figure 14: Focus Sustainability vs. Overtourism

SUSTAINABILITY

2017 is the International Year of Sustainable Tourism for Development, and WTTC – along with the sector as a whole, is increasingly focusing on the issues potentially challenging the future growth of the sector and will be publishing more on this through the year. Sustainability certainly remains an especially important issue for some of the fast growing tourism destinations around the world. One way of looking at this is through the number of international visitors compared to the local population, which provides one indicator of impact tourism may have on the destination.

For example, in Iceland in 2016, overnight international tourism arrivals outnumbered the resident population by a ratio of 5.1 to 1. The ratio is also particularly high in growing tourism hotspots like Croatia (3.3 to 1) and Montenegro (2.6 to 1). This ratio highlights destinations where continued strong growth may put a squeeze on infrastructure capacity and could lead to environmental pressures if not managed appropriately.
5. Recommendations for marketing

5.1 Product

Brown bear watching, macro-locations

The IUCN mapping of the population shows that the more “robust” (larger) areas for brown bear in Montenegro are elsewhere than NP Biogradska gora – namely in and around the NP Prokletije and the NP Durmitor; the DNA expertise has shown that in and around the Piva Nature Park there should be some 40 individuals. Through the DNA approach, the minimum number of individuals which are present in an area at a certain time is defined. In 99 samples collected in 2018, exactly 24 individuals were recognized - 17 males and 7 females. In NP Biogradska gora two individuals were identified in 2017. This is one reason why it makes sense to link the initiatives and areas, and design tour offers through more than one park, including also the (often less frequented) zones in the “Nature Park” areas.

Figure 15: Brown Bear Population and Possible Macro-Locations for Bear Watching in MNE

Micro-locations in NP Biogradska gora

In the park, ideal storytelling takes the guests “step by step” towards the main topic – therefore, the background of the park and the forest walking path should be the general starting point. The hide will be a nature-based new service that visitors are not permitted to do on their own. This makes it an attractive means of generating income by providing privileged, paid-for access. The location and positioning of a hide is fundamental to its effectiveness for viewing and photographing wildlife.

57 The DNA samples were collected only on the hunting association “Bajo Pivljanin” Piva hunting grounds, which is altogether near 80,000 ha big. The collection covered a surface of ca. 40,000 ha. The total territory of the Piva Nature Park is smaller, i.e. 32,477.90 ha. Source: Center for Protection and Research of Birds of Montenegro (CZIP)
59 https://www.iucnredlist.org/species/41688/121229971
Therefore, the suggested main factors to consider where to build and keep a bear hide in the NP Biogradska gora:

- **Safety**: Even though the bear must be the “owner” of the space, the walk to the hide, its positioning and construction must be such that there is the least possibility of direct encounter. The location allows bear/s to be viewed without being disrupted or unnecessarily disturbed.

  ![Figure 16: Informative Bear Warning Signs on Hiking Trails (Alaska, Austria)](image)

- **Accessibility vs. visitor management**: The hide must be accessible but not in any way visible to other visitors of the park, i.e. the path must stay invisible (Leave No Trace principles) and not marked. An idea is to put an informative warning sign, not in the immediate entry point towards the hide but in the vicinity. This raises the excitement and reduces the probability of other guests crossing that line.

- **Availability**: It’s important to make sure that everyone involved in the product (all NP staff, travel agencies, foreign tour operators, local guides) know the procedure how the hide is used. The best seasons must be clear and what opportunities there are in shoulder seasons (early spring, late autumn, or even winter, when the park so far has been closed).

- **Migration**: The location is good where the chances of viewing wildlife are highest. This will change for different species throughout the year. If the hide can be made mobile it can adapt to wildlife migration and prevent excess damage to the landscape.

- **Orientation**: Hides should be orientated correctly to enhance the experience they offer, considering the positioning of the sun at the times of day when wildlife is most likely to visit the hide location (typically sunrise and sunset). The angle of the sunrise or sunset in key seasons should be carefully considered for the purposes of photography.

- **User orientation**: Wildlife enthusiasts (the 1st priority) including overnight guests will prefer sunset while professional photographers will prefer dawn and sunset light. Users of the hide will typically stay in the facility for several hours, possibly overnight, and are prepared to pay for the experience.

- **Background view**: A backdrop that is not sky is preferred – here it will be forest.

The hide should be designed and built

- with the main target group „Nature enthusiasts“ in mind
- designed for 8-12 people either in one hide or split between two at a single location
- slightly more comfortable than a photographer specific hide

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60 More details in the construction guide *Wildlife Watching Hides, An inspirational guide 1.0*
• including toilet facilities (could be mobile) and a somewhat higher design specification
• emphasis is more on viewing than (professional) photographing
• windows tend to be panoramic (mirror glass) as opposed to thin observation slits\textsuperscript{61}
• In the tendering and building phase, to pay attention as much as possible, to use local workforce. This will help build more „psychological local ownership” towards the project.

Figure 17: NP Biogradska gora Camera Trap Results

Potential activities
The diversification of brown bear watching should enable several different touristic offers which incorporate all aspects of NP Biogradska gora. These must follow standards of responsible wildlife tourism and combine biodiversity, mountain life and culture, unbroken authenticity, value for money to a package of memorable, positive experiences for high value visitors. Participatory conservation activities with trained wildlife ranger guides are needed.

The proposal what kind of activities could be introduced in the NP Biogradska gora has been initially discussed since summer 2018. The below listed ideas, that still need to be verified with the new NP management, have been shared for further consultations with the JPNPCG, Parks Dinarides and the PA4NP project, working on the same topic for NP Tara.

- Ranger guided walk in the park
- Bear watching from bear hide, ranger guided
- Overnight in bear hide, ranger guided
- Other wildlife watching tour with ranger, length, which animals could be seen?
- Help with wildlife feeding with ranger
- Controlling / resetting camera traps with ranger
- Controlling / resetting Insect traps with ranger
- Tree planting with ranger
- Trail clearing / cleaning / marking with ranger
- Fish population support work
- Help building fence/s (beehive protection) – with the owner
- Beehive work demonstration & honey tasting – with owner
- Other activity, which?

\textsuperscript{61} The “Rewilding Europe” focuses on supporting the development of this type of hide within all rewilding areas.
Extended activities that are more connected with culture and culinary ideas could be workshops with (e.g. wood, wool) handicraft makers or cooking classes inspired by herbs, honey, and other local produce that are typical for the area.

5.2 Pricing

The product palette should always represent good value for money. The NPs should never be competing through pricing but quality; clients are usually happy to pay a little more for something that works well for them. But if it doesn’t, a bad review goes around via social media very fast and lasting.

The price levels indicated in the NP Tara market analysis should be the main frame also for the pricing of the activities in Montenegro. Competitiveness must be grown through value and choice. The average trip price per person per day was estimated at 312 € for bear watching tours offered in Europe in 2018. This is in line with the estimated price per person per day for wildlife watching calculated by the UNWTO (270 €) for standard tours 2012. Assuming the average profit margin for tour operators to be around 45%, the average cost estimation (operating and fixed cost) for a bear watching trip is approximately 170 € per day.

Comparison: Slovenianbears.com charges for a 4-day photography tour 850€, which is over 200€ per day, all inclusive. NP Tara charges only 45€ per visitor for a 3-4-hour bear viewing. This is much below the average price offered by competing destinations and should not be the benchmark for NP Biogradska gora. As the volume of potential customers needs to be limited to minimize harmful impacts, all stakeholders need to be looking for ways to add value to the offers they create.62

In the MORT and NTOCG Progress Monitoring of the “Wilderness Hiking & Biking” project 2008-11, the average spending per day and per person of a nature-based tourist in Montenegro was 51€-100€ without air ticket - and the majority is spent at local level. This figure should gradually grow with quality and exclusivity of the product palette. The length of stay, i.e. how intense and good experiences the NPs can provide, will also decide on the level of local new income opportunities.

In the final price should be calculated a contribution to corporate environmental responsibility, i.e. a direct contribution from every guest’s spending should be used for the cause of brown bear conservation and co-habitation (damage prevention and compensation measures) in the wider area of the park. This must be made very transparent in the collection, reporting and use of the funding – the “feelgood” moment can be an additional reason for someone to book a tour.

62 Compare: Delf, J., p. 8 and https://slovenianbears.com/
5.3 Promotion

From themes to keywords and messages

Most tourism themes are either culture or nature-based. Montenegro’s national brand „Wild Beauty“ delivers the perfect backdrop for the National Parks’ promotion. The new logo of each NP speak the “wildlife language“. PAs are per se a grateful object for marketing, having all the cornerstones of what marketing needs: The themes, „storytelling“, the nature and people aspects. They are „places with a character“, with products and services in and around. The target groups are defined and approachable.

Figure 18: New Logos of the JPNPCG & NP Biogradska gora

Also the essential qualities of adventure travel experiences are about central themes that fit. Keywords that are associated with the „Top 10“ themes basically show what Montenegro’s nature-based brand narratives (texts and visuals) should be built around. These themes and keywords describe the ideals from the traveller perspective, highlighting the personal benefits and emotional appeal that should relate also to the PAs and their offers.
However, the current messages of the JPNPCG are often published on a wrong platform in a „wrong language“. Even though wildlife watching tourists expect the highest level of information quality, the decision for a travel package is taken with the more emotional aspects in the background.

The most popular visuals used on Instagram are never the ones with „talking heads“ (they are boring on this platform), or newspieces that rather belong to a news section of a website, but stunning pictures with well chosen „hashtags“. The „likes“ below clearly show why.

The relevant content and storytelling challenge could be solved with some decentralised support: With one dedicated person or two in each NP to deliver such local content year-round, about each NP and their characteristics, curiosities, seasons, wildlife, flora, fauna, people, events.

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63 ATTA: North American Adventure Travelers, October 2017 Update, p. 20
5.3.1 Internal promotion in Montenegro

General public, younger generations

- How the citizens of Montenegro see the NPs in general has not been analysed. However, conversations reveal that a lot of internal promotion and reputation building is still necessary. The PA4NP project is currently carrying out a survey on the attitudes of the population regarding brown bear. With the results, a promotional wave in cooperation with Parks Dinarides would be ideal to kick off.

- For all domestic visitors it would be desirable to introduce a free promotional month - ideal before the start and after the storm of the season, but while the weather is still nice and stable.

- Schools from the surrounding municipalities should have an introduction to the NP and its activities. Continuous communication with schools is an excellent tool. The JPNPCG/Parks Dinarides could approach the Ministry of Education and agree on a simple recommendation to all schools (if this has not happened yet?) to work with the National Parks in their regular (biology, ecology) programs. For the start, a calendar of school visits (guest lectures by the staff of JPNPCG, NP Biogradska gora, Parks Dinarides, partner businesses and NGOs) could be
created; then a calendar of visits from classes to all Montenegro’s PAs – which should happen during several years of the school education.

- During these visits, the topics can vary from **flora & fauna, using the trails, to environmental education and Leave No Trace, up to internship and job opportunities in ecotourism**. A first such a day is pre-agreed with two teachers from Kolašin, the consultant, Parks Dinarides project manager and an experienced guide, at the same time the Country Coordinator for Montenegro of Interpret Europe - European Association for Heritage Interpretation, for the **10th May 2019**, with a group of 15-18-year-olds.

- For younger children, assuming that there is not yet much specific educational material in use, the experience of the Carpathian Large Carnivore Project could be replicated for **grades 2-4 and 5-8** – with an educational programme, summer holiday activities, publication of a children’s magazine about the PAs of MNE and their wildlife, drawing contests etc.

- **Universities** with relevant education programs (biology, economy, tourism, agriculture...) can be approached by personal presentations to the dedicated professors first, and upon interest, to lead groups to the NP.

- The most important **national and international institutions and organisations** in Montenegro must be informed (partly in writing, partly in person): Government, parliament, NTO, CTU (best with a presentation at a bigger meeting or meeting of their sectors), EU Delegation, remaining donor organisations, embassies, spouses, expat community... Like the “walk with ambassadors” has been realised, such invitation could be planned for the opening of the new wildlife activities. Many of the listed can be important as potential future co-financing partners of NP projects.

- More visibility for Montenegro’s wildlife in the whole country could be gained by an overall (national) concept for billboards and posters – starting with the **airports’ arrival area**. At the bus station in Podgorica there is one general poster in the main hall; so far it is a general awareness-raising poster with general landscape pictures of each park.

### Location-based

- A **study trip** for domestic media, travel agencies, guides - with a half-day’s program in Kolašin and the NP, at the beginning of the season – when the new visitor space and the bear hide are ready, and new activities could be „tested“.

- At **LTOs and in NP information center/souvenir shop/payment points** there must be seasonally up-to-date basic information, placed also on the outer wall of the center (to be visible also in times when the buildings are closed). Also, the **rangers** who are working on the terrain in the parks need a “quick reference card” of the NPs wildlife.

- Especially where private accommodation is popular, many accommodation providers and taxi drivers function as „information filters“ and advisors to their guests, who often do not go at all to the LTO or to the NP Info center. Therefore, to **inform local businesses** - including restaurants, cafes, also the more remote ones, as well as local travel agencies, taxi companies, car rentals etc. – of new offers on social media postings, with flyers and posters is helpful.

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65 The educational-promotional events (organised 2008-2010) of the Hiking and Biking project had at the end 100 such participants, including media.
Tourism professionals, multiplicators

- First of all, JPNPCG to inform the NTO, LTOs, NGOs (incl. PSCG), agencies, hotels and other accommodation providers in Montenegro of the new wildlife offers. Ask NTO and LTOs to support the distribution of information, for example with a dedicated mailing to their registered addresses.

- For Montenegrin tour operators and travel agencies especially:
  1) a bi-yearly newsletter / 1-page e-mailing with the presentation of new possibilities for their clients (tour operators and individuals)
  2) Invitation period of 2 months to NP Biogradska gora “come and try”, with one or two official invitation days per year, with guiding and full information.

- NP Biogradska gora to offer an introductory month with guided tours at fixed dates to it – not only on one day, but during a period. During such a promotion, organise 2 guided visits with the bear theme.

- JPNPCG to invite Montenegro Convention Bureau with members – Destination Management Companies – to consider bear watching for their groups of MICE (meetings, incentives, conferences, events) market – integrating as part of nature-based pre/post programs where appropriate.

As the budget that could be used is far too low too low for strong campaigns, the focus should be on „low cost – high cooperation“ type of marketing initiatives and new financing sources (Chapter 6). When the national and local multiplicators are on board, external promotion becomes easier.

5.3.2 External promotion

E-marketing – new website, new app, social media & more

The „customer journey“ starts and ends today mostly online and mobile. Therefore, to invest more on e-marketing and e-media work than on printed brochures – with the exception of good maps for sale – is the main recommendation. The Figure 20 shows which portals and mobile services are used in which travel phases. To be active in the right way in the most important sources of inspiration, information and advice is a must. A website is today only one basis and should not stay in isolation: the „AIDA“ relevant communication happens elsewhere – mostly in social media. The social channels of JPNPCG, are today to 90% misunderstood as political news channels, not as places to inspire, serve and meet customers.

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66 http://pscg.me/clubs/
• JPNPCG is on channels such as Facebook, Instagram, YouTube, and could add location-based services such as Swarm, Google Maps etc. But this is best done with a decentralised, however well coordinated responsibility sharing. On location-based portals it is possible to write short texts, add pictures and local tips. People will start „checking in“, learn and share their experience in no time – free of charge promotion for the NPs.

• On Facebook, the “Page” and the “Public Group” are not linked, but could be! Here is how: https://www.facebook.com/help/742706805906818. Also here it would be good to trigger more decentralised content from all 5 NPs.

• At the moment the strongly growing (video-based) promotion on YouTube is in the channel of the JPNPCG showing for the past year only “talking heads“. For those the interest (viewer) numbers are the smallest.\(^{68}\)

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\(^{67}\) M. Faber, Tourismuszukunft - presentation 10th Oct 2013, Budva; updates K. Hyvaerinen
\(^{68}\) https://www.youtube.com/channel/UC4EWG_4OQ0_qDY8oIkyujlA/videos
• A posting of Biogradska gora (4 years ago) has gained over 2,000 views. Similarly the Finnish National Parks educate about all their NPs and gain hundreds and thousands of views. The „talking heads” stay mostly below 100 impressions.

Figure 22: Latest vs. Most Popular YouTube Postings of JPNPCG & Finnish NPs, Dec 2018

- There should be much more impressions, the beauty, all four seasons, experiences, educational content – i.e. reasons why to visit. Among those in future should be also impressions of the wildlife, including camera trap pictures!
- To produce such content must not be costly – people do it all the time for free anyhow: https://www.youtube.com/results?search_query=National+Parks+Montenegro
  https://www.youtube.com/results?search_query=Biogradska+gora

Selected content can be promoted in the JPNPCG own YouTube channel and shared through the other social media channels.

- This kind of content creation and sharing can be boosted by inviting 2-3 (nature-focused) bloggers to write and distribute articles – the National Parks in all four seasons, „what to see and what to do“ - „why are they special“. The wildlife and conservation topic deliver new stories, to which a vlogger (video blogger) can create much more (pictures, interviews, short video shots etc.). This was created by such professionals in autumn 2018:
Furthermore, it is recommended doing these online promotion activities (individually for all 5 NPs):

- Find the „top 20 web pages” where the 5 parks are presented (or not yet at all!) Examples are given for individual parks with links to Wikitravel and TripAdvisor. Help add good content (texts, pictures, videos, answer questions, correct wrong information...)

For Biogradska gora, in Dec 2018 there were 10 open questions (oldest 2015) on TripAdvisor:

**Figure 24: TripAdvisor „Q no A” on NP Biogradska gora, Dec 2018**

<table>
<thead>
<tr>
<th>Question 1</th>
<th>Question 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>We visited Biogradska Gora today, only to find out that it was closed. Our tenant told us that it is closed until May. Anyone knows if the rest of the National Parks in Montenegro do this? I can’t find it anywhere on the internet.</td>
<td>Bonjour, je me permets de vous contacter car je cherche un logement pour visiter le parc et j’aurais voulu savoir comment vous avez fait pour réserver votre chambre à l’entrée du parc?</td>
</tr>
<tr>
<td>Mark, 01/10/18</td>
<td>Jean, 31/07/18</td>
</tr>
</tbody>
</table>

JPNPCG should edit and add pictures where directly possible or approach the editors if own edits are not allowed, with a short collection of news that they could and should publish. Most of them will gratefully use the information, pictures and possibly necessary corrections to their sites (such as: Lonely Planet, National Geographic, and other travel guides which work with printed books and online versions)

**Website: Content, design and reach**

The JPNPCG website has been relaunched, but a lot in marketing sense can be optimised. The map of the NP Biogradska gora is not user-friendly – pictures with pieces of information stay unreadable (see screenshot, Figure 25) and it is not optimised for mobile devices to provide an optimal viewing and

69 https://www.youtube.com/watch?v=yMckmLNiOvQ
interaction experience—easy reading and navigation with a minimum of resizing, panning, scrolling. The “Active Vacation” looks like a simple list—no interaction (klick further) is triggered the way it is.

Figure 25: Not Optimised Website Information & Experience

There is so far only one brochure (“Active Experience”), and it is not downloadable from the site, but from an external source—and so far only in Montenegrin, although it exists also in English. All the information from it could be better integrated and visualised on the website (and updated whenever necessary!).

Content wise there is “Active Vacation”, “Culture” but nothing yet about wildlife (flora & fauna) in each park. It is recommended to make a specific section on these topics - short texts, pictures, videos, useful information and links are needed here (also on the NTO and all neighbouring LTO pages.)

- The new app has a functionality called “Report”. What comes after is automatically something “problematic”. Positive feedback is not asked for, and wildlife (flora & fauna) observations don’t have a place yet!
- Its use could become higher by inviting the public to a winning game, in coop with a suitable sponsor, e.g. a mobile operator.
- Between online, social media and offline worlds are e-newsletters – the tools to collect and manage mail addresses, design the letters and send them are today available for free up to a certain number of subscribers⁷⁰ - their opening rates are higher if the content is interesting.
- Today messengers such as WhatsApp are becoming more and more important. WhatsApp has one billion users. The average SMS text has a 98% opening rate. That makes WhatsApp the most engaging marketing channel.⁷¹

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⁷¹ https://sumo.com/stories/whatsapp-for-marketers
On TV broadcasting side, the national station RTCG has been covering NP Biogradska gora, with all news around the brown bear project very well. It is a grateful topic, so this work should continue!\(^2\)

**Printed publications and souvenirs**

It is suggested to make one motivating, imagebuilding overview mapflyer, with a short introduction to the wildlife in NP Biogradska gora. This will be good to have in Montenegrin and English language, printed in large enough numbers and with the Montenegro corporate design basic, the way it is used by the NTO. This production should be a low-cost, free of charge awareness-building product, addressing all the national and local target groups, being used at fairs, press trips etc. A „credit card format“ foldable map is a good distribution article.

The book about the NP „Fauna nacionalnog parka Biogradska gora“, which is currently on sale at the souvenir shop is outdated and gives a negative message: „It (the brown bear) can be hardly found in countries of Western Europe and this trend is likely to extend to our country as well“. A more modern and up-to-date booklet with attractive photography – about the NP in general and the wildlife alone, should be considered. This production can be planned with a publishing house with similar experience (for example http://www.gligorijedijak.com/ – commission for the sales to stay with the NP, and a part of the sales should go to a fund for conservation needs (see Chapter 6.2 – Other sources of financing)

Bear themed souvenirs include so far only the above-mentioned outdated book and fridge magnets, which of one is made of wood and named with the first bear identified in the NP – Nikola.

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Maps and souvenirs...

- must be made available where direct consumers find them easiest to buy: Ideally, the NP Biogradska (and all other NPs') Montenegro branded maps should be reproduced\(^\text{73}\) and sold in international online sources, not only in the NP souvenir shop. Now on Amazon only NP Skadar Lake map is shown – and it is “unavailable”\(^\text{74}\).
- In Kolašin, the new visitor space, LTO office (which should ideally be removed to the Austrian donated central building in Kolašin!), the new souvenir shop and hotels could take a stock on sale as well.

New souvenirs with the bear theme should

\(^{73}\) E.g. Huber Kartografie, http://cartography-huber.com/k23/company

\(^{74}\) https://www.amazon.com/Montenegro-National-Park-Skadar-Lake/dp/394068614X/ref=sr_1_9?keywords=Montenegro+National+Parks
- be (hand)made in the area - or at least in Montenegro!
- contribute to new local income opportunities
- get officially branded with the NP Biogradska gora logo
- contribute to equality goals (souvenirs also made by handicapped people)
- use local natural materials (wool, wood, herbs...) and avoid plastic
- be available year-round or according to seasons (food souvenirs)
- contribute to a „Brown Bear Conservation Fund“, which is used 100% and directly for conservation purposes

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Round plates</td>
<td>Wood</td>
<td>Rajko Šćepanović</td>
<td>18€</td>
<td></td>
</tr>
<tr>
<td>Biscuits</td>
<td>Recipe with honey?</td>
<td>Local producer is already known to the NP!</td>
<td>1,50€</td>
<td></td>
</tr>
<tr>
<td>Bear figures (smaller &amp; bigger ones)</td>
<td>Wood</td>
<td>Aco Tomović</td>
<td>3-10€</td>
<td></td>
</tr>
<tr>
<td>Bear Family Puzzle</td>
<td>Wood or a classic puzzle of cardboard</td>
<td>TBD</td>
<td>3-10€</td>
<td></td>
</tr>
<tr>
<td>Honey spoons</td>
<td>Wood</td>
<td>Rajko Šćepanović</td>
<td>1-2€</td>
<td></td>
</tr>
<tr>
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</tr>
<tr>
<td>Badge/Pin (of metal or to iron on backpack etc.)</td>
<td>Metal of Cotton</td>
<td>TBD</td>
<td>2-3,50€</td>
<td>With wildlife motives / logos of JPNPCG (example of FIN)</td>
</tr>
<tr>
<td>„Buff“, Cap with JPNPCG logos</td>
<td>Cotton</td>
<td>TBD</td>
<td>10-12€</td>
<td></td>
</tr>
<tr>
<td>T-shirts with bear motives</td>
<td>Cotton</td>
<td>TBD</td>
<td>7-8€</td>
<td></td>
</tr>
<tr>
<td>Postcards</td>
<td>Cardboard</td>
<td>TBD</td>
<td>1-1,5€</td>
<td>incl. pictures of the camera traps and historic motives of the NP</td>
</tr>
<tr>
<td>Mugs</td>
<td>Ceramics</td>
<td>TBD</td>
<td>5-7€</td>
<td></td>
</tr>
<tr>
<td>Toys with all JPNPCG mascot animals</td>
<td>Wool</td>
<td>TBD</td>
<td>TBD</td>
<td>Examples: Crow &amp; Frog</td>
</tr>
</tbody>
</table>

[1] 43
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Bags</td>
<td>Wool, cotton</td>
<td>TBD</td>
<td>3-30€</td>
<td><img src="image1.jpg" alt="Image of a bag" /></td>
</tr>
<tr>
<td>Honey</td>
<td>←, 200g</td>
<td>Honey Producers’ Association KL / Udruženje pčelara Kolašin</td>
<td>TBD</td>
<td><img src="image2.jpg" alt="Image of honey" /></td>
</tr>
<tr>
<td>Wild Garlic (sremuša)</td>
<td>←, 120-200ml</td>
<td>Mimi Reljic/ Hotel Brile (also „making of” is a nice activity with guests)</td>
<td>4-5€</td>
<td><img src="image3.jpg" alt="Image of pesto" /></td>
</tr>
<tr>
<td>Herbal Teas</td>
<td>←, 25-50g</td>
<td>Association</td>
<td>2-3€</td>
<td><img src="image4.jpg" alt="Image of herbal tea" /></td>
</tr>
<tr>
<td>Print / form of a natural bear trace</td>
<td>Gypsum</td>
<td>NP Biogradska gora</td>
<td>15-25€</td>
<td><img src="image5.jpg" alt="Image of gypsum" /></td>
</tr>
<tr>
<td>Seed of fruit eaten by a bear (e.g. drenjina)</td>
<td>Small glass</td>
<td>NP Biogradska gora</td>
<td>1€</td>
<td><img src="image6.jpg" alt="Image of seeds" /></td>
</tr>
</tbody>
</table>
Fairs & events

- Fair presentations abroad should be planned a year in advance, and the participation also not last minute – in order to take advantage of lower travel cost (hotels, air tickets) and better choices with the fair organisers.
- Where the NTO is present, the NPs should be as well, and participate in special programs that are offered by the fair organisers, for example ITB Berlin – there are dedicated areas of the Convention for sustainable tourism and new presenters are welcome! The new event “Berlin Travel Festival”, taking place at the same weekend, has also relevant target groups and topics.
- When other events (local markets, Mountaineering Days, Christmas Bazar…) take place in the municipalities: NP Biogradska gora should join forces with local initiatives (honey and handicraft producers), the LTO - again with the specific topic of the brown bear in these activities. Also the new space should be opened when most people are around anyhow.
- “Day of open gates” to the NP – with a special program for citizens and guests, and more specifically this could become “Day of the Brown Bear”.

Supporting customer loyalty (B2C)

Some additional measures could be introduced how to motivate new NP visitors to return. Such measures can be based on monetary or material incentives / advantages: A reduced yearly fee for citizens, or for a person who would like to visit all five NPs should get a benefit (e.g. „pay 3, see 5“) or more strategically, with a Montenegro (or JPNPCG) Guest Card concept that could be developed together with the NTO: It could ve covering even more reasons why to stay longer / spend more and to spend in more places in Montenegro. Of the money collected, again a certain percentage should be directed to conservation infrastructure and activities. Also the „customer journey“, i.e. which places are visited in which combinations could be followed – market research relevant information would then be part of the concept.

5.3.3 International competitions

Last not least, when the Parks Dinarides and NP Biogradska gora have one day succesfully implemented new products and services with stronger sustainability qualities, and can talk more precisely about the outcomes in the dimensions of social, economic and ecological development – international competitions are a good way to gain additional awareness and interest. International media follows such competitions, potential visitors and sponsors recognise those publications. Examples:

- Here the winner was Peaks of the Balkans – Montenegro-Albania-Kosovo – including their 3 NPs: in the area: https://www.wttc.org/tourism-for-tomorrow-awards/winners-and-finalists/winners-and-finalists-2013
- World Responsible Tourism Awards, with the categories „Best of Wildlife“ and „Local Economic Benefit“: http://responsibletourism.wtm.com/about/responsible-tourism-awards/

If there is interest, the consultant can facilitate the contact to the ITB Convention and Berlin Travel Festival program responsibles for 2020.
• The German DRV EcoTrophea, [https://www.facebook.com/DRVde/videos/295301063836147/](https://www.facebook.com/DRVde/videos/295301063836147/)
• Green Destinations Top 100, with the „Best of Nature“ category: [http://greendestinations.org/best-of-top100-awards/](http://greendestinations.org/best-of-top100-awards/)
• and others that reward engagement in sustainable tourism development. It is recommended NOT to engage in competitions which require any form of „entry payments“ from the participants.

Based on experience, the application writing takes time, but is the least part of the work – much more effort has to be spent in securing the implementation quality and monitoring of proven good results.

### 5.4 Place

As already indicated, the first phase of the marketing tactics should be concentrating on Business-to-Business (B2B) clients, which are

- wildlife tourism specialised tour operators
- in Montenegro’s priority target markets (e.g. Germany, Austria, UK, France – see ANNEX A)
- For May/June 2019, it’s been proposed in all meetings and workshops to organise a study trip to such selected operators, for a 7-day familiarization of NP Biogradska gora (2 days) and NP Durmitor (2-3 days), ending at the Nature Park Dragišnica-Komarnica (1-2 days in Pošćenje) – with a possibility to connect before departures also with NP Skadar Lake, depending on the arrival/departure airports and times.
- Such a trip would also help fine tune services, prices, packages so that they have a realistic chance in international sales.

When these “first adopters” are served well and there is stronger experience on the delivery side, the new products should be made available from where the direct consumers find them easiest to buy.

Starting presumably not before 2021/22, the development focus would then be e-commerce. There are several functional portals for Free Independent Traveller (FIT) online sales (partly supported by the local agencies, e.g. [https://www.responsibletravel.com/holidays/wilderness-holidays/?pid=10&tids=1210&lids=163](https://www.responsibletravel.com/holidays/wilderness-holidays/?pid=10&tids=1210&lids=163)).

FIT travellers almost always design their own itineraries and arrange their own travel plans—FITs do not travel with group tours or according to any schedule imposed by others, but solo, as couples or small self-arranged groups of family and friends. Already 2019 looks set to see rapid developments in the way travel information is consumed and used. Generic, comprehensive travel guides of the past will make way for increasingly short-form, hyper relevant and individualized content, which can be neatly integrated in travellers’ feeds⁷⁶

In Montenegro, this individual segment is growing. Therefore, after piloting the first products and their promotion with foreign tour operators, the next step is to start placing guaranteed departures and individually doable experiences in channels. such as

• OUTDOORACTIVE (NTOCG is partnering with since 2017-18): https://www.outdooractive.com/de/suche/?q=Montenegro
• GET YOUR GUIDE https://www.getyourguide.co.uk/
• AIRBNB EXPERIENCES https://blog.atairbnb.com/what-are-airbnb-experiences/
• GOOGLE TRIPS: https://www.theverge.com/2016/9/19/12943054/google-trips-travel-app-android-ios or
• TRIPS BY TIPS: https://en.tripsbytips.com (Focus on content marketing)

FIT activities calendar
The NP Skadar Lake pioneered 2009 with the “Breathe in Spring” bookable day/ weekend tours with guaranteed departures for bird watching, hiking, biking, kayaking, visits to the wine producers, traditional river boats, excursions and events for children. Similarly the NP Biogradska gora could create and sell its own program “tiles”. To reduce the currently high seasonality concentration on two months out of 12: The NP could open in winter for a certain period (for example to offer snowshoe hiking as new attraction). Nature-based guided tours can be very attractive also in winter time and as stocking the feeding stations goes on year-round, guests could join on snowshoes.

Figure 29: Example of FIT Bookable Programs (NP Skadar Lake, 2009)

Volunteer groups
When there is interest by (mostly foreign) volunteer (biologist, student, scout) groups to work with the NPs, there should be an “off the shelve” short list of tasks that they could help realise. These can be small guest surveys, wildlife monitoring, small repairs, trail cleaning/marketing etc. Such projects have been successful for example in NP Biogradska gora,77 along the Coastal Transversal (PPT) hiking trail,78 for Via Dinarica79, as well as in in Bar/Utjeha80, in cooperation with Pošćenje village.81

78 https://springcamp.me/
80 https://www.youtube.com/watch?v=RUuio6GFyYg&list=PL2lmiqC7848miXe8OwerTb3MgrvTEE8uZ&index=2&t=0s
81 https://www.linkedin.com/pulse/tri-tima-belgijskih-volontera-u-po%C5%A1%C4%87enju-kirsi-hyvaerinen/
The groups do not need more than one person responsible for communication and coordination, and eventually a free space for camping with shower and toilets – and they can cover own external cost (transportation, food, drinks etc.). As “next generation ambassadors” these young people are not only helpful in many practical things, but also good messengers of marketing.

Figure 30: Volunteer Groups in NP Biogadska gora and Pošćenje, 2014-2017

5.5 People & Process

Having the right people in the NP is crucial because they are an important part of the new offering – their expertise, behaviour and own organisation means quite as much as the presence of wildlife. They will deliver the new activities with the guests’ active involvement and presence, so how this happens is also an essential part of what the guests are paying for.

Role of Rangers – Payment – Exchange & Education

It cannot be underlined enough how important it is to involve the park rangers as active and rewarded coordinators of new wildlife and conservation activities in the parks. Therefore, the recommendation to the JPNPCG job systematization is to plan a “ranger guide” job profile level, which would allow these rangers to guide wildlife experiences and conservation activities – and get paid better, in a reliable manner. If this does not happen, the initial motivation levels will most probably drop, or the capable ones will move further to private businesses. As a rule of thumb, some 10% of new income from ranger guided activities should be steered directly to better salaries of the ones who do this work in the future.

The new ranger guides will need more practical guiding trainings in advance and opportunities to gain experience by working with specialised wildlife tour operators, with the local agencies and their outdoor guides. Therefore, education should not end with the 1st training, but be continued, before first guests can come, and to continue also hand in hand with the pilot tour operators.

The planned exchange with the National Park Black Forest, Germany, is an excellent idea and fully in line with the requirements of the new offers – it should be realised as soon as possible.
Further practical trainings are recommended in areas such as:
- field trip organisation and safety
- time management
- acting as interface between the “product” and the tourists
- field interpretation
- managing expectations
- group dynamics, social skills
- possible environmental impacts; responsible behaviour of the group

The language gap (Montenegrin-English) with some of the initially trained rangers must not be a show-stopper: The main guide of the group must then stay the facilitator to the participants. However, language courses should be one part of HR development plans of the parks.

5.6 Physical evidence

A wildlife trip is per se full of physical evidence – the NP is experienced through all five senses and it needs to be coherent, not only with the visual signs such as logos and signage, but also with employee uniforms, vehicles etc. (to be according to the new JPNPCG brand handbook).

In the list of Weaknesses regarding the physical environment and spatial layouts, it has already been stated that the spatial organisation (traffic, parking) of the NP should change - and has already been planned to change to more environmentally friendly and efficient organisation. The ambience is also something to work on: no light pollution, no noise!

The new restaurant of the park, now well designed and privatized, should live the same values. It needs improvements which affect the overall experience “with all senses”. Guests do not know and must not care about ownership but expect
- local produce (at the moment for example, the honey served is plastic-packed and imported, craft beer bottles come from Podgorica, no local natural juices are sold, etc.)
- non-smoking (in September, waiters were smoking)
- activities of the NP to be co-promoted (in September, quad rentals were the only activity promoted in leaflets)

All these are part of the “full picture” of the NP Biogradska gora and reduce the credibility and perceived value to every higher educated nature enthusiast.

Also some of the signage and information need extension and updates - with the brown bear topic:
- on the visitor center wall information
- in the souvenir shop
- in printed materials and
- on the JPNPCG website and app

Ideally, the information concepts for the brown bear would be prepared centrally, so that all NPs with the brown bear get unified information, at relevant locations and in the new designs of JPNPCG. Here below some of the improvement needs in the NPs Biogradska gora and Durmitor:
Inclusive wildlife tourism

In the NP Biogradska gora, and in the new visitor space in Kolašin, inclusive wildlife tourism should be made possible, by planning new information in the space, as well as along the educational path in Braille code for the visually impaired.

Suitable for everyone, including persons with hearing impairments, an audio guide should be prepared. It is recommended to use the same producer “izi.Travel” as for the audio guides of Montenegro’s Panoramic Roads, in this case for the Museum of Marko Miljanov: https://izi.travel/en/dab0-museum-of-marko-miljanov/en - Use of the system and the mobile guide app is free.
Instruments for implementation, monitoring and evaluation

“No one can survive in isolation”
Therefore, it is essential to connect all marketing activities of NP Biogradska gora offers with the strategic plans and operational tactics of JPNPCG, NTOCG (e.g. see Annex A, Montenegro’s Priority Target Markets, Segments and Products 2018-2022) and Parks Dinarides - be it fairs, roadshows, congresses, study trips, media work or public campaigns in Montenegro and the region.

“What you do not measure you cannot manage”
The general need to change the set of KPIs in tourism has become a “hot” topic not only in overtourism troubled destinations. The results of any chosen measurement methods are important not only for the management and improvements, but also to give „reasons why“ for any future financing and sponsoring.

At the European level, the European Travel Commission (which NTOCG is member of) is shifting its marketing strategy for 2019, moving from a volume to a value-based approach, to help improve the quality of life on site and putting a big emphasis on experiences over specific destinations (places).

How can JPNPCG and NP Biogradska gora specifically get feedback and measure success (in „doing the right thing and doing things right“)?

- By systematically and regularly questioning the stakeholders, multiplicators and users
- By studying (and responding to) the online conversations on social media and feedback given through the app reports
- By tapping existing tools and resources for own monitoring and evaluation. In PAs, these would look also at the biodiversity and wildlife (for brown bear with the specific bear management tools), but also community involvement, local income from tourism created with the PAs etc.

Here is a relevant selection for sustainable tourism, which should be considered for implementation with the national level (MORT, JPNPCG, NTOCG):

- Since 2013, the EU has supported destinations to tackle social, cultural, economic, and environmental challenges. To measure performance in relation to sustainability, the “European Tourism Indicators System” (ETIS) was developed. From Montenegro, so far only Podgorica has participated in the II testing phase (2014-15). 83
- It is recommended to engage and initiate as a destination either in the
  - **EUROPARCS** application process for the European Charter for Sustainable Tourism in Protected Areas 84
  - or straight in the Global Sustainable Tourism Council (GSTC) certification. This program is supported by the UNWTO, the United Nations Environment Programme (UNEP), and the United Nations Foundation, seeking to harmonise more than 130 sustainable tourism standards and guidelines from around the world in a form that recognises their

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83 http://ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators_en
84 EUROPARC Federation: Sustainable Tourism in Protected Areas, Regensburg 2015, p.14ff.
individuality, while ensuring that the minimum requirements for the sustainability of tourism are met in all countries.  

- The GSTC Criteria for Destinations consists of 41 criteria in four main categories supported by a suite of performance indicators that managers can adapt to their protected area as needed. GSTC-recognised standards are increasingly adopted by government agencies and conservation organisations to certify protected areas and wildlife tourism programmes.

Figure 33: GSTC Roadmap for Destinations

6. Budgeting and financial planning

6.1 Revenue generation and cost expenditure

For NP Biogradska gora, the yearly difference between income and spend has been 2014-2016 over 100,000 € per year, sinking in 2017 a little to a 71,000€ difference; the spending should be reduced by the depreciation value, meaning that for 2017 the gap is still ca. 50,000 € (Here we have raised the question how this is covered – from public funds, sponsors, other NPs cross-financing - or just carried forward?)

Despite the rise in the number of visitors, the income/spending ratio is critical. In the period of 2014-2016, the entry fees stood for 61%-68% of the total incomes. The majority of the budget is spent on staff and transportation related cost. Conclusions:

- Other sources of own income should be strengthened, such as paid-for activities including qualified guiding, as proposed by this PA4NP project. Although guide services are already offered, according to the NP price list, they have not resulted in any income yet.
- Minor income sources should be reconsidered and redesigned. For example, bicycle rental does not make sense in this park, because there are only few, demanding trails up the hills, the income positions are very low, and good bicycle storing and maintenance would take its toll too.

85 https://www.gstcouncil.org/for-destinations/destinations-program/
86 https://www.gstcouncil.org/gstc-criteria/gstc-destination-criteria/
• So far, there is no room for any meaningful own marketing spending. Therefore, it is essential to follow cooperation models (as described in Chapter 5) and working methods that do not mean direct spending, but only some training needs and more diversified use of the staff capacities.

**Figure 34: NP Biogradska gora: Spend, Revenue & Visitors 2014-2017**

![NP Biogradska gora: Spend, Revenue & Visitors 2014-2017 Chart]

### 6.2 Other sources of financing

Apart from public funds and entry fees, and the existing WWF programs, there are other sources of funding which could be tapped. *In any case, the income from wildlife tourism in NP Biogradska gora should be steered back to the park’s further conservation, maintenance, education and marketing measures.* This chapter suggests

- diversification of the NP’s financing sources
- full public transparency in collection processes and use of funds

The most obvious areas to develop the financial situation are in the categories of **direct income** and **commissions**, by growing

- the palette of what can be done in and with the NP, i.e. wildlife and biodiversity activities
- the sales of (more, better and more widely available) branded maps, gear and souvenirs
  - Some of the brown bear related souvenir products can be designed specifically for “Brown Bear Supporters”
  - Professional products with quality design would only be accepted as official. These products would carry the brand and the bear topic
  - Visitors should receive information about where their money for the purchase will go. For example, towards new camera traps, GPS collars, binoculars, school visits, maintenance of the educational trails, safety measures, cleaning, information, etc.
  - The sales of such promotional products can take place on site (LTO offices, souvenir shops, hotels) and be advertised on the JPNPCG website and the social media channels.
Potential for Parks Dinarides, JPNPCG and NTOCG is in the **brand management**: There is also an option to **licence** the brands of the NPs to quality, local products (food, drinks, honey, herbs, textiles, handicrafts, etc). A difference should be made between licencing brand models for “**promotional**” and “**product sale**” use. The promotional use (for example, on brochures and websites) should stay free of charge (but under control). If used to promote product sales, an application process should be followed by a fee paid, if a product is accepted.87

A similarly interesting category are **strategic partnerships and sponsorships**. They include **time limited contracts** with the general co-promotion of the NP. For example, 2-3 strategic partners would have the logo and direct linking from the JPNPCG website, at fairs stands, on press conference roll ups etc., thereby making their presence and participation at these events more attractive. A standard contract is written for the obligations and rights of both sides. The compensation can be either financial, barter agreement (e.g. “unlimited WLAN use for 50 free overnights at fam trips / for journalists”) or a combination. Potential partners can be telecommunication companies, local drink producers, the chambers of commerce, festivals, retailers, airlines, hotels, travel agencies, etc.

Potential companies can be screened and approached to become strategic partners, to co-fund activities, for example, on a bi-yearly contract. Proper preparation and clear deliveries are required on both sides. Needing the money is not enough. Important questions to check in advance:

- Have they ever partnered with a non-profit organisation before?
- Who else are they currently sponsoring?
- Why?
- What is the best timing of a proposal? (the majority of Companies organise their budgets between September-November each year)
- Who is the best person to speak with about sponsorship?
- Are they interested? What is the offer?

There are many reasons that companies may decide **not** to invest in sponsorship opportunities, e.g.:

87 Example Tyrol brand licencing: http://www.tirolwerbung.at/marke-tirol/
• Bad timing – missing their budgeting cycle
• Misalignment of target markets - are the supporters their customers?
• The approach and proposal were too generic
• No clear opportunities for how the company can participate
• No measurability or opportunity for return on investment
• Worst of all: unmaintained relationships

Further, **Corporate Social Responsibility** (CSR) programs of companies with relation to outdoor and wildlife should be considered - not only in Montenegro, but internationally. These dimensions are rather for Parks Dinarides and JPNPCG than for an individual NP to consider. For example:

• The Carpathian Large Carnivore Project in Romania partnered since 1993 with **Jack Wolfskin**, a leading German outdoor gear producer.88
• **VAUDE**, another well-established German outdoor gear company, partnered with the **European Outdoor Conservation Association (EOCA)** and Euronatur for brown bear conservation.89
• Over the last 11 years, EOCA has funded 94 projects in 44 different countries to the tune of 2.3 million € in areas related to clean-up and conservation projects in the Alps or smaller trail developments.90
• Current global examples for community-based development ideas were launched 2017 by the competing platforms Airbnb and Booking. The **Airbnb Community Tourism Programme**, with up to 5 million € in funding, was launched for investments in innovative, community-based tourism projects across Europe through 2020.91
• For similar, sustainable development purposes, the Booking.com’s programme is looking for “innovative, non-profit ideas in sustainable travel” through its **2 million € Booking Cares Fund**. With the Fund, we support projects that strengthen local communities, preserve and promote local culture, help disperse tourism and protect natural resources.92
• Since 2016, the **Adventure Travel Conservation Fund** (ATCF) works to: “…directly fund local projects engaged in the conservation of unique natural and cultural resources of adventure travel destinations.” The ATCF is a non-profit that provides funding, connections and an international spotlight on projects that protect the cultural and natural resources which underpin the adventure tourism industry. Here, projects may be considered for funding only if they are nominated by a member of the Adventure Travel Conservation Fund; Parks Dinarides could become a member. The entire 100% of membership dues goes directly to funding on the ground conservation projects, located outside North America.93
• The **US National Parks** have a foundation matchmaking parks with sponsors.94

**Project based co-financing** via national, regional and EU support programmes are already in use, but eventually not to the extent and intensity that they could. For example,

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91 https://www.airbnbcitizen.com/community-tourism-programme/
92 https://www.fund.bookingcares.com/
93 http://adventuretravelconservationfund.org/
94 https://www.nationalparks.org/about-foundation/partnerships/corporate-partnerships
• The NTOCG has dedicated small grants to fund tourism development and programmes, to stimulate product development in underdeveloped areas, marketing activities, reduction of seasonality, enhancement for safety etc. The applicant could be for example the LTO Kolašin, and cooperate with the NP Biogradska gora: www.montenegro.travel/objekti/nacionalna-turisticka-organizacija-crne-gore

• the **Strategy for Utilisation of EU funds**, within the Strategic Marketing Plan for Tourism in Montenegro for 2018-2022, describes in detail how the MORT and NTO can integrate the new sector-based approach under **EU IPA II** (2014-2020) to serve tourism development purposes.95

• **TAIEX and Twinning** programs could be interesting, with the fact that Chapter 27 has been opened.

• The **Regional Cooperation Council (RCC)** in Sarajevo is an EU-funded potential partner, implementing tourism development and promotion projects “to create joint and internationally competitive cultural and adventure tourism offers in the six Western Balkans (WB6) economies which will attract more tourists to the region, lengthen their stay, increase revenues and contribute to growth and employment.” The first 12 out of 30 + grants were awarded in Nov 2018, in total value of 548,000 €96

• A new regional source is the **Western Balkans Fund**, 97 started in 2017 with the first call for regional project proposals. The objectives of the fund will be pursued through financial support of activities in fields which contribute to cross-border and inter-regional cooperation and to the strengthening of regional cohesion, in the following relevant areas:
  - Promotion of sustainable development
  - Promotion and development of scientific exchanges, research and cooperation
  - In the field of education
  - Promotion and development of exchanges between young people

• **Voluntary contributions** with direct benefits to the brown bear programme could be won through various methods. Transparent information about where and what the funds would be used and proof of how the funds were actually used is crucial. The beneficiaries should be in and around the NP: For example, a new study by the Wildlife Conservation Society finds that an ecotourism strategy based on direct payments, where local people are compensated for the amount of wildlife seen by tourists, has resulted in a reduction in illegal hunting and an increase in wildlife sightings.98

> "If ecotourism or nature tourism is going to help increase these wildlife populations, there must be a direct link between the incentives for communities and the wildlife itself “
> B. Phoomsavath, Director of Nam Et-Phou Louey National Protected Area, Laos, 2018

95 https://ec.europa.eu/neighbourhood-enlargement/instruments/funding-by-country/montenegro_en
97 http://westernbalkansfund.org
• “Adopt a Brown Bear” would be a new and rather easy approach to collect private nature enthusiast funding. Similarly works this dolphin programme of the Marine Mammals Research Association, also for Montenegro; the cost is 20 € / year, collected for “…more dedicated research efforts on those subpopulations where the data is scarce in the Mediterranean Sea, as in Montenegro. Adopting one of our dolphins will help us to keep our scientific and conservation efforts going. Of course, this is not like a standard adoption. You will not be able to take your dolphin home! Your dolphin will live freely in the Adriatic Sea while with the donation, we carry on our dedicated survey effort, which is over 400 days since 2016.”\(^99\)

• WWF has its “adoption approach” for the grizzly bear, but it is rather global and rather commercial-looking.\(^100\)

Figure 36: Model for „Adopt a Brown Bear“

- A further option is to set up a simple "Support our Brown Bears" proposal (in the souvenir shop and visitor spaces) to voluntarily donate to the conservation work: Donation boxes can be places also in the LTOs, at the airports, with a wildlife information available, e.g. via barcode link, and a notice posted on the website and social media pages of JPNPCG and Parks Dinarides.

- Possible towards the businesses: A call for voluntary support from travel agencies and tour operators that offer the NP Biogradska gora in their packages. Again, transparency of the funds collected and used must be 100%.

- Crowdfunding is a rather new method, but already successfully used in conservation and tourism projects:
  - The principle: Via specific Internet platforms, people financially support a project, events, start-ups, conservation, humanitarian actions, etc. This can happen successfully, when some prerequisites are considered, such as the team running the campaign, local motivation factors, well-planned publicity, etc.\(^101\)

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99 https://www.dmad.org.tr/adopt-a-dolphin
100 https://gifts.worldwildlife.org/gift-center/gifts/Species-Adoptions/Grizzly-Bear.aspx
“The Conversation” has recorded 577 conservation-oriented crowdfunded projects, from 72 crowdfunding platforms, which have raised around 4.8 million USD since 2009 for projects across 80 countries.102 Examples: African rhino protection103, or the Top 5 environmental projects of Australia.104 Examples of successful crowdfunding opportunities in tourism were presented at the ITB 2015 (in German language).105

7. Key conclusions for action planning - next steps

Depending on the maturity of a destination, usually in tourism development, these steps take a minimum of 3-4 years: From the first stages of awareness raising on both sides to good quality products sold and reliably delivered. Therefore, the so far activities within this project must be seen as the very first steps from „Awareness“ towards „Interest“. The action planning for 2019+ should concentrate on four key areas:

1) Good Product Realisation

a. Discuss and finish the list of new activities and working model for them (deadline was given at the workshop for February 2019; could be extended to March)

b. Plan a clear mechanism of how to book and pay the new activities and reward the ranger guides, within a B2B sales workflow (Figure 37)

c. Choose the type and ideal location for the bear hide in the park, involving bear management and wildlife tourism expertise (suggested requirements, Chapter 5.1).

d. To solve the parking problem: A planned project to move all individual cars, buses and vans down to the Kraljevo kolo location and introduce transportation trains up to the park instead.106

e. To plan, design and build the visitor space in Kolašin with information focus on the wildlife in Biogradska gora NP, especially the bear (and ideally, showing GPS data tracks of the bears with a collar).

f. To ban motorized vehicles (motorcycles, „quadbikes“) from the National Park trails which are marked and since years promoted to be used for hiking, biking, horseback riding and steer them to the 90% of Montenegro’s space which is not under protection. Radically reduce and control better private vehicles in the NP. This is not only important for the original and new target groups, but for the protection of the nature and very much also for the visitor safety and security. Described in the work plan 2016-2020 as „a significant offer growing year after year“107 - the conflict of user interests is too strong to ignore.

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102 https://theconversation.com/crowdfunded-campaigns-are-conserving-the-earths-environment-97312
103 https://www.justgiving.com/crowdfunding/rhinoprotection
104 https://chuffed.org/academy/articles/detail/top-5-environment-crowdfunding-campaigns
105 www.tourismuszukunft.de/2014/04/crowdfunding-im-tourismus
106 The planned solution should be ready for the coming summer season.
2) Organisation, Capacities, Financing

a. To keep the newly established decision-making and management bodies as well as the implementation steps of the brown bear management plan closely connected with the product development and marketing of the wildlife tourism offers (for the whole country).  

b. Plan a next stage of practical trainings with the NP ranger guides to get them to the next level of expertise in wildlife guiding.

c. JPNPCG to get Montenegro’s rangers into the International Ranger Federation.

d. In cooperation with the NP Tara, produce a „Rangers´Handbook“ and quick references for wildlife guiding.

e. Implement the JPNPCG planned exchange program with the NP Black Forest.

f. Train and dedicate a marketing person for local B2B coordination and to support e-marketing work in close cooperation with JPNPCG marketing (this should be done for all 5 NPs.)

g. Choose from the sources of financing the best suitable ones with the best chances to succeed.

h. Start with the full compensation policy of wildlife damage, according to the EU regulation.

i. For Parks Dinarides: Approach potential international sponsors (e.g. European outdoor gear producer such as Halti, Karhu-both FIN, Fjällräven-SWE, Karhu, Jack Wolfskin, Vaude-both GER, Patagonia-US...)

3) Marketing

a. Set up a working group for the 1st study trips (with domestic media, travel agencies, guides, then with foreign tour operators in May/June) and agree on the responsibilities.

b. Define and decide on the new souvenir acceptance, branding, sales and income use mechanisms.

c. Develop new content and functionalities for the website, social media and app – involving a staff member from all 5 parks.

d. Plan public awareness campaign, based on the current survey results (attitudes regarding brown bear).

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108 Parks Dinarides: Conclusions of the Brown bear population management in Montenegro workshop, Podgorica, 26-27 March 2018
109 https://www.internationalrangers.org/members-map/
4) International co-operation, relations with other projects

a. Foster working linkages for cooperation in the country and the region (e.g. JPNPCG, NTOCG, MORT, with other National Parks and the nearby Nature Parks, Natura2000 working group, RDA, other NGOs - such as CZIP experts – EU IPA projects. and nature-based tourism businesses)

b. Build new co-operations internationally (GSTC, GEN, ATCF, relevant new tour operators, media, ecotourism events - such as the yearly European Ecotourism Conference, organised by the European Ecotourism Network (EEN), which could one day also go together with the Parks Dinarides’ international conference)

Closing remarks

When I started as integrated advisor to the NTOCG in June 2006, the first thing we changed on Montenegro’s promotional map, was to delete the hunting pictograms and any suggestions to hunting as a tourism activity on some municipalities’ online and printed promotions. It just did not seem right nor sound to promote activities that would reduce the core value of the brand “Montenegro Wild Beauty” – without any knowledge about how big a population of a certain species is, and without plans or control mechanism what could get shot, when, and in which numbers.

Now, 12 years later, I am delighted to see that the registration of the bear population is taking shape with the organised DNA analysis, the stakeholders get educated about bear management, the Natura 2000 is on its way of field implementation (even though with too little capacity). In conversations I have found that there is also positive understanding amongst the rural population that Montenegro’s wildlife and biodiversity are something worth protecting. That some of this could be close to unique in Europe is not yet a mainstream perception. Here in the mountains, I have met a bear, and documented bear traces on hiking trips, even on the local trail of the village where I now live, Pošćenje. I have also registered the bad and sad news of illegal hunting in some areas.

With this report, I hope to have spotlighted some key opportunities and needs, together with new ideas and perspectives of „how to make it happen“. I trust and hope that many of the initiatives will soon be propelled towards realisation. I am happy to stay at the disposal of the supporters, implementing agency and partners – The Swedish Agency for International Development Cooperation (SIDA), Parks Dinarides, WWF Adria, Dinarica, Ekopana, and the World Organization for Nature (WON) – to assist in any of the topics, and also to help establish useful new contacts and capabilities with international responsible tourism players, be it businesses, associations, education, or media.

THR, MORT, NTOCG: Presentation of the Strategic marketing plan for tourism in Montenegro 2018-2022, Podgorica, November 2017

111 THR, MORT, NTOCG: Presentation of the Strategic marketing plan for tourism in Montenegro 2018-2022, Podgorica, November 2017
ANNEX B: PEST (Political, Economic, Socio-cultural and Technological) Analysis

This is a framework of the four macro-environmental factors to be taken into consideration, for understanding position, potential, risks and direction for operations.

<table>
<thead>
<tr>
<th>Political</th>
<th>Economic</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The EU Chapter 27 - Environment and Climate change was opened in Dec 2018. On nature protection, Montenegro is aligned with the Habitats Directive and streamlined the institutional framework for designating future Natura 2000 sites, but still needs to strengthen administrative capacity to manage Natura 2000 in the future.</td>
<td>• The country has systemic problems including an overall weak economy, still huge shadow economy, oversized administration and fiscal indiscipline. In 2016, Kolašin had, with Budva, the highest municipal total debt percentage.113</td>
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<td>• The state institutions have proven not yet to have the necessary administrative and financial capacities that are relevant for the professional management of the PAs (JPNPCG, MORT, now incl. the Environmental Protection Agency) to implement and enforce the acquis.</td>
<td>• The unemployment rate (as % of total labour force) is expected to fall to 14.6% in 2020. 114 In Kolašin the rate was 26.7% in 2014.115 In 2017, employment in the service sector in the Northern region was only 50.5%, compared with the Montenegrin average of 66.5%.116 Consequently, there is space for improvement through tourism.</td>
</tr>
<tr>
<td>• Tiny practical example: The database <a href="http://prirudainfo.me">http://prirudainfo.me</a> - since 28th Dec 2018 the domain name is expired and is “pending renewal or deletion.”</td>
<td>• The new highway, once operational, is hoped to bring people more safely and faster (30min. from Podgorica) to and from Kolašin.</td>
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<td>• Although Montenegro has transposed a significant number of European regulations, their implementation is seriously lagging, especially in the area of nature protection.</td>
<td>• Over 3/4 of national employment is generated by SMEs. However, they are confronted with the complexity of business-related legislation, particularly at local level, or the lack of access to affordable finance.</td>
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<td>• For the past decade, environment has not been of any priority. Nature protection in PAs must take over economic interests.112</td>
<td>• Therefore, to work with the business sector, PAs “should create good relationships with business community, not becoming businessmen themselves.”117</td>
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<td>• Some critical key questions need to be addressed now, to manage the tourism use of the PAs, their limits of acceptable change etc. (⇒ Annex C)</td>
<td>• The new Law on spatial planning and construction was adopted in October 2017. It shifts spatial planning and construction powers from local authorities to MORT. Suggested as an investment enabling element, this change can turn to a risk, given that the Law abolished the need for construction and operational permits for “simple projects” and that corruption is prevalent in many areas and remains an issue of concern.</td>
</tr>
<tr>
<td>• The so far Director of NP Biogradska gora has resigned. To that extent, the further implementation of the PA4NP could be uncertain; as political appointees, both JPNPCG and the NP management may change (following next elections, no later than Oct 2020), and amend development directions.</td>
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</table>

115 http://mojgrad.me/lokalna-samouprava-kolasin
116 https://www.monstat.org
117 Parks Dinarides and WWF: 2nd Dinaric Arc Parks International Conference Report, Budva 2013
Socio-cultural

- Montenegro has 23 municipalities, but 31% of the population lives in Podgorica, which is the highest concentration in the Western Balkans. The other 22 municipalities average only about 19,500 people per municipality. In Kolašin and Mojkovac the number is around 8,500 inhabitants each.
- In addition, the age dependency is high, i.e. in this area the population’s age profile is slowly but surely becoming problematic. New employment opportunities for the younger generations must be created. 118
- This takes also stronger engagement to enable new local (rural, nature-based) tourism business ideas. A good example of more exchange and support with the region of Bjelasica, Komovi and Prokletije: „Enhancing Montenegrin & Serbian Entrepreneurship and Tourism (e-MEETS)“119
- The employment of women should be supported more, not only as traditional hosts in rural households/at katuns, but also as wildlife rangers and nature guides. A good example was presented at the ITB 2018, by the Tajik Women and Conservation Initiative.120
- Values take a central role (see also Chapter 2.3). The values of the target groups towards nature protection are further developed than of the hosts’. It will be expected that the local community and NP employees, especially the ranger guides, lead by example. The existing gaps especially in appropriate waste treatment need to be closed with more education and exchange (littering is more visible in and around the municipalities than in the NPs).
- Also the partly present fear of carnivores needs more communication. Good practice examples are shared by EUROPARCS.121
- To become more attractive also as employer, the NP staff regulations need modernization and HR development plans.

Technological

- The most important technological changes and the current consequences for marketing (e-marketing, including mobile and social media) are discussed in Chapters 2.3 and 5.3.
- On the innovation side, the new visitor space should make use of the modern possibilities:
  - showing GPS data tracks of the bears with a collar
  - deploying modern visualization e.g. virtual reality (VR) goggles
  - audio-guides and Braille code for hering and visually impaired
- The brown bear research results should be made available to the public in an attractive way.
- The risk of overtourism grows with social postings by the „selfie generations“, from previously unknown and/or protected places.122
- Therefore, to offer „fixed“ alternatives (such as the „frame“ towards Sedlo in NP Durmitor) should help steer the need for great „selfies“. With wildlife around, those should be 100% forbidden for safety reasons.
- „No-drone-zones“ will be needed soon, as the prices of drones are dropping and they are more and more often used by non-professionals. The use of drones in the PAs should be strictly limited by location and times (not in wildlife breeding times, or in the highest protected areas). They can turn dangerous to the wildlife.123
- For Parks Dinarides, it would be an additional opportunity to partner with the conference Spark.me organisors, in order to involve young people and start-ups to help further innovate (research, presentation, marketing) working methods.

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119 http://emeets-erasmus.net/
ANNEX C: Key Screening Questions for Tourism in Protected Areas

Directions to some of the key questions (regarding appropriate target groups, activities, who should provide them, involvement of local communities etc.) have been given in this report. However, for a qualified judgement and development many questions remain and should be answered and actioned, with JPNPCG and the new management of NP Biogradska gora:

<table>
<thead>
<tr>
<th></th>
<th>Question</th>
<th>Answer Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>1)</td>
<td>Does the NP and its surrounds or region have the planning laws, regulations and infrastructure in place to manage the levels of anticipated visitation sustainably?</td>
<td>Yes / No → Action, When Responsible</td>
</tr>
<tr>
<td>2)</td>
<td>Are all the values of the site well known and documented as the basis for both planning and monitoring of impacts?</td>
<td>Yes / No → Action, When Responsible</td>
</tr>
<tr>
<td>3)</td>
<td>What constraints on tourism development or use flow from the mission and objectives of the protected area?</td>
<td>Known / Unknown → Action, When Responsible</td>
</tr>
<tr>
<td>4)</td>
<td>What kind and scale of infrastructure is appropriate and where should it be located?</td>
<td>Known / Unknown → Action, When Responsible</td>
</tr>
<tr>
<td>5)</td>
<td>What level of biophysical impacts, if any, is acceptable given the mission and objectives of the protected area?</td>
<td>Known / Unknown → Action, When Responsible</td>
</tr>
<tr>
<td>6)</td>
<td>What level of impacts to biodiversity and the physical environment is acceptable given the mission and objectives of the protected area?</td>
<td>Known / Unknown → Action, When Responsible</td>
</tr>
<tr>
<td>7)</td>
<td>How can communities within and adjacent to the NP sustainably participate in the NP protected area wildlife tourism development?</td>
<td>Planned / Unplanned → Action, When Responsible</td>
</tr>
<tr>
<td>8)</td>
<td>What kinds of services and engagement should be offered by surrounding local communities?</td>
<td>Planned / Unplanned → Action, When Responsible</td>
</tr>
<tr>
<td>9)</td>
<td>How will tourism- and visitor-generated funds be secured and distributed for the NP work - for conservation - for communities?</td>
<td>Planned / Unplanned → Action, When Responsible</td>
</tr>
<tr>
<td>10)</td>
<td>How can NP management determine and plan for an acceptable level of impacts and appropriate experience opportunities?</td>
<td>Known / Unknown → Action, When Responsible</td>
</tr>
<tr>
<td>11)</td>
<td>How will management actions and their outcomes be monitored?</td>
<td>Known / Unknown → Action, When Responsible</td>
</tr>
<tr>
<td>12)</td>
<td>How can policy be influenced within conservation planning and tourism sectors to address these issues?</td>
<td>Known / Unknown → Action, When Responsible</td>
</tr>
</tbody>
</table>

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ANNEX D: Participants in stakeholder workshop, 21 Nov 2018, Kolašin
ANNEX E: Literature and online sources

- Adventure Travel Trade Association (ATTA, various authors): North American Adventure Travelers, October 2017 Update, p.3 ff.
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• World Travel & Tourism Council (WTTC): Travel & Tourism Global Economic Impact & Issues 2017, p. 2
• World Youth Student and Educational Travel Confederation: Millennial Traveller, Executive Summary 2014
ANNEX F: Contacts for further information

<table>
<thead>
<tr>
<th>Name</th>
<th>Title and Organization</th>
<th>Email</th>
<th>Website</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. Zoran Mrdak</td>
<td>Director, Parks Dinarides</td>
<td><a href="mailto:zoran.mrdak@parksdinarides.org">zoran.mrdak@parksdinarides.org</a></td>
<td><a href="http://www.parksdinarides.org">www.parksdinarides.org</a></td>
<td></td>
</tr>
<tr>
<td>Ms. Jelena Marejović Galić</td>
<td>Communications Officer, Project Manager</td>
<td><a href="mailto:jelena.marojovic79@gmail.com">jelena.marojovic79@gmail.com</a></td>
<td><a href="http://www.parksdinarides.org">www.parksdinarides.org</a></td>
<td>+382 20 671 688</td>
</tr>
<tr>
<td>Ms. Kirsi Hyvaerinen</td>
<td>Project Consultant, PRÁTTO Consulting d.o.o.</td>
<td><a href="mailto:k.hyvaerinen@pratto.eu.com">k.hyvaerinen@pratto.eu.com</a></td>
<td><a href="http://www.linkedin.com/in/khyvaerinen">www.linkedin.com/in/khyvaerinen</a></td>
<td>+382 67 288 776</td>
</tr>
<tr>
<td>TBA</td>
<td>Director, National Park Biogradska Gora</td>
<td><a href="http://nparkovi.me/np-biogradska-gora/">http://nparkovi.me/np-biogradska-gora/</a></td>
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