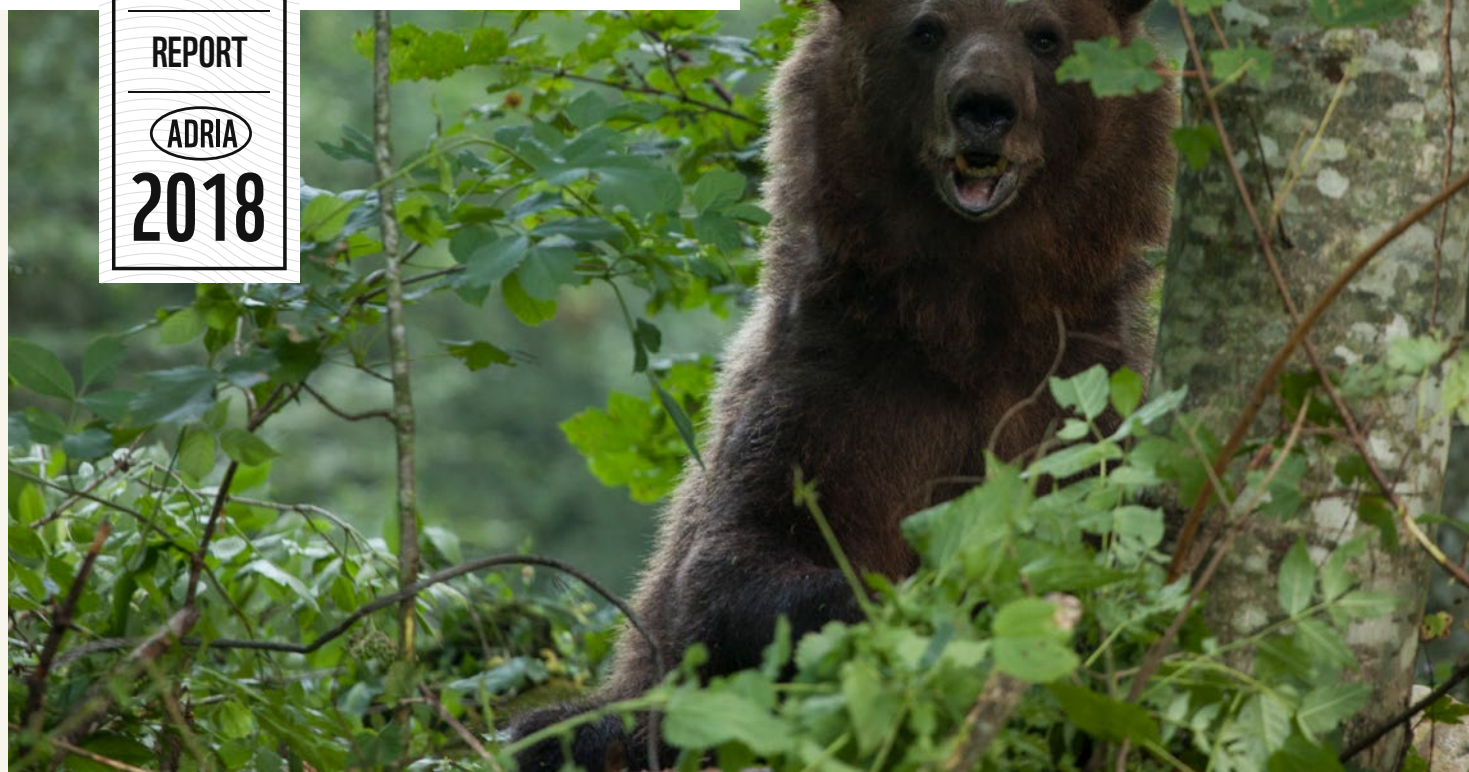




REPORT

ADRIA
2018

THIS REPORT HAD
BEEN PRODUCED IN
COLLABORATION
WITH:



Market research and potentials for sustainable Brown bear watching in Tara National Park, Serbia

Protected Areas for Nature and People (PA4NP) Programme
Field project “Bear Watching in National Park Tara and
National Park Biogradska gora”

Report by Jack Delf

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Acronyms

ATTA – Adventure Travel Trade Association

BW – Bear Watching

CBD – The Convention on Biological Diversity

CSO – Civil Society Organization

ECST – European Charter for Sustainable Tourism

GDP – Gross domestic product

GSTC – Global Sustainable Tourism Criteria

IUCN – International Union for Conservation of Nature

LCM – Local Community

LNT – Leave No Trace

MINTEL – Market Intelligence (the world's leading company for market trends data)

NP – National Park

PA4NP – Protected Areas for Nature and People programme

PA – Protected Area

PAs – Protected Areas

PAM – Protected Area manager

PA4NP – Protected Areas for Nature and People programme

PE – Public Enterprise

PEST – Political, Economic, Socio-cultural and Technological analysis

RAMSAR Convention – The Convention on Wetlands of International Importance

SWOT – Strength, Weakness, Opportunity and Threat analysis

TGI – Target Group Indicator (market intelligence concerning consumer preferences)

UNWTO – United Nations World Tourism Organisation

USP – Unique Selling Point

WWF – World Wide Fund for Nature

Glossary of Terms

Tourism – usually defined as a “set of relations and phenomena related to the activities of persons traveling and staying in places outside their permanent residence, up to a year, for leisure activities, business and other reasons”.

Tourism market – set of relations of tourism offer and tourism demand, oriented toward the exchange of goods and services in exchange of money.

Inbound and Outbound tourism markets. ‘Outbound tourism’ businesses send clients overseas, ‘Inbound operators’ are receiving clients and providing activities and services in a destination.

Tourism Offer (= Tourism Product) – a travel service or activity which will be offered for paying guests.

Tourism Package – multi-day or multi-activity tourism offer. Packaged tourism services often include transport, accommodation, some or all food, activities and excursions.

Tourism experience – Increasingly, travelers think about the whole experience of visiting a destination, keen to try and sample more of local culture and lifestyle. In planning guest activities, successful tour operators think of creating an ‘experience’ with many factors considered not only travel and ‘sights’.

‘High value low impact’ tourism – “High value” refers to business providing service standards and creating more memorable, rewarding travel experiences, so that they can add value to their offers and increase profit. “Low impact” travel defines tourism which minimizes the harmful effects to a host community or destination (in this report it refers to nature in Tara NP). Often low impact can be achieved by limiting group sizes (which also adds value for customers), by dispersal of visits and by better planning.

Adventure Travel – Often misunderstood as tourism which only involves outdoor activities rich in adrenaline such as climbing, canyoning, mountain biking, rafting, etc. Adventure tourism is today



© Green Bear, Stand Up Paddling



© PE "Tara National Park", Mountain biking

defined by the Adventure Travel Trade Association (ATTA) and it involves the combination of active, cultural and nature based travel experiences, therefore, wildlife watching and nature conservation activities can go hand in hand with cultural activities such as cookery, craft making. The Adventure Travel segment is high value and growing faster than traditional tourism.

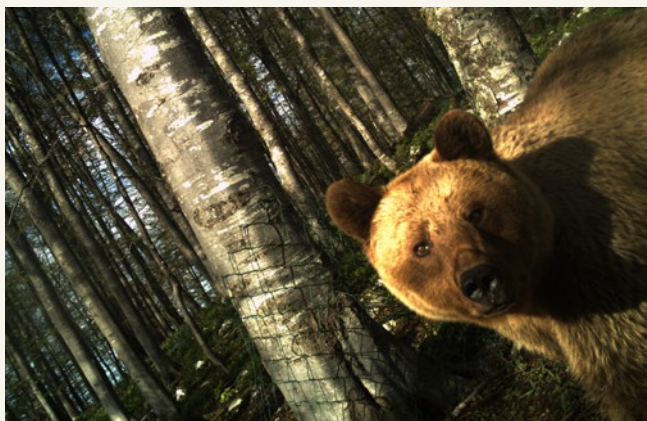
Wildlife Tourism – tourism based on observation of wild flora and fauna species in their natural habitats.

Wildlife tourists – tourists who list wildlife as something they would like to see and experience in a destination or on their holiday, however, this is not necessarily the main reason for them to choose a particular holiday.

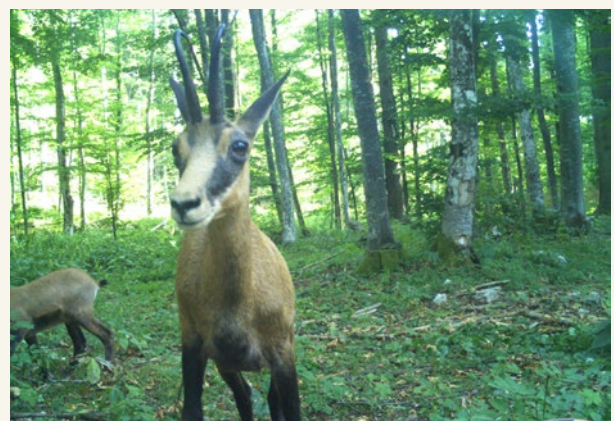
Wildlife enthusiasts – tourists who often consider the availability of wildlife viewing opportunities as their primary motive for choosing a destination.

Conservation tourism – tourism based on activities which directly contribute to nature conservation (in a protected area or wider).

Gross domestic product (GDP) – a monetary measure of the market value of all final goods and services produced in a period (quarterly or yearly) of time in one country.



© PE "Tara National Park", Brown bear (*Ursus arctos*) caught by a camera trap



© PE "Tara National Park", Chamois (*Rupicapra rupicapra*) caught by a camera trap



© Vesna Maksimović, live locally evening

Background

Sustainable use of natural capital in countries of the Balkan Peninsula could form a basis for social and economic development which would be safeguarded through enhanced environmental responsibility among the public, governments, Civil Society Organizations (CSOs) and the business sector.

WWF Adria is working on the four-year Programme “Protected Areas for Nature and People” (PA4NP) in the Balkan Peninsula. Protected Areas (PAs) will be used as “natural laboratories” to develop model solutions for sustainable development safeguarding the natural capital. The Programme aims to help PAs to increase their role in local social and economic development and become more valued and supported by their constituents. Furthermore, 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 nature.

The results of the Protected Areas Benefits Assessment in 6 PAs in Serbia reveal that biodiversity, tourism and education are the overall economic potentials recognized by all stakeholders. **To ensure that PAs demonstrate tangible examples of economic and social benefits to local communities, WWF and local partners are working on the field project “Bear Watching in National Park Tara and National Park Biogradska gora”, through which these PAs will benefit from bear-watching related tourism activities.** Bear-watching will be developed as a wildlife tourism product in PAs, in addition to the measures for Brown bear (*Ursus arctos*) protection and habitat improvement. Furthermore, through the sustainable bear-watching tourism offer, public support to PAs and economic benefit for local communities will be increased.

An important component is the local community (LCM) awareness concerning bear co-habitation, as well as promotion and highlighting of potential economic benefits of living near wildlife-rich habitats. Local community will have the opportunity to engage in measures to protect Brown bear, but also to take part in creation of attractive tourism offers in the role of wildlife interpreters or providers of accommodation, gastronomy, souvenirs inspired by Brown bear, and other nature-based tourist services.

However, wildlife tourism at Tara National Park (NP) is largely undeveloped, less than 50 guests have paid to visit the bear viewing hides so far. **The bear viewing offer is very limited because it does not offer supporting wildlife viewing or participatory conservation activities for the guests. Trained wildlife guides with language skills and activity facilitators are needed. Local tourism businesses do not have experience working with high value wildlife tour operators.** Therefore, education is the first task of this field project. **Local stakeholders and PA managers need to understand the international market for bear watching, to learn from best case examples of good wildlife tours, and to identify the essential elements of successful bear watching tours which are required at Tara PA.**

Scope

The main purpose of this report, and future deliverables within the field project, is to assist the Tara NP manager in developing wildlife tourism products and services which meet the needs of their targeted market, in a strategic and planned manner. In the light of emerging nature-based tourism market, the development of commercial wildlife and bear watching tourism should prove to be a win-win solution for environmentalists and economists in Tara NP and the surrounding region. **At first, we need to understand the potential for Tara NP. It is also necessary for stakeholders to understand which steps need to be taken in order to compete with other high value wildlife tourism destinations.**

This market analysis of existing international bear watching offers had the following objectives:

Estimate the size of the market / volume of consumer demand for wildlife tourism globally and from Western Europe and the Balkans source regions.

- Identify optimal source countries/target markets for the new offers.
- Demographic profiling of potential consumers with insights into their travel spending habits and their needs and desires for wildlife tourism experiences.
- Estimate potential visitor numbers for the launch and growth of the new offers.
- Identify seasonal demand.

Understand the potential for development of competitive high value wildlife tourism at Tara NP.

- Identify the optimal mix of activities (wildlife viewing as well as hands on conservation activities) for high value wildlife tourism.
- Identify suitable accommodation types.
- Identify optimum group sizes, technical competencies of guides and activity facilitators.
- Give insights into pricing and marketing strategies of successful competing products.

The marketing plan, business plan and supporting documents which are to be developed at the later stage will draw upon insights given in this report. It is intended that **the findings given below can serve as a roadmap** for park managers, tourism authorities and local businesses for implementation of Brown bear and wildlife viewing and conservation activities for Tara NP and the locality.

If all stakeholders understand the competitive market for wildlife tourism, they will best understand the requirements they need to fulfil and opportunities for developing successful tourism products. Successful tourism products will require knowledgeable and empowered local stakeholders, making the key investment.

Methodology

Three sources of information are included in the research:

1. Competitive analysis considered commercial multi-day tours and single day activities offered online for 2018, which include Bear Watching or Bear Conservation as the main advertised attraction.

The survey included all tours offered online in Europe¹. In total some 54 separate offers were considered with 32 chosen for a more detailed study (see appendix for summaries).

Those products chosen for more detailed analysis were those which were considered most commercially viable (rather than new, untried or speculative offers). Therefore, offers which met one or more of the following criteria were chosen:

- Proven track record of sales over two or more years.
- Included links to customer feedback / endorsement (for example on Trip Advisor).
- Guaranteed departure dates.
- Published prices. In several cases companies which offered tailored itineraries or high value packages had to be contacted for prices, those that answered within 48 hours were included in the survey.
- Offered by a well-known or established international outbound operator (e.g. Explore, Exodus).

Data was collected from the published /advertised material available for each offer. The following data was collected:

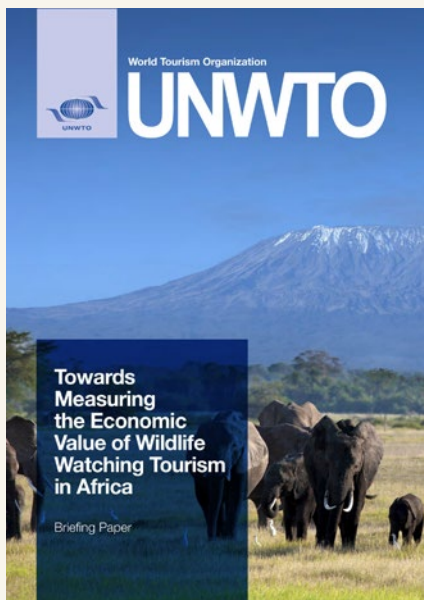
- Pricing.
- Duration of the tour or activity.
- Optimum mix of nature, 'outdoor active' or cultural activities.
- Unique Sales Points of each offer.
- Service standards (guiding, accommodation types, travel times and transport types).
- Seasonality.
- Compliance with international agreements concerning responsible wildlife tourism.

2. Published statistical reports covering Wildlife viewing were also considered. Unfortunately, much of the published data for wildlife tourism is limited or out of date.

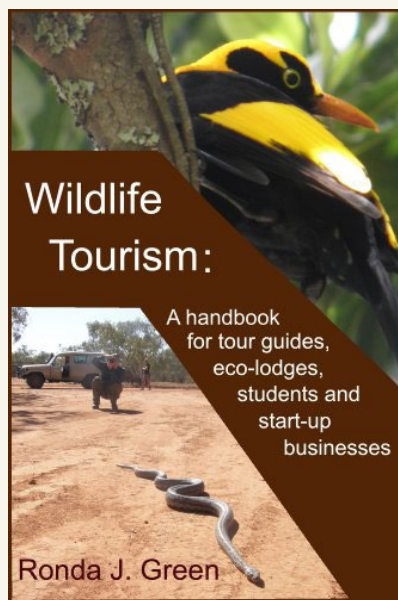
The most useful sources referred to in this report included:

- MINTEL 2008 Wildlife Tourism http://reports.mintel.com/display/349671/?__cc=1
- UNWTO 2015 - Towards measuring the economic value of wildlife watching tourism in Africa sustainabledevelopment.un.org/content/documents/1882unwtowildlifepaper.pdf
- 2013 Wildlife Tourism Start up Guide book <https://www.amazon.com.au/Wildlife-Tourism-Operators-Job-seekers-Start-ups-ebook/dp/B00HE1SX1Q>

¹ Some 20 Bear watching tours outside of Europe were also studied to understand the optimal mix of tour activities, accommodation types etc. However, due to the wide variation in travel times, the variety of animals which can be viewed and other cultural attractions offered in these destinations it was decided to concentrate on European offers as offering the best competitive comparison for Tara NP.



© Janina Kubik (Dreamstime.com) from UNWTO 2015



© Ronda J. Green (publisher)



© MINTEL

3. Stakeholder SWOTs and PEST analysis of Tara NP's potential were completed by the consultant and local stakeholders from national park management, local tourism businesses, accommodation providers, activity providers, handicraft and souvenir producers. Once the initial report findings were presented to stakeholders, SWOTs and PEST analysis were conducted with them to jointly identify the natural advantages which Tara NP and stakeholders can benefit from, as well as obstacles which may need to be overcome. The results of both are given in the appendix and referred to in the text where relevant.



© Vesna Maksimović, workshop with stakeholders from Bajina Bašta, November 2017



© Vesna Maksimović, brainstorming on the SWOT analysis

Competitive Analysis of international Bear watching tourism offers in Europe in 2018 – Studied elements and results

1. Destinations

Finland has the most developed offer, followed by Slovenia. Apart from the new offers in Macedonia (which were created in 2016) and two offers for Serbia (in which bear watching is just one activity), the Western Balkans is not otherwise represented.

- Finland (11 tours)
- Slovenia (4 tours)
- Poland, Romania, Slovakia, Bulgaria, Sweden, Serbia (2 tours in each destination)
- Greece, Macedonia, Spain, Italy, Estonia (1 tour in each destination)

SWOT Assessment of Tara NP offer: *There are a few tours already offered in the Western Balkans but potential consumers are not aware of the region's potential for Bear watching. This could be both a weakness (lack of awareness) but also an opportunity (Wildlife enthusiasts like to visit unknown and unspoiled destinations). In terms of flight availability and price, the most demanded destinations (Scandinavia) are more difficult and expensive to fly to than Serbia so this is an opportunity for NP Tara.*

2. Context of offers

With the exception of one offer in Romania², all the products which were considered in the analysis included activities in Protected Areas. 12 of the offers stated that the PA management received funds from the tours and offers, only 16 offers stated that a percentage of income from the offers went directly to conservation efforts.

All the offers were sold and administered by private businesses. It is difficult to determine the level of involvement of PA staff in delivering the experiences offered. Of the 32 offers studied in detail, 21 (66%) made use of park facilities such as hides or accommodation.

Only 5 tours mentioned that Park Rangers provide activities or guiding services. However, it was clear from the offer descriptions that the involvement of PA management in delivering or endorsing the tourism activities added credibility. PA involvement also supported the claim that the tourism directly benefits conservation efforts.

SWOT Assessment of Tara NP offer: *The Tourism business community close to Tara NP is well developed. Bajina Bašta and south western Serbia already have large numbers of visitors; although they are drawn largely from local source markets and not for wildlife themes offers.*

² The one offer considered in Romania is provided in association with an animal rescue centre where bears are kept in captivity and rehabilitated (if possible) for reintroduction to a protected area.

*The community is ready to work in new ways and the Tara NP manager is also willing to work with local businesses. Contacts between the stakeholders are also well developed. **The main weakness is lack of knowledge and understanding of high value wildlife tourism among all stakeholders.***

3. Average pricing per day

To calculate the trip price per day of activity, it was necessary to take out the flight costs (where included) and any days which did not include activities (for example, arrival and departure days in which guests only transfer to their accommodation). The two offers for Serbia were also excluded from this calculation as the complete bear watching trip only included ½ day of bear watching activity for the multi-day tours.

The **average trip price per person per day was then estimated at 312 EUR or 36,900 RSD** (e-rate: 1 EUR = 118,3 RSD) for bear watching tours offered in Europe in 2018. This compares to an estimated price per person per day for wildlife watching calculated by the UNWTO at 270 EUR (24,500 RSD) for standard tours and 643 EUR (76,050 RSD) for 'luxury' wildlife tours in 2012.

Assuming the average profit margin for tour operators is around 45%, we can then estimate that the average cost (operating and fixed cost) for a Bear Watching trip is around 170 EUR per day.

SWOT Assessment of Tara NP offer: *Currently Tara NP management charges only 50 EUR per visitor for a 3 - 4 hour bear viewing. This is much below the average price offered by competing destinations. Local tourism businesses tend to compete in terms of price, so the prices for transfers and accommodation in the area are low compared with those studied in the report. As the volume of potential customers for Bear viewing needs to be limited to minimize harmful impacts on wildlife, then **a comparatively low price is not in itself an advantage for Tara NP.** Instead, all stakeholders need to be looking for ways to add value to the offers they create, to command higher prices. The lack of experience in creating high value tourism packages is one weakness which was identified.*

4. Accommodation Standard

As Bear watching tends to occur away from developed areas, it is not surprising that just a few of the tours offer 5-star accommodation, at least not for the bear watching days. Even for the most expensive tours the preference is for family run, locally owned accommodation, hotel or homestay, usually 3-star or equivalent. In 50% of the trips studied, the accommodation is quite basic, but clean and attractive (often in a nature setting). The trend for more 'authentic' (locally distinctive) accommodation is also a feature of high value adventure tourism in recent years. According to Wildlife Worldwide (www.wildlifeworldwide.com), wildlife enthusiasts will accept lower standards of comfort and accommodation in return for higher standard of wildlife viewing (see chapter "Key Conclusions concerning service standards and experience design").

SWOT Assessment of Tara NP offer: Tara offers a good range of locally owned accommodation and small hotels. The standard is good in terms of professional staff, cleanliness food and facilities. There are no local 5-star hotels, but there is much private accommodation of a similar standard.

Issues which need to be addressed for western European visitors include smoking and noise in some hotels. For wildlife visitors a strict no smoking policy in restaurants and in select bedrooms is a basic requirement.

5. Travel Times/distances

According to the UNWTO briefing paper on wildlife watching in Africa (sustainabledevelopment.un.org/content/documents/1882unwtowildlifepaper.pdf), wildlife tourists want to observe the activities of specific species in their wild habitats. Mintel TGI data for the European travel market shows that wildlife tourists also want to visit 'virgin' places, relatively undiscovered and unknown as tourism attractions. Therefore, wildlife specialist tourists are prepared to travel further (and accept a higher level of discomfort) than ordinary travellers. From the tours studied in this analysis, the average travel time from the closest airport to the destination is just under 3 hours.

SWOT Assessment of Tara NP offer: Bajina Bašta is about 3.5 hours from the closest international airport (Belgrade) and so travel time should not be a problem for the development of wildlife tourism. A new road link is also being developed which will reduce journey times. A number of attractions can be visited on the journey from the main international airports so we can break the guests' journey.

6. Seasonality

The peak season for bear viewing is between June and August, with only one specialist tour unavailable in these months. 70% of offers included dates in May, 53% in September and 20% of tours offered dates in either April or October. Two of the tours studied avoided the breeding season (April) and the deer mating season to minimize harmful impacts on wild fauna.

7. Duration of the offered programs

Of the 32 offers studied, 6 (19%) were one-day duration, including both offers for one day of bear watching at Tara NP. 12 tours (38%) were 3-4 days duration, 13 tours (41%) were 7-8 days in duration and only one tour was for 12 days in total.

8. Visitors' profile

A study of advertised wildlife offers cannot provide a statistical breakdown of visitor profiles, although some inferences can be drawn from the customer endorsement, promotional images of guest activities and product descriptions.

Most offers tended to focus on the high quality of wildlife experiences, which suggests that the target consumers are wildlife tourists or wildlife enthusiasts (whose primary reason for choosing a tourism offer or destination is the availability and quality of wildlife viewing).

In general, the less expensive tours (with higher group sizes) tended to offer more varied attractions to broaden the appeal to include families, casual wildlife viewers, etc.

Conversations with wildlife tourism operators (Biosphere Expeditions, Natural Selection) supported the idea that wildlife enthusiasts are the preferred consumers for high value tours.

According to both Mintel and UNWTO published research, wildlife tourists are usually professional and highly educated customers from higher economic and social groups of society, who have better-paid jobs). These guests have high disposable income. **The average age is 50 - 70 years of age** but there is a growing interest in wildlife viewing as a family activity.



© Ola Jennersten, wildlife photographer



© Ola Jennersten, wildlife watching from a professional observation hide



anko Milanović, guests visiting the most famous "Banjska rock" viewpoint overlooking Drina river

9. Group sizes

The smallest group tours started at 4 persons, the average group size was 10 persons. Only one tour offered packages for more than 12 guests (20 was the maximum number). The smaller groups commanded the highest prices as exclusivity was promoted as a unique sales point. The optimum group size (number of guests versus per person price) was 8 persons (for the 32 tours studied in detail).

SWOT Assessment of Tara NP offer: In Tara NP we have two operational observation hides. Each only accommodates up to three guests plus a park ranger. This would limit the group size to maximum 6 (3+3) persons at the same time. The group size will be too small for most international wildlife tour operators. The high ratio between rangers and guests at Tara also increases costs. Due to the lack of guest facilities at Tara's hides, and without high quality wildlife interpretation and guides' language skills, we cannot sell the small size of the hide as a premium personalized experience.

Key conclusions concerning service standards and experience design

There was a great variety in the activities and attractions offered by the tours. Similarly, there were differences in accommodation standard, duration, logistical support, group size and guide 'style'. Many tours offered unique experiences or unique selling points (USPs). However, optimal elements can be discerned from the research, for example the **tours with the most guaranteed departure dates (and highest prices) included participatory conservation activities for guests.**

Nearly all tours promoted similar certain 'key' elements. Therefore, it was clear that **a set of minimum requirements apply for any Bear watching offer, and these include:**

1. Good track record of sightings

None of the tours guarantee a Bear sighting (except for a captive rehabilitation program in Romania). Most tours offered a better than 60% chance to see wild bears, with some of the Finnish tours offering a 98% chance.

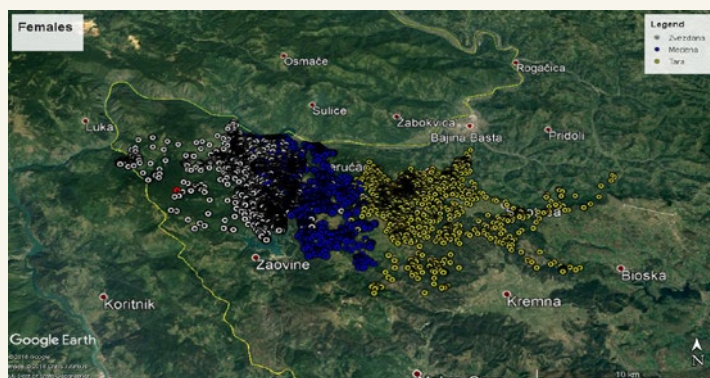
SWOT Assessment of Tara NP offer: According to the commercial groups which have visited the bear viewing/feeding site so far, the number of guests who have seen a bear is more than 60%. However, the experience of bear watching from the hides in Tara NP is not good when compared to the competition because the hides are small, they lack facilities and sufficient level of comfort and the area surrounding them is full of trash. However, the park is working to keep the public areas of the park free of trash as an ongoing task.

Suggested next steps for Tara NP management (PAM):

- Improve the quality of bear viewing hides (see subchapter 3 below for more details).
- Develop additional activities which will improve the chance of seeing a bear in the wild. These can include:
 - Escorted bear tracking;
 - Bear viewing hikes at optimum times and locations;
 - Using tracking technology and survey data (including visitor log books on bear sighting) to improve the chances of encountering a bear;
 - Better synchronise the existing bear feeding program with tourism visits (but only when there are no negative impacts on Bear behaviours)..



© Vesna Maksimović, Game ranger explaining brown bear behaviour at the feeding site



© Doc dr Duško Čirović, Movement of three female brown bears in Tara NP during 2017

2. Expert Nature guides

All considered tours stress the high levels of expertise and experience of their wildlife guides. All tours use local guides and 11 of the tours (34%) promote that they are working with local wildlife experts and conservationists such as biologists, park rangers, etc.

SWOT Assessment of Tara NP offer: *Wildlife guides are necessary. A good wildlife guide needs to be able to tell the ‘story’ of the wildlife in Tara National Park. For all fauna encountered in the park, the guides must be able to communicate: Behaviour, Morphology, Life Cycle, Reproduction, Food types and sources. A good knowledge of the main types of flora encountered in the park is also necessary. If bears are not encountered during the tours, the guide needs to maintain the guest’s interest and provide local and recent evidence of bear activity in the area. Wildlife expert also needs to have good generic guiding skills.*

Suggested next steps for WWF Adria and Consultant:

- Provide a refresher guide skills training for Tara NP rangers so that they can lead tourism activities.
- Provide wildlife training for local registered guides.
- Provide “Leave No Trace” course for park rangers and registered guides.
- Attract tour operators who would bring experienced external/international expert wildlife guides to work alongside the park rangers and local registered guides, who can learn through the experience of working with experienced international wildlife guides and improve their skills.



© Ranko Milanović, Escorted bear tracking

3. Dedicated viewing hides offering basic facilities

Nearly all the bear viewing hides in other European Bear watching tours included the following features:

- Comfortable seating close to the viewing apertures/windows.
- Optimum size and siting of window/apertures for photographers are mentioned in more than half of the offers studied, together with a table/shelf for stabilizing the camera and/or space for tripods.
- Sleeping bunks (with or without bedding).
- A toilet (the best solution being a 'dry-drop' eco-toilet attached to the hide).
- A small room or light protected area where guests can prepare a hot drink, snack or reload cameras, check optical equipment, etc.
- A log book to record sightings, which will provide interest for guests.
- Most hides are designed to allow groups of 6-12 guests to overnight (but not with bunks for each guest). The optimum number seems to be 8 persons plus guide.

Five of the tours which were considered (15%) also offered dedicated photography hides, often smaller in capacity and housing only 2 guests. In these examples the guides escort the guests to the hide and then collect them at the end of their activity. One offer included the rental of hides for 122 EUR per day for private groups.



© Vesna Maksimović, bear observation hide in Tara NP



© Vesna Maksimović, bear observation hide in Tara NP



© Ola Jennersten, bear observation hide in Finland



© Ola Jennersten, bear observation hide in Finland

SWOT Assessment of Tara's offer: The Bear viewing hides in Tara NP are too small to accommodate more than 2 guests and a guide (the 2:1 ratio of guide to guests either pushes the price up or reduces park management's operating profit). The hides in Tara NP lack any facilities for guest comfort.

The situation at the feeding site which was visited during the field survey leaves much to be desired. Plastic and other waste was evident at the site (the trash is cleaned seasonally and prior to each organised visit), any visitor can take the track up to the site by ordinary vehicles (this will be solved by installing ramps and hiking until the feeding site), and the hide is poorly orientated for photography. All these factors mean that the offer currently is very low value.

Suggested next steps for all stakeholders:

- WWF Adria / PA manager – Provide detailed blue-prints for a range of designs for bear watching hides (written by Rewilding Europe), which can be costed and considered by Park Administration. These should be presented and discussed with the Head of Game and Fisheries Department at PE “Tara National Park”.
- WWF Adria / Consultant / PA manager – Arrange a clean-up of the hide sites during a “Leave No Trace” course for national park rangers.
- Local community – The improvement of wildlife viewing hides and the clean-up of the feeding and viewing sites could provide an opportunity for joint activities and community involvement.

4. Potential for Nature based (Conservation) activities for visitors

Almost all the tours which were considered included opportunities to see other wildlife at the destination. Guests will want to experience the health of the ecosystem which surrounds the bears, with opportunities to observe rare species.

Tara NP is home to 58 mammal species. The Bat population alone is considered to have ‘very significant diversity’. The area is primarily important as a habitat for Large Carnivores such as Brown bear (*Ursus arctos*) and Grey wolf (*Canis lupus*), as well as a habitat for the Wild cat (*Felis silvestris*) and Pine marten (*Martes martes*). Many of these species are flagship species, with great appeal for wildlife tourists. The rarity and endangered status of many mammals in Tara NP also add to the attraction for wildlife specialist tourists. European otter (*Lutra lutra*) is an endangered species which inhabits aquatic habitats of the PA and, jointly with Grey wolf, it is important for protection at the national and European level.

Tara NP is the only habitat in Serbia and the easternmost habitat for the Liechtenstein's pine vole (*Microtus liechtensteini*) in the Balkans. Also interesting is the Alpine shrew (*Sorex alpinus*) which is listed as ‘near threatened’ on the IUCN Red List, and Eurasian Water shrew (*Neomys fodiens*), in addition to aquatic habitat species.

Tara Mountain is an extremely important habitat for the conservation of Chamois (*Rupicapra rupicapra*).

Birdwatching is featured in many offers and should be included in the offers which are being developed at Tara NP. There are about 100 species of protected birds in the national park. 31 are listed as species of European importance such as the Corncrake (*Crex crex*), Capercaillie (*Tetrao urogallus*) and Eurasian

three-toed woodpecker (*Picoides tridactylus*). Tara NP is on the list of Important Bird Areas, primarily due to populations of Peregrine falcon (*Falco peregrinus*), Golden eagle (*Aquila chrysaetos*), Grey woodpecker (*Picus canus*) and Green woodpecker (*Picus viridis*). Tara NP is also an important nesting area for the Eurasian Woodcock (*Scolopax rusticola*) and is considered extremely important for nesting of Eurasian pygmy owl (*Glaucidium passerinum*) and Ural owl (*Strix uralensis*).

Other nearby attractions will offer opportunities for excursions such as the Griffin vulture (*Gyps fulvus*) colony at Uvac and Trešnjica canyons together with Golden eagle, Goshawk (*Accipiter gentilis*) and Sparrow hawk (*Accipiter nisus*).

As all species are interconnected in a preserved ecosystem around Tara NP, then opportunities exist for visitors to the Bear Watching experience to also take part in conservation work to support other species.



© Szilard Kovacs, Female brown bear (*Ursus arctos*) Zvezdana recorded in Tara NP



© PE "Tara National Park", Grey wolf (*Canis lupus*) on camera trap



© PE "Tara National Park", Pantic spruce (*Picea omorica*)



© Marko Janković, Eurasian pygmy owl (*Glaucidium passerinum*)



© Marijana Josipović, Peregrine falcon (*Falco peregrinus*)

Of the tours studied, **55% (the most expensive tours) included participatory conservation activities for guests.** The conservation tasks included:

- **Building tourism facilities and infrastructure:** Hides; Toilets (dry-drop or composting toilets offer the smallest eco-footprint and can also be portable); Walkways to protect vulnerable habitats; Fences and sign posts to control visitor traffic. These activities would be run by the PA manager (PAM).

- The preparation and set-up of bear-proof fences for beehives and orchards in the villages, as well as preparation and maintenance of a natural freshwater pool close to the bear feeding sites (which can attract other wildlife) would be great guest projects (PAM).
- Clean up and collection of trash. This could be an activity organised jointly by PAM and the local community and businesses (LCOM).
- Forestry Management: Tree planting; Habitat rehabilitation; Coppicing/Clearance (PAM).
- Survey work: Animal tracking (with tracking collars or following tracks, feces, etc.); Camera trap maintenance; Collection of samples for scientific analysis (PAM and LCOM conservation groups).

SWOT Assessment of Tara's offer: *At present, there are only very limited opportunities for guests to join in conservation tasks. Tara NP managers lack experience in this area and no local community groups have been found which can offer these activities. The park management had expressed their willingness to create new activities.*

Suggested next steps for all stakeholders:

- PA manager / WWF Adria / Consultant – List all existing or potential conservation tasks in Tara NP which could be funded through participatory tourism.



© Szilard Kovacs, hair sample collection for DNA analysis



© Vesna Maksimović, feces sample collection for DNA analysis



© Vesna Maksimović, an injured Chamois taken care of by the park ranger



© Vesna Maksimović, checking camera traps



© Vesna Maksimović, checking camera traps

5. Cultural activities

The shorter programs (1-3 days) offer few local cultural attractions other than traditional local cuisine. For longer duration tours, most programs included a range of cultural visits other than activities (such as cooking classes or craft making). It seems that for most less well-known or visited destinations, guests like to see the main attractions that the destination has to offer (for example guests coming to Tara and/or Serbia for the first time would probably want to visit Belgrade, particularly if they use the airport there).

SWOT Assessment of Tara's offer: As the living culture of Western Serbia is so well preserved, there are a great many opportunities to develop cultural activities for guests to differentiate the new offers from other destinations. This is a great strength for the new offers. One weakness is a lack of facilitators to bring the culture to life by creating hands on activities for guests. **High value tourism increasingly relies upon participatory activity to educate and inform guests.** A good facilitator should have experience and language skills. **The kinds of activities which could be developed around Tara NP include: pottery, gastronomy and cooking classes, handicraft making, wine and 'rakija' production, animal husbandry and agri-tourism.** One weakness locally is the over-reliance of local tour operators on observational tourism attractions such as monasteries.

Suggested next steps for all stakeholders:

- WWF Adria / Consultant / LCOM – List all existing or potential cultural activities which could be experienced by guests in a participatory manner.
- WWF Adria / Consultant – Provide case studies and training into cultural activities and learning tourism, with examples from Serbia and BiH.
- WWF Adria / Consultant – Work with local activity providers to fine tune the delivery of tourism activities.



© Vesna Maksimović, local artisan motivating guests to choose a traditional motive for a souvenir



© Jack Delf, safety measures are undertaken during each activity



© Jack Delf, craftmaking together with a local artisan



© Jack Delf, finished souvenir



© Jack Delf, guests actively participate in cooking classes



© Vesna Maksimović, guests actively participate in cooking classes



© Vesna Maksimović, a good facilitator of activities is needed



© Jack Delf, guests want to connect with the hosts

Appendices

International agreements concerning Wildlife Tourism and Nature Conservation

It is important that the new conservation and wildlife tourism offers developed at Tara NP comply with international agreements covering wildlife and nature protection. The ecosystems in Tara National Park are the primary asset on which wildlife tourism can be developed and need to be protected to ensure the economic sustainability of the new products.

Wildlife specialist tourists are very knowledgeable concerning nature conservation. The level of scientific detail provided in marketing materials for the tours which were studied in this survey indicate that guests need to be assured that their tour guides ensure that best practice in Nature conservation are followed. Many of the offers made reference to International standards with which their offers comply, these included: The Convention on Biological Diversity (CBD); Convention on Wetlands of International Importance (RAMSAR) for birdwatching tours primarily; Convention concerning the Protection of the World Cultural and Natural Heritage (the World Heritage Convention) for cultural activities; Convention on the Conservation of European Wildlife and Natural Habitats (Bern Convention), which was referenced in 5 of the offers studied.

None of the tours which were studied referenced the Global Sustainable Tourism Criteria (GSTC) which was introduced in 2016 as the comprehensive international standard for responsible tourism businesses to follow. GSTC was developed under the umbrella of the UN and is expected to become the international benchmark for sustainable tourism standards. Section D3 of the GSTC concerns the conservation of biodiversity, ecosystems and landscapes and should be followed (see Suggested next steps below).

Two tours mentioned that their guides and tours followed 'Leave No Trace' principles to minimize harmful human impacts in nature.



© Marko Maksimović

Suggested next steps for all stakeholders to ensure compliance with international agreements:

As yet, there is no GSTC recognized certification/auditing body covering Serbia. However, GSTC is gaining recognition among more sophisticated and environmentally aware travellers. From the beginning, PE “Tara National Park” and all of the businesses which contribute services to the final products of bear watching should agree that:

- *D3.1 (GSTC) - Wildlife species are not harvested, consumed, displayed, sold or traded, except as part of a regulated activity that ensures that their utilization is sustainable, and in compliance with local to international laws.*
- *D3.2 - No captive wildlife is held, except for properly regulated activities, in compliance with local to international law. Living specimens of protected and wildlife species are only kept by those authorized and suitably equipped to house and care for them humanely.*
- *D3.4 - The organization supports and contributes to biodiversity conservation, including natural protected areas and areas of high biodiversity value. (As an indicator for GSTC, businesses need to donate a percentage of annual budget to and/or in kind support of natural protected areas or biodiversity conservation).*
- *D3.5 - Interactions with wildlife, taking into account cumulative impacts, do not produce adverse effects on the viability and behaviour of populations in the wild. Any disturbance of natural ecosystems is minimized, rehabilitated, and there is a compensatory contribution to conservation management.*

All guides working with wildlife specialist guests will need to have a good understanding and follow ‘Leave No Trace’ (LNT) principles. During the project, LNT certificated training to trainer was given.



© Mилоје Јовановић, LNT training – digging a foxhole



© Милоје Јовановић, LNT training – making a campfire



© Весна Максимовић, LNT training – setting up a bear bag

PEST (Political, Economic, Socio-cultural and Technological) analysis

Political factors which should be considered

- Park management – Tara NP management body is Public Enterprise “Tara National Park”. Directors of public enterprises in Serbia are political appointees and can be changed following an election. This could be problematic if the Tourism development plan of the national park is still being developed. A new park administrator can decide to take a new direction and develop more hunting and/or mass tourism offers for the national park, however, the park directors are confident that any future changes in management will not mean a change in direction from developing high value low impact tourism.
- Law on Tourism – All stakeholders have identified restrictive and outdated tourism laws which can hinder the development of new activities and experiences. The main problems are:
 1. Guide training – The current curriculum for the national tourism guide qualification concentrates on the study of historic dates and facts which have less interest to today’s traveler. There is no training in leading guest activities, no first aid training, no nature interpretation training, no wildlife guide training or any environmental training such as ‘Leave no Trace’.
 2. Guide eligibility – To apply for a tourism guide certificate, candidates must hold a high school degree, therefore, suitable candidates with language and outdoor activity skills but lower education level are precluded.
 3. Lack of provision for innovation – The national Law on tourism does not contain a provision for entrepreneurs who wish to start home-based tourism activities such as farming, cookery and craft making.
- Designation of protected areas – Even though according to the national classification Tara is a national park, under the IUCN classification system of PAs and management of the PA, Tara NP can be classified as category V (Protected landscape) rather than category II. Protected



© Vesna Maksimović. Storytelling as the best way of wildlife interpretation

landscape is “an area where the interaction of people and nature over time has produced a distinct character with significant ecological, biological, cultural and scenic value: and where safeguarding the integrity of this interaction is vital to protecting and sustaining the area and its associated nature conservation and other values“. There is potential for Tara NP to fit into IUCN category II, after changing the management principles and increasing the percentage of strictly protected territory.

According to the Law on Nature Protection, a **national park is an area** of with a large number of diverse ecosystems of national importance, with outstanding natural features and cultural heritage **in which humans live in harmony with nature, set aside for** the preservation of its existing natural values and resources, biodiversity, as well as for educational, scientific, spiritual, aesthetic, cultural and **tourist and recreational use**, in accordance with the principles of sustainable development.

Moreover, Tara NP also contains areas under the first level of protection (Strict Nature Reserves) – “areas of unmodified or slightly modified ecosystems of great scientific and practical importance, which enable the processes of natural succession and preservation of habitats and animal populations in the wild“. The first level of protection, among other things, “limits the works and activities to scientific research and monitoring of natural processes, controlled visits for educational, recreational and cultural purposes”, with approval from the Ministry.

PEST assessment for Tara NP: It is desired that the areas under the first level of protection will be accessible to small groups of tourists accompanied by the park ranger. Provision is made for some tourism and it is desired that these areas be used, if the work conducted by guests involves scientific research and monitoring, and if adequate permits are obtained.



© Vesna Maksimović

- EU legislation – To align the legislation with the European Union, Serbia needs to comply with two directives:
 1. Birds Directive – protects all wild birds in the EU, covering some 500 species. EU countries identify and protect sites that are particularly important for wild birds. So far, around 5,300 ‘Special Protection Areas’ have been created.
 2. Habitats Directive – obliges EU countries to protect the habitats of endangered species of plants, animals and habitat types. Protected sites are known as ‘Special Areas of Conservation’. The Habitats Directive covers some 1,500 rare and threatened plants and animals, and around 230 habitat types.

The areas protected under these two Directives form the Natura 2000 network. Its aim is to safeguard all of Europe’s major habitat types and endangered species. Natura 2000 recognises that humans and nature work best in partnership. Its aim is not to exclude economic activities but ensure they are compatible with safeguarding valuable species and habitats. The main objectives within Natura 2000 sites are: Avoid activities that could seriously disturb the species or damage the habitats for which the site is designated; Take positive measures, if necessary, to maintain and restore these habitats and species to improve conservation.

PEST assessment for Tara NP: To comply with present and future EU legislation, the new tourism offers developed at Tara NP for the WWF project will follow the European Charter for Sustainable Tourism in Protected Areas (ECST).

- General Political Situation – Serbia and Western Balkans. Despite the relatively recent history of conflict in former Yugoslavia, the situation now is considered settled and safe (see: <https://safearound.com/europe/serbia/>). Recent European wide issues with immigration and terrorism have had little impact in the region and consequently negative news stories have been few in recent years. Political issues related to the Yugoslav conflicts in the 1990s can still create a negative image of Serbia but it seems that consumer confidence is growing, particularly among the younger ‘millennial’ tourism market. In 2017 Serbia saw a 12% increase in international tourism visits.

Economic factors which should be considered

Exchange Rates – There is a lot of uncertainty in international currency markets, fluctuations could be created by external economic and political factors such as Brexit, divergence from monetary policies by central banks, etc. The growth in Gross domestic product (GDP) in Serbia (2.8% in 2017) is being driven by higher domestic consumer spending; the value of imports from the EU is rising which may weaken the Serbian Dinar.

PEST assessment for Tara NP: The exchange rate should be considered and updated for pricing the new tourism offers.

- Recession – High frequency indicators signal a continued economic expansion in Serbia. Domestic and external trade remains robust; imports growth increased, indicating a pick-up in domestic demand. Global recession or economic slowdown is not forecast for the foreseeable future but could still adversely affect demand for tourism. Evidence from the 2007 global

recession showed that demand for high value tourism was least affected. This is in part because consumers would prefer to continue to take vacations but would make other financial sacrifices.

PEST assessment for Tara NP: The WWF project will develop life changing (transformational) tourism offers which are high value and low volume.

General Economic situation – According to the Delegation of the European Union to the Republic of Serbia, economic growth is forecast to strengthen, while exports and investment are projected to remain robust (see: <https://europa.rs/economic-forecast-for-serbia/?lang=en>). Due to negative terms of trade, external imbalances are expected to widen. The budget balance is forecast to outperform targets and turn to a small surplus in 2018.

Social factors which should be considered

- Cultural attitudes (of both visitors and host communities) are an important factor in developing new tourism offers. From the visitor perspective, tourism demand is growing for ‘authentic’ and unique experiences which value the distinctiveness of destinations. **Visitors are increasingly seeking connections and friendships with host communities; they are more willing to take part in experiential work or leisure pursuits with locals.** There is also a growth in demand for ‘eco-friendly’ and carbon-neutral holidays in which the guest can minimize the harmful impacts of their travel and bring beneficial changes through voluntary work.

PEST assessment for Tara NP: The host community around Tara NP seem well disposed to increasing tourism; so far tourist numbers are relatively small but growing. Though many inhabitants in the national park and ‘URSUS’ “cluster” partners value and preserve their own cultural traditions, many do not understand how to turn this ‘living culture’ into a monetized tourism attraction.

- Lifestyle changes in important source markets tend to favor the development of high value wildlife based offers. **Increasing urbanization (with now more than 50% of the global population living in urban areas), means that outdoor nature-based experiences, particularly in undeveloped, rural and “wild” destinations, are being increasingly valued as vacation themes.**

PEST assessment for Tara NP: Urbanization around Bajina Bašta and NP Tara could be a problem, as rural populations migrate to large towns and cities. However, the rural population around Bajina Bašta remains stable (showing a decrease of -1.08% per year between 2011 and 2016 according to the Statistical Office of the Republic of Serbia). The situation does not necessarily



© WWF, live locally activities with hosts – activity providers



© Vesna Maksimović, Bajina Bašta

mean the gradual deterioration of villages through depopulation; many émigrés visit frequently and invest in holiday accommodations. Often houses left vacant in local villages are maintained and even modernized for tourism rental.

- Waste and environmental damage.

PEST assessment for Tara NP: Many of the scenic areas which have been identified and which could be included into the new tourism offers are blighted by discarded trash, however, the park is working hard to keep the public areas of the park free of trash, as an ongoing task. Although there is a political element to the problem, the main cause seems to be cultural. Although many locals value their wild heritage, many also do not consider the impact they have on the environment. The principles of minimizing visitor impacts are not either followed or understood.

Guests will expect that everyone involved in wildlife tourism will lead by example, in particular National Park rangers. The rangers who will work with guests and other stakeholders (outdoor guides) will be trained as 'Leave No Trace' trainers. It is not within the scope of this project to remove all trash from the protected area, but guests should be assured that the national park and travel providers are addressing the problem.

Technological factors which should be considered

- Internet – Tourism has been fundamentally changed by the internet, not only in the way which travellers research trips but the way they shop for activities and experiences, often after arrival at the destination.

PEST assessment for Tara NP: During development of the marketing plans for stakeholders, the primary media/channels which will be considered are online and mobile.

- Mobile telephony is not only important for marketing and promotion, new applications can be used to craft and deliver visitor experiences (for example: online guides may offer a substitute for experienced wildlife guides or enhance the visitor experience of hiking and biking tours through the NP).

PEST assessment for Tara NP: During the development of new bear watching offers, consideration will be given to any mobile technologies which may be relevant for the new tourism offers.

- Outdoor equipment (camping, clothing, and technical equipment) is continually improved and updated. As we are offering new products for the high value tourism market, we need to ensure that we keep up to date with these changes.

PEST assessment for Tara NP: New equipment such as night vision binoculars, Stand up paddle boards should be incorporated into the offers as soon as financially viable.



© Green Bear, Stand up paddle boards

SWOT (Strength, Weakness, Opportunity, Threat) analysis

Rated scores for important elements. The subjects (and scores) were suggested by local stakeholders after considering the results of the competitiveness survey.

Strength

- National Park (Quality of attraction) – 4
- Biodiversity – 4
- Number of bears (on the increase) – 4
- Variety of offers (vicinity of surrounding sites) – 4
- Tara NP is a new destination – 4
- Tourist agencies – 3.5
- Accommodation capacities – 3
- Small local community – 3
- Authentic culture – 3
- The vicinity of the tourist market – 2
- Connection with air traffic – 1.5
- Lookouts - Hides
- Proximity to potential activities
- Quick response to problems
- Easy access to bear sight points
- Everyone knows everyone else, everything can be arranged over the phone
- All activities within 15-20 km
- New offers
- Tourist agencies from Bajina Bašta
- Hotel prices (competitive, good price / quality ratio, offers for smaller groups)
- Range of tourist offers in a small area

Notes: In general there is an optimistic appraisal, identifying that cooperation already is well developed among local businesses but also with the park manager. It is good that all stakeholders acknowledged the natural advantages that Tara has over other more successful destinations. For the volume of tourism we would anticipate that we have more than adequate logistical support from the tourism industry, accommodation capacities and agencies.

Weakness

- Undeveloped rural households – 5
- Inexperience in work with the target group – 4
- Support to local communities (investment) – 4
- Tourist Inspection Sector – 4
- Poor equipment for the observation of the bear – 3
- Low ecological standards – 3
- Unordered / inadequate Observers – 3
- Bad cooperation – 3
- Illegal issuance of accommodation and guide services – 3
- Network of forest roads – 3
- Lack of personnel potential – 2
- Lack of adequate guides – 2
- Infrastructure – 2
- Air traffic connectivity – 1
- Education at all levels – 1
- Misunderstanding of the new type of tourism
- National Park Tara
- Lack of language knowledge (English, German, Russian, Chinese)
- Low eco standards
- Few licensed guides, experts
- Lack of equipment for bear viewing
- Small capacity of hides for viewing bears
- No range of alternative activities as a backup in case visitors do not see a bear
- Uneducated hosts for this type of tourism
- Lack of cooperation at operative and management level

Notes: A number of factors were mentioned as both strengths and weaknesses: cooperation, air traffic connections, lack of alternate activities and the National Park, so differences of opinion exist. The major problems identified and voted upon can be divided into educational (learning) and material (practical).

We can address the educational training problems in the next trainings: Leave No Trace and Guide training. The guide trainings would only be a basic introduction, we need to find potential international outbound partners to provide guide coaching. Language learning could be arranged through the Mountaineering club, 3 of their guides are receiving basic language courses.

Material issues, and those beyond our control, include undeveloped rural households (from site visit we concluded that we have good locally owned accommodation options but perhaps less of the smaller home stays).

The viewing equipment, optics etc. need investment; it is hoped from the National Park manager.

Opportunity

- Demand growth – 4
- Increased awareness of the local population – 4
- New socio-cultural contents – 4
- Undoubtedly the tourist product in the region – 3
- Increasing Brown bear population – 3
- Enrichment of supply with additional content – 2
- Connectivity with air traffic – 2
- Excessive desire for travel – 2
- Changeable cabbie for travel – 1
- Human resources
- Increased ecological awareness
- Education
- Sales of specific food and beverages
- Small number of offers on the market
- The offer in Mavrovo NP is not the highest quality
- Opportunity to sell premium packets

Notes: Enthusiastic responses suggest an awareness of the value potential in the local offer. **The high end tourism market can be attracted to the region, and credit is given for a raised local awareness in new tourism and nature based tourism, of the value that can be generated.**

Threat

- Regulations in the National Park (difficulty working in protected areas) – 4
- Signalizations (placed bear boards people) – 4
- Degradation of nature – 4
- Poorly designed products – 3
- Excessive tourism – 2
- Infrastructure
- Possibility of poor service delivery
- Price for “ordinary” tourists (signs of the bear’s habitat scare away other hikers etc. through the national park).

Notes: All stakeholders had concerns for degradation of nature in the park. Environmental protection will be critical for these offers to reach our intended markets. Any infrastructure such as signs need to be carefully considered. The intended footprint of this tourism should be small but its growth will need to be managed.

The possibility of poor service was raised, with general agreement. This will need to be stressed.

Bear watching/Conservation tourism pricing examples – Europe 2018

‘Honey Bears in Finland’

TOUR OPERATOR: Wildlife Worldwide

WEB ADDRESS: <http://www.wildlifeworldwide.com/>

PERIOD: May – August Duration: 4 days

Price including flights: From £1,145 per person (152,000 RSD)

Trip style: Program adapted to suit individual requirements



Learn about the Brown Bears of Finland

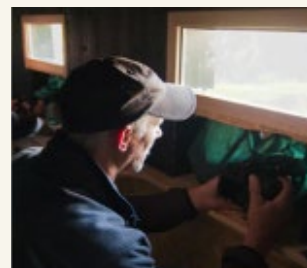
TOUR OPERATOR: Wildlife Worldwide

WEB ADDRESS: <http://www.wildlifeworldwide.com/>

PERIOD: May – July Duration: 8 days

Price including flights: From £1,845 per person (244,500 RSD)

Trip style: Group tour



Photography Predators

TOUR OPERATOR: Wildlife Worldwide

WEB ADDRESS: <http://www.wildlifeworldwide.com/>

PERIOD: Jun – August Duration: 6 days

Price including flights: From £2,395 per person (317,337 RSD)

Trip style: Group tour



Brown Bear watching from a hide

TOUR OPERATOR: Wild Sweden

WEB ADDRESS: <http://www.wildsweden.com/>

PERIOD: April – September Duration: 1 day

Price excluding flights: From EUR 287 per person (34,175 RSD)

Trip style: Group tour – maximum 8 persons



Monitoring of Lynx, Wolf and Bear in the Slovakian Carpathians

TOUR OPERATOR: Biosphere Expeditions

WEB ADDRESS: <https://www.biosphere-expeditions.org/>

PERIOD: April – October Duration: 8 days

Price excluding flights: From £1750 per person (145,000 – 206,500 RSD)

Trip style: Group tour – maximum of 12 persons



Northern Greece bear conservation tour

TOUR OPERATOR: Natural Greece

WEB ADDRESS: <http://www.natural-greece.gr>

PERIOD: Dates to be confirmed Duration: 8 days

Price including flights: From EUR 900 per person (106,200 RSD)

Trip style: Group tour – maximum 12 people



Finland wildlife photography tour

TOUR OPERATOR: Responsible Travel

WEB ADDRESS: <https://www.responsibletravel.com>

PERIOD: June – August Duration: 7 days

Price including flights: From £2999 to £3299 pp (400,300 – 440,300 RSD)

Trip style: Group tour – maximum 8 persons



Brown bear watching holiday in Bulgaria

TOUR OPERATOR: Responsible Travel

WEB ADDRESS: <https://www.responsibletravel.com>

PERIOD: Dates to be confirmed Duration: 8 days

Price excluding flights: From £1099 to £1169 (145,000 – 154,300 RSD)

Trip style: Group tour – 12 people



Wildlife conservation holiday in Finland

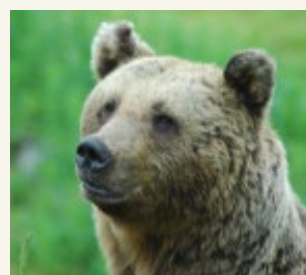
TOUR OPERATOR: Responsible Travel

WEB ADDRESS: <https://www.responsibletravel.com>

PERIOD: Dates to be confirmed Duration: 8 days

Price excluding flights: From £1395 per person (184,140 RSD)

Trip style: Group tour – 10 persons



Finland Just Brown Bears

TOUR OPERATOR: Naturetrek

WEB ADDRESS: <http://www.naturetrek.co.uk>

PERIOD: May – August Duration: 4 days

Price excluding flights: From £850 per person (112,200 RSD)

Trip style: Group tour – 12 people



Bear Watching in Macedonia

TOUR OPERATOR: Regent Holidays

WEB ADDRESS: <https://www.regent-holidays.co.uk>

PERIOD: May – October Duration: 7 days

Price excluding flights: From £1760 per person (232,320 RSD)

Trip style: Group tour – 12 people



Carpathian walking and Bears

TOUR OPERATOR: Exodus

WEB ADDRESS: <https://www.exodustravels.eu>

PERIOD: June – August Duration: 8 days

Price excluding flights: From £1145 per person (151,140 RSD)

TIP PUTOVANJE: Group tour – 16 persons



The Brown Bear Mountains (Spain)

TOUR OPERATOR: Two Birds One Stone

WEB ADDRESS: <http://twobirdsonestone.es>

PERIOD: April – September Duration: 3 days

Price excluding flights: From £285 per person (37,670 RSD)

Trip style: Group tour – 8 persons



Marsican Bears and Rock Partridge (Italy Abruzzo NP)

TOUR OPERATOR: Wise Birding Holidays

WEB ADDRESS: <http://www.wisebirding.co.uk>

PERIOD: May Duration: 3 days

Price excluding flights: From £899 per person (119,110 RSD)

Trip style: Group tour – 4-7 persons



Finland Bear Watching

TOUR OPERATOR: ScanAdventures

WEB ADDRESS: <http://www.scanadventures.co.uk>

PERIOD: April – October Duration: 4 days

Price including flights: From £999 per person (132,350 RSD)

Trip style: Group tour – 8 persons



Bear Watching (Estonia)

TOUR OPERATOR: Estonian Wildlife Tours

WEB ADDRESS: <http://www.estonianwildlifetours.com>

PERIOD: May – June Duration: 3 days

Price excluding flights: From EUR 690 per person (81,420 RSD)

Trip style: Group tour for 4-12 persons



Bear Watching and Birdwatching tour in Romania

TOUR OPERATOR: Ibis Tours

WEB ADDRESS: <http://www.ibis-tours.ro>

PERIOD: May – September Duration: 12 days

Price including flights: From £1400 per person (estimated).

Trip style: Group tour – 12 persons



Brown Bear Weekend (Finland)

TOUR OPERATOR: Explore

WEB ADDRESS: <https://www.explore.co.uk>

PERIOD: June – September Duration: 4 days

Price excluding flights: From £619 per person (82,000 RSD)

Trip style: Group tour 8-14 persons



Wild Brown Bear Adventure Holiday (Finland)

TOUR OPERATOR: Mighty Fine

WEB ADDRESS: <https://www.mightyfinecompany.com>

PERIOD: April – October Duration: 4 days

Price excluding flights: From £907 per person (120,150 RSD)

Trip style: Group tour 12 persons



Bear Watching Holiday in Wild Taiga (Finland)

TOUR OPERATOR: Mighty Fine

WEB ADDRESS: <https://www.mightyfinecompany.com>

PERIOD: May – August Duration: 8 days

Price excluding flights: From £1850 per person (245,070 RSD)

Trip style: Group tour 12 people



Bear Watching Holiday in Bulgaria

TOUR OPERATOR: Balkan Trek

WEB ADDRESS: <http://www.balkantrek.com>

PERIOD: April – October Duration: 8 days

Price excluding flights: From £1099 per person (145,600 RSD)

Trip style: Group tour 10 persons



Bear Watching Slovenia

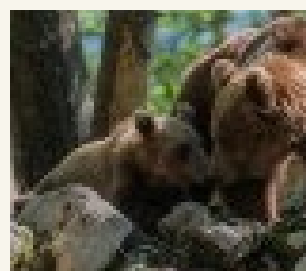
TOUR OPERATOR: Just Slovenia

WEB ADDRESS: <http://www.justslovenia.co.uk>

PERIOD: April – August Duration: 1 day

Price excluding flights: From £85 per person (11,2600 RSD)

Trip style: Group activity 4 persons



A la recherche de l'ours brun (Slovenia)

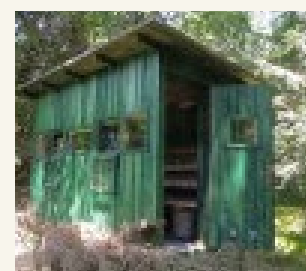
TOUR OPERATOR: Objectif Nature

WEB ADDRESS: <http://www.objectif-nature.fr>

PERIOD: May – September Duration: 7 days

Price excluding flights: From EUR 1,490 per person (175,820 RSD)

Trip style: Group tour 6 persons



Unbekanntes Slowenien Bären (Slovenia)

TOUR OPERATOR: ARR Nature & Kultur Reisen

WEB ADDRESS: <http://www.arr.at>

PERIOD: May Duration: 7 days

Price excluding flights: From EUR 1,820 per person (214,780 RSD)

Trip style: Group tour – 8 persons



Wilde beren in ongerept slovenie (Slovenia)

TOUR OPERATOR: Wild Pix Travel

WEB ADDRESS: <https://www.wildpixtravel.com>

PERIOD: May – September Duration: 7 days

Price excluding flights: From EUR 1,750 per person (206,500 RSD)

Trip style: Group tour – 6 persons



Bear Watching in Slovakia (without hides)

TOUR OPERATOR: Adventoura

WEB ADDRESS: <https://www.adventoura.eu>

PERIOD: June – October Duration: 0.5 days

Price excluding flights: From EUR 90 per person (10,620 RSD)

Trip style: Group activity for 2-20 persons



Bear Safari Day Tour (Slovenia)

TOUR OPERATOR: Tuamv

WEB ADDRESS: <https://tuamv.com>

PERIOD: May – October Duration: 0.5 days

Price excluding flights: From EUR 200 per person (23,600 RSD)

Trip style: Group activity – 5 persons



Bear Viewing in Finland

TOUR OPERATOR: Gane and Marshal

WEB ADDRESS: <https://www.ganeandmarshall.com>

PERIOD: May – September Duration: 4 days

Price including flights: From £750 per person (99,000 RSD)

Trip style: Group tour for 2-8 people



Volunteering with Bears in Romania

TOUR OPERATOR: Get Active

WEB ADDRESS: <http://www.getactivewithanimals.com>

PERIOD: May – September Duration: 7 days

Price excluding flights: From £925 per person (99,000 RSD)

Trip style: Group tour – 10 persons



Nordic Wilderness Adventure (Finland)

TOUR OPERATOR: The Great Projects

WEB ADDRESS: <https://www.thegreatprojects.com>

PERIOD: May – August Duration: 7 days

Price including flights: From £1,395 per person (149,302 RSD)

Trip style: Group tour – 4 persons



Serbia Wildlife Tours

TOUR OPERATOR: Wonderland Travel

WEB ADDRESS: <http://www.panacomp.net/>

PERIOD: May - September Duration: 4 days

Price excluding flights: From EUR 680 per person (80,240 RSD)

Trip style: Group tour – 12 persons



Wildlife Experience Serbia

TOUR OPERATOR: TaraTours

WEB ADDRESS: <http://taratours.rs/>

PERIOD: May - September Duration: 4 days

Price excluding flights: From EUR 556 per person (65,610 RSD)

Trip style: Group tour – 12 person



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Sverige

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**Why we are here.**

To stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature.

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