

# Final Report

## **SUMMARY OF TOURIST SURVEY, FOCUS GROUP FINDINGS AND TOURIST COUNTING 2020**

**Project for Integrated Urban and Tourism Development**

**Submitted by:  
Albanian Center for Economic Research (ACER)  
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**The Final Report "Summary of tourist survey, focus groups findings and tourist counting, 2020"** has been prepared by ACER with assistance of the Albanian Development Fund (ADF) in the framework of the PIUTD implementation. This survey, the analysis and the recommendations contained in this document represent the views only of the authors, and do not necessarily reflect the analysis, views and opinions of the World Bank or the Albanian Development Fund, nor of the donors or stakeholders involved in the Project for Integrated Urban and Tourism Development

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## Table of Content

List of Acronyms.....	7
Executive Summary .....	8
Introduction.....	10
Chapter 1. Tourist Survey 2020.....	12
1.1 Project Aim and Objectives .....	12
1.2 Coordination and Implementation of the Survey.....	12
1.3 Methodology of Quantitative Study.....	13
1.3.1 Survey Sample.....	13
1.3.2 Selection and Training of Enumerators .....	14
1.3.3 Engagement of Regional Supervisors .....	14
1.3.4 Electronic Data Collection.....	14
1.3.5 Other Details Regarding Survey Implementaion .....	16
1.4 Limitations of the Study .....	16
Chapter 2. Cain Findings of Tourist Survey 2020.....	17
2.1 Tourists' Demographic Profile .....	17
2.2 Entry and Length of Stay .....	20
2.3 Tourist Satisfaction .....	22
2.3.1 Diversity of Activities in Tourist Destinations .....	23
2.3.2 Quality of Products, Services and Hospitality .....	26
2.3.3 Other Touristic Aspects 2016, 2018, 2019 dhe 2020 .....	37
2.4 Information on Tourists' Expenditures .....	45
Chapter 3. Summary of Focus Group Discussion Findings.....	49
3.1 Methodology of Qualitative Study.....	49
3.2 Limitation of Qualitative Study.....	49
3.3 Focus Group Discussion Findings.....	49
Chapter 4. Tourist Counting.....	53
4.1 Methodology of Tourist Counting .....	53
4.2 Tourist Counting Findings .....	53
Chapter 5. Conclusions and Reccomendation.....	55
Annex 1: Tourist Survey's Questionnaire.....	57
Annex 2: FGD Informative Materials .....	62
Annex 3: Focus Group Findings .....	66
3/1 Focus Group Discussion - Berat.....	66
3/2 Focus Group Discussion - Permet.....	68
3/3 Focus Group Discussion - Gjirokaster .....	70
3/4 Focus Group Discussion - Saranda.....	72
Annex 4: List of Participants and Photos of FGD .....	74

## List of Tables

Table 1. Distribution of tourists according to length of stay 2016-2020.....	21
Table 2. Length of stay according to touristic destination 2016 - 2020 .....	21
Table 3. Overall tourist satisfaction according to touristic destination 2016 - 2020 .....	23
Table 4. Overall tourist satisfaction according to touristic destination 2016- 2020 .....	23
Table 5. Evaluation of the quality of experience disaggregated according to the tourist destination .....	24
Table 6. The assessment of the quality of activities 2016 - 2020 .....	25
Table 7. The assessment of the quality of activities 2016 - 2020 .....	25
Table 8. The assessment of the quality of activities 2016 - 2020 .....	26
Table 9. Assessment of aspects of the stay taking into account the whole of Southern Albania.....	26
Table 10. Assessment of aspects of stay, considering all destinations in Southern Albania.....	27
Table 11. Personal safety disaggregated by tourist status 2016-2020 .....	28
Table 12. Personal safety disaggregated by tourist status 2016-2020 .....	28
Table 13. Assessment of aspects of stay, considering all destinations in Southern Albania.....	29
Table 14. Friendliness of people disaggregated by tourist status 2016-2020 .....	29
Table 15. Friendliness of people disaggregated by tourist status 2016-2020 .....	30
Table 16. Assessment of aspects of stay, considering all destinations in Southern Albania.....	30
Table 17. Local gastronomy disaggregated by tourist status 2016-2020 .....	31
Table 18. Local gastronomy disaggregated by tourist status 2016-2020.....	31
Table 19. Assessment of aspects of stay, considering all destinations in Southern Albania.....	31
Table 20. Quality of restaurants disaggregated by tourist status 2016-2020 .....	32
Table 21. Quality of restaurants disaggregated by tourist status 2016-2020 .....	32
Table 22. Assessment of aspects of stay, considering all destinations in Southern Albania.....	33
Table 23. Assessment of aspects of stay, considering all destinations in Southern Albania.....	33
Table 24. Assessment of aspects of stay, considering all destinations in Southern Albania.....	34
Table 25. Assessment of aspects of stay, considering all destinations in Southern Albania.....	35
Table 26. Convenience for payment transactions using cards (debit/credit) 2016-2020 .....	36
Table 27. Convenience for payment transactions using cards (debit/credit) 2016-2020 .....	36
Table 28. Assessment of aspects of stay, considering all destinations in Southern Albania.....	36
Table 29. Quality of guides disaggregated by tourist status 2016-2020.....	37
Table 30. Quality of guides disaggregated by tourist status 2016-2020.....	37
Table 31. Easiness of finding information about the touristic destinations .....	38
Table 32. Easiness of finding information about the destinations disaggregated by tourist status 2016-2020.	38
Table 33. Easiness of finding information about the destinations disaggregated by tourist status 2016-2020.	38
Table 34. Easiness of finding the destinations.....	39
Table 35. Ease of finding the location of the destination disaggregated by tourist status 2016-2020 .....	39
Table 36. Ease of finding the location of the destination disaggregated by tourist status 2016-2020 .....	39
Table 37. Quality of walking pathways in touristic destination.....	40
Table 38. Quality of walking pathways disaggregated by tourist status 2016-2020 .....	40
Table 39. Quality of walking pathways disaggregated by tourist status 2016-2020 .....	41
Table 40. Interpretation/ signage available in touristic destination .....	41
Table 41. Interpretation/ signage available by tourist status 2016-2020.....	41
Table 42. Interpretation/ signage available disaggregated by tourist status 2016-2020.....	41
Table 43. Level of cleanliness in touristic destination .....	42
Table 44. Level of cleanliness disaggregated by tourist destinations 2016-2020 .....	43
Table 45. Level of cleanliness disaggregated by tourist destinations 2016-2020 .....	43
Table 46. Quality and availability of sanitation facilities in touristic destinations.....	43
Table 47. Quality and availability of sanitation facilities disaggregated by tourists' status 2016-2020.....	44
Table 48. Quality and availability of sanitation facilities disaggregated by tourists' status 2016-2020.....	44
Table 49. Facilities for children in touristic destinations .....	44

Table 50. Facilities for children disaggregated by tourists' status 2016- 2020 .....	45
Table 51. Facilities for children dissagregated by tourists' status 2016- 2020.....	45
Table 52. Tourist's daily average expenditure2016-2020 (EUR) .....	45
Table 53. Tourist's daily average expenditure 2016-2020 (EUR).....	46
Table 54. Tourist's daily average expenditure, according to tourist status 2016-2020(EUR).....	47
Table 55. Distribution of tourists according to their stay's satisfaction in Albania.....	47
Table 56. Distribution of tourists according to their stay's satisfaction in Albania.....	47
Table 57. Number of businesses related to tourism2018, 2019 and 2020 .....	48
Table 58. Information about focus group discussions .....	49
Table 59. Common barriers and respective solutions in each municipality.....	52
Table 60. Average number of tourists during 7 days of the week, 2020.....	53
Table 61. Average number of tourist during 7 days of the week, 2019 .....	54
Table 62. Average number of tourist during 7 days of the week, 2018 .....	54
Table 63. The percentage of decrease in tourist between 2019 and 2020 Year.....	54

## List of Figures

Figure 1. Toursits interviewed according to Gender & Group-age 2016-2020 .....	18
Figure 2. Tourist categorization regarding status of residency, employment and education 2016-2020 .....	19
Figure 3. Entry Points in Albania and Visit Frequency 2016-2020 .....	20
Figure 4. Type of visiting tourists 2016-2020.....	22
Figure 5. Customs and migration services at entry points 2016 - 2020 .....	27
Figure 6. Personal Safety 2016-2020 .....	28
Figure 7. Friendliness of people 2016-2020.....	29
Figure 8. Local Gastronomy 2016-2020 .....	30
Figure 9. Quality of restaurants 2016-2020.....	32
Figure 10. Quality of services in restaurants, hotels etc. 2016-2020.....	33
Figure 11. Degree of knowledge of foreign languages from the services personnel 2016-2020.....	34
Figure 12. Convenience for payment transactions using cards (debit/credit) 2016-2020.....	35
Figure 13. Quality of guides 2016-2020.....	37
Figure 14. Easiness of finding information about the touristic deastinations.....	38
Figure 15. Easiness of finding the location of the touristic sites .....	39
Figure 16. Walking pathways in touristic destinations .....	40
Figure 17. Interpretation/ signage available in touristic destination .....	41
Figure 18. Level of cleanliness in touristic destination .....	42
Figure 19. Quality and availability of sanitation facilities in touristic destinations .....	43
Figure 20. Facilities for children in touristic destinations .....	44

## List of Acronyms

<b>ACER</b>	– Albanian Center for Economic Research
<b>ADF</b>	– Albanian Development Fund
<b>CAPI</b>	– Computer Assisted Personal Interviewing
<b>COVID-19</b>	– Coronavirus 2019
<b>GDP</b>	– Gross Domestic Product
<b>EDC</b>	– Electronic Data Capturing
<b>FGD</b>	– Focus Group Discussion
<b>INSTAT</b>	– Institute of Statistics
<b>MTE</b>	– Ministry of Tourism and Environment
<b>OECD</b>	– Organization for Economic Co-operation and Development
<b>PIUTD</b>	– Project for Integrated Urban and Tourism Development
<b>SEE</b>	– Southeast Europe
<b>WTO</b>	– World Tourism Organization

## Executive Summary

The final report "Summary of Tourist Survey, Focus Group Findings and Tourist Counting 2020", is organized in 5 (five) chapters. The first chapter presents a description of the 2020 Tourist Survey regarding the aim and the methodology used; The second chapter analyzes the Findings of the Tourist Survey, 2020, while comparing the data with the survey of 2019, 2018 and the baseline study of 2016; The third chapter describes the Findings on the Focus Group Discussions; meanwhile the Tourist Counting Findings in 9 tourist destinations included in the project are presented in chapter 4 (four); and the conclusions and recommendations drawn from the 2020 Tourist Survey and focus group discussions can be found in Chapter 5 (five).

The Tourist Survey 2020 was conducted by the Albanian Center for Economic Research (ACER), contracted by the Albanian Development Fund (ADF). ACER conducted the tourist survey in 9 touristic areas, where the Project for Integrated Urban and Tourism Development (PIUTD) is being implemented, as well as four focus group discussions online in 4 urban centers selected for the implementation of PIUTD. The instrument is based on the baseline study questionnaire in 2016, the survey of 2018 and 2019. This year, the survey was conducted from August 16th-31st, in 4 urban areas: Saranda, Berat, Permet and Gjirokastra, as well as in the tourist areas: Blue Eye, Porto Palermo, Zvernec, Oriq and Benje, same as in the 2019 and 2018 surveys. The same methodology and the same survey instrument were used to maintain the comparability of the data (See [Annex I](#)).

Despite the challenges faced by tourism in Albania during 2019-2020 (earthquake of November 26, 2019 and Covid-19, 2020) Tourist Survey 2020 aimed to provide reliable information on the perceptions of tourists (visitors) on existing tourism products in urban centers where PIUTD is being implemented. The survey provides useful data on the problems encountered in tourist areas and an opportunity for improvement in the coming years. Most importantly, the survey provides an overview of visitors' perceptions of these 4 urban centers as touristic destinations, creating opportunities for comparison with the results of the same survey conducted in 2019, 2018 and 2016. The survey analyzes the satisfaction with tourism facilities as well as the dimensions of touristic experiences. To make an assessment of the perception and experiences of national and international tourists, on their satisfaction during their stay in Albania in the four regions studied, ACER prepared a study report for 2020 generated by the survey of 1,260 visitors and Focus Group Discussions (FGD).

In the following, the main findings of the quantitative and qualitative study for 2020 are summarized, using as a comparative basis with the results from 2019, 2018 and 2016.

- ❖ The results of the 2020 survey show that *less than 2/3 of tourists (63%) are international tourists*, so the percentage of international tourists (foreign visitors and non-resident Albanians) has decreased compared to 2019 (74.8%), to 2018 (80%) and to 2016 (64%) data results. *Data from focus group discussions show that more than 90% of international tourists were from Eastern Europe*, unlike in previous years when most international tourists came from Western Europe.
- ❖ In 2020, more than 1/2 of tourists (56.4%) state that they spend an average of eight days in Albania. Compared to 2019, 2018 and 2016, *there is a decrease in the number of tourists who*



have stayed in Albania for an average of eight days. The length of stay of tourists in the country is a very important indicator of the potential that Albania has to offer to tourists, in terms of activities or services, but for 2020 the situation caused by the pandemic in the country has affected the length of stay of tourists in the touristic destinations.

- ❖ In the 2020 Survey, the percentage of tourists who claim to have visited Albania more than once has increased (from 22% to 28%), alike for the tourist area (from 29.6% to 44%). These results show and convey the message of the importance of guaranteeing the satisfaction of tourists in order to repeat the experience in the future.
- ❖ The Tourist Survey in 2020 shows a high level of overall tourist satisfaction (4.08). When comparing to the study of 2018 (4.07) and the study of 2019 (4.05), the average level of general satisfaction has increased slightly.
- ❖ Higher levels of satisfaction are for nature park exploration activities [mainly in Zvernec (4.92); Saranda (4.89) and Benja (4.86)], for the villages [mainly in Zvernec, Gjirokastra (4.63) and Benja (4.56)] and for the churches [(mainly in Zvernec (4.62), Saranda (4.48) and Gjirokastra (4.49)].
- ❖ The lowest levels of tourist satisfaction with the activities are mainly for musical activities [mainly in Permet (3.33), Benja (3.60) and Saranda (3.67)] and for local gastronomy [mainly in Përmet (3.91) and the Blue Eye (3.99)].
- ❖ In general terms, there is an increase in satisfaction with the quality of service at entry points in Albania, compared to a year ago (from an average rating of 3.03 to 3.2).
- ❖ Despite the global Covid-19 pandemic, the overall assessment of personal safety shows a slight increase (from 3.01 to 3.2) compared to a year ago. Also, the pandemic negatively affected the service providers on the tour guides (a significant part of them were closed), but despite this difficult period, the guide providers that continued their activity, managed to provide a high quality service (2.64 in 2019 compared to 2.86 in 2020).
- ❖ In 2020 a tourist spent an average of 46.68 Euro/ day, which compared to 2019, has decreased by 0.63 Euro / day of average daily spending (was 48.82 Euro/ day).
- ❖ As in the previous years, the largest influx of tourists in the studied areas is found in the coastal areas taking into account the period when the survey took place (August). For 2020 Saranda (m=1000), Blue Eye (m=201), Zvernec (m=125) and the Castle in Gjirokastra (m=125) are the areas with the highest average number of tourists.

In conclusion, we can say that tourists generally express a high level of total satisfaction during their visit to the host destination. Despite the quantitative data, the data extracted from the online focus group discussions show that there are a number of problematic aspects that require intervention and that should focus on: (i) local government cooperation with private or public actors involved in development of tourism, (ii) improving the appropriate infrastructural conditions for accessing of natural and cultural tourism assets in the four studied destinations and (iii) effective promotion of tourist values.

## Introduction

Tourism in Albania is one of the most important sectors for economic empowerment in the country and with high development potential. Tourism has expanded the natural and cultural potentials of touristic destinations in Albania by offering a high variety of opportunities for tourism such as: coastal tourism (beaches), rural tourism, mountain tourism, cultural tourism, marches, etc. However, it is necessary to promote these destinations to attract both foreign and domestic tourists and increase their access to information starting from the view that awaits them, to the diversity of activities when they arrive at the destination. The year 2020 was designed at the beginning as the "year of tourism and rural development" by the World Tourism Organization (WTO)<sup>1</sup> to give economic importance traveling to rural destinations.

However, Albania, like the whole world, did not have a normal year in 2020 and the tourism sector is one of the most affected by the spread of the new COVID-19 coronavirus that paralyzed the entire globe. Tourism in Albania in 2020 has faced unknown challenges, as a result of two consecutive natural disasters: the earthquake of November 26, 2019 and the pandemic of COVID-19, which brought serious consequences both humanly and economically. The tourism sector was among the most affected by other economic sectors, taking into account the fact of preparation for the tourist season, precisely in the period of total closure (quarantine), by economic operators and businesses operating in this field.

Currently, the main strategic document in the field of tourism is: National Strategy for Sustainable Tourism Development 2019-2023<sup>2</sup>. Other documents that have significantly influenced the development of this sector in the country are: Sectorial Strategy - National Sectoral Plan on Tourism, Albanian Alps Region, 2017;<sup>3</sup> Cross-cutting Strategy "Digital Agenda of Albania 2015-2020";<sup>4</sup> National Strategy for Development and Integration 2015-2020;<sup>5</sup> National Cross-cutting Strategy for Decentralization and Local Government 2015-2020<sup>6</sup>, but it should be noted that these policies are in the last year of implementation and the need arises to be updated in the upcoming period in order to be as coherent as possible with developments in the country.

## COVID-19 impact

From the monthly publications of the Institute of Statistics (INSTAT) regarding the tourism figures for the last year, it is ascertained what was expected to happen – the significant decrease of the inflows of Albanian and foreign citizens during the period January-August 2020 (3,530,238 entries in

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<sup>1</sup>World Tourism Organization: <https://www.unwto.org/world-tourism-day-2020/tourism-and-rural-development-technical-note>

<sup>2</sup>National Strategy for Sustainable Tourism Development 2019-2023, MTE <http://mjedisi.gov.al/wp-content/uploads/2019/06/Strategjia-Komb%C3%ABtare-e-Turizmit-2019-2023.pdf>

<sup>3</sup> National Sectoral Plan on Tourism, Albanian Alps Region (Sectorial Strategy), 2017, implemented by ADF:

<https://www.albaniandf.org/wp-content/uploads/2018/07/2-STRATEGJIA-SEKTORIALE-PKST-ALPE.pdf>

<sup>4</sup>Cross-cutting Strategy, Digital Agenda of Albania 2015-2020, Council of Ministers, Republic of Albania: [http://akshi.gov.al/wp-content/uploads/2018/03/Digital\\_Agenda\\_Strategy\\_2015\\_-\\_2020.pdf](http://akshi.gov.al/wp-content/uploads/2018/03/Digital_Agenda_Strategy_2015_-_2020.pdf)

<sup>5</sup>National Strategy for Development and Integration 2015-2020, Council of Ministers, Republic of Albania: [http://www.mbrojtja.gov.al/images/PDF/strategji2016/SKZHI\\_FINAL\\_QBZ.pdf](http://www.mbrojtja.gov.al/images/PDF/strategji2016/SKZHI_FINAL_QBZ.pdf)

<sup>6</sup>Cross-sectoral Strategy for Decentralization and Local Government 2015-2020, Council of Ministers, Republic of Albania: <http://www.bpe.al/sites/default/files/publications/Strategjia-ndersektoriale-per-decentralizimin-dhe-qeverisjen-vendore.pdf>

total) in comparison with the same period in 2019 (8,582,641 entries in total).<sup>7</sup> According to INSTAT, the inflows of Albanian and foreign citizens in Albania only on August 2020 are 846,973, suffering a significant decrease of 62.5% compared to August 2019.<sup>8</sup> According to the Tourist Survey Report 2020, the overall tourist number has decreased mostly in these destinations of Southern Albania: In Benja – Termal Water by 40.2%; in Zvernec by 33.5%; in Berat by 33.3%; in Gjirokastra by 30.9%; and in Permet by 30%, comparing to the year 2019. Referring to another source, the Albanian Association of Tour Operators and Touristic Agencies, has stated that this summer season in Albania is comprised of only 20 percent of the total tourists that was predicted in normal times which directly has affected the country's economy.

The situation created by COVID-19 affected the Gross Domestic Product (GDP) in Albania with an assessed decrease of 10.23% referring to the months April-May-June 2020 compared to the same period in 2019, a time which corresponds to the start of tourist season from a high number of accommodation facilities and beyond. The group of activities that gave the biggest impact on this decrease in GDP were trade, transport, accommodation and food service (with a decrease of 26.35% in the period April-May-June 2020 compared to the same period of one year ago).<sup>9</sup> The latest report published by the Organization for Economic Co-operation and Development (OECD) on the economies of Southeast European (SEE) countries and the response to the Covid-19 crisis, states that Albania is one of the countries that will suffer the most in the economy aspect due to the contribution that tourism has. The report cites that “Tourism, which accounts for more than 20% of Albania’s GDP, was one of the most affected sectors by the pandemic”.<sup>10</sup>

Measures taken by governments to minimize or reduce the spread of the virus such as travel / flight restrictions, border closures, quarantines and social distance measures, etc. together with the media impact on their periodic news reports makes tourist destinations unattractive and the feeling of fear spread to future visitors. Hotels are arguably the most hit chain by COVID-19. As a result of mass cancellations of flights, tours, events, hotel reservations and a decline in domestic travel, the number of hotel beds and the sharp drop in average room rates caused an unprecedented drop in profit margins for these structures. Up to 90% is the share of cancellations in the accommodation structures in the areas where the project is being undertaken, according to focus group discussions with stakeholders in Berat, Permet, Saranda and Gjirokastra. Thus, the results of this study report are attributed, among other things, to external factors related to: *First*, the unstable situation created in the country as a result of the spread of the COVID-19 virus, which continues to be active throughout the country. *Secondly*, the consequences of the earthquake of November 26, 2019, which although fell with epicenter in the city of Durrës, which is not part of the PIUTD project, but as a place distinguished by the high number of tourists, affected the cancellation of reservations by many potential visitors who would visit Albania, thus reducing the entry of foreign and Albanian citizens into the country and the contribution they would have brought to tourism and the economy.

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<sup>7</sup> INSTAT, Citizens' movements in Albania, August 2020: [http://www.instat.gov.al/media/7507/levizja-e-shtetasve-gusht\\_2020.pdf](http://www.instat.gov.al/media/7507/levizja-e-shtetasve-gusht_2020.pdf)

<sup>8</sup> Ibid.

<sup>9</sup> INSTAT, Quarterly Economic Growth, 2<sup>nd</sup> quarter, 2020: <http://www.instat.gov.al/media/7519/pbb-tr2-2020.pdf>

<sup>10</sup> OECD, COVID-19 Crisis in Albania, 2020: <https://www.oecd.org/south-east-europe/COVID-19-Crisis-in-Albania.pdf>

## Chapter I. Tourist Survey 2020

In order to assess the implementation and achievement of the objectives of PIUTD, a quantitative and qualitative study was conducted by ACER focusing on tourist satisfaction, use of public services and infrastructure as well as spending patterns and length of stay during the tourists' visit to Southern Albania, which facilitates the assessment on the economic impact of the PIUTD. The quantitative study was conducted through the survey with a sample of 1,260 tourists in Southern Albania. To clarify some special aspects of the quantitative study and to reinforce the findings, a qualitative study was conducted as a follow-up where the opinions, experiences and suggestions of the stakeholders involved were gathered through focus group discussions in 4 cities: Berat, Permet, Gjirokaster and Saranda. The methodology used for each study is described in more detail below.

### 1.1 Project Aim and Objectives

The aim of this survey is to provide data with a particular focus on the use of public services and infrastructure by tourists, the level of satisfaction of tourists with these services, as well as the overall spending trends during their visit, which allows for a more complete assessment of the economic impact of the project.

The key data collection tasks in the coming years, which will be included in the assessment, are: (i) a representative survey of households in each of the 4 selected urban centers, namely in Berat, Gjirokastra, Permet, and Saranda, (ii) a representative survey (formal and informal) of tourism-related businesses in each of the 4 selected urban centers, and (iii) a survey of a certain number of tourists in 9 selected tourist sites. The first two tasks are intended to yield data on households, whether they benefit from project investments and how, either directly - through public services, urban infrastructure improvement or project related jobs, or indirectly - through increased economic opportunities linked to these investments, especially those related to the tourism industry.

### 1.2 Coordination and Implementation of the Survey

Coordination and overall implementation of the survey has been the responsibility of ACER. Legally and contractually, ACER was liable for a range of responsibilities, which were met through close cooperation with ADF technical team of supervisors. Some of these responsibilities were:

- Identification and contact of staff for field work,
- One-day training for interviewers who will conduct field work,
- Providing the necessary logistical base for conducting the survey,
- Administration of data collected according to the specified standards as well as their preparation for the analysis and interpretation of the survey findings.

### **I.3 Methodology of Quantitative Study**

The quantitative study includes the survey visiting tourists in Southern Albania, the area which is subject to PIUTD. In support of the project reference terms, the survey was conducted in 9 preselected locations as outlined to the following list. The same selection of sites provided by the ADF was followed in the study of the 2019, 2018 and in the baseline study conducted in 2016. In each of the locations mentioned below, 140 questionnaires were completed respectively.

#### **Municipalities:**

1. Saranda – Promenade Area
2. Gjirokastra – Castle
3. Berati – Castle
4. Përmeti – Town Square

#### **Touristic Sites:**

5. Benja – Thermal Waters
6. Porto Palermo – Castle
7. Zvernec – Church Entrance
8. Orik – Ancient City
9. Blue Eye – The source

#### **I.3.1 Survey Sample**

Tourists in these areas have been the base unit of the survey . Likewise, as in the case of the methodology in the baseline study and in the 2018 and 2019 study, the method used to select respondents is that of accidental sampling. Accidental sampling is a non-probability sampling method, which comes as a result of not being able to identify the entire population taken in the study. For this reason, people who are in these predetermined areas are interviewed without prejudice. In the case of a group of family visitors, it has become possible for only one family member to participate in the survey. In order to ensure a more representative and comprehensive tourist sample the interviews were conducted:

- a. In different days of the week
- b. In different times during the day

The random distributions of the interviews allowed capturing all the nuances on tourists' perceptions of their use and satisfaction with public services and infrastructure, as well as overall spending trends during their visit. From the Tourists' survey yielded the following quantitative data - among others:

1. Duration of the visit,
2. Place of stay and means of transport;
3. Diversity of activities involved during the visit to these places
4. Itemized amount spent during visit and

5. Expectation and satisfaction with a set of attributes, including tourist sites, accommodation, food, accessibility, transportation in and transportation within, urban infrastructure, expensiveness, cultural heritage, etc.

### **1.3.2 Selection and Training of Enumerators**

For the development of this study, ACER engaged a team of three regional supervisors, who supported the selected enumerators and supervised the implementation of the field survey. The training was held on August 13th and included 14 interviewers, through a one-day special training program. The provided materials during the training were related to fieldwork implementation, survey's instruments and questionnaires, enumerators' selection according to survey methodology, using of the software as well as information on the geographical extent of the survey. The division of enumerators according to the specific areas was as following: Saranda - 4 interviewers, Gjirokastra - 2 interviewers, Berat - 2 interviewer and Permet - 3 interviewers as well as to cover the touristic areas of Orik (Ancient City) and Zvernec (Church Entrance) - 3 interviewers. All interviewers received a set of written instructions scattered before starting work on the field.

The fieldwork lasted 2 weeks, which began on August 16th 2020 and ended on August 31st 2020. Along with the interviews conducted, the interviewers counted the tourists visiting the area that day. Also, at the end of the interviews, they counted all the businesses that operated in that area (or near the place as in the case of castles).

### **1.3.3 Engagement of Regional Supervisors**

To oversee the fieldwork, 3 supervisors were contracted in each of the 4 areas. Through the constant communication of the supervisors with the interviewers, a field work plan was prepared every day, which was reported to the project coordinator at ACER's office. The ACER's coordinator supervised the implementation of the plan on a daily basis and reported weekly to the ADF. The supervisors assisted the interviewers during their fieldwork, facilitating communication with the interviewed tourists and the correct implementation of the assigned task.

### **1.3.4 Electronic Data Collection**

ACER employed the Electronic Data Capturing (EDC) technology for the data-gathering process. The face to face interviews were conducted via CAPI (Computer Assisted Personal Interviewing) system. For this purpose, ACER has all the necessary tools such as electronic equipment (14 tablets), and the capacity to conduct interviews through EDC.

As it is known, this system provides a number of advantages, including:



The scripts defining the entry form will automatically perform logical controls and consistency checks and immediately notify interviewers of potential issues. During and post the data entry phase, questionnaire data is subject to five kinds of checks: Range checks; Checks against reference data; Skip checks; Consistency checks and Typographic checks. Below is described in details:

- a. Range checks are intended to ensure that every variable in the survey contains only data within a limited domain of valid values. Categorical variables can have only one of the values predefined for them on the questionnaire (for example, gender can be coded only as 1 for males or 2 for females); chronological variables should contain valid dates, and numerical variables should lie within prescribed minimum and maximum values (such as 15 to 95 years for age.)
- b. A special case of range checking occurs when the data from two or more closely related fields can be checked against external reference tables such as the case of Consistency of geographical regions, for example.



- c. Skip checks. These verify whether the skip patterns have been followed appropriately. Depending on his or her age and gender, each respondent is supposed to answer (or skip) specific sections of the questionnaire.
- d. Consistency checks. These checks verify that values from one question are consistent with values from another question. A simple check occurs when both values are from the same statistical unit, for example, the date of birth and age of a given individual.
- e. Typographical checks. Control totals and check digits' procedures are followed when possible.

Each interview conducted by the enumerator was immediately uploaded in the dedicated server located in the ACER premises. The database is progressively updated in the server which allows us to check the status of data collection process. The server saves the database in a back up file. Automatic recording in the system of the time and date of the interview is performed. Geo-location function allows the recording and tracking of the location of the interview and by bringing a graphical representation of each questionnaire in the fieldwork (checking also whether the interviews are conducting in the specified primary sampling unit).

### **1.3.5 Other Details Regarding Survey Implementaion**

The number of registered questionnaires was completed according to the requirements of the survey sample: 1260 questionnaires in total. The refusal rate of interviews is reported to be 27%, so 340 interviewed visitors were not willing to participate in the study.

### **1.4 Limitations of the Study**

When conducting the tourist survey, the interviewers and their supervisors did not identify major problems that could affect the quality of the information collected. Nevertheless, based on the reports prepared by them regarding the problems encountered by the interviewers during the fieldwork, the following main findings result:

- In the context of the situation created by the COVID-19 pandemic and taking into account the EU decision for (not) opening of international borders to our country, the tourist survey, unlike previous years, was postponed two weeks later, from the initial planning and took place during the dates 16-31 August.
- The situation caused by COVID-19 resulted in a high refusal rate of by mostly foreign tourists to be included in the survey. Despite the difficulties, the interviewers took care to have a representation of at least 30% foreign tourists in each of the tourist areas.

These limits or difficulties were overcome with the support of the coordinators and the necessary clarifications from the interviewers according to the relevant instructions prepared by ACER.



## Chapter 2. Main Findings of Tourist Survey 2020

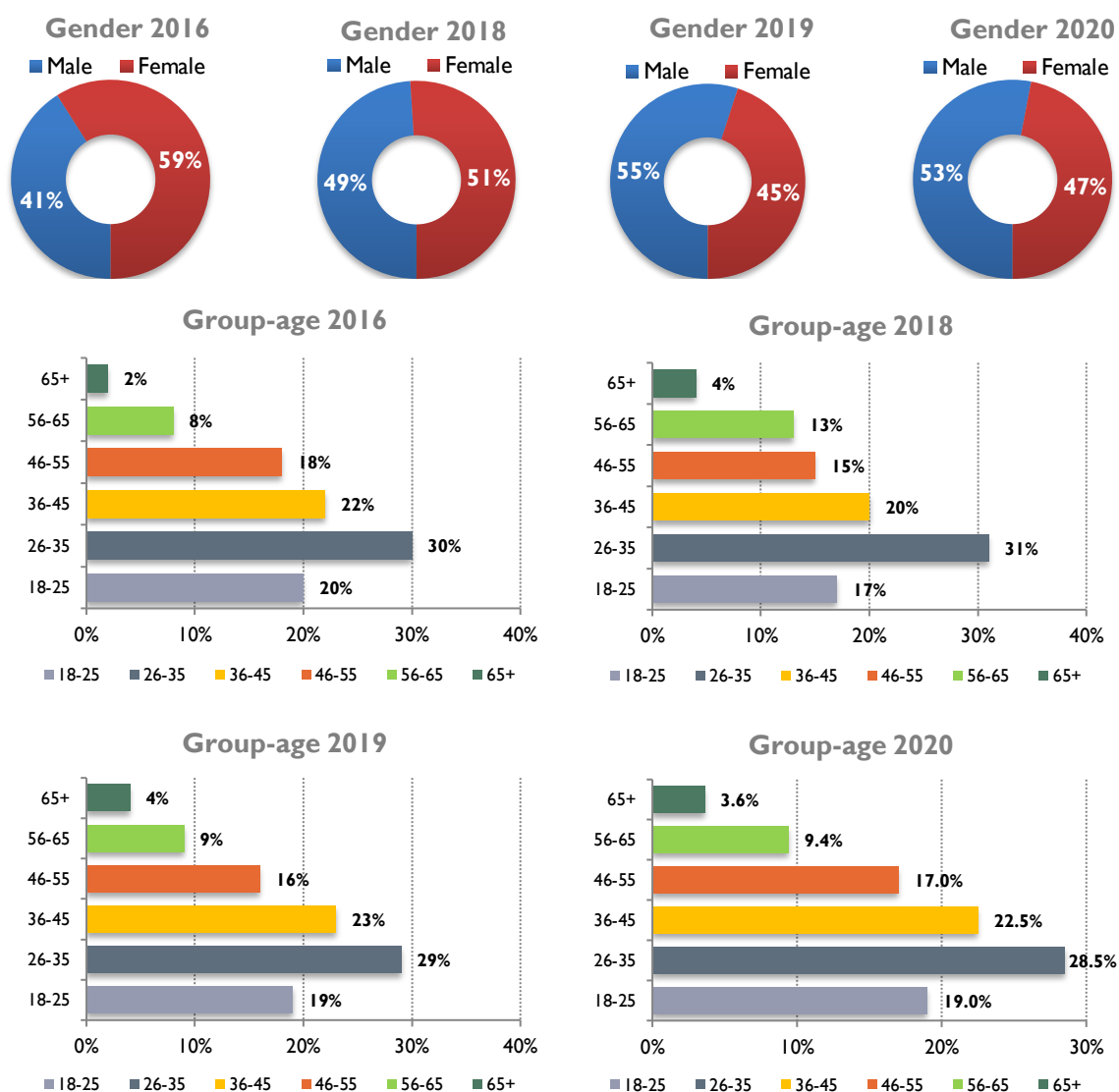
This chapter presents a comparative analysis between the years of undertaking this study on the satisfaction of tourists regarding various aspects of their stay in Albania. The comparative analysis includes the results of the tourist survey in 2020 with the surveys conducted in 2016, 2018, 2019. For the comparability of the data, the results are analysed for the same touristic destinations.

The first sub-section provides a description of the demographic profile of the survey sample. The information obtained in this regard relates to aspects such as: gender, age, tourist status, employment status and level of education. The second sub-section presents data on entry points used by tourists to travel to Albania, length of stay in the country, etc. The third sub-section details the results, which have to do with tourist satisfaction. Finally, the fourth sub-section analyzes the information gathered on tourist expenditures in the destinations where PIUTD is being implemented.

### 2.1 Tourists' Demographic Profile

In the survey conducted in 2020, 47 % of tourists are females and 53 % males. Likewise, in the 2019 study, we have a higher representation of males with 55% versus 45% females. Unlike the study of 2018, where we have a higher representation of females with 51% versus 49% males. The group-age that prefers to travel to Albania in 2020 is 26-35 years old (28.5%) followed by 22.5% of tourists in the range 36-45 years old and 19% from 18-25 years old. The age distribution is very similar compared to the survey of 2019, 2018 and baseline study. Results are presented in the Figure 1 below.

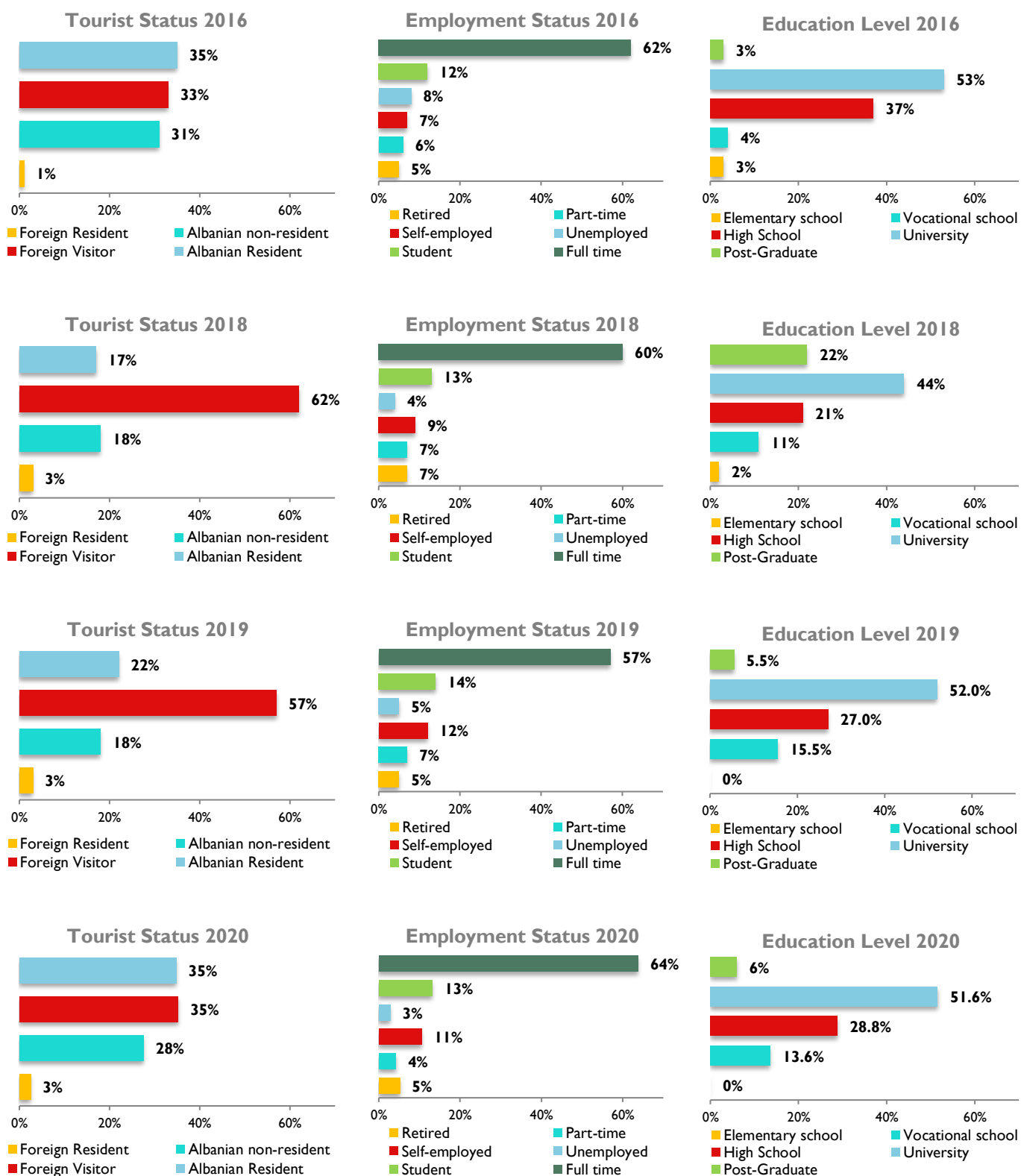
Figure I. Toursits interviewed according to Gender & Group-age 2016-2020



Source: Database 2016; ACER, Study 2018, 2019 and 2020

A summary of the results generating tourist status, employment status and education level is provided in Figure 2. The survey results for 2020 show that 63% are *international tourists*, so the percentage of international tourists has decreased (foreign visitors and non-resident Albanians) compared to 2019, 2018 and 2016 studies (in 2019 - 74.8%; in 2018 - 80% and in 2016 - 64%). In the 2020 survey, as in previous studies, tourists were asked about their employment status. 64% of the tourists interviewed stated that they are *full-time employed*, 13% are students, 11% self-employed, 4% work in a part-time job and a small part of them are in retirement. Such a distribution of employment status is presented almost the same in the surveys of 2019, 2018 and in the baseline study. In terms of education level, 51.6% of tourists interviewed stated that they have completed an universit degree versus 52% in 2019 and 44% in the 2018 survey. In 2020 we have a higher representation of tourists who have completed high-school education (28.8% of tourists interviewed), compared to 27% a year earlier and 21% two years ago.

Figure 2. Tourist categorization regarding status of residency, employment and education 2016-2020



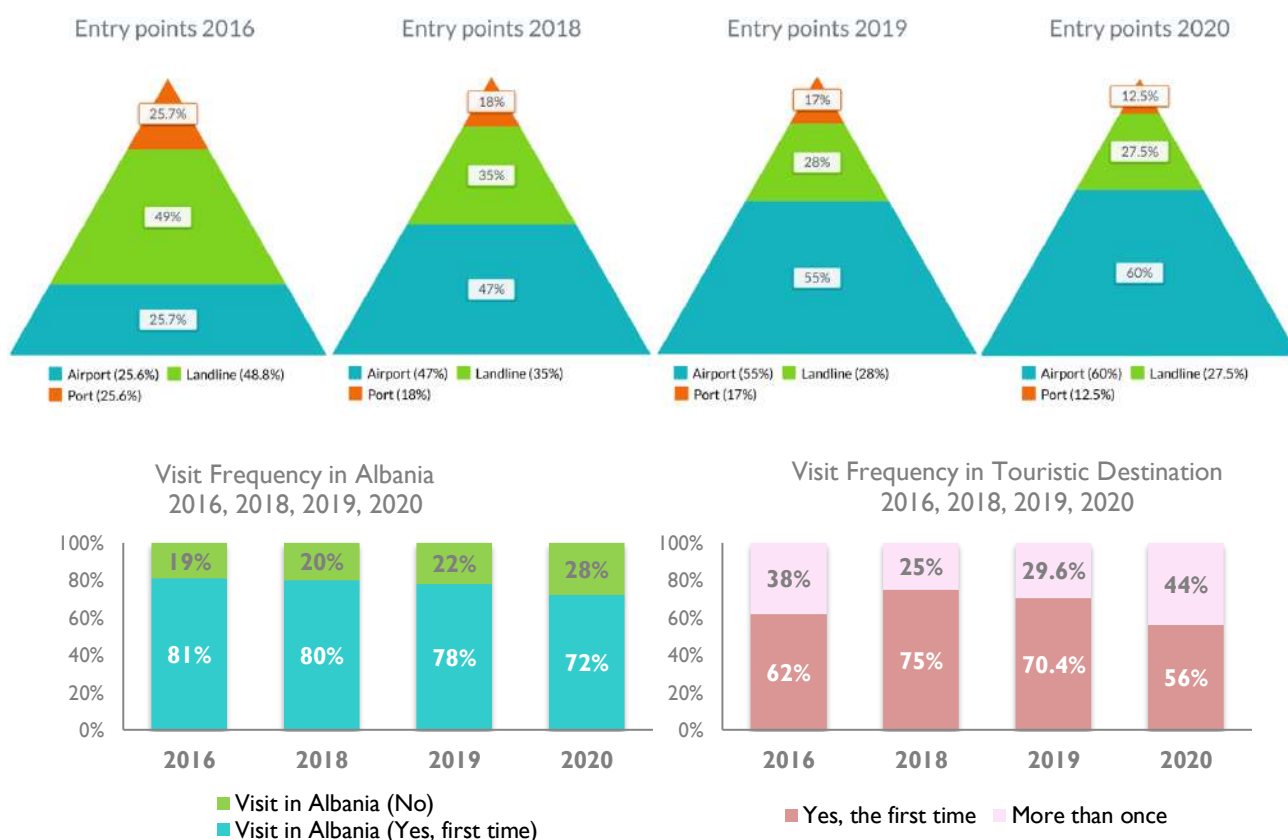
Source: Database 2016; ACER, Study 2018, 2019 and 2020

## 2.2 Entry and Length of Stay

In 2020, more than 1/2 of tourists (60%) entered the Albanian territory from airport, compared to 55% in 2019; 47% in 2018 and with the baseline study where only 25.7% of tourists have used this entry point. The second most frequented way was the landline, accepted by 27.5% of tourists versus 28% a year ago, 35% two years ago and 49% four years ago. Regarding sea routes, it turns out that it is the least frequented way to enter the Albanian territory (accepted by 12.5% of tourists).

Analyzing the frequency of visits of foreign tourists in Albania, not necessarily individuals who have visited Albania, have also visited tourist areas. For this reason, tourists were asked if it was the first time they visited Albania (this question was valid only for visitors not staying in Albania) and if it was the first time they visited the destination where they were asked (this question was valid for all interviewees). In 2020, the percentage of tourists who claim to have visited Albania more than once has increased (from 22% to 28%) and for visiting the tourist area has also increased (from 29.6% to 44%). Based on focus group discussions, participants report that the increase in the number of tourists visiting Albania more than once in the pandemic year is because they have rated Albania as a safer place compared to other European countries and some of Albanian visitors living abroad have returned due to unemployment they may have encountered during this pandemic period. The results are summarized in Figure 3.

Figure 3. Entry Points in Albania and Visit Frequency 2016-2020



Source: Database 2016; ACER, Study 2018, 2019 and 2020

In 2020, the majority of tourists (56.4%) state that they spend an average of eight days in Albania. Compared to 2019 (57.7%) and 2018 (68%) there is a decrease in the number of tourists who have stayed in Albania for an average of eight days. The length of stay of tourists in the country is a very important indicator of the potential that Albania has to offer to tourists, in terms of activities or services, but for 2020 the situation caused by the pandemic in the country has affected the length of stay in tourist areas. Also, a decrease for the length of stay between one to three days has occurred compared to the study of 2019, 2018 and baseline. While the number of tourists staying between 4-7 days has increased (41%), compared to 2019 (39.5%), 2018 (25%) and 2016 (33%).

**Table 1. Distribution of tourists according to length of stay 2016-2020**

Length of stay	2016		2018		2019		2020	
	N	Percentage	N	Percentage	N	Percentage	N	Percentage
1-3 days	26	5%	102	8%	39	2.8%	32	2.5%
4-7 days	164	33%	320	25%	553	39.5%	517	41%
>= 8 days	323	62%	879	68%	808	57.7%	711	56.4%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

When talking about the length of stay in the destinations included in the study, the calculations are made by combining two questions: "Please tell me how many days you stayed in this destination" and "How many more days do you intend to stay in this destination". In 2020, tourists are more likely to stay longer in coastal areas like Saranda (43% of them stay more than 8 days) compared to other tourist destinations. Also, in 2019, tourists stayed longer in the Saranda area, compared to 2018 and 2016 where tourists declared staying longer in areas such as Gjirokastra and Berat. This result can be explained by the fact that the survey was conducted in August 2020, a period when tourists prefer to go to the beach and are attracted by the attractions of the coastal area.

**Table 2. Length of stay according to touristic destination 2016 - 2020**

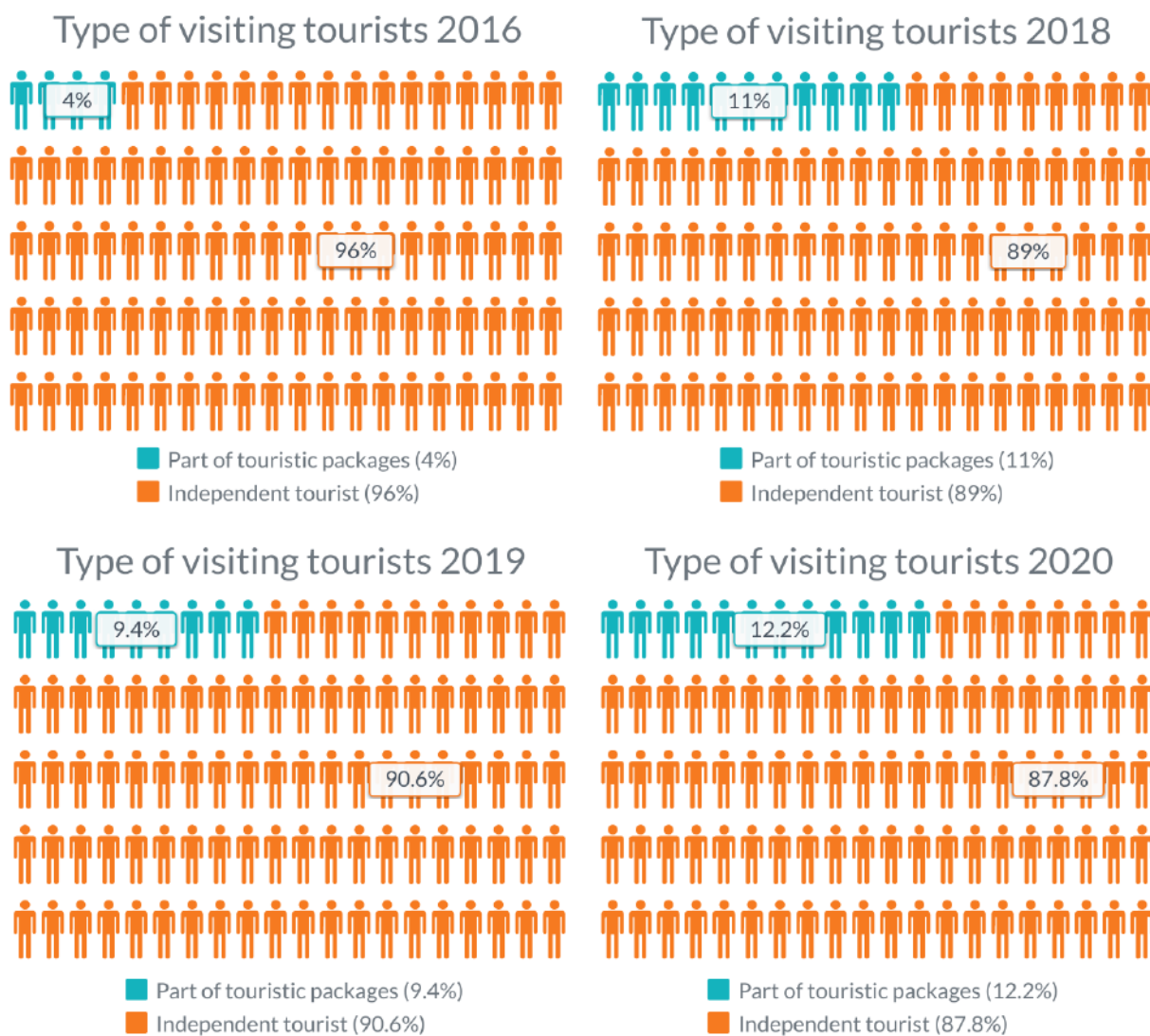
Year	Length of stay	1-3 days	4-7 days	>= 8 days
2016	Saranda – Promenade Area	6 (7%)	35 (43%)	41 (50%)
	Gjirokaster – The castle	4 (4%)	24 (24%)	71 (72%)
	Berat – The castle	6 (6%)	29 (31%)	60 (63%)
	Permet – Town Center	6 (11%)	9 (16%)	42 (74%)
	Blu Eye	4 (5%)	35 (44%)	40 (51%)
	Porto Palermo	0 (0%)	32 (37%)	55 (63%)
2018	Saranda – Promenade Area	21 (15%)	43 (31%)	74 (54%)
	Gjirokaster – The castle	2 (2%)	22 (21%)	101 (77%)
	Berat – The castle	7 (5%)	38 (27%)	94 (68%)
	Permet – Town Center	12 (9%)	26 (20%)	95 (71%)
	Blu Eye	13 (9%)	28 (20%)	99 (71%)
	Porto Palermo	1 (1%)	43 (32%)	88 (67%)
2019	Saranda – Promenade Area	0 (0%)	39 (28%)	101 (72%)
	Gjirokaster – The castle	4 (3%)	82 (58.5%)	54 (38.5%)
	Berat – The castle	4 (3%)	87 (62%)	49 (35%)
	Permet – Town Center	9 (6%)	71 (51%)	60 (43%)
2020	Saranda – Promenade Area	0 (0%)	80 (57%)	60 (43%)
	Gjirokaster – The castle	14 (10%)	80 (57%)	46 (33%)
	Berat – The castle	121 (86%)	18 (13%)	1 (1%)
	Permet – Town Center	113 (81%)	27 (19%)	0 (0%)

Source: Database 2016; ACER, Study 2018, 2019 and 2020

For 2020, tourists have been asked if they are part of touristic packages coming in Albania or have visited the country independently. These results show that 87.8% of them visited Albania

independently versus 12.2% of tourists who were part of tourist packages. Compared to 2019, we have a decrease in the number of tourists visiting Albania as an independent tourist (from 90.6% in 2019 to 87.8% in 2020). This decrease indicates an improvement in the quality and value of travel packages, despite the situation created by the global pandemic (COVID-19).

Figure 4. Type of visiting tourists 2016-2020



Source: Database 2016; ACER, Study 2018, 2019 and 2020

### 2.3 Tourist Satisfaction

Tourist Survey in 2020 shows a high level of overall tourist satisfaction. On a rating scale of 1 to 5 (1 very dissatisfied and 5 very satisfied) tourists have estimated their overall satisfaction with tourism in Albania on average 4.08. Saranda has the highest level of satisfaction (4.49), followed by Permeti (4.37) and Gjirokastra (4.29). Compared to the study of 2019 and 2018, the average level of overall satisfaction has increased slightly, from 4.07 in 2018, 4.05 in 2019 to 4.08 in 2020.

**Table 3. Overall tourist satisfaction according to touristic destination 2016 - 2020**

Touristic Destination	2016		2018		2019		2020	
	Mean	N	Mean	N	Mean	N	Mean	N
Saranda - Pormenade	4.11	130	3.89	140	4.48	140	4.49	140
Gjirokaster – Castle	4.26	130	4.06	140	4.27	140	4.29	140
Berat – Castle	4.32	130	4.48	140	4.19	140	4.23	140
Permet – Town square	4.41	130	4.29	140	4.37	140	4.37	140
Blue Eye – Source	4.02	131	4.11	140	3.80	140	3.84	140
Porto Palermo – Castle	4.22	130	3.93	140	3.91	140	3.95	140
Zvernec – Church Entrance			3.69	140	3.53	140	3.56	140
Orik – Ancient City			3.86	140	3.69	140	3.8	140
Benja- Thermal Water			4.27	140	4.16	140	4.19	140
<b>Total</b>	<b>4.22</b>	<b>781</b>	<b>4.07</b>	<b>1260</b>	<b>4.05</b>	<b>1260</b>	<b>4.08</b>	<b>1260</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

In total, females are *relatively more satisfied than males*. Female tourists are satisfied with an average of 4.10 while male tourists are satisfied with an average of 4.06. In the 2020 study, in the destinations with the highest rating (Saranda and Gjirokastra) and other destinations, women are relatively more satisfied than men, while in Permet and Blue Eyes, it is the men who are most satisfied (same result compared to the 2019 survey). The results show that there has been an increase in female satisfaction (from 4.05 to 4.10) and a slight increase in male satisfaction (from 4.04 to 4.06) compared to 2019. More details are presented in Table 4.

**Table 4. Overall tourist satisfaction according to touristic destination 2016- 2020**

Touristic Destination		2016	2018	2019	2020
Saranda - Pormenade	Female	4.06	3.93	4.50	4.51
	Male	4.14	3.84	4.43	4.45
	Total	4.11	3.89	4.48	4.49
Gjirokaster – Castle	Female	4.28	4.10	4.32	4.36
	Male	4.25	4.01	4.22	4.21
	Total	4.26	4.06	4.27	4.29
Berat – Castle	Female	4.34	4.45	4.28	4.38
	Male	4.30	4.52	4.10	4.12
	Total	4.32	4.48	4.19	4.23
Permet – Town square	Female	4.42	4.24	4.31	4.31
	Male	4.39	4.34	4.42	4.42
	Total	4.41	4.29	4.37	4.37
Blue Eye – Source	Female	3.97	4.13	3.72	3.76
	Male	4.03	4.09	3.86	3.90
	Total	4.02	4.11	3.80	3.84
Porto Palermo – Castle	Female	4.3	4.02	3.96	3.98
	Male	4.17	3.87	3.87	3.93
	Total	4.22	3.93	3.91	3.95
<b>Total</b>	Female	4.26	4.08	4.05	4.10
	Male	4.19	4.05	4.04	4.06
	<b>Total</b>	<b>4.22</b>	<b>4.07</b>	<b>4.05</b>	<b>4.08</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

### 2.3.1 Diversity of Activities in Tourist Destinations

In the tourist areas where the PIUTD project is being implemented, tourists have been asked to make an assessment of the quality of their experience for each activity tested on a scale of 1 to 5, where 1 means very poor quality and 5 means excellent quality. Based on the results of the 2020 survey and the 2019 survey, the following table summarizes the satisfaction of tourists on the activities in the respective destinations, divided into three categories: 1) Satisfaction is significantly reduced; 2) Same satisfaction/ slightly decreased; 3) Satisfaction has increased. *In general, the satisfaction of tourists regarding the activities has increased for each tourist destination.* Increased tourist



satisfaction is reported by tourist asked in Saranda (regarding religion, villages and hiking), Gjirokastra (regarding churches, religion, villages, etc.), Berat (regarding churches, natural parks, etc.), Permet (regarding natural parks, villages and religion), Blue Eye (regarding churches, bars, natural parks, etc.), Porto Palermo (regarding churches, hiking, bars, etc.) Zvernec (beaches, local gastronomy, etc.), Orik (beaches, churches, hiking, etc.), Benja (natural parks, religion, bars, etc.). Compared to 2019, tourist satisfaction regarding *churches* (Saranda and Përmet), natural parks (Saranda), *hiking* (Gjirokastra, Blue Eye and Benja), *local gastronomy* (Saranda, Porto Palermo, Orik and Benja), *bars* (Berat and Permet) and the *musical performance* (Berat and Zvernec) has remained almost the same. Tourists' satisfaction with the *beaches* (claimed by tourists asked in Saranda, Berat, Permet, Blue Eye, Porto Palermo and Benja), *musical performance* (accepted by tourists asked in Saranda, Gjirokastra, Permet, Blue Eye and Benja ), *hiking* (accepted by tourists surveyed in Berat and Permet) and *local gastronomy* (accepted by tourists surveyed in Berat, Permet and the Blue Eye) has decreased significantly compared to a year ago.

**Table 5. Evaluation of the quality of experience disaggregated according to the tourist destination (comparison 2019-2020)<sup>11</sup>**

Touristic Destination	DECREASED	SAME	INCREASED
<b>Saranda - Pormenade</b>	Beaches; Musical performance Bars	Churches; Natural parks Local gastronomy	Religion; Villages Hiking
<b>Gjirokaster – Castle</b>	Musical performance	Hiking	Churches; Beaches Religion; Villages Natural parks; Local gastronomy; Bars
<b>Berat- Castle</b>	Beaches Hiking Local gastronomy	Musical performance Bars	Churches; Religion; Villages Natural parks
<b>Permet</b>	Beaches; Musical performance; Hiking; Local gastronomy	Churches Bars	Religion Villages Natural parks
<b>Blue Eye – Source</b>	Beaches; Musical performance Local gastronomy	Hiking	Churches; Religion; Villages; Natural parks; Bars
<b>Porto Palermo – Castle</b>	Beaches	Local gastronomy	Churches; Religion Villages; Natural parks; Hiking; Bars
<b>Zvernec – Church Entrance</b>		Musical performance	Churches; Beaches; Religion; Villages; Natural parks Hiking; Local gastronomy; Bars
<b>Orik – Ancient City</b>		Local gastronomy	Churches; Beaches; Musical performance; Religion; Villages; Natural parks; Hiking; Bars
<b>Benja – Thermal Water</b>	Beaches Musical performance	Hiking Local gastronomy	Churches; Religion; Villages Natural parks; Bars

Source: Database 2016; ACER, Study 2018, 2019 and 2020

In general, tourists have remained satisfied with the activities undertaken in tourist destinations (Table 6, 7 and 8). *The highest levels of satisfaction result for natural park exploration activities* (mainly in Zvernec - with an average rating of 4.92; Saranda - with an average rating of 4.89 and Benje, Gjirokastër - with an average rating of 4.86), Villages (mainly in Zvernec, Gjirokastra - with an average rating of 4.63 and Benja - with an average rating of 4.56) and Churches (mainly in Zvernec - with an average rating of 4.62, Saranda - with an average rating of 4.48 and Gjirokastra - with an average rating of 4.49). *The lowest levels of tourist satisfaction with the activities result mainly for musical*

<sup>11</sup> Tourists are asked to evaluate any activity carried out in the southern area of Albania and not just for a specific destination.



activities (mainly in Përmet - with an average rating of 3.33, Benja - with an average rating of 3.60 and Saranda - with an average rating of 3.67) and local gastronomy (mainly in Permet - with an average rating of 3.91 and the Blue Eye - with an average rating of 3.99).

Such a result has been expected from tourism service providers in the respective destinations, given that due to the global pandemic, music activities have been discontinued and the type of tourists has been local increasing expectations for local gastronomy (supported by data released by focus group discussions).

**Table 6. The assessment of the quality of activities 2016 - 2020**  
(assessed with a scale from 1="Very dissatisfied" to 5="Very satisfied")

Touristic destination	Churches				Beaches				Musical Performance			
	2016	2018	2019	2020	2016	2018	2019	2020	2016	2018	2019	2020
Saranda	4.54	4.37	4.49	4.48	3.89	3.97	4.18	4.02	4.28	4.68	4.33	3.67
Gjirokaster	4.01	4.51	4.44	4.49	3.87	4.48	4.16	4.28	3.85	4.44	4.39	4.00
Berat	4.26	4.17	4.34	4.42	3.89	4.16	4.11	3.95	4.29	4.45	4.00	4.00
Permet	4.22	4.21	4.44	4.45	4.15	4.00	4.46	4.04	4.72	4.23	4.20	3.33
Blue Eye	3.97	4.12	3.93	4.25	4.05	3.47	4.25	4.13	4.10	4.17	3.80	3.71
Porto Palermo	4.47	4.51	3.78	4.50	4.44	4.70	4.34	4.07	4.10	4.46	4.10	4.50
Zvernec		3.79	3.66	4.62		4.14	4.08	4.22		3.95	3.74	3.80
Orik		4.09	3.88	4.33		4.19	4.26	4.34		4.19	3.82	4.10
Benja		4.15	4.26	4.46		4.43	4.31	4.08		4.29	3.92	3.60
<b>Total</b>	<b>4.24</b>	<b>4.19</b>	<b>4.23</b>	<b>4.43</b>	<b>4.07</b>	<b>4.15</b>	<b>3.90</b>	<b>4.12</b>	<b>4.20</b>	<b>4.25</b>	<b>3.82</b>	<b>3.87</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Table 7. The assessment of the quality of activities 2016 - 2020**

Touristic destination	Religion				Villages				Natural Parks			
	2016	2018	2019	2020	2016	2018	2019	2020	2016	2018	2019	2020
Saranda	4.00	4.48	4.86	5.00* (n=4)	4.48	3.24	4.41	4.47	4.54	4.31	4.88	4.89
Gjirokaster	4.20	4.20	3.79	4.25	4.03	3.92	4.36	4.63	4.33	4.43	4.66	4.85
Berat	4.34	4.50	4.14	4.71	3.95	3.73	4.16	4.5	4.19	4.33	4.41	4.86
Permet	4.46	4.75	4.14	5.00* (n=4)	4.13	4.11	4.48	4.6	4.20	4.32	4.40	4.83
Blue Eye	4.41	3.83	3.65	3.69	4.01	3.86	3.84	4.24	4.37	4.46	4.31	4.60
Porto Palermo	4.00	5.00	3.83	4.25	4.35	3.93	3.92	4.52	4.48	4.69	4.44	4.83
Zvernec		3.95	3.64	5.00* (n=1)		3.84	3.45	4.63		4.32	4.17	4.92
Orik		4.19	3.77	4.14		4.04	3.78	4.48		4.54	4.34	4.68
Benja		4.60	4.56	5.00* (n=5)		3.93	4.31	4.56		4.55	4.37	4.86
<b>Total</b>	<b>4.33</b>	<b>4.31</b>	<b>3.82</b>	<b>4.36</b>	<b>4.17</b>	<b>3.87</b>	<b>4.02</b>	<b>4.52</b>	<b>4.35</b>	<b>4.42</b>	<b>4.38</b>	<b>4.80</b>

\*The maximum rating in cases where mean is 5.00, comes as result of a very small number of tourists who have responded in total for this specific activity.

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Table 8. The assessment of the quality of activities 2016 - 2020**

Touristic destination	Hiking				Local Gastronomy				Bars			
	2016	2018	2019	2020	2016	2018	2019	2020	2016	2018	2019	2020
Saranda	4.75	4.88	4.00	4.30	4.05	4.20	4.10	4.13	4.13	4.43	4.40	4.30
Gjirokastr	4.30	4.35	4.1	4.14	4.19	4.56	4.02	4.27	3.86	3.77	4.26	4.38
Berat	4.02	4.25	4.29	3.92	4.35	4.55	4.25	4.12	4.01	4.26	4.2	4.23
Permet	4.30	4.34	4.32	4.00	4.68	4.29	4.53	3.91	4.11	4.04	4.34	4.33
Blue Eye	4.00	4.23	4.12	4.15	4.27	4.19	4.07	3.99	4.17	4.17	3.95	4.25
Porto Palermo	4.42	4.48	3.88	4.36	4.05	4.22	4.05	4.06	3.75	4.03	4.01	4.24
Zvernec		4.23	3.59	4.33		4.02	3.78	4.31		4.21	3.83	4.35
Orik		4.38	4.15	4.28		4.17	4.14	4.19		4.33	3.98	4.24
Benja		4.40	4.17	4.15		4.36	4.16	4.12		4.17	4.07	4.32
<b>Total</b>	<b>4.19</b>	<b>4.35</b>	<b>4.10</b>	<b>4.16</b>	<b>4.26</b>	<b>4.28</b>	<b>4.11</b>	<b>4.12</b>	<b>4.00</b>	<b>4.13</b>	<b>4.08</b>	<b>4.29</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

## 2.3.2 Quality of Products, Services and Hospitality

### 2.3.2.1 Customs and migration services at entry points

In order to have a complete and comprehensive assessment of all aspects of the tourist experience in the respective destinations, tourists were asked to give their rating on a certain list, with a rating scale from 1 (very bad) to 4 (very good). The following tables summarize the assessment for all aspects.

In 2020, there is a slight increase in tourist satisfaction in some aspects of staying in Albania compared to 2019. Tourist satisfaction with the quality of customs services has increased (from 3.06 in 2019 to 3.23 in 2020) and as well as the convenience of entry points (from 3.10 in 2019 to 3.25 in 2020).

**Table 9. Assessment of aspects of the stay taking into account the whole of Southern Albania**

(assessed with a scale from 1="Very dissatisfied" to 4="Very satisfied")

Touristic destination	Customs and Immigration services at the point of entry				Convenience of Point of Entry			
	2016	2018	2019	2020	2016	2018	2019	2020
Saranda- Promenade	3.21	3.16	3.13	3.17	3.22	3.21	3.24	3.26
Gjirokaster- Castle	2.65	2.59	3.07	3.19	2.66	2.79	3.16	3.28
Berat- Castle	2.95	3.54	2.66	3.19	2.97	3.53	2.76	3.22
Permet – Town Square	3.12	2.81	2.76	3.09	3.08	2.75	2.75	3.14
Blue Eye – Source	3.09	2.63	3.31	3.34	2.97	2.49	3.28	3.26
Porto Palermo – Castle	2.96	2.21	3.24	3.19	3.05	2.39	3.21	3.19
Zvernec – Church Entrance	2.97	2.95	3.24	3.34	2.98	2.93	3.17	3.31
Orik – Ancient City		3.04	3.37	3.39		3.01	3.29	3.36
Benja- Thermal Water		2.90	3.06	3.19		2.82	3.06	3.19
<b>Total</b>	<b>2.99</b>	<b>2.83</b>	<b>3.06</b>	<b>3.23</b>	<b>2.99</b>	<b>2.86</b>	<b>3.10</b>	<b>3.25</b>

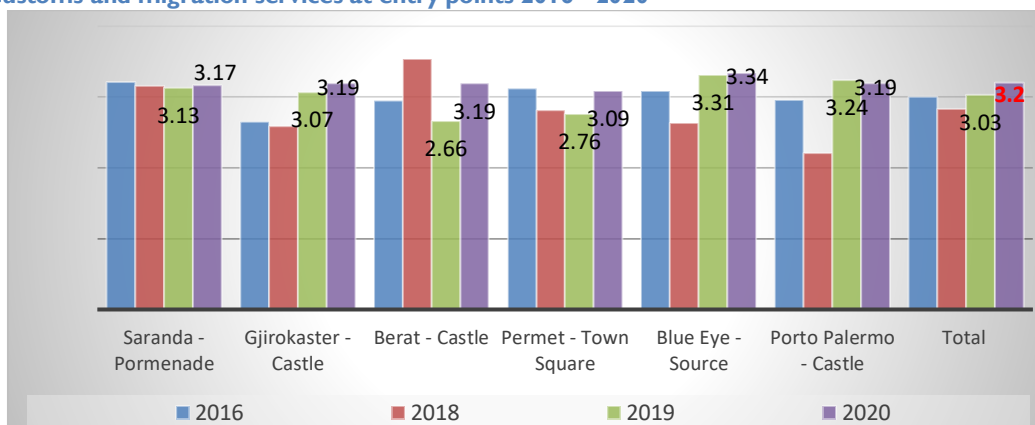
Source: Database 2016; ACER, Study 2018, 2019 and 2020

Figure 5 presents the evaluation of tourists on the quality of service of entry points in Albania in 2020, compared to 2019, 2018 and the basic study in 2016.<sup>12</sup> The evaluation is done according to scales 1 (very bad) to 4 (very good). In general terms, there is an increase in satisfaction with the quality of service (from an average rating of 3.03 to 3.2) at entry points in Albania, compared to a

<sup>12</sup>All relative estimates in the figures below have excluded Orik and Benja in the analysis, in order to recalculate a general average for those destinations that have been part of the study since 2016.

year ago. Tourists interviewed in the Blue Eye (3.34) express more satisfaction compared to other destinations included in the project.

Figure 5. Customs and migration services at entry points 2016 - 2020<sup>13</sup>



Source: Database 2016; ACER, Study 2018, 2019 and 2020

### 2.3.2.2 Personal Safety and Friendship of People

Personal safety is less assessed in Permet (2.69), while high perception of safety is expressed in the areas of Orik (3.30 and Porto Palermo (3.27). Compared to 2019, there are significant changes in the perception of tourists on personal safety, with a slight average increase of 0.17 (from 3.05 in 2019 to 3.22 in 2020).

Table 10. Assessment of aspects of stay, considering all destinations in Southern Albania (rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic destination	Personal Safety			
	2016	2018	2019	2020
Saranda- Promenade	3.33	2.70	3.09	3.21
Gjirokaster- Castle	3.59	3.54	2.96	3.19
Berat- Castle	3.41	3.86	2.69	3.19
Permet – Town Square	3.57	3.22	2.89	3.10
Blue Eye – Source	3.20	3.10	3.25	3.25
Porto Palermo - Castle	3.17	2.88	3.19	3.27
Zvernec – Church Entrance	3.38	3.22	3.24	3.26
Orik – Ancient City		3.20	3.21	3.30
Benja- Thermal Water		3.20	3.1	3.19
<b>Total</b>	<b>3.38</b>	<b>3.20</b>	<b>3.05</b>	<b>3.22</b>

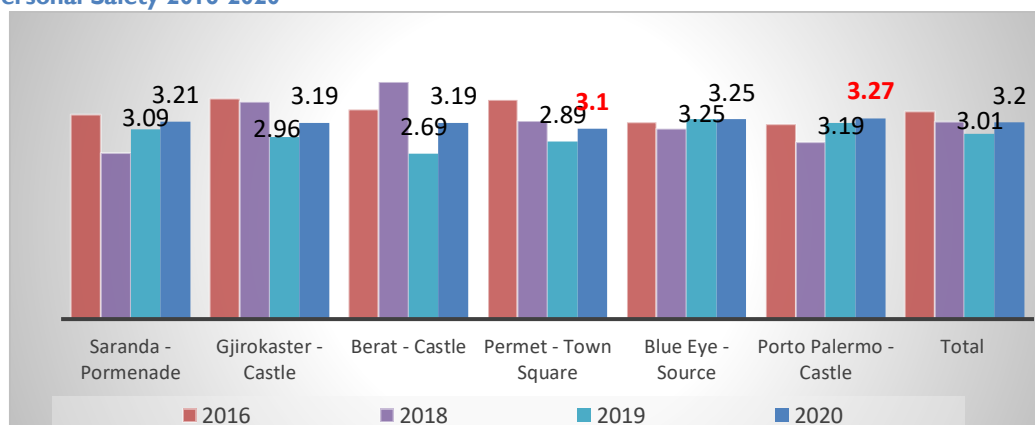
Source: Database 2016; ACER, Study 2018, 2019 and 2020

Personal safety has consistently been treated as an important condition for the development of tourism in the country. The changes in the world during the last two decades are great, such as: terrorist acts, natural disasters, pandemics, etc. The consequences of these events are clearly seen in the tourism industry.<sup>14</sup> Despite the global COVID-19 pandemic, the overall assessment of personal safety shows a slight increase (from 3.01 to 3.2) compared to a year ago. The same assessment of personal safety compared to the 2019 study is observed in the Blue Eye destination (3.25).

<sup>13</sup>Means for the years 2018-2020 are calculated considering only 6 areas to maintain comparability with 2016.

<sup>14</sup>Istvan, K. and Zimany, K. (2011) Safety and security in the age of global tourism: [file:///D:/USER/Downloads/Safety\\_And\\_Security\\_In\\_The\\_Age\\_Of\\_Global\\_Tourism\\_T.pdf](file:///D:/USER/Downloads/Safety_And_Security_In_The_Age_Of_Global_Tourism_T.pdf)

**Figure 6. Personal Safety 2016-2020**



Source: Database 2016; ACER, Study 2018, 2019 and 2020

To understand the behavior according to the status of the tourist, the following table reflects the opinions of national and international tourists on the issue of personal safety. For 2020, 20.1% of domestic tourists admit that their personal safety is "very bad/ bad" compared to only 16.0% of international tourists. In the 2019 study it is noticed that 33.3% of domestic tourists admit that their personal security is "very bad/ bad" compared to 21.1% of international tourists.

**Table 11. Personal safety disaggregated by tourist status 2016-2020**

Status	2016				2018			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	1.2%	3.3%	57.5%	38.1%	8.1%	31.9%	32.6%	27.4%
International	1.0%	3.6%	48.0%	47.4%	2.9%	14.2%	30.8%	52.1%

Status	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	4.6%	28.7%	42.3%	24.3%	2.3%	17.8%	36.4%	43.4%
International	1.2%	19.9%	38.3%	40.6%	2.5%	13.5%	42.5%	41.5%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

Table 12 summarizes the results of Table 11. Domestic tourists feel more insecure compared to international ones, but again compared to 2019 the percentage of domestic tourists who claim to feel "very bad / bad" about safety has decreased their personal (from 33.3% to 20.1%).

**Table 12. Personal safety disaggregated by tourist status 2016-2020**

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
Domestic	4.50%	95.60%	40.00%	60.00%	33.3%	66.7%	20.1%	79.9%
International	4.60%	95.40%	17.10%	82.90%	21.1%	78.9%	16.0%	84%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

The friendliness of the people in Albania remains well appreciated by tourists. Compared to 2019 the hospitality of people is almost the same (from 3.01 to 3.00). Meanwhile, hospitality was rated lower by tourists interviewed in Gjirokastra (2.94) and Permet (2.97).

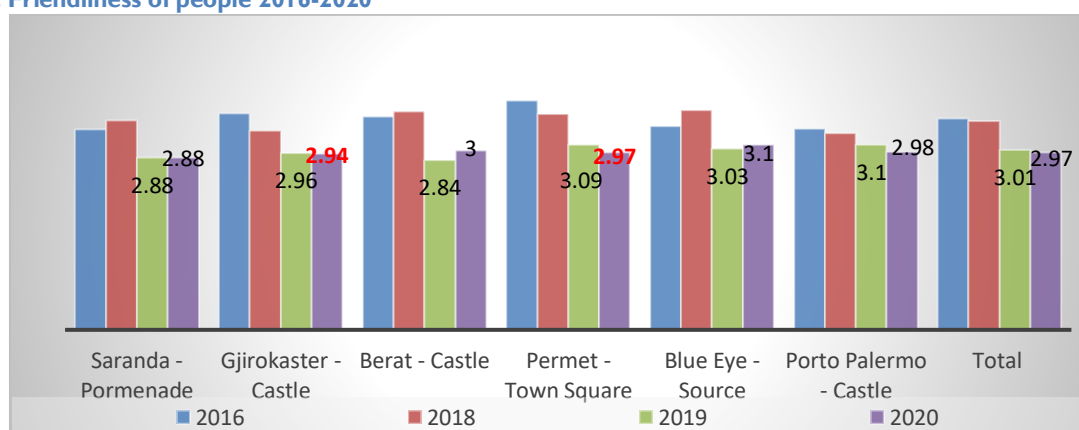
**Table 13. Assessment of aspects of stay, considering all destinations in Southern Albania**  
(rated from 1="Very dissatisfied" to 4="Very satisfied")

Destinacionituristik	Friendliness of the people			
	2016	2018	2019	2020
Saranda- Promenade	3.35	3.50	2.88	2.88
Gjirokaster- Castle	3.62	3.33	2.96	2.94
Berat- Castle	3.57	3.65	2.84	3.00
Permet – Town Square	3.83	3.61	3.09	2.97
Blue Eye – Source	3.41	3.67	3.03	3.07
Porto Palermo – Castle	3.36	3.29	3.1	2.98
Zvernec – Church Entrance	3.53	3.35	2.94	3.06
Orik – Ancient City		3.45	2.88	3.05
Benja- Thermal Water		3.54	3.15	3.04
<b>Total</b>	<b>2.99</b>	<b>3.50</b>	<b>3.01</b>	<b>3.00</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

Compared to other destinations, in terms of people friendliness, tourists are more satisfied in the area of Blue Eye (3.07), Zvernec (3.06) and Orik (3.05).

**Figure 7. Friendliness of people 2016-2020**



Source: Database 2016; ACER, Study 2018, 2019 and 2020

Disaggregated by tourist status for 2020, most locals are more satisfied than international tourists (69.9% of international tourists admit that people's friendship is very good/ good versus 72.4% of domestic tourists).

**Table 14. Friendliness of people disaggregated by tourist status 2016-2020**

Status	2016				2018			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	1.8%	2.5%	46.5%	49.3%	2.9%	17.1%	32.1%	47.9%
International	0.4%	3.2%	33.7%	62.7%	2.3%	7.3%	23.9%	66.6%
Status	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	2.5%	30.0%	38.1%	29.5%	1.0%	26.6%	41.1%	31.2%
International	1.2%	24.2%	42.1%	32.4%	0.6%	29.5%	43.6%	26.3%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

There is an increase of 4.9% of domestic tourists, who perceive the kindness of the Albanian people as "very good/ good" compared to 2019, while there is a decrease of 4.7% in the percentage of international tourists who perceive the kindness of people in 2020 as "very good/ good" compared to 2019.

**Table 15. Friendliness of people disaggregated by tourist status 2016-2020**

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
Domestic	4.30%	95.80%	20.00%	80.00%	32.5%	67.5%	27.6%	72.4%
International	3.60%	96.40%	9.60%	90.50%	25.6%	74.6%	30.1%	69.9%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

### 2.3.2.3 Local Gastronomy, Quality of Restaurants and Knowledge of New Language

Traditional food in Albania is estimated at the average rate (3.03). Tourists have expressed the highest level of satisfaction in Gjirokastra (3.22) and Benja (3.15). Tourists interviewed in the area of Permet, Blue Eye, Zver nec and Or ik have evaluated traditional food at a lower level compared to 2019.

Tourists who were interviewed in Zver nec and Or ik are less satisfied compared to other destinations. Meanwhile, from the data of Figure 8, compared to 2019, it is noticed that there is a decrease in the average rating of local gastronomy in the area of Saranda (from 3.20 to 3.11), Permet (from 3.24 to 2.93) and the Blue Eye (from 3.09 in 2.92).

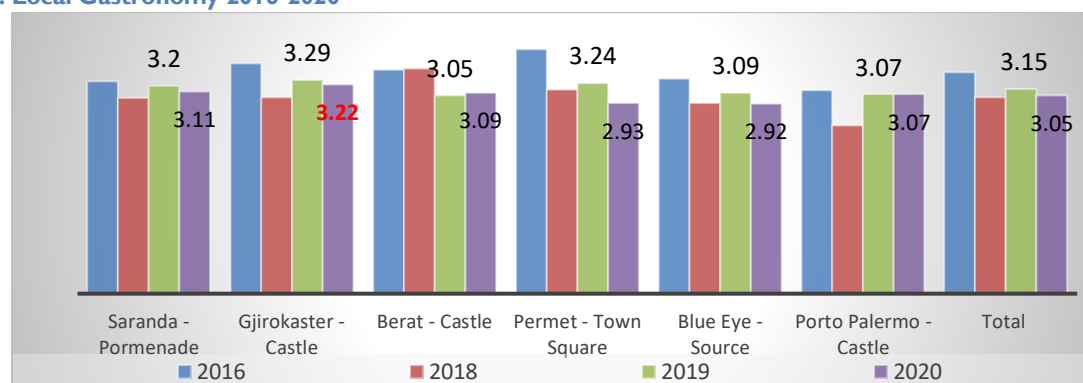
**Table 16. Assessment of aspects of stay, considering all destinations in Southern Albania**

(rated from 1="Very dissatisfied" to 4="Very satisfied")

Toristic destination	Local Gastronomy			
	2016	2018	2019	2020
Saranda- Promenade	3.27	3.01	3.20	3.11
Gjirokaster- Castle	3.54	3.02	3.29	3.22
Berat- Castle	3.44	3.46	3.05	3.09
Permet – Town Square	3.76	3.14	3.24	2.93
Blue Eye – Source	3.31	2.93	3.09	2.92
Porto Palermo – Castle	3.13	2.59	3.07	3.07
Zver nec – Church Entrance	3.41	3.07	2.84	2.87
Or ik – Ancient City		3.18	2.94	2.87
Benja- Thermal Water		3.13	3.24	3.15
<b>Total</b>	<b>3.42</b>	<b>3.05</b>	<b>3.10</b>	<b>3.03</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Figure 8. Local Gastronomy 2016-2020**



Source: Database 2016; ACER, Study 2018, 2019 and 2020

Disaggregated by tourist status, for 2020 it turns out that internationals are more satisfied than domestic tourists (78.9% versus 76.3%). This also comes as a result of facing new tastes previously unproven by foreign tourists. However, compared to 2019 there is a slight decrease in the percentage

of domestic tourists who think that the national cuisine / drinks are "very bad/ bad" (from 23.8% to 23.7%).

**Table 17. Local gastronomy disaggregated by tourist status 2016-2020**

Status	2016				2018			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	1%	3%	49%	48%	7%	34%	33%	26%
International	1%	2%	50%	46%	2.0%	19%	45%	34%
Status	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	3.9%	19.9%	42.3%	33.9%	<b>5.0%</b>	<b>18.7%</b>	47.3%	29.0%
International	1.7%	18.0%	45.1%	35.2%	<b>2.3%</b>	<b>18.7%</b>	49.3%	29.7%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Table 18. Local gastronomy disaggregated by tourist status 2016-2020**

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
Domestic	4%	97%	41%	59%	<b>23.8%</b>	76.8%	<b>23.7%</b>	<b>76.3%</b>
International	3%	96%	21%	79%	19.7%	80.3%	21.1%	<b>78.9%</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

In the 2020 study, the quality of restaurants in general has decreased slightly compared to a year ago. However, in the area of Gjirokastra (3.13), Porto Palermo (3.04) and Benja (3.04) tourists are more satisfied with the quality of restaurants, compared to other tourist areas.

**Table 19. Assessment of aspects of stay, considering all destinations in Southern Albania**

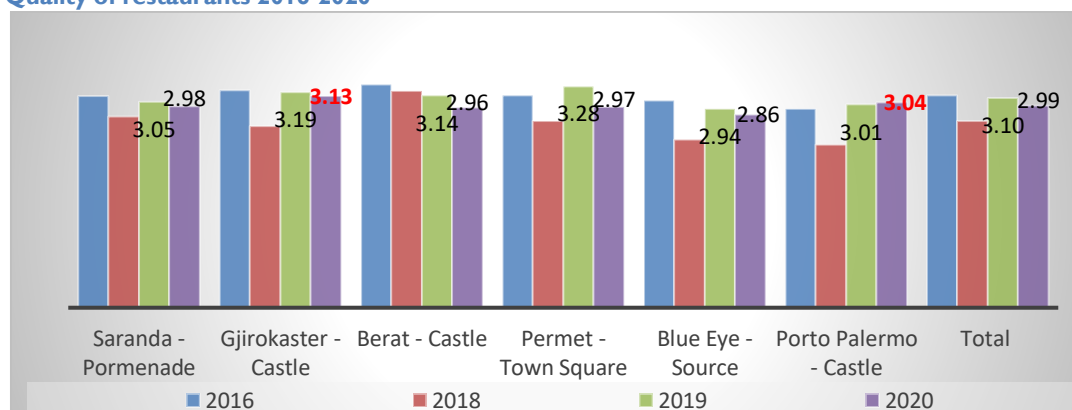
(rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic destination	Quality of restaurants			
	2016	2018	2019	2020
Saranda- Promenade	3.13	2.83	3.05	2.98
Gjirokaster- Castle	3.22	2.69	3.19	<b>3.13</b>
Berat- Castle	3.30	3.21	3.14	2.96
Permet – Town Square	3.14	2.76	3.28	2.97
Blue Eye – Source	3.07	2.49	2.94	2.86
Porto Palermo – Castle	2.94	2.41	3.01	<b>3.04</b>
Zvernec – Church Entrance	3.13	2.96	2.91	2.88
Orik – Ancient City		3.22	2.88	2.83
Benja- Thermal Water		2.79	3.11	<b>3.04</b>
<b>Total</b>	<b>3.13</b>	<b>2.79</b>	<b>3.06</b>	<b>2.97</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

Oriku (2.83) and Blue Eye (2.86) have the lowest level of restaurant quality, while two other destinations with a level below 3 (maximum is 4) are Zvernec, Permet, Berat and Saranda. These results are almost the same as a year ago, so they should serve as a message to state authorities to increase their oversight of Albanian restaurants.

Figure 9. Quality of restaurants 2016-2020



Source: Database 2016; ACER, Study 2018, 2019 and 2020

For this aspect, domestic tourists are more dissatisfied compared to international tourists. For 2020, 27.4% of domestic tourists say that the quality of restaurants is "very bad/ bad" compared to 26.7% of international tourists who have such an opinion. It should be noted that there is an increase in the share of tourists, who express negatively about the quality of restaurants, compared to a year ago (Table 21).

Table 20. Quality of restaurants disaggregated by tourist status 2016-2020

Status	2016				2018			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	1.90%	12.70%	64.60%	20.90%	10.90%	40.10%	38.70%	10.20%
International	1.60%	4.10%	68.10%	26.10%	5.10%	26.50%	47.40%	21.00%

Status	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	2.6%	22.0%	51.1%	24.2%	1.3%	26.1%	49.4%	23.2%
International	0.7%	19.9%	45.1%	34.2%	0.6%	26.1%	46.1%	27.2%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

Table 21. Quality of restaurants disaggregated by tourist status 2016-2020

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
Domestic	15%	86%	51%	49%	22.6%	77.4%	27.4%	72.6%
International	6%	94%	32%	68%	20.6%	79.4%	26.7%	73.3%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

The quality of services in restaurants and hotels has decreased (from 3.10 to 3.06) compared to the study of 2019. Tourists interviewed in the area of Blue Eye (2.91), Orik (2.92), Berat (2.97) and Zvernec (2.98) are less satisfied with the quality of services in restaurants or hotels (with a rating from 1 to 4). From focus group discussions, it is reported that a large number of restaurants have been closed due to the pandemic situation. Meanwhile, those restaurants / hotels that have been open, due to declining revenues have found it difficult to invest in the quality of restaurants or hotels.



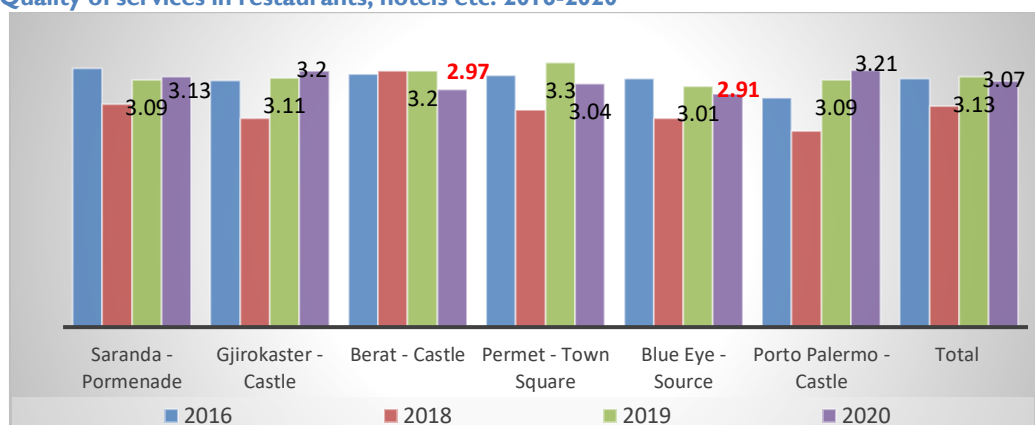
**Table 22. Assessment of aspects of stay, considering all destinations in Southern Albania**  
(rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic destinations	Quality of services (restorants, hotels etc.)			
	2016	2018	2019	2020
Saranda- Promenade	3.23	2.78	3.09	3.13
Gjirokaster- Castle	3.08	2.61	3.11	3.20
Berat- Castle	3.16	3.20	3.20	<b>2.97</b>
Permet – Town Square	3.14	2.71	3.30	3.04
Blue Eye – Source	3.10	2.61	3.01	<b>2.91</b>
Porto Palermo – Castle	2.86	2.45	3.09	3.21
Zvernec – Church Entrance	3.09	2.93	2.92	<b>2.98</b>
Orik – Ancient City		3.07	2.99	<b>2.92</b>
Benja- Thermal Water		2.76	3.19	3.16
<b>Total</b>	<b>3.10</b>	<b>2.78</b>	<b>3.10</b>	<b>3.06</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

The tourist destinations, which are rated with the best quality of services in restaurants and hotels, are Porto Palermo (3.21), Gjirokastra (3.20) and Saranda (3.13). Compared to a year ago, tourists' satisfaction with the quality of services has decreased mainly in the areas of Berat (from 3.20 to 2.97) and Përmet (from 3.30 to 3.04). This result should be seen as an opportunity for future intervention and improvement.

**Figure 10. Quality of services in restaurants, hotels etc. 2016-2020**



Source: Database 2016; ACER, Study 2018, 2019 and 2020

The next aspect, which determines the quality of service, is the knowledge of foreign languages by the staff.

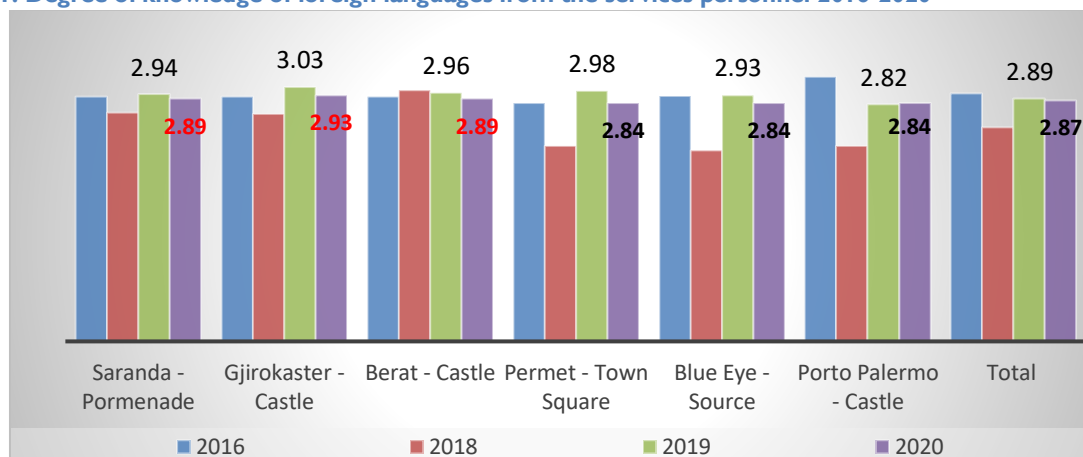
**Table 23. Assessment of aspects of stay, considering all destinations in Southern Albania**  
(rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic destination	Knowledge of foreign languages			
	2016	2018	2019	2020
Saranda- Promenade	2.91	2.72	2.94	<b>2.89</b>
Gjirokaster- Castle	2.91	2.71	3.03	<b>2.93</b>
Berat- Castle	2.91	2.99	2.96	<b>2.89</b>
Permet – Town Square	2.84	2.33	2.98	2.84
Blue Eye – Source	2.92	2.27	2.93	2.84
Porto Palermo – Castle	3.15	2.33	2.82	2.84
Zvernec – Church Entrance	2.97	2.53	2.24	2.86
Orik – Ancient City		2.73	2.76	2.84
Benja- Thermal Water		2.61	3.03	<b>2.89</b>
<b>Total</b>	<b>2.95</b>	<b>2.56</b>	<b>2.89</b>	<b>2.87</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

Regarding the knowledge of a foreign language, tourists are most satisfied in the areas of Gjirokastra (2.93), Saranda (2.89), Berat (2.89; Figure 11).

Figure 11. Degree of knowledge of foreign languages from the services personnel 2016-2020



Source: Database 2016; ACER, Study 2018, 2019 and 2020

### 2.3.2.4 Telecommunication, Public Transport, Payment with credit/ debit cards and Quality of Guides

The quality of telecommunications was assessed with an average score of 3.09. This indicator experienced a slight decrease of 0.04 points compared to a year ago. Also this year, it should be noted that the quality of telecommunications varies depending on the destination, as long as not all of Albania is fully covered with the highest internet speed. Tourists expressed more satisfaction with local public transport compared to last year (from 2.73 to 2.90). In terms of access to local public transport, tourists rated the area of Saranda (2.79) and Gjirokastra (2.82) with a lower level compared to other destinations included in the project. Foreign tourists are concerned about the lack of ability to pay by bank card, because most businesses in Albania are not yet equipped with Points of Sale (POS terminals).

Table 24. Assessment of aspects of stay, considering all destinations in Southern Albania (rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic destination	Telecommunication				Public Transport			
	2016	2018	2019	2020	2016	2018	2019	2020
Saranda- Promenade	2.65	3.12	2.59	2.76	2.83	2.85	2.57	2.79
Gjirokaster- Castle	3.26	3.36	2.71	2.80	2.47	2.21	2.68	2.82
Berat- Castle	3.11	3.32	3.22	3.14	2.73	2.29	2.84	3.01
Permet – Town Square	3.23	2.94	3.26	3.09	3.04	2.35	3.19	2.99
Blue Eye – Source	2.67	2.89	3.36	3.06	2.75	2.35	2.75	2.86
Porto Palermo – Castle	3.39	2.70	3.26	2.78	2.93	1.84	2.63	2.97
Zvernec – Church Entrance	3.06	2.90	3.03	3.36	2.84	2.34	2.45	2.89
Orik – Ancient City		2.99	3.59	3.41		2.31	2.92	2.89
Benja- Thermal Water		2.93	3.14	3.06		2.24	2.70	2.88
<b>Totals</b>	<b>3.06</b>	<b>3.00</b>	<b>3.13</b>	<b>3.09</b>	<b>2.80</b>	<b>2.32</b>	<b>2.73</b>	<b>2.90</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

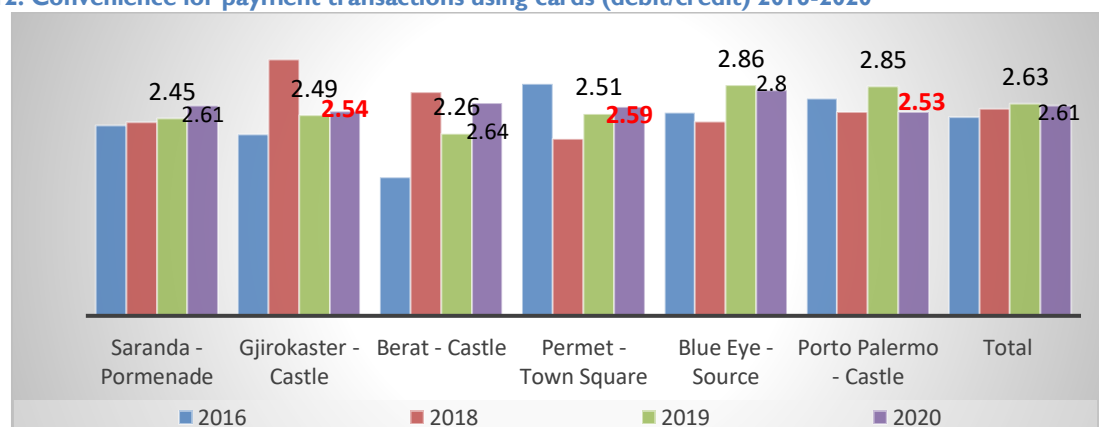
**Table 25. Assessment of aspects of stay, considering all destinations in Southern Albania**  
(rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic destination	Payment with credit/ debit cards			
	2016	2018	2019	2020
Saranda- Promenade	2.31	2.39	2.45	2.61
Gjirokaster- Castle	2.24	3.17	2.49	2.54
Berat- Castle	1.60	2.85	2.26	2.64
Permet – Town Square	2.95	2.13	2.51	2.59
Blue Eye – Source	2.55	2.38	2.86	2.80
Porto Palermo – Castle	2.79	2.60	2.85	2.53
Zvernec – Church Entrance	2.51	2.50	2.85	2.81
Orik – Ancient City		2.58	2.43	2.81
Benja- Thermal Water		2.47	2.84	2.82
<b>Total</b>	<b>2.42</b>	<b>2.54</b>	<b>2.59</b>	<b>2.68</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

The possibility of making payments using bank cards is another aspect of the stay, which is estimated at an average of 2.61 for 2020. In Figure 12, it is noted that we have had an increase in the rating for this aspect over the years of study compared to the baseline study. 2016, the study of 2018 and 2019. However, tourists are generally not very satisfied with this practice in Albania, where the lowest levels during 2020 were accepted by tourists interviewed in Porto Palermo, Gjirokastra and Përmet. As mentioned above, this result is to be expected, considering the low prevalence of POS in general.

**Figure 12. Convenience for payment transactions using cards (debit/credit) 2016-2020**



Source: Database 2016; ACER, Study 2018, 2019 and 2020

International tourists find it more necessary to use debit / credit cards at points of sale when receiving a service. Compared to 2019, the percentage of international tourists who claim that the convenience for payment transactions using debit/ credit card is "very bad / bad" has decreased (from 36.7% to 35.2%). The need to make payments through the use of debit / credit cards is also important for domestic tourists. The results show that the percentage of domestic tourists who claim that the suitability for card payment transactions is "very good" (from 55% to 66.2%) has increased.

**Table 26. Convenience for payment transactions using cards (debit/credit) 2016-2020**

Status	2016				2018			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
<b>Domestic</b>	17.1%	9.8%	56.1%	17.1%	34.7%	39.7%	19.8%	5.8%
<b>International</b>	24.3%	17.4%	47.2%	11.1%	18.5%	42.4%	26.10%	13.0%

Status	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
<b>Domestic</b>	18.2%	26.8%	39.5%	15.5%	8.3%	25.5%	<b>50.8%</b>	<b>15.4%</b>
<b>International</b>	13.4%	23.3%	43.8%	19.3%	15.8%	19.4%	<b>53.9%</b>	<b>10.9%</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Table 27. Convenience for payment transactions using cards (debit/credit) 2016-2020**

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
<b>Domestic</b>	26.9%	73.1%	74.4%	25.6%	45%	<b>55%</b>	33.8%	<b>66.2%</b>
<b>International</b>	41.7%	58.3%	60.9%	39.1%	<b>36.7%</b>	63.3%	<b>35.2%</b>	64.8%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

The year of 2020 was a difficult year for the tourism industry having a negative impact on service providers on tour guides. A significant portion of tour operators offering guides were shut down, due to the status of tourists this year the independent tourist prevailed. *Despite the difficult period from the global epidemic, the guide providers who continued to work despite a small number of tourists, managed to provide high quality service.* For this, tourists were asked about the quality of guides, where they generally express themselves with an average high rating compared to a year ago (2.64 in 2019 compared to 2.86 in 2020).

**Table 28. Assessment of aspects of stay, considering all destinations in Southern Albania**

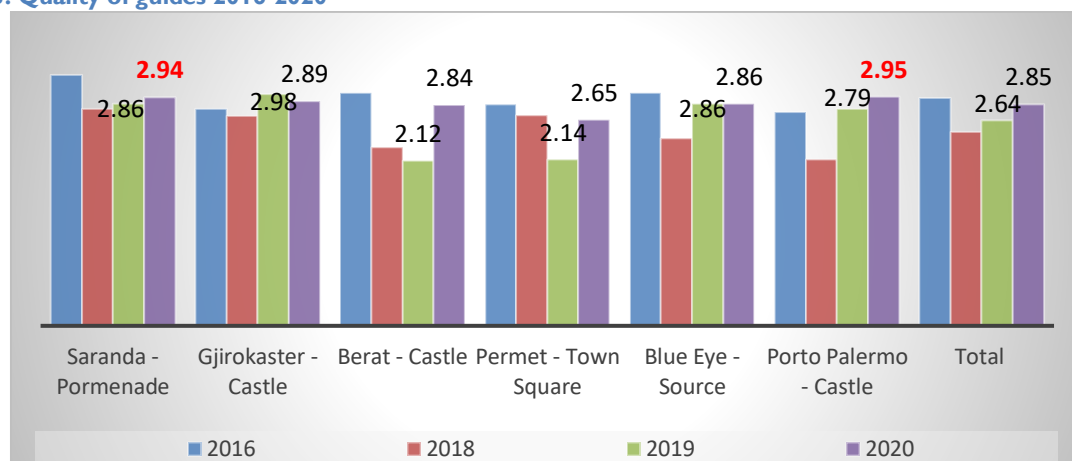
(rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic destination	Quality of guides			
	2016	2018	2019	2020
Saranda- Promenade	3.23	2.79	2.86	<b>2.94</b>
Gjirokaster- Castle	2.79	2.70	2.89	2.89
Berat- Castle	3.00	2.30	2.12	2.84
Permet – Town Square	2.85	2.71	2.14	2.65
Blue Eye – Source	3.00	2.41	2.86	2.86
Porto Palermo – Castle	2.75	2.14	2.79	<b>2.95</b>
Zvernec – Church Entrance	2.88	2.36	2.31	2.89
Orik – Ancient City		2.42	2.70	2.86
Benja- Thermal Water		2.34	2.67	2.86
<b>Total</b>	<b>2.93</b>	<b>2.47</b>	<b>2.64</b>	<b>2.86</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

The quality of guides is evaluated more positively in the destination of Zvernec (2.95) and Saranda (2.94) compared to other tourist destinations. Tourists in tourist destinations such as Permeti (2.65), Oriku (2.86) and Benja (2.86) rate the quality of guides with a lower average compared to other tourist destinations where the PIUTD is being implemented.

Figure 13. Quality of guides 2016-2020



Source: Database 2016; ACER, Study 2018, 2019 and 2020

The analysis of the guides of quality by tourist status is given in Tables 29 and 30. The satisfaction of domestic and international tourists has increased in relation to the quality of guides, compared to a year ago. 73.9% of domestic tourists claim that the quality of guides is "very good / good" compared to 58.2% of domestic tourists for 2019. Meanwhile, 72.4% of international tourists claim that the quality of guides is "very good / good" compared to 65.5% of international tourists for the year 2019.

Table 29. Quality of guides disaggregated by tourist status 2016-2020

Status	2016				2018			
	Shumëkeq	Keq	Mirë	Shumëmirë	Shumëkeq	Keq	Mirë	Shumëmirë
Domestic	14.6%	19.5%	58.5%	7.3%	34.7%	39.7%	19.8%	5.8%
International	6.8%	9.9%	64.0%	19.3%	18.5%	42.4%	26.1%	13.0%

Status	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	23.8%	18.0%	39.9%	18.3%	11.1%	15.0%	51.2%	22.7%
International	15.2%	19.2%	43.8%	21.7%	5.3%	22.3%	52.8%	19.6%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

Table 30. Quality of guides disaggregated by tourist status 2016-2020

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
Domestic	34.1%	66%	74%	26%	41.8%	58.2%	26.1%	73.9%
International	16.7%	83.3%	60.9%	39.1%	34.4%	65.5%	27.6%	72.4%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

### 2.3.3 Other Touristic Aspects 2016, 2018, 2019 dhe 2020<sup>15</sup>

#### 2.3.3.1 Easiness of Finding Information and Location of the Touristic Destination

In tourist areas such as Benja, Porto Palermo, Zvernec, Orrik and Blue Eye, tourists were asked about a number of other aspects, which are mainly related to the cleanliness and infrastructure of the visited destination. Their rating is measured on a scale of 1 - very bad and 4 - very good. The first aspect relates to the ease of finding different sources of information on the destination they

<sup>15</sup>In the 2016 study data are available only for the Porto palermo and the Blue Eye.

will be visiting. The ease of finding information *has increased slightly* compared to a year ago and the baseline study, as a result of the increased variety of information sources.

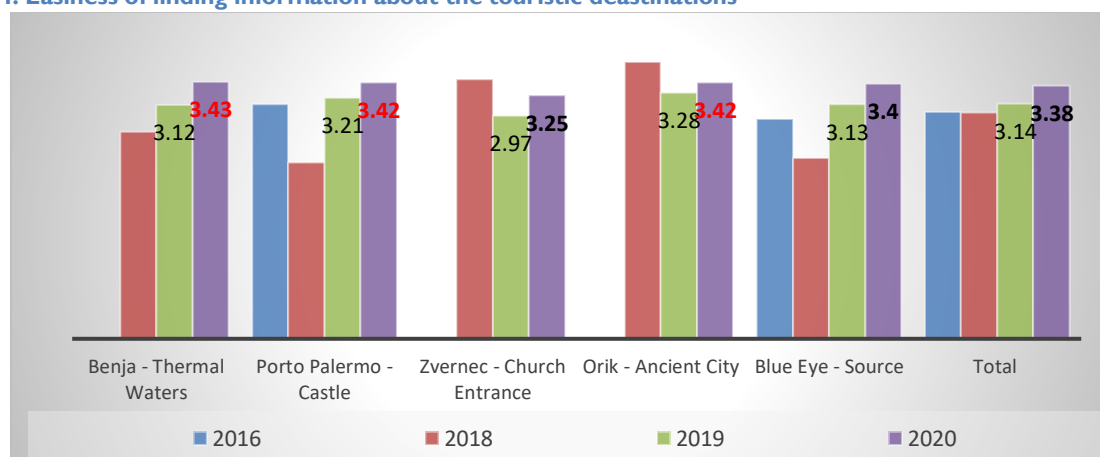
**Table 31. Easiness of finding information about the touristic destinations**  
(rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic Destinations	Easiness of finding information			
	2016	2018	2019	2020
Benja- Thermal Water		2.76	3.12	3.43
Porto Palermo –Castle	3.13	2.35	3.21	3.42
Zver nec – Church Entrance		3.46	2.97	3.25
Orik – Ancient City		3.69	3.28	3.42
Blue Eye- The Source	2.93	2.41	3.13	3.4
<b>Total</b>	<b>3.03</b>	<b>3.02</b>	<b>3.14</b>	<b>3.35</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

Tourists find information about tourist destinations like Benja (3.43), Porto Palermo (3.42) and Orik (3.42) more easily compared to tourist destinations. Figure 14 shows that for 2020 tourists find it easier to find information on tourist destinations (from 3.14 for 2019 to 3.38 for 2020).

**Figure 14. Easiness of finding information about the touristic destinations**



Source: Database 2016; ACER, Study 2018, 2019 and 2020

Compared to a year ago, international and domestic tourists find it easier to find information about the tourist area (Domestic tourists - from 76.6% to 92.1%; International tourists - from 82.3% to 93.9%).

**Table 32. Easiness of finding information about the destinations disaggregated by tourist status 2016-2020**

Status	2016				2018			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	8.3%	10.4%	61.5%	19.8%	1.2%	39.5%	27.6%	31.7%
International	3.1%	5.6%	70.8%	20.5%	3.5%	32.5%	22.8%	41.2%
Status	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	2.8%	20.6%	45.6%	31.0%	1.6%	6.3%	50.1%	42.0%
International	2.7%	15.0%	41.5%	40.8%	1.3%	4.8%	47.6%	46.3%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Table 33. Easiness of finding information about the destinations disaggregated by tourist status 2016-2020**

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
Domestic	18.7%	81.3%	40.7%	59.3%	23.4%	76.6%	7.9%	92.1%
International	8.7%	91.3%	36%	64%	17.7%	82.3%	6.1%	93.9%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

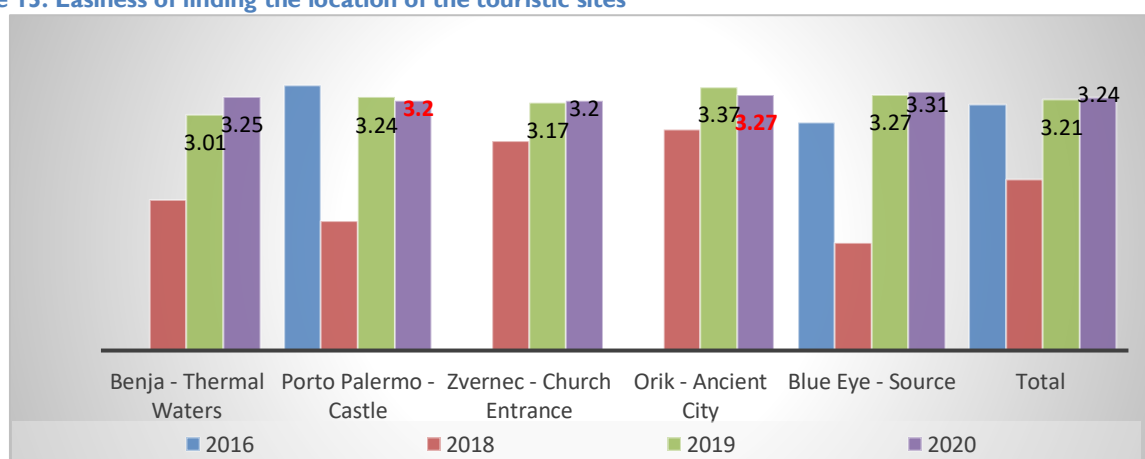
The ease of finding the destination has increased slightly compared to a year ago and the baseline study, as a result of the increased variety of information sources. Compared to a year ago, tourists claim that they find it more difficult to find the location of areas like Oriku (from 3.37 to 3.27) and Porto Palermo (from 3.24 to 3.20).

**Table 34. Easiness of finding the destinations**  
(rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic destinations	Easiness of finding the destinations			
	2016	2018	2019	2020
Benja- Thermal Water		1.93	3.01	3.25
Porto Palermo –Castle	3.39	1.66	3.24	3.20
Zver nec – Church Entrance		2.68	3.17	3.20
Orik – Ancient City		2.83	3.37	3.27
Blue Eye- The Source	2.92	1.38	3.27	3.31
<b>Total</b>	<b>3.15</b>	<b>2.19</b>	<b>3.21</b>	<b>3.25</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Figure 15. Easiness of finding the location of the touristic sites**



Source: Database 2016; ACER, Study 2018, 2019 and 2020

For domestic tourists, finding the location of tourist areas has improved, compared to a year ago (from 74.0% to 75.3%). International tourists admit that they find it more difficult to find tourist destinations compared to a year ago (21.2% of them claim that finding a destination is "bad/ very bad").

**Table 35. Ease of finding the location of the destination disaggregated by tourist status 2016-2020**

Status	2016				2018			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
<b>Domestic</b>	5.2%	10.4%	55.2%	29.2%	1.8%	29.9%	25.2%	43.1%
<b>International</b>	2.4%	8.5%	56.7%	32.3%	2.9%	28.1%	18.9%	50.1%

Status	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
<b>Domestic</b>	4.7%	21.3%	41.9%	32.1%	3.2%	21.6%	33.5%	41.8%
<b>International</b>	2.3%	16.0%	35.6%	46.1%	1.6%	19.6%	26.7%	52.1%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Table 36. Ease of finding the location of the destination disaggregated by tourist status 2016-2020**

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
<b>Domestic</b>	15.6%	84.4%	31.7%	68.3%	26.0%	74.0%	24.8%	75.3%
<b>International</b>	11%	89%	31.0%	69.0%	18.3%	81.7%	21.2%	78.8%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

### 2.3.3.2 Walking pathways and Signage

In terms of infrastructure quality, it has been evaluated positively this year, experiencing an increase in evaluation compared to a year ago. More specifically, the quality of the pathways has improved compared to the studies of previous years (2.31 in 2016; 1.07 in 2018, 2.75 in 2019 and 2.88 in 2020).

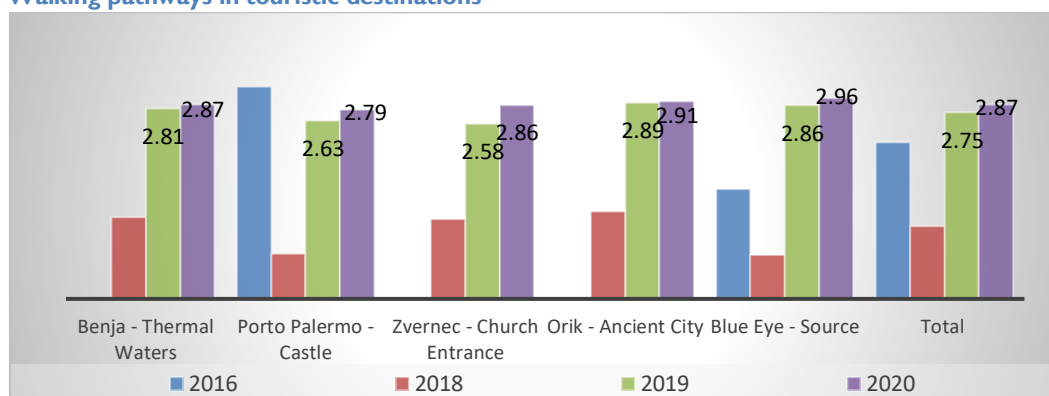
**Table 37. Quality of walking pathways in touristic destination**  
(rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic Destinations	Quality of walking pathways			
	2016	2018	2019	2020
Benja- Thermal Water		1.20	2.81	2.87
Porto Palermo –Castle	3.13	0.67	2.63	2.79
Zver nec – Church Entrance		1.18	2.58	2.86
Orik – Ancient City		1.29	2.89	2.91
Blue Eye- The Source	1.62	0.65	2.86	2.96
<b>Total</b>	<b>2.31</b>	<b>1.07</b>	<b>2.75</b>	<b>2.88</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

As shown in Figure 16, in all touristic destinations (Benja, Porto Palermo, Zver nec, Orik and the Blue Eye) the quality of the walking pathways has improved.

**Figure 16. Walking pathways in touristic destinations**



Source: Database 2016; ACER, Study 2018, 2019 and 2020

In 2020, the number of domestic and international tourists who rate the quality of the walking pathways as "very good/ good" has increased, compared to previous years.

**Table 38. Quality of walking pathways disaggregated by tourist status 2016-2020**

Status	2016				2018			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	44.7%	20%	27.1%	8.2%	26.9%	48.5%	24.6%	0.0%
International	25%	14.5%	47.4%	13.2%	16.2%	55.1%	27.3%	1.40%
Status	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	15.3%	25.8%	40.9%	18.0%	9.8%	18.5%	44.6%	27.0%
International	8.5%	19.1%	41.8%	30.6%	6.4%	16.7%	45.0%	31.8%

Source: Database 2016; ACER, Study 2018, 2019 and 2020



**Table 39. Quality of walking pathways disaggregated by tourist status 2016-2020**

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
Domestic	64.7%	35.3%	75.4%	24.6%	41.1%	<b>58.9%</b>	28.3%	<b>71.7%</b>
International	39.5%	60.5%	71.3%	28.7%	27.6%	<b>72.4%</b>	23.1%	<b>76.8%</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

The interpretation/ signage available is rated higher compared to previous years (2.77 in the baseline survey; 1.70 in the 2018 study and 2.79 in the 2019 study) except in Porto Palermo and Orik.

**Table 40. Interpretation/ signage available in touristic destination**

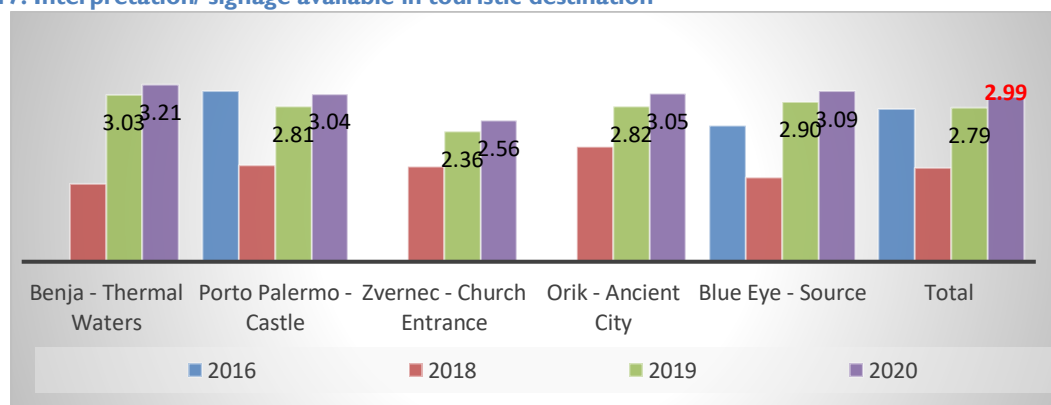
(rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic Destination	Signage			
	2016	2018	2019	2020
Benja- Thermal Water		1.41	3.03	3.21
Porto Palermo –Castle	3.10	1.75	2.81	3.04
Zvernec – Church Entrance		1.73	2.36	2.56
Orik – Ancient City		2.08	2.82	3.05
Blue Eye- The Source	2.47	1.53	2.90	3.09
<b>Total</b>	<b>2.77</b>	<b>1.70</b>	<b>2.79</b>	<b>2.99</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

Tourists are more satisfied with the interpretation/ signage available in areas like Benja (3.21) and the Blue Eye (3.09). Satisfaction with the signage is estimated at lower values by tourists in the Zvernec destination (2.56).

**Figure 17. Interpretation/ signage available in touristic destination**



Source: Database 2016; ACER, Study 2018, 2019 and 2020

Regarding the status of tourists, the number of domestic and international tourists, who assess the signage available as "very good/ good", has increased compared to a year ago (Domestic tourists - from 67.2% to 89.2%; international tourists - from 76.6% to 94.5%; Table 41 and Table 42).

**Table 41. Interpretation/ signage available by tourist status 2016-2020**

Status	2016				2018			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	12.8%	17%	63.8%	6.4%	8.4%	33.5%	23.4%	34.7%
International	6.3%	13.9%	67.8%	12%	10.1%	28.7%	25.8%	35.4%
Status	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	9.7%	23.1%	43.4%	23.8%	10.8%	0.0%	66.0%	<b>23.3%</b>
International	6.0%	17.4%	54.2%	22.4%	5.5%	0.0%	73.0%	<b>21.5%</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Table 42. Interpretation/ signage available disaggregated by tourist status 2016-2020**

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
<b>Domestic</b>	29.8%	70.2%	41.9%	58.1%	32.8%	<b>67.2%</b>	10.8%	<b>89.2%</b>
<b>International</b>	20.2%	79.8%	38.8%	61.2%	23.4%	<b>76.6%</b>	5.5%	<b>94.5%</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

### 2.3.3.3 Level of Cleanliness in the Area, Quality and Availability of Sanitary Equipment

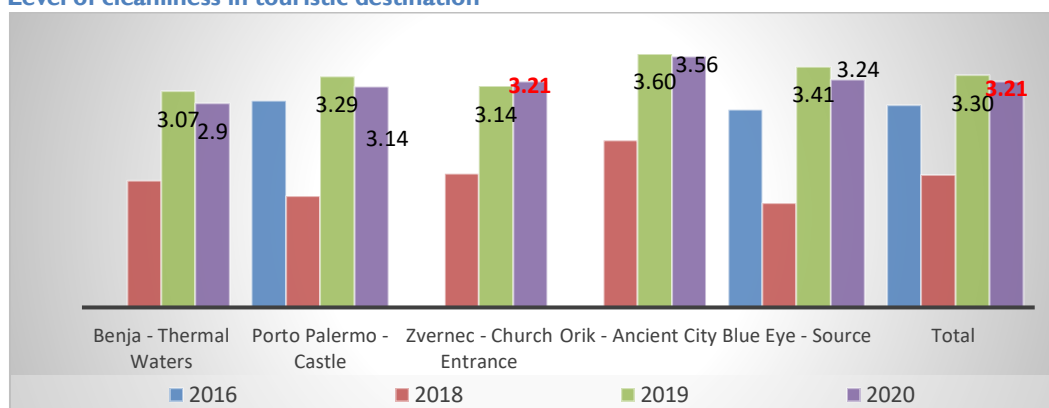
Tourists were asked about their satisfaction about the level of cleanliness. In total, compared to a year ago the value of the level of cleanliness has decreased slightly (from 3.30 to 3.21). Compared to the 2019 study, the level of cleanliness has increased in the Zvernecestination (from 3.14 to 3.21) but has decreased slightly in tourist areas such as Benja, Porto Palermo, Orik and the Blue Eye.

**Table 43. Level of cleanliness in touristic destination**  
(rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic Desyinations	Level of cleanliness			
	2016	2018	2019	2020
Benja- Thermal Water		1.80	3.07	2.90
Porto Palermo –Castle	2.94	1.58	3.29	3.14
Zvernece – Church Entrance		1.9	<b>3.14</b>	<b>3.21</b>
Orik – Ancient City		2.37	3.60	3.56
Blue Eye- The Source	2.81	1.48	3.41	3.24
<b>Total</b>	<b>2.87</b>	<b>1.88</b>	<b>3.30</b>	<b>3.21</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Figure 18. Level of cleanliness in touristic destination**



Source: Database 2016; ACER, Study 2018, 2019 and 2020

Compared to a year ago, international and domestic tourists are less satisfied than a year ago about the level of cleanliness. In the 2020 study, it turns out that 77.7% of domestic tourists rate the level of cleanliness very well compared to 78.1% of international tourists.

**Table 44. Level of cleanliness disaggregated by tourist destinations 2016-2020**

Status	2016				2018			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
<b>Domestic</b>	6.3%	21.1%	66.3%	6.3%	8.4%	33.5%	23.4%	34.7%
<b>International</b>	3.6%	14.5%	64.2%	17.6%	10.1%	28.7%	25.8%	35.4%

Status	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
<b>Domestic</b>	2.3%	14.3%	44.1%	39.3%	3.8%	18.5%	32.3%	<b>45.4%</b>
<b>International</b>	0.7%	14.6%	33.4%	51.3%	2.6%	19.3%	25.7%	<b>52.4%</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Table 45. Level of cleanliness disaggregated by tourist destinations 2016-2020**

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
<b>Domestic</b>	27.4%	72.6%	41.9%	58.1%	16.6%	<b>83.4%</b>	22.3%	<b>77.7%</b>
<b>International</b>	18.1%	81.9%	38.8%	61.2%	15.3%	<b>84.7%</b>	21.9%	<b>78.1%</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

In the values from 1 (very dissatisfied) to 4 (very satisfied), the quality and availability of sanitation facilities in 2020 is estimated at 3.13 in total, which has increased compared to 2019. From figure 19 it can be seen that in all tourist destinations the quality and availability of sanitation facilities has increased compared to 2019, the study of 2018 and 2016.

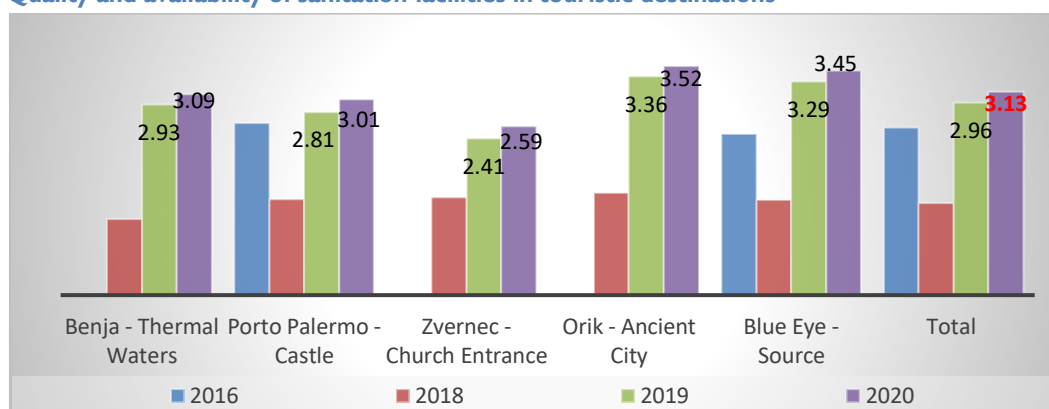
**Table 46. Quality and availability of sanitation facilities in touristic destinations**

(rated from 1="Very dissatisfied" to 4="Very satisfied")

Touristic destinations	Quality and availability of toilets and sanitation facilities			
	2016	2018	2019	2020
Benja- Thermal Water		1.17	2.93	3.09
Porto Palermo –Castle	2.64	1.47	2.81	3.01
Zver nec – Church Entrance		1.5	2.41	2.59
Orik – Ancient City		1.57	3.36	3.52
Blue Eye- The Source	2.48	1.46	3.29	3.45
<b>Total</b>	<b>2.58</b>	<b>1.41</b>	<b>2.96</b>	<b>3.13</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Figure 19. Quality and availability of sanitation facilities in touristic destinations**



Source: Database 2016; ACER, Study 2018, 2019 and 2020

Regarding the quality and availability of sanitation facilities disaggregated with the status of tourists, the results represent an increase compared to studies of previous years. For 2020 year, international tourists assess more positively the quality and availability of sanitation facilities compared to domestic tourists (93.2% versus 86.2%).

**Table 47. Quality and availability of sanitation facilities disaggregated by tourists' status 2016-2020**

Status	2016				2018			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	20.7%	27.6%	44.8%	6.9%	67.7%	27.5%	4.8%	0%
International	10.8%	15.7%	63.9%	9.6%	63.7%	32.5%	3.8%	0%
Status	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	14.3%	18.3%	38.6%	28.8%	13.8%	0.0%	54.1%	32.1%
International	7.4%	16.4%	41.1%	35.1%	6.8%	0.0%	56.3%	37.0%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Table 48. Quality and availability of sanitation facilities disaggregated by tourists' status 2016-2020**

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
Domestic	48.3%	51.7%	95.2%	4.8%	32.6%	67.4%	13.8%	86.2%
International	26.5%	73.5%	96.2%	3.8%	23.8%	76.2%	6.8%	93.2%

Source: Database 2016; ACER, Study 2018, 2019 and 2020

### 2.3.3.4 Facilities for children

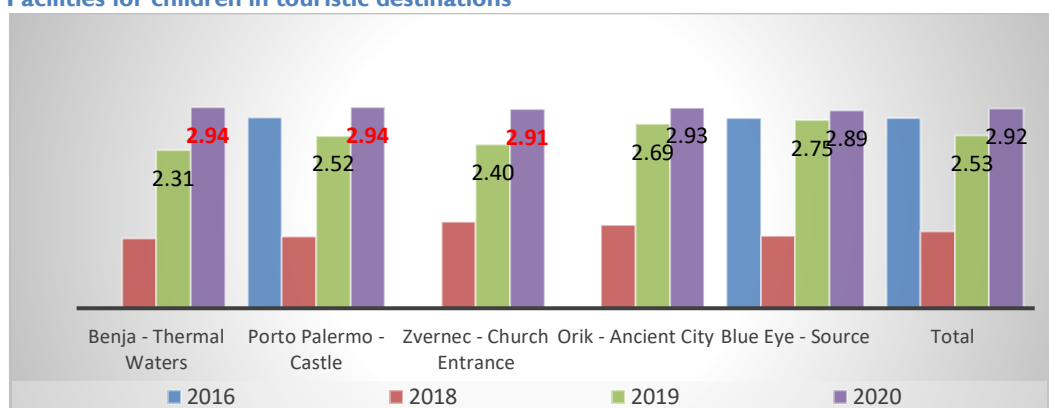
In the year 2020, there is an improvement in tourist satisfaction over facilities for children in the tourist destinations where the project is being implemented. In 2020, regarding the facilities for children, tourists express the satisfaction with a mean of 2.9. The highest scores have tourists surveyed in Benja and Port Palermo. Tourists surveyed in Blue Eye evaluate the quality of facilities for children more negatively compared to other tourist destinations (2.91; Figure 20).

**Table 49. Facilities for children in touristic destinations**

Touristic destinations	Facilities for children			
	2016	2018	2019	2020
Benja- Thermal Water		1.02	2.31	2.94
Porto Palermo –Castle	2.79	1.05	2.52	2.94
Zvernec – Church Entrance		1.26	2.40	2.91
Orik – Ancient City		1.22	2.69	2.93
Blue Eye- The Source	2.78	1.06	2.75	2.89
<b>Total</b>	<b>2.78</b>	<b>1.12</b>	<b>2.53</b>	<b>2.92</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Figure 20. Facilities for children in touristic destinations**



Source: Database 2016; ACER, Study 2018, 2019 and 2020

As shown in Table 50 and Table 51, for 2020 international tourists are more satisfied than locals over children's entertainment facilities. 86.2% of international tourists rate the facilities for children

as “good / very good” compared to 82.1% of domestic tourists. It is worth noting that, compared to the 2019 study, both *international and domestic tourists assess more positively the quality of facilities for children.*

**Table 50. Facilities for children disaggregated by tourists' status 2016- 2020**

Status	2016				2018			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	7%	16.3%	74.4%	2.3%	9.6%	34.7%	35.9%	19.8%
International	8.2%	11.5%	70.5%	9.8%	12.5%	24.6%	44.9%	18.0%
Statusi	2019				2020			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	23.5%	34.1%	29.1%	13.3%	0.5%	17.3%	73.3%	<b>8.8%</b>
International	13.4%	21.0%	54.4%	11.2%	0.0%	13.8%	77.1%	<b>9.0%</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

**Table 51. Facilities for children dissagregated by tourists' status 2016- 2020**

Status	2016		2018		2019		2020	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
Domestic	23.3%	76.7%	44.3%	55.7%	57.6%	<b>42.4%</b>	17.9%	<b>82.1%</b>
International	19.7%	80.3%	37.1%	62.9	34.4%	<b>65.6%</b>	13.8%	<b>86.2%</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

## 2.4 Information on Tourists' Expenditures

To analyze the real value of the tourist experience it is necessary to make a financial calculation on the expenses of tourists during their stay in the tourist areas taken in the study. The analysis of the monetary value spent is done through the financial calculation of the average tourist expenses, including: the cost of the tourist package, accommodation, food, transport and other activities. According to the results presented in the table below, in 2020 a tourist spent an average of 46.68 Euro / day, which compared to 2019, has decreased by 0.63 Euro / day of average daily spending (was 48.82 Euro / day).

**Table 52. Tourist's daily average expenditure 2016-2020 (EUR)**

Touristic destination	Mean 2016	Mean 2018	Mean 2019	Mean 2020
Saranda–Pormenade	102.53	76.79	50.50	48.21
Gjirokaster–Castle	36.01	71.14	49.30	42.43
Berat- Castle	32.23	44.41	45.06	41.97
Permet- Town Square	13.68	41.64	39.05	43.94
Blue Eye – Source	60.23	39.27	49.49	45.44
Porto Palermo- Castle	21.38	45.64	51.79	49.66
Benja- Thermal Water		39.27	49.89	47.51
Zvernec – Church		59.88	47.32	
Entrance				52.29
Orik – Antic City		60.66	54.43	48.64
<b>Total</b>	<b>44.49</b>	<b>53.14</b>	<b>47.31</b>	<b>46.68</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

Regarding the gender analysis for 2020, we can conclude that women generally have higher daily expenditures than men in the respective tourist areas with the exception of areas such as Berat, Permet, Benja and Zvernec, which result in female tourists. with lower costs than male tourists. However, spending between male and female tourists has very small differences (Table 53).

**Table 53. Tourist's daily average expenditure 2016-2020 (EUR)**

Touristic destination	Gender	Mean 2016	Mean 2018	Mean 2019	Mean 2020
Saranda – Pormenade	Male	129.74	81.16	52.58	47.06
	Female	61.73	72.54	48.93	49.75
	Total	<b>102.53</b>	<b>76.79</b>	<b>50.50</b>	<b>48.21</b>
Gjirokaster – Castle	Male	34.85	70.29	54.04	39.02
	Female	37.53	71.97	44.82	46.02
	Total	<b>36.01</b>	<b>71.14</b>	<b>49.30</b>	<b>42.42</b>
Berat – Castle	Male	38.51	41.05	45.53	42.98
	Female	23.92	47.08	44.50	<b>41.11</b>
	Total	<b>32.23</b>	<b>44.41</b>	<b>45.06</b>	<b>41.97</b>
Permet – Town Square	Male	17.44	44.25	39.63	45.51
	Female	11.28	39.39	38.36	<b>42.61</b>
	Total	<b>13.68</b>	<b>41.64</b>	<b>39.05</b>	<b>43.94</b>
Blue Eye – Source	Male	60.75	40.11	48.82	45.07
	Female	58.39	38.43	50.43	45.68
	Total	<b>60.23</b>	<b>39.27</b>	<b>49.49</b>	<b>45.44</b>
Porto Palermo – Castle	Male	21.01	48.49	53.07	45.77
	Female	22.06	41.49	49.91	52.33
	Total	<b>21.38</b>	<b>45.64</b>	<b>51.79</b>	<b>49.66</b>
Benja- Thermal Water	Male		40.11	51.12	48.29
	Female		38.43	48.00	<b>46.55</b>
	Total		<b>39.27</b>	<b>49.89</b>	<b>47.51</b>
Zver nec – Church Entrance	Male		57.9	47.46	54.73
	Female		61.91	47.21	<b>50.23</b>
	Total		<b>59.88</b>	<b>47.32</b>	<b>52.29</b>
Orik – Antic City	Male		58.11	52.43	46.98
	Female		63.21	56.80	49.81
	Total		<b>60.66</b>	<b>54.43</b>	<b>48.64</b>
<b>Total</b>		<b>44.49</b>	<b>53.14</b>	<b>47.31</b>	<b>46.68</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

An analysis of tourist status shows that in 2020 in most tourist areas, international tourists spend on average more compared to domestic tourists, with the exception of the area of Saranda, Permet and Porto Palermo, where domestic tourists are those who spend more than international tourists. The analysis of the tourist status for 2020 shows that the highest amount spent on average was in the Blue Eye by international tourists in the amount of 50.63 Euro / day, while for the same tourist area, local tourists interviewed stated that have spent on average 47.01 Euro / day, ie approximately 7.7% less than international tourists. The largest difference by tourist status is observed in Berat - Kalaja, where international tourists spent 12.4% more than domestic tourists (Table 54).

**Table 54. Tourist's daily average expenditure, according to tourist status 2016-2020(EUR)**

Touristic destination	Tourist status	Mean 2016	Mean 2018	Mean 2019	Mean 2020
Saranda – Pormenade	Domestic	61.97	63.67	45.78	48.95
	International	126.28	78.36	53.20	<b>47.34</b>
	<b>Total</b>	<b>102.53</b>	<b>76.79</b>	<b>50.50</b>	<b>48.21</b>
Gjirokaster – Castle	Domestic	13.40	62.67	45.66	40.67
	International	42.58	72.16	51.52	45.49
	<b>Total</b>	<b>36.01</b>	<b>71.14</b>	<b>49.30</b>	<b>42.43</b>
Berat – Castle	Domestic	3.82	80.00	38.13	40.22
	International	42.73	44.15	50.89	45.22
	<b>Total</b>	<b>32.40</b>	<b>44.41</b>	<b>45.06</b>	<b>41.97</b>
Permet – Town Square	Domestic	0.00	33.33	34.66	45.18
	International	30.39	44.52	41.72	<b>41.25</b>
	<b>Total</b>	<b>13.50</b>	<b>41.64</b>	<b>39.05</b>	<b>43.94</b>
Blue Eye – Source	Domestic	31.30	30.02	45.90	47.01
	International	79.80	43.23	51.36	50.63
	<b>Total</b>	<b>60.70</b>	<b>39.27</b>	<b>49.49</b>	<b>48.64</b>
Porto Palermo – Castle	Domestic	2.02	45.53	49.62	49.86
	International	30.40	45.7	53.67	<b>49.40</b>
	<b>Total</b>	<b>21.16</b>	<b>45.64</b>	<b>51.79</b>	<b>49.6</b>
<b>Totals</b>		<b>44.49</b>	<b>53.15</b>	<b>47.31</b>	<b>46.68</b>

Source: Database 2016; ACER, Study 2018, 2019 and 2020

To understand how the interventions carried out up to the time of conducting this study had an impact, tourists were asked how they assessed their stay in Albania where they rated it with 1 - Very dissatisfied, 2 - Dissatisfied, 3 - Neutral, 4 - Satisfied and 5 - Very satisfied. In order to analyze the number of tourists in absolute value, those tourists who responded as Neutral were excluded. In 2019 there are 1050 tourists who state that they are "very satisfied / satisfied" with their stay in Albania and 72 respondents state that they are "very dissatisfied / dissatisfied". Meanwhile in 2020 there are 1084 who claim to be "very satisfied / satisfied" and 93 tourists who are "very dissatisfied / dissatisfied". So, we have an increase of 3.2% of tourists who say they are satisfied.

**Table 55. Distribution of tourists according to their stay's satisfaction in Albania**

	2018	2019	2020
Very dissatisfied	16	16	27
Dissatisfied	52	56	66
Neutral	179	138	83
Satisfied	<b>602</b>	<b>695</b>	<b>687</b>
Very Satisfied	<b>411</b>	<b>355</b>	<b>397</b>
<b>Total</b>	<b>1260</b>	<b>1260</b>	<b>1260</b>

Source: ACER, Study 2018, 2019 and 2020

**Table 56. Distribution of tourists according to their stay's satisfaction in Albania**

	2018	2019	2020
Unsatisfied	68	<b>72</b>	<b>93</b>
Neutral	179	138	83
Satisfied	1013	<b>1050</b>	<b>1084</b>
<b>Total</b>	<b>1260</b>	<b>1260</b>	<b>1260</b>

Source: ACER, Study 2018, 2019 and 2020

Considering one of the components of the project, which is related to the strengthening of local business, the interviewers counted the businesses present (formal and informal) in the studied areas. This category will be the main target in the business survey in the coming years. An approximate number is shown in Table 57 below. Compared to a year ago, there is a decrease in the number of businesses in Saranda (from 52 businesses in 2019, to 43 businesses in 2020), in

Gjirokastra (from 22 businesses in 2019 to 20 businesses in 2020), in Berat (from 32 businesses in 2019 to 30 businesses in 2020). The decrease in the number of businesses in tourist destinations is related to the situation caused by the global pandemic COVID-19, a result supported by discussions in focus groups.

**Table 57. Number of businesses related to tourism 2018, 2019 and 2020**

<b>No.</b>	<b>Touristic destination</b>	<b>No. of Businesses 2018</b>	<b>No. of Businesses 2019</b>	<b>No. of Businesses 2020</b>
1	Sarande-Promenade	47	52	43
2	Gjirokaster – Castle	18	22	20
3	Berat – Castle	38	32	30
4	Permet – Town Square	10	9	9
5	Benja – Thermal Water	0	0	0
6	Porto Palermo – Castle	6	5	4
7	Zvernec – Church Entrance	7	8	9
8	Orik – Ancient City	8	8	8
9	Blue Eye – Source	6	4	4

Source: ACER, Study 2018, 2019 and 2020



## Chapter 3. Summary of Focus Group Discussion Findings

### 3.1 Methodology of Qualitative Study

The purpose of the qualitative study was to develop focus group discussions with the main objective of sharing the preliminary findings that emerged from the quantitative study "Tourist Survey" conducted on 16-31 August 2020, as well as obtaining more in-depth data from actors involved in the development of tourism in specific areas.

The qualitative study has been carried out in the area of Southern Albania, specifically in four municipalities where there have been and are foreseen to continue interventions from the project: Berat, Permet, Gjirokastra and Saranda. These four municipalities were defined in advance by ADF. Four focus group discussions have been conducted in these cities with the purpose of deeper discussion on some of the quantitative study results and participants' opinions and suggestions on the current situation and on the possibility of improvement. The focus groups were conducted with households, business and local government representatives. In each discussion, participants were encouraged to give their opinions on the progress of the project implementation and the impact on tourism development, as well as to express their opinions freely and identify the main issues. All participants were provided with information materials via e-mail address, namely:

- Schedule of the meeting
- Information on the Project
- List with orientation questions

### 3.2 Limitation of Qualitative Study

Unlike previous years, focus group discussions were held online through the Zoom Meeting platform in compliance with the anti-COVID-19 protocol. The contact and dissemination of information has been via e-mail. But this did not affect the development of focus group discussions and the number of participants in the four online meetings.

### 3.3 Focus Group Discussion Findings

As part of the qualitative study, four Focus Group Discussions were conducted with about 59 individuals. The purpose of the focused group discussions was to gather additional opinions regarding some aspects related to project implementation and the impact the project has on community. The table below shows the place, the date of the development of each meeting and the composition of the participants in each meeting.

**Table 58. Information about focus group discussions**

Location	Date	Time	No. of participants
Permet	30/09/2020	09:30	15
Gjirokaster	30/09/2020	12:00	14
Berat	02/10/2020	09:00	16
Saranda	02/10/2020	11:30	14
<b>Total</b>			<b>59</b>

Source: ACER, Qualitative Study 2020, Year III

According to focus group discussions it turned out that tourism in 2020 has had difficulties due to the global pandemic. Two important events that have affected Albania during the years 2019-2020, such as the earthquake of November 26 and the global pandemic (quarantine), have influenced the continuation of the project. From the four meetings, the implementation of the project has resulted more positively in the municipality of Berat, while the participants of the other three municipalities claim that there has been intervention but still expect a lot.

Participants point out that the assessment of tourism in 2020, should be taken with limits due to the pandemic, and cannot be compared with previous years because this year has not been in the same conditions as other years. The type of tourists this year has also been very different from previous years due to the closure of borders. Discussions in four municipalities point out that there have been large numbers of domestic tourists and businesses or other institutions providing tourism services have been caught unawares. Domestic tourists have different requirements from international tourists, affecting the activities and services offered. It is also worth noting that, this year the type of tourists has been mainly independent and not with travel agencies plus the fact that tourists have been local, has resulted in a reduction in the length of stay in tourist areas.

*Accommodation structures and infrastructure* in the main neighbourhoods in the four cities has been positively evaluated and this is thanks to the project for Integrated Urban and Tourism Development. But, like last year, there should be an intervention in the infrastructure that connects the city centre with tourist areas or villages (*the road that connects Permet with the village of Leuze, with Benja; the lack of a ring road in the city of Gjirokastra*). According to the participants, the bad infrastructure makes not use the full potential of each country, negatively affecting the satisfaction of tourists.

Based on the quantitative study, tourists have expressed mainly dissatisfaction with the local public transport in each city, due to the quality of transport and the lack of tables for every tourist to be informed about the schedules. From the discussions in the focus groups it was confirmed the fact that the measures taken by Covid -19 have affected public transport and this must have affected the satisfaction of tourists on this service.

“ The municipality has undertaken a research on accommodation structures in the city of Gjirokastra, which is still ongoing. One of the worrying findings is that about 60% of businesses are closed / unemployed due to the pandemic situation.”

Local Authorities, Gjirokaster

“Cooperation should be achieved between local government and other operators, both private and public, for the benefit of tourism and not for the individual benefit.”

Guide, Permet

From the online meetings it turned out that tourists can spend more quality days in the country. The participants listed several reasons that lead to the short stay of tourists:

Promotion: In the discussions held in the four cities, an immediate need was expressed for the creation of a "Destination Management Organization" to promote tourist areas for each specific country. In this way the tourist is informed about what each city has to offer (churches, museums, beaches, landscapes or tourist areas near the city) and chooses whether or not to visit them. The data from the qualitative study show that the municipality of Gjirokastra has a more developed promotion of the country and its tourist destinations thanks to the web site "Visit Gjirokastra".<sup>16</sup>

"The municipality of Berat has a very good working group specialized in the field of tourism, and I promise you that next year the municipality of Berat will have the best online promotion compared to other municipalities in Albania."

Local Authorities, Berat

Activities in cities: For the year 2020, a lack of activities has been expressed due to the global pandemic. Musical activities have been lacking and some of the activities that have been held have been done with strict measures, with very few people, to respect the anti Covid-19 protocol. Bars and restaurants have been open only to tables outside. So, it has been difficult to offer a range of activities and this has been felt mainly in the area of Gjirokastra, Berat and Permet. The lack of activities in the Saranda area has not been felt much by tourists in the Saranda area due to the coast.

Infrastructure: It leaves much to be desired road infrastructure that connects the main areas with churches, forts (accepted by participants in the Gjirokastra area), roads connecting the city with villages (accepted by participants in the Permet area). Participants in the online meeting in the Berat area said that the road infrastructure connecting the city with the villages has improved and will continue to improve in the coming years.

Parking and waste: Parking continues and remains a problem in all four municipalities, but not only for tourists but also for locals. Cleaning the area was another issue, expressed mainly in the municipality of Permet, while representatives from the municipality of Berat said that the main problem was dogs in the street and the local government should take action on this issue.

Recreational areas: Participants in online meetings in the Gjirokastra and Saranda brought to attention the lack of recreational areas. Lack of rest areas for children and late adulthood brought low satisfaction for tourists.

Representatives from the municipalities, in all four online discussions highlighted the fact that the influx of tourists this year was really lower in figure compared to previous years. The measurement of the influx of tourists in each of the cities does not reflect the real number of tourists, as this number is measured either by the number of tickets sold in the Castle / Museums / House of Culture. For 2020 it is difficult to talk about the quality of tour guides, because very few guides have worked and this as a result of the situation caused by the pandemic. [Annex 2](#) provides detailed findings by focus groups for each of the municipalities: Berat, Permeti, Gjirokastra and Saranda.

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<sup>16</sup> Visit Gjirokastra: <https://www.visit-gjirokastra.com/>

The focus groups resulted in some common concerns of family members and local businesses. Table 59 summarizes the common barriers in Berat, Permet, Gjirokastra and Saranda, as well as the proposed solutions.

**Table 59. Common barriers and respective solutions in each municipality**

<b>COMMON BARRIERS</b>	<b>PROPOSED SOLUTION</b>
<b>Cooperation with local authorities</b>	Cooperation of local government with various private actors involved in the touristic destinations' tourism in order to solve common problems, not individually and thus achieve a sustainable development of tourism in the country.
<b>Promotions of destinations</b>	The promotion of the destination and the creation of the "Organization of Destination Management" should be taken seriously by the local government and the PIUTD.
<b>Recreational areas</b>	The more green areas and playgrounds a child has a place, the more it attracts family tourists and late adulthood.
<b>Investments in road infrastructure</b>	Increase investment in improving the roads that lead tourists to key tourist spots and tourist villages.
<b>Residues</b>	Cleaning the city and villages, in order to attract as many tourists as possible and solve the problem with street dogs.
<b>Parking</b>	Creating new parking spaces, so that tourists have easier access to the city by personal car.

Source: ACER, Study 2020, Year III

## Chapter 4. Tourist Counting

### 4.1 Methodology of Tourist Counting

Based on the literature, there are different methods for monitoring visitors in tourist areas. Such methods include i) direct observation, ii) video observation, iii) counting equipment, iv) recording books, v) interviews, etc. It is worth noting that most of these methods and instruments are known in Albania and it is impossible to use them due to their high cost. In the multitude of existing methods, taking into account the method used in the basic study of 2016, in the first year of study, 2018 and in the second year of study 2019 (method of counting tourists in real time on the same day and hours, in 9 selected tourist areas), the same method was used in the 2020 study. Throughout the fieldwork, interviewers took care to count the influx of tourists to the study area. Table 60 shows the average number of tourists seven days a week. It is emphasized that this number does not accurately indicate the number of tourists who have stayed in the area, but an approximate number of the daily trend.

### 4.2 Tourist Counting Findings

As in the surveys of previous years, in the studied areas, the coastal areas have the largest influx, taking into account the period during the survey (August). For 2020 Saranda (m=1000), Blue Eye (m=201), Zvernec (m=125) and the Castle in Gjirokastra (m=125) are the areas with the highest average number of tourists (Table 60). Also, for 2019, Saranda leads again with the highest influx of tourists, followed by the Blue Eye (m=200) and Zvernec (m=188; Table 60). Permeti (m=42), Benja (m=47) and Porto Palermo, as a year ago, are the areas with the lowest average number of tourists, compared to other destinations included in the project.

Comparing the averages of the number of tourists during 2019 and 2020, it results that in Orik there is an increase of 2.8% of the average number of tourists and in Benje the percentage of tourists visiting this country has decreased, of 40.2%.

**Table 60. Average number of tourists during 7 days of the week, 2020**

No.	Touristic destination	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Mean
1	Sarande-Promenade	1000+	1000+	1000+	1000+	1000+	1000+	1000+	1000
2	Gjirokaster – Castle	113	142	159	104	112	145	103	125
3	Berat – Castle	75	65	71	82	57	98	56	72
4	Permet – Town Square	32	27	54	41	62	41	34	42
5	Benja – Thermal Water	25	36	64	24	65	42	65	46
6	Porto Palermo – Castle	85	91	65	75	98	87	68	81
7	Zvernec – Church Entrance	120	113	124	140	126	140	113	125
8	Orik – Ancient City	113	125	125	144	175	185	145	145
9	Blue Eye – Source	150	167	198	231	205	221	232	201

Source: ACER, Study 2020 Year III

**Table 61. Average number of tourist during 7 days of the week, 2019**

No.	Touristic destination	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Mean
1	Sarande-Promenade	1000+	1000+	1000+	1000+	1000+	1000+	1000+	1000
2	Gjirokaster – Castle	142	186	250	240	165	140	142	181
3	Berat – Castle	113	120	115	62	75	158	116	108
4	Permet – Town Square	42	50	78	56	69	55	70	60
5	Benja – Thermal Water	70	82	110	113	42	56	69	77
6	Porto Palermo – Castle	90	86	70	60	112	95	82	85
7	Zvernec – Church Entrance	140	152	178	226	223	200	195	188
8	Orik – Ancient City	120	115	185	169	140	145	110	141
9	Blue Eye – Source	170	165	223	245	250	180	165	200

Source: ACER, Study 2019 Year II

**Table 62. Average number of tourist during 7 days of the week, 2018**

No.	Touristic destination	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Mean
1	Sarande-Promenade	1000+	1000+	1000+	1000+	1000+	1000+	1000+	1000
2	Gjirokaster – Castle	175	165	185	230	210	150	145	180
3	Berat – Castle	120	110	120	80	90	200	200	131
4	Permet – Town Square	50	45	50	70	80	55	40	56
5	Benja – Thermal Water	50	65	70	90	80	70	65	70
6	Porto Palermo – Castle	80	75	90	65	100	110	80	86
7	Zvernec – Church Entrance	120	135	140	220	200	220	180	174
8	Orik – Ancient City	80	100	95	110	135	120	100	106
9	Blue Eye – Source	140	155	170	220	230	200	180	185

Source: ACER, Study 2018 Year I

Comparing the averages of the number of tourists during 2019 and 2020, it results that in Orik there is an increase of 2.8% of the average number of tourists and in Benja the percentage of tourists visiting this touristic destination has decreased, of 40.2%. Table 63 shows the percentages of increase or decrease of the average number of tourists in each touristic destination, compared to the previous year.

**Table 63. The percentage of decrease in tourist between 2019 and 2020 Year**

No.	Touristic destination	Year 2019 Mean	Year 2020 Mean	Percentage of Decrease/ Increase
1	Sarande-Promenade	1000	1000	0%
2	Gjirokaster – Castle	181	125	-30.9%
3	Berat – Castle	108	72	-33.3%
4	Permet – Town Square	60	42	-30%
5	Benja – Thermal Water	77	46	-40.2%
6	Porto Palermo – Castle	85	81	-4.7%
7	Zvernec – Church Entrance	188	125	-33.5%
8	Orik – Ancient City	141	145	2.8%
9	Blue Eye – Source	200	201	0.5%

Source: ACER, Study 2019 Year II; Study 2020 Year III

## Chapter 5. Conclusions and Recommendation

The conclusions listed below are as the result of a quantitative and qualitative study conducted in the framework of evaluating the implementation of the PITUD:

- *The group-age that prefers to travel to Albania for 2020 is 26-35 years old, (28.5%) followed by 22.5% of tourists in the range of 36-45 years old and 19% from 18-25 years old. The age distribution is very similar compared to the 2019, 2018 survey and baseline study.*
- *International tourists (63%) account for the largest share of the number of tourists in the country, who have entered Albania mainly through the airport (60%) and landlines (27.5%). Tourists are generally new visitors (72%), who have never been to Albania before. Meanwhile, compared to a year ago, the number of tourists who have visited Albania more than once has increased (from 22% to 28%).*
- *The national average of tourist length of stay in Albania is estimated at 8 days, although we have a decrease in the number of tourists staying on average 8 days in an area (from 57.7% to 56.4%). This result can be attributed to the situation caused by the COVID-19 pandemic.*
- *Compared to a year ago, in 2020 we have an increase in the number of tourists visiting Albania through tourist packages (from 9.4% to 12.2%). This increase indicates an improvement in the quality and value of travel packages, despite the situation created by the global pandemic.*
- *Compared to the study of 2019 and 2018, the average level of overall satisfaction has increased slightly, from 4.07 in 2018, 4.05 in 2019 to 4.08 in 2020. Saranda has the highest level of satisfaction (4.49) , followed by Përmeti (4.37) and Gjirokastra (4.29).*
- *In general, tourists' satisfaction with the activities has increased for each touristic destination. Compared to a year ago, tourists' satisfaction with the beaches (claimed by tourists asked in Saranda, Berat, Përmet, Blue Eye, Porto Palermo and Benja), musical performances (claimed by tourists interviewed in Saranda, Gjirokastra, Përmet, Blue Eye and Benja), marching (claimed by tourists interviewed in Berat and Përmet) and local gastronomy (claimed by tourists interviewed in Berat, Përmet and the Blue Eye) is significantly reduced.*
- *For 2020, the dissatisfaction of tourists, turn out to be: lack of adequate infrastructure that connects the city center with villages or certain tourist areas, debit / credit card payment transactions, local public transport, children's recreation areas and cleaning. These data have resulted from the tourist survey on August 16-31, while also confirmed by online discussions in focus groups.*
- *The easiness of finding information has increased slightly compared to a year ago and the baseline study, as a result of the increased variety of information sources (3.15 in 2016, 3.21 in 2019 and 3.25 in 2020).*
- *Tourists have expressed dissatisfaction regarding parking, the level of dirt, the lack of children's entertainment areas, and local public transport, confirmed by the focus groups.*
- *Regarding the assessment of the average daily expenses of tourists during their stay in Albania, it turned out that on average a tourist spends 46.68 Euros per day, 0.63 Euros less compared to last year.*



Considering the data generated by the quantitative study and consultation with participants across focus groups as well as the pandemic situation in the country, below are listed some recommendations, which have the ultimate goal of increasing the number of tourists in the studied areas:

- **Effective support of the business community:** The data generated by the quantitative and qualitative study, show the urgent need of businesses for support in various forms (either central or local government). The challenges posed by the pandemic have reduced the financial capacity of local businesses, thus jeopardizing their closure. The negative chain effect on the local and national economy is great. For this, it is suggested to build financial instruments and packages, to come to the aid of the local business community.
- **Continued infrastructure improvement:** Quantitative and qualitative study confirms the improvements that tourist destinations have made in relation to infrastructure. However, it remains a concern in some of the study areas. For this, the local and central government will have to intensify the efforts for the completion of emergency infrastructure projects, as soon as possible.
- To mitigate the negative effects of the Covid-19 crisis, it is suggested to **improve the cooperation between the government, the private sector and the civil society** with the aim of increasing health security, especially accommodation facilities and restaurants, as well as promoting domestic tourism, but also stimulating demand from the region starting with Kosovo by providing various incentives for citizens to spend their holidays in Albania. This goal can be served by the intensification of government-community business dialogue for well-thought-out decision-making on state support for tourism, etc. In this way the tourism sector will be encouraged to adapt its offer to the new regional and global tourism market, once the restrictions due to the pandemic are removed.
- To recover the impact of the pandemic on the Albanian economy, it is suggested that **this economy diversify its offer and orient the further development of tourism to new destinations by emphasizing the principles of sustainable tourism development.** The country has high potential (natural and cultural heritage) for the development of tourism, from mass tourism with overcrowded destinations in its Western part, to green and sustainable destinations, offering unique tourism experiences in Eastern Albania.
- **Effective promotion of touristic values following a holistic approach:** Despite the growing trend of visitors / tourists, studies again identify the need for a more effective promotion of tourist destinations in Albania. For this, it is necessary to build a comprehensive approach between the main actors of the tourism sector.



## Annex I: Tourist Survey's Questionnaire

<b>ID. Serial Number</b>									
		<b>d</b>	<b>d</b>	<b>m</b>	<b>m</b>				
<b>Date of Interview</b>						<b>2</b>	<b>0</b>	<b>2</b>	<b>0</b>
						<b>h</b>	<b>h</b>	<b>m</b>	<b>m</b>
<b>Time of beginning</b>									
<b>Time of ending</b>									
<b>Duration of the interview</b>									
<b>Enter the number of refusing that have occurred. If not, enter 0.</b>									
<b>Name of enumerator</b>									
<b>SITE: Tourism site</b>		<ol style="list-style-type: none"> <li>1. Saranda – Promenade area</li> <li>2. Gjirokaster – The castle</li> <li>3. Berat – The castle</li> <li>4. Permet – The town square</li> <li>5. Blue Eye – The source</li> <li>6. Porto Palermo – The castle</li> <li>7. Benja Thermal waters</li> <li>8. Porto Palermo – The castle</li> <li>9. Zver nec – church entrance</li> </ol>							
<b>LANG: Questionnaire Language</b>		<ol style="list-style-type: none"> <li>1. Albanian</li> <li>2. English</li> <li>3. Italian</li> </ol>							

### INTRODUCTION

*This survey is done through face-to-face interviews. During the interview please read the questions as they are formulated in the questionnaire. Circle the respective codes for every answer. Open-ended questions should be written exactly as given by the respondent. Instructions for interviewers are in italic letters.*

#### Interviewer READ:

Hello. I am \_\_\_\_\_ and I work for ACER. ACER company is conducting a survey on visitors perceptions and experiences regarding the current visit in the area and in this specific site. You have been chosen in a random way as part of this survey. Your responses are confidential and no one will know your name or link your name to the responses.

Do you have any questions? Can we start? Thank you!

#### A. PROFILE OF THE RESPONDENT

<b>A1</b>	<b>Gender</b>	<ol style="list-style-type: none"> <li>1. Male</li> <li>2. Female</li> </ol>
<b>A2</b>	<b>Age</b>	_____ years old.

<b>A3</b>	<b>Are you?</b>	<ol style="list-style-type: none"> <li>1. An Albanian residing in Albania</li> <li>2. An Albanian residing abroad</li> <li>3. A foreigner residing in Albania</li> <li>4. A foreigner visiting Albania</li> </ol>
<b>A4</b>	<i>If A3 =2 or 4 Ask</i> <b>In what country do you reside in?</b>	_____
<b>A4.1</b>	<i>If A3=2 or 4</i> <b>Could you please tell us your point of entry to Albania</b>	<ol style="list-style-type: none"> <li>1. Airport</li> <li>2. Port of Durrës</li> <li>3. Port of Vlora</li> <li>4. Port of Saranda</li> <li>5. Land border entry, specify _____</li> </ol>
<b>A5</b>	<i>If A3=4 ask</i> <b>Is this your first time visiting Albania?</b>	<ol style="list-style-type: none"> <li>1. Yes</li> <li>2. No</li> </ol>
<b>A6</b>	<i>Ask all</i>  Please, tell me how many days ( <b>from the day you entered to the day you will leave</b> ) will be your stay in Albania.	_____ days.
<b>A7</b>	<i>Ask All</i> <b>Is this your first time visiting _____?</b>	<ol style="list-style-type: none"> <li>1. Yes</li> <li>2. No</li> </ol>
<b>A8</b>	<b>Can I ask about your employment status? Are you?</b>	<ol style="list-style-type: none"> <li>1. A student</li> <li>2. A retiree</li> <li>3. A full time employee</li> <li>4. A part time employee</li> <li>5. Self-employed</li> <li>6. Currently unemployed</li> <li>7. Other, specify _____</li> </ol>
<b>A9</b>	<b>What is the highest level of education that you completed?</b>	<ol style="list-style-type: none"> <li>1. Elementary</li> <li>2. High School</li> <li>3. Vocational/ Trade School</li> <li>4. University</li> <li>5. Post-Graduate</li> </ol>
<b>A10</b>	<b>In regard to the visit you are having on _____, are you?</b>	<ol style="list-style-type: none"> <li>1. An independent tourist</li> <li>2. On a package tour</li> <li>3. Other, specify _____</li> </ol>
<b>A11</b>	<b>Are you visiting alone or with a party?</b>	<ol style="list-style-type: none"> <li>1. Alone</li> <li>2. With a party/family</li> </ol>
<b>A12</b>	<i>If A10=2, Ask</i> <b>How many people are in your travel party?</b>	_____ people.
<b>A13</b>	<i>If SITE=1, 2, 3 or 4, then ask</i>  <b>Please tell me how many days will you stay in this area/site</b>	<b>A13.1</b> ...up to now _____ <b>A13.2</b> ...to be spent within the day _____
<b>A14</b>	<i>If SITE =5, 6 or 7, ask</i>  <b>Please tell me how many hours will you stay in this area/site</b>	<b>A14.1</b> ...up to now _____ <b>A14.2</b> ...to be spent within the day _____

## B. MARKET INFORMATION

<b>BI</b>	<b>Where did you obtain information about...</b>  <i>Select all that apply (Multiple)</i>	<b>BI.1 Albania</b> A. Radio B. Television C. Newspaper D. Magazine E. Internet F. Travel brochure G. Tour operator H. From a friend/relative I. Other	<b>BI.2 SITE</b> A. Radio B. Television C. Newspaper D. Magazine E. Internet F. Travel brochure G. Tour operator H. From a friend/relative I. Other
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<b>B2</b>	<b>What touristic activities have you done or intend to do in the South of Albania?</b>			
	<b>Activity</b>	<b>B2.1 Have done?</b>	<i>(IF B2.1=2)</i> <b>B2.2 Intend to do?</b>	<i>(IF HI=1)</i> <b>B2.3 Evaluate in a scale from 1 to 5 the quality of your experience where 1=Very Poor and 5=Very good</b>
	<b>A.</b> Visiting churches, museums or cultural monuments (Castle, Ruins, archaeological sites etc)	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>B.</b> Laying In the Beach	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>C.</b> Visiting museums	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>D.</b> Attending art or music performances (i.e. dancing, drumming, singing, craft demonstrations)	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>E.</b> Attending religious ceremonies	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>F.</b> Attending festivals	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>G.</b> Visiting (nearby) villages and communities	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>H.</b> Visiting natural parks	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>I.</b> Hiking/trekking/ biking	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>J.</b> Adventure tourism such as: rafting, paragliding, water sports...	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>K.</b> Shopping for souvenirs	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>L.</b> Enjoying local gastronomy	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>M.</b> Bar – cafes, night clubs	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	<b>N.</b> Water sports	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5

**B3** Which destinations have you visited in Albania and how do you rate the quality of the experience (up to 3)? Name of destinations like vities, villages, municipalities, etc.

Evaluate the quality of experience on a scale of 1 to 5 where 1=Very Bad and 5=Very good

A. _____	1	2	3	4	5
B. _____	1	2	3	4	5
C. _____	1	2	3	4	5
D. Other: _____	1	2	3	4	5

**B4** Ask all

How would you evaluate the following aspects of your stay taking into consideration all Southern Albania?

(Please circle the number of the answer that represents your evaluation of each factor)

Products, Services & Hospitality	Very good	Good	Bad	Very bad
A. Customs and immigration services at the point of entry	4	3	2	1
B. Convenience of the point of entry	4	3	2	1
C. Personal safety	4	3	2	1
D. Friendliness of the people	4	3	2	1
E. National cuisine/drinks	4	3	2	1
F. Quality of restaurants	4	3	2	1
G. Quality of lodging	4	3	2	1
H. Quality of service (in restaurants, hotels, etc.)	4	3	2	1
I. Accessibility to historical heritage sites	4	3	2	1
J. Interpretation of historical heritage sites	4	3	2	1
K. Interpretation/signage at historical heritage sites	4	3	2	1
L. Visitor information at historical heritage sites	4	3	2	1
M. Quality of guides	4	3	2	1
N. Degree of knowledge of foreign languages from the service personnel	4	3	2	1
O. Police services	4	3	2	1
P. Facilities for children	4	3	2	1
Q. Shopping opportunities	4	3	2	1
R. Telecommunications (mobile, internet...)	4	3	2	1
S. Convenience and access to local transport	4	3	2	1
T. Foreign exchange facilities	4	3	2	1
U. Convenience for payment transactions using cards (debit/credit)	4	3	2	1

**B5** In overall during all your stay in Southern Albania, taking into consideration all the aspects mentioned above, how would you evaluate your stay?

1. Very dissatisfied
2. Dissatisfied
3. Neutral
4. Satisfied
5. Very satisfied

**B6***(IF SITE=5, 6 or 7 then ask)***How would you evaluate the following aspects of your stay in [Site]***(Please circle the number of the answer that represents your evaluation of each factor)*

<b>Products, Services &amp; Hospitality</b>	Very good	Good	Bad	Very bad
<b>A.</b> Easiness to find information about the site prior to visiting	4	3	2	1
<b>B.</b> Easiness to find the location of the site	4	3	2	1
<b>C.</b> Natural or cultural attractiveness of the site	4	3	2	1
<b>D.</b> Quality of parking facilities	4	3	2	1
<b>E.</b> Quality of the walking pathways	4	3	2	1
<b>F.</b> Quality of restaurants facilities on site (if available)	4	3	2	1
<b>G.</b> Quality of recreation facilities	4	3	2	1
<b>H.</b> Level of Cleanliness of the site	4	3	2	1
<b>I.</b> Quality and availability of toilets and sanitation facilities	4	3	2	1
<b>J.</b> Interpretation/signage available	4	3	2	1
<b>K.</b> Quality of the guides (if available)	4	3	2	1
<b>L.</b> Facilities for children	4	3	2	1

**C. EXPENDITURE INFORMATION****C1** Did you come to this destination as part of a tour package?

1. Yes
2. No

**C2** When considering the stay **IN THIS DESTINATION/AREA**, could you please tell me, on average/approximately, what is the amount of money you have spent **PER CAPITA ON A DAILY BASIS** (counting all expenditures, tour package, accommodation, food, transportation, activities, shopping etc).**C2E.** \_\_\_\_\_ EURO**C2L.** \_\_\_\_\_ Lek**C2C.** Comment \_\_\_\_\_**Thank you!**

## Annex 2: FGD Informative materials

### Information regarding Project for Integrated Urban and Tourism Development

Length: 2017 – 2022

Donor: World Bank

Implemented by: Albanian Development Fund (ADF)

Geographical coverage: 3 districts (Vlora, Berat, Gjirokaster); 4 municipalities (Saranda, Gjirokastra, Berat, Permet) and the tourism corridor of this region.

Beneficiaries: 84 thousand inhabitants and about 300 thousand tourists.

Project Objective is to improve urban infrastructure, enhance tourism assets and strengthen institutional capacity to support tourism-related local economic development in selected areas in the south of Albania. The project will affect the growth of the economy and improve the living conditions in South Albania through infrastructure projects.

#### Project Components :

- Urban upgrading and infrastructure improvement
- Tourism centers upgrading
- Tourism market and product development

In the framework of PIUTD project, funded by the World Bank and implemented by ADF, the Albanian Center for Economic Research (ACER) has been contracted to provide consultancy services. ACER has undertaken the development of a study aimed at evaluating project implementation and achievement of the Project Development Objectives by August 2020, compared to the baseline study conducted in 2016, 2018 and 2019. This study aims to identify the achievements from 2016, 2018 and 2019, assess the status of the project in line with the Development Objectives, and propose recommendations for continuance of project development, with a particular focus on the use of public services and infrastructure by tourists, the level of tourist satisfaction, as well as the overall trend of spending during their visit to the country.

Within the framework of these studies, 4 focus groups discussion will be held in four cities: Berat, Permet, Gjirokaster and Saranda, with the purpose of sharing the main findings that have resulted from quantitative research, as well as gaining more information from the actors included in the implementation of the project.

## AGENDA

### FOCUS GROUP DISCUSSION Project for Integrated Urban and Tourism Development Tourists Survey, August-2020

**City:**

**Date:**

**Time:**

**Location:**

---

#### Participants:

- Representatives of the Municipality
- Representatives of Business/Associations
- Households
- ACER Tourist Survey Staff

Time: \_\_\_\_: \_\_\_\_

Description of the project

Purpose of the meeting

Introduction of Participants

Time: \_\_\_\_: \_\_\_\_

Discussions by participants about the findings of tourist survey (2020)

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For more information please contact:

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# PROJECT FOR INTEGRATED URBAN AND TOURISM DEVELOPMENT

## Focus Group Discussion

### LIST OF QUESTIONS DIVIDED BY STAKEHOLDERS

#### **FOR HOUSEHOLDS**

1. How do you evaluate the quality of the following aspects of public spaces in your city? Has there been improvement compared to last year?

a. Street Roads:

---

b. Main roads;

---

c. Sidewalks;

---

d. Parks;

---

e. Pormenades;

---

f. Strees Lightings;

---

2. How do you evaluate the qualities of the following aspects? Has there been any improvement compared to last year?

a. Preserving historical sites and structures;

---

b. Conditions and maintenance of park equipment and facilities and the playground

---

c. Safety of parks and areas frequented by tourists;

---

d. Cleanliness and maintenance of parks;

---

3. In your opinion, has there been an increase / improvement of tourist activities in your city compared to two years ago? Specifically what?

4. Did you / your family have any direct / indirect benefit from improving / increasing the number of tourists in the area?

- Direct benefits: LIST

- Indirect benefits: LIST

5. Are you or your acquaintances exercising any economic activity in your home? (hostel, products for sale, etc.).



6. What do you think should be improved in your area / interventions to be made, so that there is an increase in the number of tourists, the increase of tourists' stay nights, so that you also have benefits?

### **FOR BUSINESSES**

1. What is your business profile? What activities do you currently perform?
2. Have you enriched the list of products / services of your business during the last two years? Specifically what?
3. What are the problems your business is currently facing? (taxes, tax control, lack of funding, corruption, informality, lack of skilled workers - these will be taken into account in response to a business response). How can you solve these problems?
4. One of the results of the study is the dissatisfaction with the offered service. What are your efforts to improve the latter?
5. During the last year (2019), a number of tourists were foreign and Albanian? How do you see the trend of tourists this year, compared to a year ago?
6. How much did an average foreign-Albanian tourist spend on a daily basis in 2018? How has this changed in 2019? In financial terms, how do you evaluate your business performance this year compared to a year ago?
7. On average, how much did a tourist stay last year? What about this year? Why is it such a short stay? What are the factors that hinder / should promote tourist's length of stay in your area?
8. Have you heard about the destination management offices (linking local government to the business)?
9. How do you connect with the tourist? What promotional activities do you realize / what about the instruments? (Are you on Airbnb, etc.)?
10. What other activities should be added by your business to enrich a tourist package? Which factors hinder this achievement?
11. Do you know the grants give AZHBR (only for guesthouses)? Have you applied?
12. In your opinion, what measures should be taken by local government and central government to develop tourism in the country and empower the community in remote areas?

### **FOR LOCAL AUTHORITIES**

1. What has been the frequency of tourists during the last three years? Do you have a statistical register that tracks the number of tourists, their status, and nights of stay?
2. What investments have been made in the framework of the Project for Integrated Urban and Tourism Development?
3. Have there been improvements in the provision of public services in your area (waste collection, infrastructure, etc.).
4. Have you built a database with key actors that you need to collaborate on further development of tourism in some ways? (DMO, etc).
5. In your opinion, are your assets in the area of tourism development properly utilized?
6. What are the emerging interventions that the project needs to achieve in order to revitalize the area, better use of assets, enrich the tourist package in order to extend its stay and increase the pleasure?

# Annex 3: Focus Group Findings

## 3/1 Focus Group Discussion - Berat

### Introduction

The Albanian Center for Economic Research (ACER) as part of study to evaluate the implementation of the Project for Integrated Urban and Tourism Development organized a focus group discussion in Berat, where some interventions are underway in the framework of this project. This online meeting was organized with the purpose of dividing the main findings from the quantitative study conducted by ACER, strengthening these findings with some qualitative data, as well as obtaining in-depth data from actors involved in project implementation in this city, in line with the 3 components of the project: Urban design and improvement of infrastructure, improvement of tourist sites as well as the tourism market and product development.

### Methodology

On 02/10/2020 a group discussion took place focused on the online platform "Zoom Meeting" with participants from the City of Berat. The discussion started at 09:00 and ended at 10:20. The meeting was led by M.Sc Bylyre Serjanaj and assisted by M.ScAmenaLosha starting with a brief presentation of the preliminary findings of the survey in general and specifically for the city of Berat. The meeting then continued through conversation with participants with questions and answers based on a list of orientation questions divided into 3 categories: questions for family members, businesses and local authorities.

The meeting was attended by 16 people who were representatives from the Municipality (Director of Tourism and other specialists), from local businesses and families. Based on the orientation questions, but also on the experience of each of the participants with the tourists, during the discussions it was noted the knowledge they had about the ongoing PIUTD project presenting the positive sides of the project but also problems and recommendations for possible solutions / improvements. The participants have been sent in advance by e-mail the set of materials such as: Meeting agenda, Project data, and Discussion Orientation Questions. At the bottom of this document is the participants list and photos from Zoom Meeting ([Annex 4](#)).

### Identification of Main Issues

#### Main Findings

- In the city of Berat there have been changes this year as the reconstruction of the main roads, the reconstruction of "Rr. MuzakTopia and "MihalKakomeno", but still not finished as white lines and lighting.
- Lack of parking in the city center is a problem for tourists.
- City lighting not at the right level.
- Berat is considered a relatively clean city in terms of level of cleanliness. The problem is not with tourists but with locals. Rather the problem faced by tourists is the high presence of street dogs that need to be kept under control.
- There is a lack of data on the number of tourists collected from 3 sources: ticket sales at the castle (official used); municipal information office and Onufri museum.
- The type of tourist has been independent and exploratory tourist, domestic. While international tourists have been in an extremely small number and unlike other years have come from Eastern Europe as from Belarus or Ukraine.

- Increasing satisfaction rating for villages was an expected result this year due to infrastructure interventions (Approved 2020 survey findings).
- Three immediate needs for intervention result: reconstructions in areas not only around the Castle; facade reconceptuals and lighting; hanging internet and phone cables have to go underground to look good aesthetically.

## Families

Family members who participated in the focus group discussions have relatively positive views on the implementation of the project in the city of Berat.

- They claimed that there had been reconstructions of some roads that have been required for a long time to be rehabilitated, but the works are still in progress.
- Waste collection is done regularly.
- The number of activities offered should be increased, but the year 2020 made it impossible to achieve this point.
- Parking is not only a problem for tourists but also for family members.

## Businesses/ NGOs

The profile of the businesses that participated this year in the focus group discussion in Berat belonged to the field of hospitality, guides, travel agencies, but also NGOs working in the field of tourism. The main steps to be taken to improve service delivery and increase tourist satisfaction were:

- Promotion of the city, mainly by individuals with social impact (influencers).
- Training of service staff and improvement of working conditions in order to provide services in Berat and not to leave for the other areas of South Albania during the summer season.
- Development of exploratory tourism as a strong point of the City of Berat (since it lacks beaches). Increase the focus on religious or adventure exploration activities so that a tourist can return again next year.

Access to public transport has been difficult to assess this year due to the closure of a period and subsequent opening in specific conditions different from previous years. Since businesses have not met the required points a year ago, this way they need more improvement.

- Support from local and central government in order to develop tourism and empower the community.
- Staff training through professional courses.
- Enrichment of tourist packages with new tours / activities; enrichment of signs throughout the city for finding tourist attractions (in several languages).

## Local authorities

Local authorities from the municipality of Berat has planned a series of activities starting from January 2020, but was continuously interrupted due to quarantine and pandemic situation. The project has had a very positive impact on the creation of road infrastructure that connects the city with the tourist villages and this is a positive change for this year. Numerous investments have been noticed in restaurants and bars by private actors involved in the area tourism. The positive changes are visible for 2020 and there is still work

from the local authorities group involved in the development of tourism in the municipality of Berat, with a special focus on promoting domestic tourism.

- *Design of a promotional web site of the municipality of Berat with all tourist destinations.*
- *Completion of road infrastructure connecting the city with the surrounding villages.*
- *City parking and cleaning will receive special attention in future periods.*

## **3/2 Focus Group Discussion - Permet**

### **Introduction**

The Albanian Center for Economic Research (ACER) as part of study to evaluate the implementation of the Project for Integrated Urban and Tourism Development organized a focus group discussion in Permet, where some interventions are underway in the framework of this project. This online meeting was organized with the purpose of dividing the main findings from the quantitative study conducted by ACER, strengthening these findings with some qualitative data, as well as obtaining in-depth data from actors involved in project implementation in this city, in line with the 3 components of the project: Urban design and improvement of infrastructure, improvement of tourist sites as well as the tourism market and product development.

### **Methodology**

On 30/09/2020 a group discussion took place focused on the online platform "Zoom Meeting" with participants from the Municipality of Permet. The discussion started at 09:30 and ended at 11:00. The meeting was led by M.Sc Bylyre Serjanaj and assisted by M.ScAmenaLoshaj starting with a brief presentation of the preliminary findings of the survey in general and specifically for the municipality of Përmet. The meeting then continued through conversation with participants with questions and answers based on a list of orientation questions divided into 3 categories: questions for family members, businesses and local government.

The meeting was attended by 15 people who were representatives from the Municipality (Director of Tourism and other specialists), from local businesses, non-profit organizations and families. Based on the orientation questions, but also on the experience of each of the participants with tourists, during the discussions it was noted the knowledge they had about the ongoing PIUTD project presenting the positive sides of the project but also problems and recommendations for possible solutions / improvements. . The participants have been sent in advance by email the set of materials such as: Meeting agenda, Project information and Discussion Orientation Questions. At the bottom of this document is the participants list and photos from Zoom Meeting ([Annex 4](#))

### **Identification of Main Issues**

#### **Main Findings**

- In the framework of the project development, there was an intervention in the lighting of the entrance of the city and the continuation of the pedestrian from the centre towards the City Stone, this has been realized within the last two years and there is no visible intervention from 2019 to 2020.
- During this year there is a decrease in the number of tourists in the country due to the situation caused by the pandemic.
- Domestic tourists were more numerous in number compared to international ones.

- The type of tourists (domestic) caught the service providers in Permet unprepared because they were used to the demands of international tourists.
- Waste and cleaning remain a problem for this city.
- Road infrastructure connecting the city with tourist villages is an issue that requires immediate solutions.
- Despite the situation caused by the pandemic, for next year the city of Permet 70% -80% reservations now for next year.
- Promotion is an important point in improving tourism in the city of Permet.

## Families

The family members present at the meeting emphasized that the emergency investments in the city of Permet are the cleaning and maintenance of the place. Road infrastructure to the village of Leuza and Benja should receive special attention from the project. There is a need regarding parking inside the city.

- Improving the cleaning and maintenance of the city and tourist villages.
- Road infrastructure that connects the city with villages like Leuza and Benja.
- A designated car parking area for both locals and tourists.

## Businesses/ NGOs

Same as last year, business representatives point out that in recent years there has been a very large increase in tourists visiting Permet, due to private investment by local entrepreneurs. Business representatives also assessed the improvement of infrastructure as the most urgent need of the municipality of Permet. It was acknowledged by businesses that this year was very different from other years and the demands of domestic tourists differed with international tourists.

The promotion of the country and the tourist areas of the municipality of Permet should be under the attention of the local authorities. During the discussions it was mentioned that a stronger cooperation between the local authorities and businesses is needed to make the necessary interventions in order to attract as many tourists as possible. The cooperation of the local authorities with the businesses would bring interventions not for the individual good but for a general and sustainable development of the municipality of Permet.

- *Wider promotion of tourist areas and businesses involved in tourism.*
- *Cooperation with the local authorities, for effective interventions for a sustainable development of tourism in the municipality of Permet.*

## Local authorities

Representatives from the local authorities emphasized that during the last two years, the ADF has made some interventions, such as lighting the entrance of the city and continuing the pedestrian street from the center towards the City Stone. The representatives said that it is necessary to create a statistical register that tracks the number of tourists, as currently the real flow can not be measured. Tourist data is collected from the tourist information office and hotels / inns, so there is no real number of visitors to this city.

- *Compilation of a register to measure the real number of tourists visiting Përmet.*

- *Maintenance and Parking will be one of the points on which future interventions will be based.*
- *Cooperation with businesses and promotion of tourist areas will be in the constant attention of local authorities.*

### **3/3 Focus Group Discussion - Gjirokaster**

#### **Introduction**

The Albanian Center for Economic Research (ACER) as part of study to evaluate the implementation of the Project for Integrated Urban and Tourism Development organized a focus group discussion in Gjirokaster, where some interventions are underway in the framework of this project. This online meeting was organized with the purpose of dividing the main findings from the quantitative study conducted by ACER, strengthening these findings with some qualitative data, as well as obtaining in-depth data from actors involved in project implementation in this city, in line with the 3 components of the project: Urban design and improvement of infrastructure, improvement of tourist sites as well as the tourism market and product development.

#### **Methodology**

On 30/09/2020 a group discussion took place focused on the online platform "Zoom Meeting" with participants from the City of Gjirokaster. The discussion started at 12:00 and ended at 13:30. The meeting was led by M.Sc Bylyre Serjanaj and assisted by M.Sc Amena Losha starting with a brief presentation of the preliminary findings of the survey in general and specifically for the city of Gjirokaster. The meeting then continued through conversation with participants with questions and answers based on a list of orientation questions divided into 3 categories: questions for family members, businesses and local authorities.

The meeting was attended by 14 people who were representatives from the Municipality (tourism specialists), from local businesses, non-profit organizations and families. Based on the orientation questions, but also on the experience of each of the participants with the tourists, during the discussions it was noted the knowledge they had about the ongoing PIUTD project presenting the positive sides of the project but also problems and recommendations for possible solutions / improvements. The participants have been sent in advance by email the set of materials such as: Meeting agenda, Project data and Discussion Orientation Questions. At the bottom of this document is the participants list and the photos from Zoom Meeting ([Annex 4](#)).

#### **Identification of Main Issues**

#### **Main Findings**

- Very low influx of tourists in the city of Gjirokastra, so based on data from focus groups there is no real number of tourists this year to use as a comparison base with last year.
- The municipality has undertaken a research on accommodation structures in the city of Gjirokastra, which is still ongoing. One of the worrying findings is that about 60% of businesses are closed / unemployed due to the pandemic situation.
- Only 20% to 30% of business bed capacity has been filled this year.
- Problem keeping records and statistics by the business for the number of tourists, nights spent, etc.
- Tourists stay in July-August, 1-2 days.
- In the period January-August the highest number registered was 1000 tourists from one business, while others in this time frame have registered from 100-200 tourists.

- Visit Gjirokastra is a portal where you can find the digitalization of attractions in Gjirokastra, published in two languages: English and Albanian. A statistic on web visibility shows that during this year the online site users have been 25,000 visitors: most of them domestic, due to the general situation of tourism in the country and in the world, and a part of international tourists from America, Greece, Italy, England and others to a much smaller extent.
- Interference should be made to the large ring in order to make the passage easier. That is, the residents of the upper neighbourhood of the pedestrian area have been penalized and should be given a choice.
- It is seen with a critical eye and as very necessary cooperation between different structures / actors. Awareness should be raised and not acted upon individually.
- The fastest necessary interventions are: Itineraries, guides, tours as visible as possible; alleys, neighbourhoods behind the castle should be cobbled; lighting of dwellings declared monument I and II.

## Families

Family members praised the construction of the pedestrian zone and the maintenance of the city. Despite the beauty of the pedestrian area in the city, the movement of residents by car in the upper neighbourhoods of the pedestrian area remained a concern. The problem expressed by family members was the need for as much green space as possible, spaces where children could have fun. Same as last year, the quality of public transport, according to family members, had not changed at all and left much place for improvement.

- *Interference with the large ring to facilitate movement with cars.*
- *It is recommended to create relaxing recreation areas for children and late adulthood, as well as to improve public transport.*

## Businesses/ NGOs

Representatives from businesses stated an unsatisfactory situation in terms of tourism in the municipality of Gjirokastra. *"The part of outdoor tourism has been very weak this year. Not specifically for the horse-riding activity that I offer but in general outdoor activities have not been selected by tourists in 2020."* - said the representative elected by Horse Riding Albania. Businesses reported that about 60% of businesses were closed / unemployed due to the pandemic situation. Only 20% to 30% of the capacity of business beds has been filled this year, in terms of the city of Gjirokastra.

Visit Gjirokastra has provided a very important output through the digitized promotion of Gjirokastra services - the creation of a website to raise awareness. The digitalization of attractions that you can find in Gjirokastra, are published in two languages: English and Albanian.

- It is seen with a critical eye and as very necessary cooperation between different structures / actors. Awareness should be raised and not acted upon individually.
- The fastest necessary interventions are: Itineraries, guides, tours as visible as possible; alleys, neighbourhoods behind the castle should be cobbled; lighting of dwellings declared monument I and II.

## Local authorities

The representatives of the Municipality were very willing to inform the other participants about the new interventions that would be made within the project. The official number of tourists for 2020 is filtered by



the number of tickets in museums (from the structures directly dependent on the municipality from which the municipality collects revenue). What is noticed this year is the considerable index of domestic tourists. To help bring local tourists closer, the municipality of Gjirokastra has undertaken intensive initiatives on promotion for the city of Gjirokastra. In the period January-August the highest number registered were 1000 tourists from one business, while others in this time frame have registered from 100-200 tourists.

- *Wider cooperation with public and private actors on sustainable tourism in the municipality of Gjirokastra was promised.*
- *Improving the infrastructure and promoting the city.*

### **3/4 Focus Group Discussion - Saranda**

#### **Introduction**

The Albanian Center for Economic Research (ACER) as part of study to evaluate the implementation of the Project for Integrated Urban and Tourism Development organized a focus group discussion in Saranda, where some interventions are underway in the framework of this project. This online meeting was organized with the purpose of dividing the main findings from the quantitative study conducted by ACER, strengthening these findings with some qualitative data, as well as obtaining in-depth data from actors involved in project implementation in this city, in line with the 3 components of the project: Urban design and improvement of infrastructure, improvement of tourist sites as well as the tourism market and product development.

#### **Methodology**

On 02/10/2020 a group discussion took place focused on the online platform "Zoom Meeting" with participants from the City of Saranda. The discussion started at 11:30 and ended at 13:15. The meeting was led by M.Sc Bylyre Serjanaj and assisted by M.ScAmenaLosha starting with a brief presentation of the preliminary findings of the survey in general and specifically for the city of Saranda. The meeting then continued through conversation with participants with questions and answers based on a list of orientation questions divided into 3 categories: questions for family members, businesses and local authorities.

The meeting was attended by 14 people who were representatives from the Municipality (Director of Tourism and other specialists), from local businesses and families. Based on the orientation questions, but also on the experience of each of the participants with the tourists, during the discussions it was noted the knowledge they had about the ongoing PIUTD project presenting the positive sides of the project but also problems and recommendations for possible solutions / improvements. The participants have been sent in advance by e-mail the set of materials such as: Meeting agenda, Project data, and Discussion Orientation Questions. At the bottom of this document is the participants list and photos from Zoom Meeting ([Annex 4](#)).

#### **Identification of Main Issues**

##### **Main Findings**

- Local tourists saved tourism in the city of Saranda. Due to the situation from the pandemic, a worse situation of tourism was expected in the municipality of Saranda.
- The implementation of the project has not created any significant changes from last year regarding the municipality of Saranda. Even those interventions that have been carried out so far need improvement (the promenade).



- Butrint Park lacks paths, in the Blue Eye area garbage disposal remains a problem, while in the city of Saranda there is a lack of recreational areas for children and late adults.
- Visible parking problems.
- The bus terminal should receive more attention from the local government.
- Lack of activities due to pandemic.
- It is recommended to increase the quality of local gastronomy and not to abuse prices.
- Establishment of a "Destination management organization" in order to increase the promotion of tourist areas in Saranda.

## Families

Family members involved in online discussions about the municipality of Saranda expressed as problematic the lack of recreational areas, cleaning the city and parking in the country. Recreation areas are a problem that persists over the years. Family members find it difficult to find areas where they can take their children to rest and play.

- *It is recommended to create green areas for vacationers and parks for children.*
- *The well-being of the place and parking need intervention from the local authorities.*

## Businesses/ NGO

Representatives from businesses claimed that this year was very difficult in terms of tourism. Lack of activities and the pandemic had major effects on reducing the number of tourists. It is also worth noting that local tourists have made it possible for some of the businesses to survive this year. Businesses would be greatly helped by a greater promotion by the local government and the creation of a "Destination Management Organization".

- *Stronger cooperation between businesses and local government is recommended.*
- *Promotion of the place and creation of the "Organization of Destination Management".*

## Local Authorities

Local government representatives claim that compared to last year the number of tourists is really low (from 6.8 million in 2019 to 1 million in 2020). "This year is not a year of figures in terms of the number of tourists but a year of salvation of the tourism industry" - said the tourism specialist. Tourists were away activities this year. Also, within the PIUTD there are still objectives to be achieved and to be met in the municipality of Saranda.

- *Cooperation with businesses to promote the country.*
- *Meeting the objectives within the PIUTD project.*

## Annex 4: List of Participants and Photos of FGD

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Recording

Participants (15)

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- Blytre Serjana (Host)
- Ali Dellaj
- Rizaldo Vrenosi
- Vasilq Nikolla
- ACER Conference Room
- Bleona
- Cesvi Albania
- Elidjon Thanasi
- Eraldo Sakollari
- Klodja Cko
- Kristjana Ibrahim
- Niko M-Hall
- Pro Permet
- Robert

Recording

00:09:54 9:43 AM

Next slide

### Informacion mbi shpenzimet e turistëve

	Minimum	Maksimum	Mesatare
2016	0	2000	44.49
2018	10	200	52.87
2019	3	200	47.08
2020	10	200	48.54

Në vitin 2020 një turist ka shpenzuar mesatarisht **48.54 Euro/ditë**, e cila në krahasim me vitin 2019, ka pësuar rritje të lehtë prej **1.46 Euro/ditë** të shpenzimeve mesatare ditore (ishte 47.08 Euro/dite).

Slide 14 of 15

### FALEMINDERIT

Thank you for attending

No Notes.

Participants (15)

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- Blytre Serjana (Host)
- ACER Conference Room
- Bleona
- Cesvi Albania
- Elidjon Thanasi
- Eraldo Sakollari
- Klodja Cko
- Kristjana Ibrahim
- Pro Permet
- Rizaldo Vrenosi
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ACER  
Albanian Center for Economic Research

FONDI SHQIPTAR I ZHVILLIMIT  
ALBANIAN DEVELOPMENT FUND

# PROJEKTI PER ZHVILLIM TE INTEGRUAR URBAN DHE TURIZEM

## 2020- Vrojtimi i Turistëve

Tetor, 2020

Participants: Bujar Geronzi, Elli Kapi, Engeli Skopri, Galaxy S8+, Alma, Hevjola Sherifi

Remaining Meeting Time: 05:58

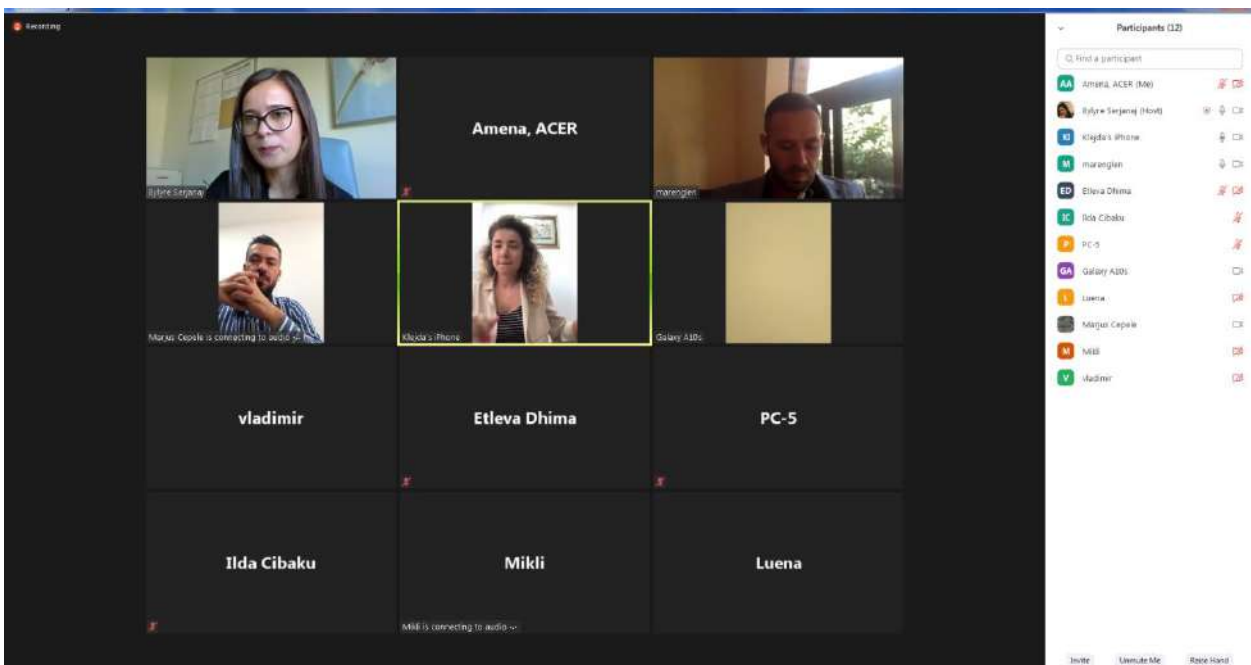
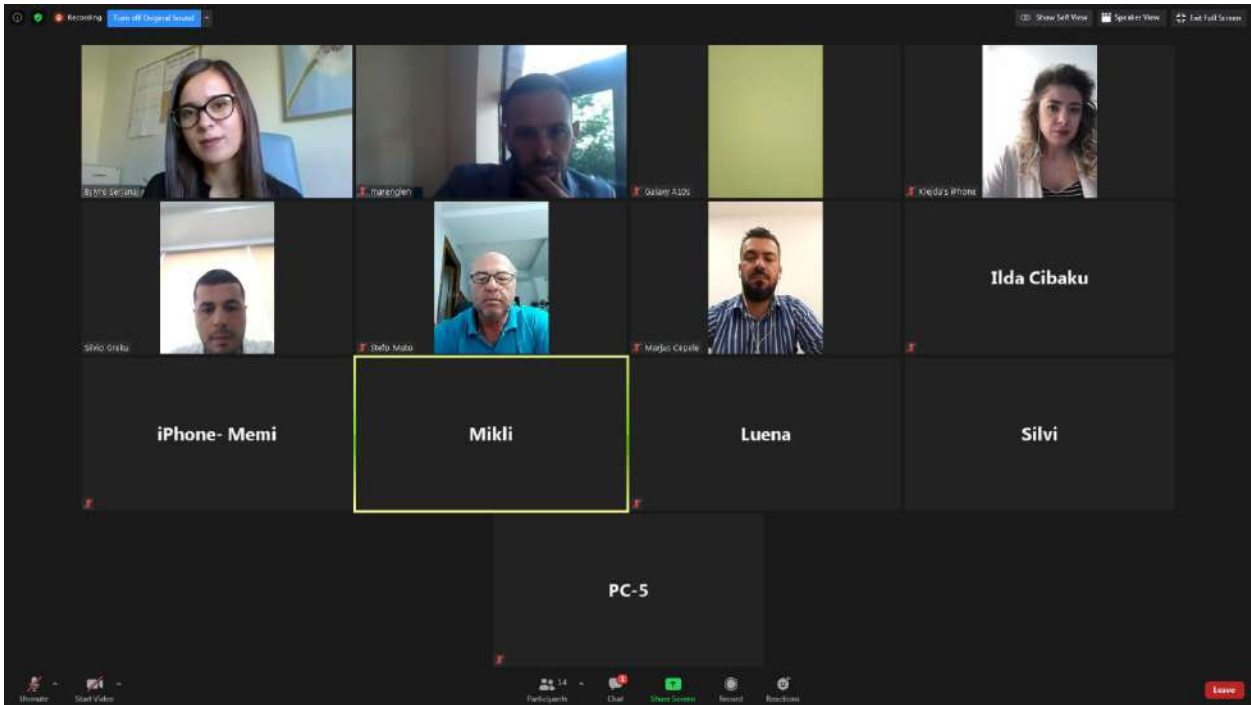
Participants (12)

- ACER (Me)
- Bujar Geronzi (Host)
- Edvin Lamce
- Elli Kapi
- Engeli Skopri
- Hevjola Sherifi
- Alma
- Enkela's iPhone
- Galaxy S7 edge
- Galaxy S8+
- Katerina
- Luana Bakaj/Bashkia Qirokazeri

Video thumbnails: Bujar Geronzi, Elli Kapi, Enkela's iPhone, Edvin Lamce, Hevjola Sherifi, Alma, Katerina

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