

Final Report

SUMMARY OF TOURIST SURVEY, FOCUS GROUP FINDINGS AND TOURIST COUNTING 2019

Submitted by:
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This survey, analysis and recommendations contained in this document represent the views only of the authors, and do not necessarily reflect the analysis, attitudes and opinions of the World Bank, or the Albanian Development Fund, nor of the donors or parties involved in the Project Integrated Urban and Tourist Development.

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List of Acronyms

ACER – Albanian Center for Economic Research

ADF – Albanian Development Fund

AIDA – Albanian Investment Development Agency

ALL – Albanian Lek

CAPI – Computer Assisted Personal Interviewing

EDC – Electronic Data Capturing

FGD – Focused group discussion

INSTAT - National Institute of Statistics

MTE – Ministry of Tourism and Environment

NAT – National Agency of Tourism

NAPA – National Agency for Protected Areas

NSA – National Seashore Agency

PIUTD – Project for Integrated Urban and Tourism Development

Executive Summary

This report is divided into four main chapters: The first chapter presents a description of the 2019 Tourist Survey; Chapter two analyzes Tourist Survey Findings, 2019 and a comparison of data with the 2018 survey and 2016 baseline study; Chapter Three describes Focus Group Discussion Findings and Chapter Four presents Tourist Counting Findings at 9 tourist destinations included in the project.

Albanian Center for Economic Research (ACER) contracted by the Albanian Development Fund (ADF) conducted a tourist survey in 9 areas in which the Project for Integrated Urban and Tourism Development (PIUTD) is being implemented, as well as four focus group discussions in 4 preselected urban centers within the framework of the project, in cooperation with the respective Local Government Units.

The survey is based on the baseline survey questionnaire in 2016 and 2018 study. This year, the survey was conducted from 1-15 August in 4 urban areas: Saranda, Berat, Permet and Gjirokastra, along with touristic areas: Blue Eye, Porto Palermo, Zvernec, Orik and Benja, same as in the 2018 survey. During this period, ACER conducted 2 surveys, in 2018 and most recently in 2019. To maintain comparability of data, the same methodology and the same survey instruments were used (*see Annex 1*). The purpose of this survey is to provide reliable information from tourists' perceptions on existing tourism products in urban centers where the PITUD is being implemented.

In the recent years, tourism has become one of the most important and developing sectors of the Albanian economy and has been considered by the government as one of the main engines for national growth. Albania is being recommended more and more each year as a tourist destination by various tour operators and international travel guides. Tourism aims to meet the demands of foreign tourists for cultural visits, leisure, health and sports, accommodation, food and entertainment, etc., by positively changing the economic structure, creating new jobs and generating revenue, as well as contributing to the social and economic development of the country.

This survey aims to determine how visitors perceive existing tourism products in urban centres where PIUTD is being implemented, and as such, the survey provides useful data for marketing destination in the upcoming years. Most importantly, the survey provides an overview of the perceptions of visitors to these 4 urban centres as a tourist destination, creating opportunities for comparison with the results of the same survey conducted in 2018 and in 2016.

As is well known, tourism products are diverse and include a number of different elements. As a result, visitor satisfaction at a destination can be influenced by a variety of tourism experiences, which can be derived from many sources (e.g. accommodation, use of natural attractions, restaurants and so on). Similarly, when using any tourism product there are a number of aspects that affect visitor satisfaction. For example: the treatment provided by service personnel, the physical environment, or the visitor ease of access to enter on a touristic object. For this reason, the survey analyzes both satisfactions with tourism facilities and dimensions of the tourist experience.

In order to assess the perceptions and experiences of national and international tourists on their satisfaction while staying in Albania in four regions studied, ACER prepared a study report for 2019 generated from the survey of 1260 visitors and four Focus Group Discussions (FGD).

Following, are summarized the key findings of the quantitative and qualitative study for 2019, while using as a comparative basis the results from 2018 and 2016.

- ❖ *3 out of 4 tourists are international*, 90 % of international tourists come from Europe (mainly France, Italy and Germany) and 10 % come from Canada, United States, Asia and Australia. Whereas, *1 out of 4 interviewed tourists are domestic*. When compared to a year ago and baseline study – *74.8 % of tourists are internationals versus only 80 % in 2018 and 64 % in 2016*.
- ❖ In 2019, the majority of tourists (57.7 %) declare that they spend an average of eight days in Albania. Compared to 2018 and 2016, it is noted a decrease in the number of tourists staying in Albania for an average of eight days. However, the number of tourists staying between 4-7 days has increased significantly (39.5 %), compared to 2018 and 2016 where these figures were respectively 25 % and 33 %.
- ❖ *90.6 % of tourists visited Albania independently*, against 9.4 % of tourists who were part of tourist packages. Compared to 2018, *there is a small decrease in the number of tourists visiting Albania through tourist packages* (from 11 % in 2018 to 9.4 % in 2019).
- ❖ Most of the interviewed tourists declared to be very satisfied/ satisfied during their stay in Southern Albania. *The international tourist is more satisfied during the stay in the destination than the national tourist*. Compared to 2018, the average level of overall satisfaction is almost the same (from 4.07 to 4.05).
- ❖ Activities such as *exploring natural parks, churches and local gastronomy* have resulted with highest level of satisfaction. In the 2018 survey, the highest levels of satisfaction result for activities such as *exploring natural parks, hiking and religious activities*.
- ❖ There has been an *increase in the satisfaction with quality of services* (from an average rating of 2.86 to 3.1) at entry points in Albania, compared to 2018. Tourists interviewed in Saranda, Berat and Permet have resulted *less satisfied than in 2018*.
- ❖ The 2019 survey shows a slight decline in *the evaluation of personal security* of the tourist compared to 2018. Domestic tourists feel more insecure than international tourists. When compared to a year ago, it has increased the proportion of international tourists who rated personal security in Albania as very bad / bad (from 17.1 % to 21.1 %).
- ❖ *Tourists evaluate positively the friendship of people* (but with a lower level of satisfaction than a year ago) and *the quality of food/drinks*. On the same page, there are some aspects where tourists are largely unsatisfied. Lack of facilities for children, quality of guides, state police services, access to public transport, etc. remain some of the main tourist's concerns.
- ❖ In 2019, tourists spent *on average 47 Euro/day*. Compared to the average amount spent in 2018, there has been a *decrease in the daily average spending* (in 2018 it was 53 Euro/day).
- ❖ In regard to tourist counting in the 9 areas where the survey was conducted, results show that *the coastal areas have the largest tourist influx*, taking into consideration the time period during which the survey was conducted (August). *Saranda and Berat are the tourist destinations with the largest number of businesses* when compared to other destinations.

In conclusion, the survey shows that tourists generally express a high level of overall satisfaction during their visit at the touristic destination. However, this level is lower compared to the previous year and the baseline study. One of the reasons for the decrease in satisfaction may be the continuation of work in some tourist areas. Also there are a number of key areas which require immediate attention: (i) improving internal infrastructure, (ii) creating the adequate infrastructure conditions needed to facilitate better conditions for access to natural and cultural tourism assets in the four destinations studied, (iii) focused interventions to increase host capacities and improve service quality and (iv) empowering communities by fostering co-operation between tourism actors and their local businesses and institutions.

Introduction

Tourism is evaluated as one of the most important sectors in the economy of the Republic of Albania. According to the National Institute of Statistics (INSTAT), tourism-related activities (accommodation, food/drinks services, travel agencies, tour operators and other booking service activities) for 2018 contributed about 2.8% to Gross Domestic Product.¹ Meanwhile, tourism's direct contribution to Gross Domestic Product was 2.5% or otherwise generated ALL 39 billion in value added in 2017, compared to ALL 34 billion in 2016. Considering the vital role of tourism in Albania, the Government of Albania has increased its focus, concentrating mainly on strengthening the legal framework (Decision No. 22/2018, *On the Approval of Criteria for Certification of Agrotourism Activity*; Order No. 745/2017 *Tourist Guide of Honor*; Law No. 114/2017 amended to Law No. 93/2015 “*On Tourism*”; Law no. 71/2017, amended to Law No. 92/2014, “*On Value Added Tax*”)² and institutional framework: Ministry of Tourism and Environment (MTE), National Agency of Tourism (NAT), National Agency of Seashore (NAS), National Agency for Protected Areas (NAPA), Albanian Investment Development Agency (AIDA). In the last decades, a number of strategies have been drafted for the development of the tourism sector, which have significantly influenced the development of this sector in the country, such as: National Strategy for Sustainable Tourism Development 2019-2023;³ National Strategy for Sustainable Tourism Development 2018-2022;⁴ Sectorial Strategy: National Sectoral Plan of Tourism, Albanian Alps Region, 2017;⁵ Cross-cutting Strategy “Digital Agenda of Albania 2015-2020”⁶, National Strategy on Development and Integration 2015-2020;⁷ National Cross-cutting Strategy for Decentralization and Local Governance 2015-2020.⁸

The increasing attention of Government of Albania to this sector and the interventions carried out in certain geographical areas has resulted in an increase in the number of tourists visiting Albania. From August 2017 to August 2018, according to INSTAT, Albania welcomed 2.1 million visitors - an increase of 15.8 %. In 2018, the inflow of foreign visitors has increased by 4.13 % compared to 2017. Meanwhile, the number of foreign visitors entering our country during the nine months of 2019 (January-September) increased by 7.9 %, compared to the same period in 2018.⁹ The largest number of visitors is mainly concentrated in regions such as Saranda, Ksamili and Durres. Whilst, Berat and Gjirokastra are considered as specialized urban centers in the region, due to population decline, low access to services and inferiority in terms of economic development. Across

¹Tourism in figures, INSTAT, Albania, 2019: http://www.instat.gov.al/media/5529/turizmi-ne-shifra_.pdf

²Laws and bylaws, MTE <http://www.mjedisi.gov.al/ligjet-dhe-aktet-nenligjore/>

³National Strategy for Sustainable Tourism Development 2019-2023, MTE: <http://www.mjedisi.gov.al/wp-content/uploads/2019/06/Strategjia-Komb%C3%ABtare-e-Turizmit-2019-2023.pdf>

⁴ National Strategy for Sustainable Tourism Development 2018-2022, MTE: <http://mjedisi.gov.al/wp-content/uploads/2018/02/Strategjia-e-Turizmit-18-22-draft-1.pdf>

⁵National Sectoral Plan of 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>

⁶ 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

⁷ National Strategy on Development and Integration 2015-2020, Council of Ministers, Republic of Albania: http://www.mbrojtja.gov.al/images/PDF/strategji2016/SKZHI_FINAL_QBZ.pdf

⁸ National Cross-cutting Strategy for Decentralization and Local Governance 2015-2020, Council of Ministers, Republic of Albania: <http://www.bpe.al/sites/default/files/publications/Strategjia-ndersektorale-per-decentralizimin-dhe-qeverisjen-vendore.pdf>

⁹ Movements of citizens in Albania, September 2019: <http://www.instat.gov.al/media/6383/levizjet-e-shtetasve-n%C3%AB-shqip%C3%ABri-shtator-2019.pdf>

the region, personnel service capacities are conditioned by seasonal population growth, while their poor quality prevents to reach the maximum economic potential of these areas. Also, tourism activities, which are the main drivers of regional economic development, occur only during a short period in summer and are dominated by very high volume but low quality local and regional services, with very little diversification or innovation.

Despite the increasing trend in the number of tourists visiting Albania, including this year, it should be noted that the context and overall climate of a country has a significant impact on the choice of tourist destination. The 2019 year in Albania has been coincided with several local events that directly and indirectly have affected some aspects of satisfaction of tourists' stay in the country. However, it should be noted that although this year had many protests and political instability, the number of tourists has increased compared to the previous year. On the other hand, data from the Albanian Tourism Association as well as the Albanian Association of Tour Operators and Tourist Agencies indicate a high number of cancellations from international tourists. This point out Albania's potential in the field of tourism if the political situation would be more favorable.

Hence, the results of this study report are attributed inter alia to external factors related to: First, the unstable situation created in the country as a result of numerous protests this year. Second, the ineffective and unorganized anti-informality action the Albanian government undertook this year. This action was implemented during the tourist season and created dissatisfaction in many directions. Under normal circumstances, such action should have begun with information and awareness to taxpayer, months before the tourist season began. Third, the year 2019 was an election year (June, 2019) for local elections. In these circumstances, the transition of mayors has required sufficient time to resume normal activity in each region. This is accompanied by delays in the implementation of local interventions and which indirectly affects the satisfaction of tourists. Finally and within the framework of this project, this study report aims to assess the satisfaction of tourists in certain areas, taking into account the interventions carried out by the project. From consultations with focus groups and published documents by ADF, so far in the framework of the PIUTD, it has been realized: Rehabilitation of cobblestone road "Mihal Komneno" to Berat Castle; rehabilitation of Saranda stairs by combining white stone with ceramics; Bazaar cobblestone roads rehabilitation in Gjirokastra and street lighting in Permet. Investments have focused on cobblestone restoration, lighting system, power grid interference, communication networks, sewer system, urban design and greenery. The future investment package focuses on making the best use of public spaces, protecting the identity of the respective cities, functional aspects serving residents and visitors, as a result of revitalizing tourist areas.

Chapter 1. Tourist Survey 2019

To evaluate the implementation of the PIUTD and achievement of the objectives of this project, ACER conducted a quantitative and qualitative study with the aim of providing a particular focus on tourists' satisfaction and use of public services and infrastructure as well as identifying spending patterns and staying during the visit of tourists to Southern Albania, which facilitates the assessment of the economic impact of the PIUTD. A survey with a sample of 1,260 tourists in Southern Albania was conducted for the quantitative study. To clarify some particular aspects of the quantitative study, the latter was followed by a qualitative study where the opinions, experiences and suggestions of the stakeholders were gathered through focus group discussions in 4 cities: Berat, Permet, Gjirokastra and Saranda. Below, the methodology used for each study is given in detailed.

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 assessment comprises three key data collection tasks to be carried out: (i) a representative household survey in each of the 4 selected urban centres, namely in Berat, Gjirokaster, Permet and Saranda, (ii) a representative survey of (formal and informal) tourism-related businesses in each of the 4 selected urban centres, and (iii) a survey of tourists in a number of 10 pre-selected touristic sites. The first two tasks are intended to yield data on whether and how households benefit from project investments, both directly - through public services, improved urban infrastructure or project-related jobs, or indirectly - through increased economic opportunities linked to those investments, especially those related to the tourism industry.

1.2 Coordination and Implementation of the Survey

The coordination and overall implementation of the Tourist survey was under the responsibility of ACER. Legally and contractually, ACER is liable for a range of responsibilities, which were fulfilled through close liaison with ADF technical team of supervisors. Some of these responsibilities are:

- Identification of relevant staff for field work and its training.
- Providing the necessary logistical basis for the survey.
- Administration of data collected according to specified standards and their preparation for analysis and interpretation of survey findings.

1.3 Methodology of Quantitative Study

The quantitative study includes the survey conducted with tourists in Southern Albania, area which is object of the Project. The tourist survey was conducted in 9 pre-selected destinations as described below. The site selection was determined by the Albanian Development Fund (ADF) based on the

2018 study and the baseline study conducted in 2016. In each of the mentioned destinations, a total of 140 questionnaires have been conducted 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

1.3.1 Survey Sample

Tourists in these areas have been the base of the survey. Similar to the methodology used in the baseline study and year one study of 2018, the tourist sample has been extracted by using accidental selection. Accidental sampling is a non-probability sampling method, which comes as a result of the inability to identify the entire population under study. For this reason, people who are in these predetermined areas are interviewed without prejudice. In cases of family group visitors, it has made possible for only one member to participate in the survey. In order to provide a representative sample and obtain inclusive and unilateral information, interviews were conducted:

- a. On different days of the week
- b. At different times of the day

Accidental sampling has allowed capturing all the nuances in tourists' use and satisfaction with public services and infrastructure, as well as their expenditures during their visit. From the tourist survey, several quantitative data have resulted – among others:

- Tourists' process of gathering information and bookings made in the touristic destination.
- Tourists' duration of visit, place of stay and means of transport.
- Places visited by tourists during the stay.
- Tourist's daily expenditures.
- Tourists' attitudes and satisfaction with a variety of attributes, including tourist sites, accommodation, food, accessibility, transport, urban infrastructure, spending, cultural heritage etc.

1.3.2 Selection and Trainings of Interviewers

For the development of this study, ACER created a team of three regional supervisors, who supported the selected enumerators and supervised the implementation of the field survey. The training was held on 27 July and included 11 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 interviewers were divided by areas: Saranda - 5 interviewers, Gjirokastra - 2 interviewers, Berat - 1 interviewer and Permet - 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 1 August 2019 and ended on 15 August 2019. No major problems were identified during the process. Along with the interviews conducted, the interviewer also carried out the counting of tourists visiting the area on that day as well as businesses carrying out activities in the area (or near the area in the case of Castles).

1.3.3 Engagement of Regional Supervisors

To oversee field work, 3 supervisors were contracted in each of the 4 areas. Through continuous communication of the supervisors with the enumerators, every two days a work plan was prepared, which was reported to the ACER office staff. The ACER's coordinator has overseen the implementation of the plan every day. Supervisors assisted the interviewers in their fieldwork, facilitating communication with interviewed tourists and 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). ACER provided all the necessary means (tablets), equipment and capacities to conduct the interviews via EDC, which has facilitated the process of data collection. EDC has a number of advantages, including:

Cleaner Data: EDC software is particularly good at enforcing certain aspects of data quality. Edit checks programmed into the software can make sure data meets certain required formats, ranges, etc. before the data is accepted into the trial database.

More Efficient Processes: EDC facilitates the process of clarifying data discrepancies with tools for identifying and resolving data issues with sites.

Speed: Collecting data through the use of a mobile phone can greatly speed up the data collection process. Where network availability allows for near-instantaneous transmission of data to a central coordinating group, the reduced amount of time that elapses between local data collection and delivery can save weeks or even months of time. In addition, an early warning system of sorts can be established, allowing survey coordinators to quickly identify potential problems with data collection efforts and (potentially) correct them in almost real time.

Accuracy: Digital data capture at the source can greatly reduce transcription errors, and data transmission over mobile networks may ensure that no data are lost 'in transit'. Capture and transmission of data digitally may also ensure that it is easier to store and access them at later dates, should this be required.

Familiarity and convenience: Enumerators and survey respondents may, at a general level, already be quite comfortable using a mobile phone (and indeed may be using their own personal device), even if they have not used it specifically as part of data collection efforts. Such devices may

be widely available already in target populations, who may be accustomed to their use in a variety of contexts.

Training: Because people may already know how to use the devices for many purposes, less technical training may be necessary in some circumstances. In addition, on tablets, and to a lesser extent with feature phones, help files and on-screen prompts may provide useful relevant supporting documentation and guidance that may reinforce messages from training that does occur, and potentially obviate the need for some sorts of training altogether.

Low power: Compared with devices such as laptops, mobile phones may be much easier to keep charged, as they require much less power and because many fast, low-cost charging options may be available in local communities because people are already utilizing such devices extensively for other purposes as part of their daily lives.

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 Implementation

During implementation of fieldwork, supervisors identified some difficulties:

- ✓ Higher non-response rate in the sites of Saranda promenade area, Vlora promenade area as a result of the short period of time staying in that site. Tourists during the day stated that they did not have time to take part in the survey since they had to go to the beach and/ or restaurant and were simply passing-by at that destination.
- ✓ Difficulties in determining the amount of expenses in cases of organizing groups of tourists and in cases where the expenditure has been paid in advance, such as in the form of a tourist package. Despite this, interviewers consistently encouraged tourists to calculate an approximate average of the costs incurred by them.
- ✓ The number of registered questionnaires was completed as provided in the sample survey: 1260 questionnaires. It was recorded an overall of 12 % of non-response rates, so 168 were not willing to participate in the survey.

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

1.4 Limitations of the Study

Based on the reports prepared by the supervisors regarding the difficulties encountered during field work, it was noted:

- The same difficulty remains as in the previous year: Due to the fact that the declaration of personal income is not related to the execution of expenditures, generally Albanian families do not document in detail the expenditures they incur. Consequently, data gathered through interviews help to understand the trend and express perceptions, while data on expenditure should be treated with caution.
- Election year (local administrative elections) and inter-party problems (opposition parties exit from parliament, ongoing protests, opposition non-participation in elections) are estimated to have affected tourist cancellations, tickets, etc., especially from international tourists, because of their perception of the unstable political situation in Albania.

Chapter 2. Main Findings of Tourist Survey 2019

This chapter presents a comparative analysis of tourists' satisfaction with various aspects, throughout their stay in Albania. The comparative analysis refers to the tourist survey results in 2019 and tourist survey results in 2018 and 2016. For purposes of developing the comparative analysis, results have been analysed for the same touristic destinations.

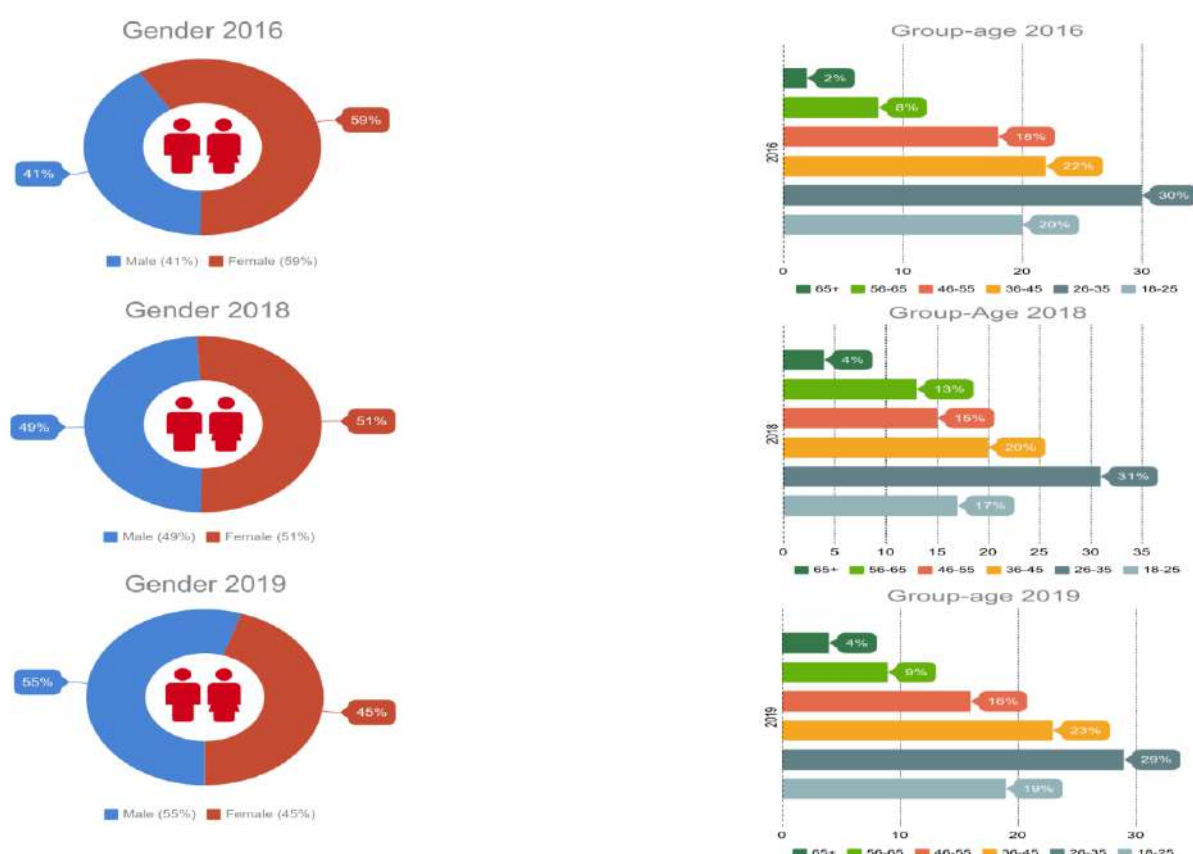
The first section describes the demographic profile of the survey sample, including information related to several aspects such as: tourist status, resident or not resident (domestic or international tourist), employment status, education etc. The second section presents data on tourists' satisfaction regarding entry points in Albania and their length of stay. In the third section, results related to tourist satisfaction are described. Lastly, the fourth section describes in details information gathered regarding tourist expenditures in the destinations where PIUTD is being implemented.

2.1 Tourists' Demographic Profile

In the survey conducted in 2019, 45 % of tourists are females and 55 % males. Compared to 2018, it had a higher female representation with 51 % females against 49 % males, also in 2016, where 59 % of tourists are female and 41 % male. The group-age who prefers to travel to Albania in 2019 is the age interval of 26-35 (29 %) followed by 23 % of tourists from 36-45 group-age and 19 % from 18-25 group-age. The age distribution is very similar compared to the 2018 survey and baseline study. This trend is also confirmed by the latest INSTAT data on the statistics of tourist influx in Albania for 2019.¹⁰ Results are presented in the Figure 1, below.

¹⁰Tourism in figures, INSTAT, Albania, 2019: <http://www.instat.gov.al/al/publikime/librat/2019/turizmi-n%C3%AB-shifra-2019/>

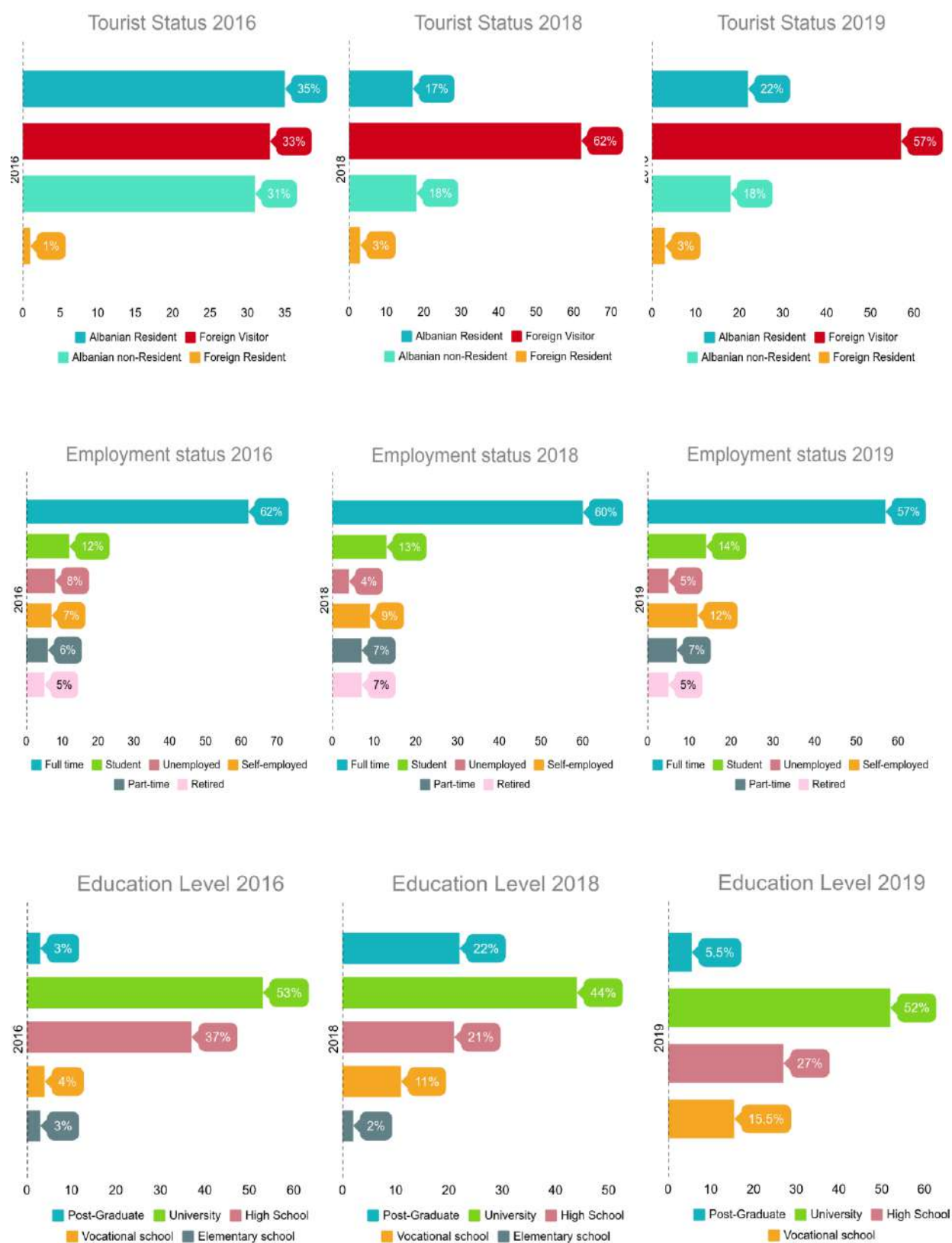
Figure 1. Tourists interviewed according to gender & group ages 2016, 2018 and 2019



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Figure 2, provides a summary of generated results regarding tourist status, employment status and education level. Survey results for 2019 show that 74.8 % of respondents are *international tourists* (foreign visitors and Albanian non-resident) compared to 80 % in last year or 64 % three years ago. The majority of international tourists (89.6 %) are from Europe (mainly France, Italy, Germany) and 10.4 % from Canada, United States, Asia and Australia. For 2019, tourists were asked regarding their employment status. 57.3 % of the interviewed tourists are *employed full-time*, 13.6 % are students, 12.4 % self-employed, 6.6 % work part time and 5.4% are retired. Such distribution of employment status is similar for 2018 and 2016 as well. Regarding the level of education, 51.9 % of interviewed tourists declared that they have a university degree versus 44 % and 53 % of tourists respectively in 2018 and 2016. Unlike last year, in 2019 we have a higher representation of tourists who have completed high school 42.5 % compared to 32 % a year earlier. Meanwhile unlike the previous studies, in 2019 there is no representation of tourists who have only completed elementary school.

Figure 2. Tourist categorization regarding residency, employment & education status 2016, 2018 and 2019



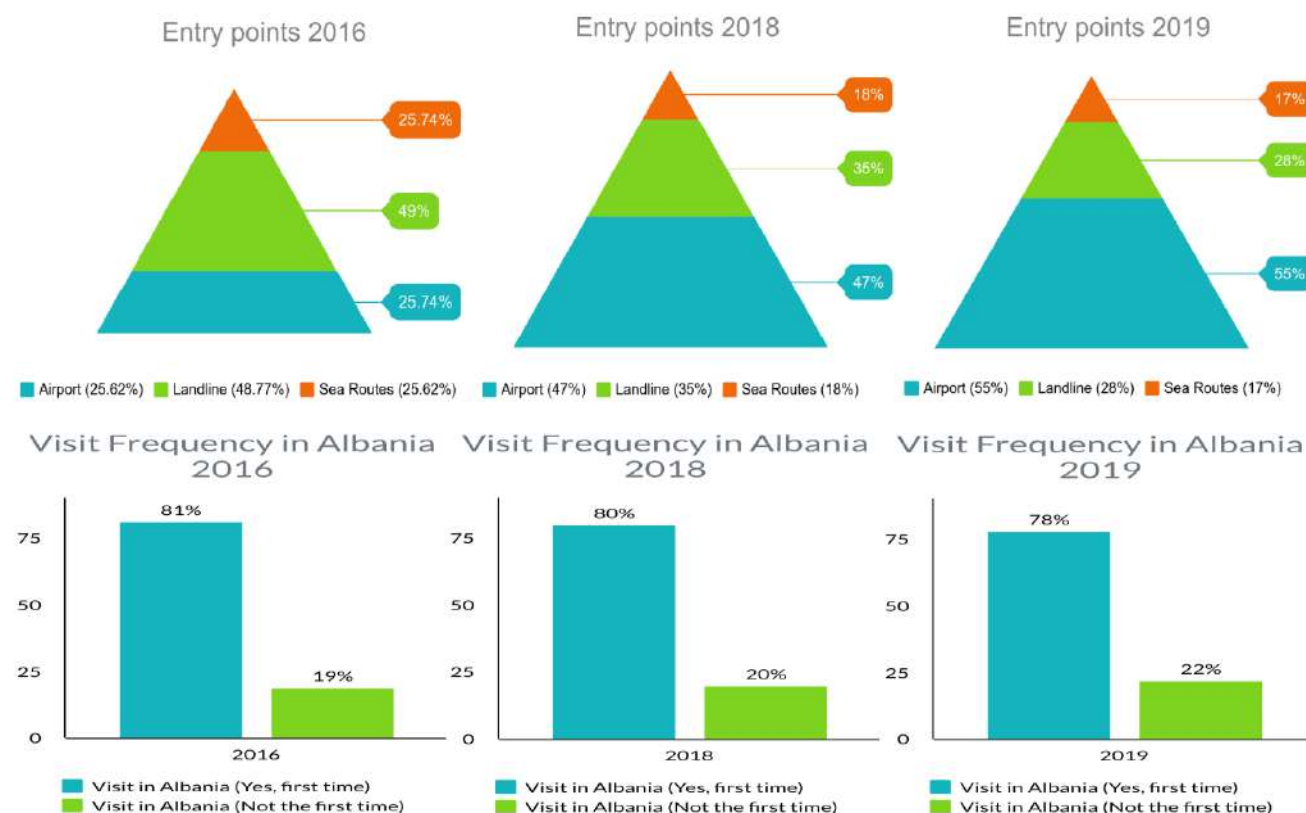
Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

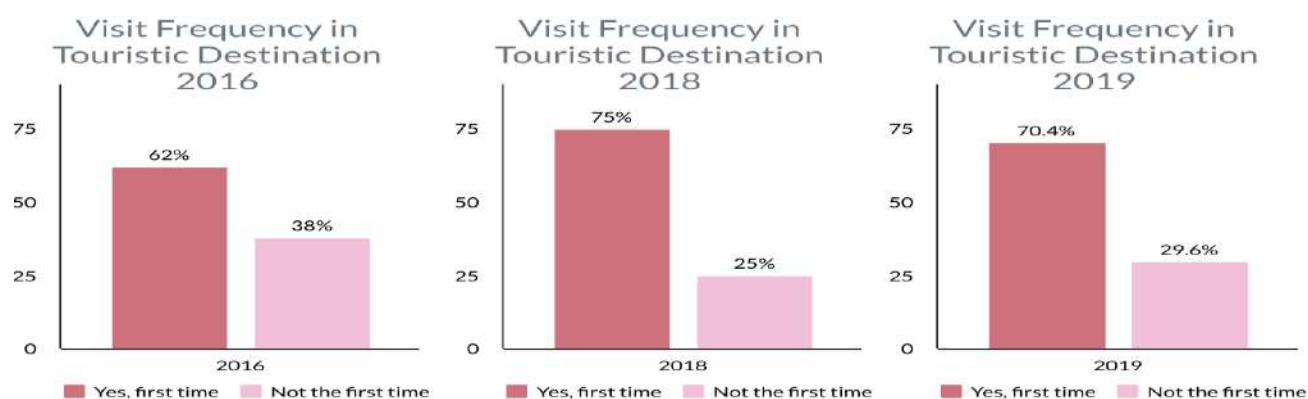
2.2 Entry and Length of Stay

In 2019, 55 % of tourists entered the Albanian territory from airport, compared to 47 % in 2018 and the baseline study with only 26 % of tourists who used this entry point. The second most frequented way has been the landline; this is accepted by 28 % of tourists versus 35 % of tourists one year ago and 49 % three year ago. According the sea routes, specifically the ports of Durrës, Saranda and Vlora have been less frequented compared to one and three year ago, however the port of Saranda has resulted with the largest number of tourists.

Through analyzing the frequency of visits of international tourists to Albania, not necessarily the individuals, who have visited Albania, have also visited the tourist areas. For this reason, tourists were asked if it was the first time they visited Albania (this question was only valid for non-resident visitors) and whether it was the first time they visited the destination they were asked about (this question was valid for all respondents). It turns out that 77.9 % of tourists visited Albania for the first time, versus 22.1 % who had visited earlier. Meanwhile in 2018, 80 % of tourists said it was the first time they visited Albania, versus 20 % who had visited earlier. Compared to the two previous studies, no significant differences were observed, both when asked about Albania and specifically for tourist sites. These results show the potential of visiting Albania touristic destinations by young tourists (who visit Albania for the first time), and outlining the message of the importance of guaranteeing their satisfaction in order to repeat the experience in the future. The results are summarized in Figure 3.

Figure 3. Entry points in Albania and visit frequencies 2016, 2018 and 2019





Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

In 2019, the majority part of tourists (57.7 %) declares that they spend an average of eight days in Albania. Compared to 2018 and 2016, there is a decrease in the number of tourists staying in Albania for an average of eight days. The length of stay is a very important indicator of Albania's potential to offer to tourists, in terms of activities or services. Therefore, a significant decrease of 11 % of this number should be viewed with concern as a negative indicator. Also, a decrease in tourists is seen in staying one to three days, compared to the 2018 study and baseline study. While the number of tourists staying for 4-7 days has increased significantly (39.5 %), compared to 2018 and 2016 where these figures were respectively in values of 25 % and 33 %.

Table 1. Distribution of tourists according to length of stay 2016, 2018 and 2019

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

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

In order to have a clear picture of the tourists' length of stay in Albania we have calculated the average of total days of stay. On average, a tourist stays 9.16 days in Albania, compared to a year ago where a tourist stayed 12.16 days. Considering the fact that the standard deviation is relatively high, especially in 2018, we should consider the Median. While comparing the two median we notice a narrowing of the differences by only 2 days. This is also supported by the above analysis which states that there is a decrease in staying tourists 1-3 days or over 8 days but a significant increase in staying tourists 4-7 days. An important factor in this regard is the unstable political situation in the country. Tourists, anxious by the ongoing protests in the country, tend to avoid Albania as their holiday destination. This data is also supported by the Albanian Tourism Association, which states that Albania has lost that part of tourists who stay 1-3 days due to political instability. That is the part that is experimenting and tent to confirm new vacation destinations for the future.

Table 2. Descriptive data on length of staying in 2018 and 2019

	N		Mean	Median	Standart deviation	Minimum	Maximum
	Valid	Missing					
2018	1260	0	12.16	10.00	7.82	1	65
2019	1260	0	9.16	8.00	4.17	1	25

Source: ACER, Study 2018 Year I; Study 2019 Year II

When it comes to the length of stay in touristic destination, calculations are performed combining two questions “Please tell me for how many days have you been staying in this destination” and “How many other days do you plan to stay in this destination”. In 2019, tourists are more inclined to stay longer in coastal destinations like Saranda, compared to 2018 and 2016 when tourists reported staying more in areas like Gjirokastra and Berat. It is worth noting that the number of tourists who stay 1-3 days has decreased and the number of tourists who tend to stay 4-7 days has significantly increased.

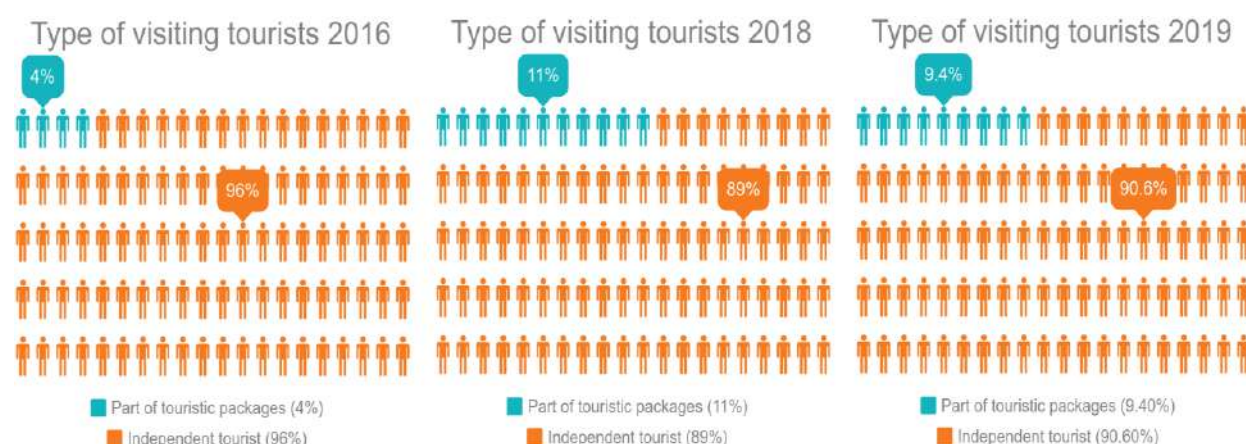
Table 3. Length of stay 2016, 2018 and 2019

	Length of stay	1-3 days	4-7 days	>= 8 days
2016	Saranda – Pormenade	6 (7%)	35 (43%)	41 (50%)
	Gjirokaster – Castle	4 (4%)	24 (24%)	71 (72%)
	Berat – Castle	6 (6%)	29 (31%)	60 (63%)
	Permet – Town square	6 (11%)	9 (16%)	42 (74%)
	Blue Eye	4 (5%)	35 (44%)	40 (51%)
	Porto Palermo	0	32 (37%)	55 (63%)
2018	Saranda – Pormenade	21 (15%)	43 (31%)	74 (54%)
	Gjirokaster – Castle	2 (2%)	22 (21%)	101 (77%)
	Berat – Castle	7 (5%)	38 (27%)	94 (68%)
	Permet – Town square	12 (9%)	26 (20%)	95 (71%)
	Blue Eye	13 (9%)	28 (20%)	99 (71%)
	Porto Palermo	1 (1%)	43 (32%)	88 (67%)
2019	Saranda – Pormenade	0 (0%)	39 (28%)	101 (72%)
	Gjirokaster – Castle	4 (3%)	82 (58.5%)	54 (38.5%)
	Berat – Castle	4 (3%)	87 (62%)	49 (35%)
	Permet – Town square	9 (6%)	71 (51%)	60 (43%)

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

In 2019, tourists were asked whether they came to Albania as part of a touristic package or independently. 90.6 % of tourists stated that they visited Albania independently versus 9.4 % of tourists were part of tourist packages. Compared to 2018, there has been a decrease in the number of tourists visiting Albania through tourist packages (from 11 % in 2018 to 9.4 % in 2019). This decrease indicates a need to improve the quality and value of tourist packages, as well as the need to strengthen the role of tourist agencies in promoting tourism in Albania through tourist packages.

Figure 4. Type of visiting tourists 2016, 2018 and 2019



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

2.3 Tourist Satisfaction

Tourist survey results in 2019 indicate in general a high level of satisfaction. Expressed in an overall rating, tourists have estimated on average 4.05 (out of the 5 maximum). The highest level of satisfaction resulted for Saranda (4.48), followed by Permet (4.37) and Gjirokastra (4.27). Compared to 2018 and 2016, the average level of the overall satisfaction has dropped slightly, from 4.22 in 2016, 4.07 in 2018 to 4.05 in 2019. In relative terms Saranda, Gjirokastra and Permet, appears better but in other destinations a slight decline in satisfaction is noticed.

Table 4. Overall tourist satisfaction according to touristic destination 2016, 2018 and 2019

Touristic destination	2016		2018		2019	
	Mean	No.	Mean	No.	Mean	No.
Saranda - Pormenade	4.11	130	3.89	140	4.48	140
Gjirokaštër – Castle	4.26	130	4.06	140	4.27	140
Berat – Castle	4.32	130	4.48	140	4.19	140
Përmet – Town square	4.41	130	4.29	140	4.37	140
Syri i Kaltër – Source	4.02	131	4.11	140	3.80	140
Porto Palermo – Castle	4.22	130	3.93	140	3.91	140
Zvernec – Church Entrance			3.69	140	3.53	140
Orik – Ancient City			3.86	140	3.69	140
Benja- Thermal Water			4.27	140	4.16	140
Total	4.22	781	4.07	1260	4.05	1260

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

A disaggregation of the overall level of satisfaction by gender shows that in 2019 at the destinations with the highest ratings (Saranda and Gjirokastra), females are relatively more satisfied than males, meanwhile in Permet and Blue Eye, males are more satisfied. Compared to 2018, results show that Saranda, (the overall tourist satisfaction is increased from 3.89 to 4.48) Gjirokastra (the overall tourist satisfaction is increased from 4.06 to 4.27) and Permet (the overall tourist satisfaction is increased from 4.29 to 4.37) experienced an increase in female and male satisfaction. Other destinations have been characterized by a slight decline for both genders. If we analyze the trend with previous year, the situation is almost the same where women admit they are more satisfied than men. Further details are displayed in Table 5.

Table 5. Overall tourist satisfaction according to touristic destination 2016, 2018 and 2019

Touristic destination		2016	2018	2019
Saranda- Pormenande	Female	4.06	3.93	4.5
	Male	4.14	3.84	4.43
	Total	4.11	3.89	4.48
Gjirokaster- Castle	Female	4.28	4.10	4.32
	Male	4.25	4.01	4.22
	Total	4.26	4.06	4.27
Berat- Castle	Female	4.34	4.45	4.28
	Male	4.30	4.52	4.10
	Total	4.32	4.48	4.18
Permet – Town Square	Female	4.42	4.24	4.31
	Male	4.39	4.34	4.42
	Total	4.41	4.29	4.37
Blue Eye - Source	Female	3.97	4.13	3.72
	Male	4.03	4.09	3.86
	Total	4.02	4.11	3.80
Porto Palermo - Castle	Female	4.3	4.02	3.96
	Male	4.17	3.87	3.87
	Total	4.22	3.93	3.91
Total	Female	4.26	4.17	4.18
	Male	4.19	4.14	4.15

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

2.3.1 Diversity of Activities in Tourist Destinations

To assess the tourists' satisfaction for any experienced activity, tourists have been asked to make an assessment of the quality of experience with a 1-5 degree, where 1 means very poor quality and 5 means excellent quality. Based on the three surveys' results, the following table contains a summary of tourists' satisfaction with organized activities in tourist destination, divided into three categories: 1) Satisfaction is sharply decreased; 2) Satisfaction is almost the same/ only decreased slightly; 3) Satisfaction increased. In Porto Palermo, Blue Eye, Zvernec, Orik and Benja, there are almost no activities, for which tourists' satisfaction is increased. This is because of the project has not yet begun to be implemented/ or completed in these areas. Meanwhile, in Saranda, Gjirokaster, Berat and Permet, there are more activities for which tourists' satisfaction is increased.

Table 6. Main activities and assessment of the quality of experience 2016, 2018 and 2019

Touristic destination	Decrease Sharply	Almost the same/Decrease slightly	Satisfaction Increase
Saranda- Promenade	Hiking	Music Performance Local gastronomy Bars	Churches Beaches Religion Villages Natural Parks
Gjirokaster- Castle	Beaches Religion Hiking Local Gastronomy	Musical Performance Churches	Villages Natural Parks Bars
Berat- Castle	Musical Performance Religion Local Gastronomy	Beaches Bars	Churches Villages Natural Parks Hiking
Permet – Town Square	Religion	Music Performance Hiking	Churches Beaches Villages Natural Parks Local Gastronomy Bars
Blue Eye – Source	Churches Natural Parks Bars	Music Performance Religion Villages Hiking Local Gastronomy	Beaches
Porto Palermo - Castle	Churches Beaches Musical Performance Religion Hiking Local Gastronomy Bars	Villages Natural Parks	
Zvernec – Church Entrance	Religion Villages Hiking Local Gastronomy Bars	Churches Beaches Music Performance Natural Parks	
Orik – Ancient City	Religion Villages	Churches Music Performance Natural Parks Hiking Local Gastronomy Bars	Beaches
Benja- Thermal Water	Local Gastronomy	Churches Beaches Music Performance Religion Natural Parks Hiking Bars	Villages

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 7 shows the results where tourists are generally very satisfied. The highest levels of satisfaction result for activities of natural parks (maximum rating by tourists was given at Saranda Pormenade, with mean = 4.88), exploration activities of churches (tourists interviewed at Saranda Pormenade with mean = 4.49), and those who enjoyed local gastronomy (tourists interviewed in Permet with mean = 4.53). When compared to 2018, results show that tourism rating in terms of

satisfaction has slightly decreased. In 2019, exploration of natural parks (4.38) remains the activity for which tourists express the highest satisfaction followed by church visits (4.23) and gastronomy enjoyment (4.11). Meanwhile, in 2018 the activities that tourists enjoy the most are: exploring natural parks, marching and participating in religious activities. The slight decrease in tourist satisfaction averages across almost all activities (except church exploration and village visitation) indicates instability of tourist qualities in the respective destinations. Compared to all other activities, activities of a religious character (mainly in the Blue Eye and Orik area) and musical performances (mainly in the Zvernec and Blue Eye area) are least rated in the 2019 study. In 2018, it was the quality of villages, bars, beaches, and churches that were less valued relative to other activities.

Such an outcome requires special attention, in order to explore the root causes of this low level of satisfaction with activities of a religious character, musical and beach quality, while recommending effective policies to improve the situation.

Table 7. Main activities and assessment of the quality of experience 2016, 2018 and 2019

Touristic destination		Churches			Beaches			Musical Performance		
		2016	2018	2019	2016	2018	2019	2016	2018	2019
Saranda – Pormenade	Mean	4.54	4.37	4.49	3.89	3.97	4.18	4.28	4.68	4.33
Gjirokaster – Castle	Mean	4.01	4.51	4.44	3.87	4.48	4.16	3.85	4.44	4.39
Berat – Castle	Mean	4.26	4.17	4.34	3.89	4.16	4.11	4.29	4.45	4.00
Permet – Town Square	Mean	4.22	4.21	4.44	4.15	4.00	4.46	4.72	4.23	4.20
Blue Eye - Source	Mean	3.97	4.12	3.93	4.05	3.47	4.25	4.10	4.17	3.80
Porto Palermo - Castle	Mean	4.47	4.51	3.78	4.44	4.70	4.34	4.10	4.46	4.10
Zvernec – Church Entrance	Mean		3.79	3.66		4.14	4.08		3.95	3.74
Orik – Ancient City	Mean		4.09	3.88		4.19	4.26		4.19	3.82
Benja – Thermal Water	Mean		4.15	4.26		4.43	4.31		4.29	3.92
Total	Mean	4.24	4.19	4.23	4.07	4.15	3.90	4.20	4.25	3.82

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 8. Main activities and assessment of the quality of experience 2016, 2018 and 2019

Touristic destination		Religion			Villages		
		2016	2018	2019	2016	2018	2019
Saranda- Pormenade	Mean	4.00	4.48	4.86	4.48	3.24	4.41
Gjirokaster- Castle	Mean	4.20	4.20	3.79	4.03	3.92	4.36
Berat- Castle	Mean	4.34	4.50	4.14	3.95	3.73	4.16
Permet – Town Square	Mean	4.46	4.75	4.14	4.13	4.11	4.48
Blue Eye – Source	Mean	4.41	3.83	3.65	4.01	3.86	3.84
Porto Palermo – Castle	Mean	4.00	5.00	3.83	4.35	3.93	3.92
Zvernec – Church Entrance	Mean		3.95	3.64		3.84	3.45
Orik – Ancient City	Mean		4.19	3.77		4.04	3.78
Benja- Thermal Water	Mean		4.60	4.56		3.93	4.31
Total	Mean	4.33	4.31	3.82	4.17	3.87	4.02

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 9. Main activities and assessment of the quality of experience 2016, 2018 and 2019

Touristic destination		Natural Parks			Hiking			Local Gastronomy			Bars		
		2016	2018	2019	2016	2018	2019	2016	2018	2019	2016	2018	2019
Saranda- Pormenade	Mean	4.54	4.31	4.88	4.75	4.88	4.00	4.05	4.20	4.10	4.13	4.43	4.40
Gjirokaster- Castle	Mean	4.33	4.43	4.66	4.30	4.35	4.1	4.19	4.56	4.02	3.86	3.77	4.26
Berat- Castle	Mean	4.19	4.33	4.41	4.02	4.25	4.29	4.35	4.55	4.25	4.01	4.26	4.2
Permet – Town Square	Mean	4.20	4.32	4.40	4.30	4.34	4.32	4.68	4.29	4.53	4.11	4.04	4.34
Blue Eye – Source	Mean	4.37	4.46	4.31	4.00	4.23	4.12	4.27	4.19	4.07	4.17	4.17	3.95
Porto Palermo - Castle	Mean	4.48	4.69	4.44	4.42	4.48	3.88	4.05	4.22	4.05	3.75	4.03	4.01
Zvernec – Church Entrance	Mean		4.32	4.17		4.23	3.59		4.02	3.78		4.21	3.83
Orik – Ancient City	Mean		4.54	4.34		4.38	4.15		4.17	4.14		4.33	3.98
Benja- Thermal Water	Mean		4.55	4.37		4.40	4.17		4.36	4.16		4.17	4.07
Total	Mean	4.35	4.42	4.38	4.19	4.35	4.10	4.26	4.28	4.11	4.00	4.13	4.08

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

A disaggregated rating of tourist satisfaction by gender is presented in the table below. According to the results of the survey in 2019, no significant differences are observed between male and female tourists in terms of declared satisfaction, although females are slightly more satisfied than males. Compared to the studies of 2018 and 2016, the same trend of satisfaction's expression is observed between males and females.

Table 10. Disaggregated means (for all municipalities/touristic sites) for touristic activities 2016, 2018 and 2019

Gender	Churches			Beaches			Musical Performance			Religion		
	2016	2018	2019	2016	2018	2019	2016	2018	2019	2016	2018	2019
Females	4.27	4.16	4.23	4.102	4.13	3.84	4.35	4.11	3.81	4.25	4.33	3.81
Males	4.21	4.22	4.23	4.05	4.17	3.94	4.10	4.41	3.83	4.42	4.36	3.84
Total	4.24	4.19	4.23	4.07	4.15	3.90	4.20	4.43	3.82	4.33	4.31	3.82

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 11. Disaggregated means (for all municipalities/touristic sites) for touristic activities 2016, 2018 and 2019

Gender	Villages			Natural Parks			Hiking			Local Gastronomy			Bars		
	2016	2018	2019	2016	2018	2019	2016	2018	2019	2016	2018	2019	2016	2018	2019
Females	4.23	3.95	4.07	4.38	4.43	4.38	4.06	4.31	4.03	4.38	4.29	4.09	4.08	4.14	4.08
Males	4.13	3.79	3.94	4.33	4.42	4.39	4.29	4.38	4.21	4.18	4.27	4.13	3.94	4.13	4.08
Total	4.17	3.87	4.02	4.35	4.42	4.38	4.19	4.35	4.10	4.26	4.28	4.11	4.00	4.13	4.08

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

2.3.2 Quality of Products, Services and Hospitality

2.3.2.1 Customs and Immigration Services at the Entry point

In order to have a full and comprehensive assessment of all aspects of the tourist experience in the touristic destinations, tourists have been asked to give an assessment on a particular list of aspects, on a scale of 1 (very bad) to 4 (very good). The following table summarizes tourists' assessments for all aspects, including infrastructure.

The survey of 2019 uncovered a slight decrease of tourist satisfaction in terms of several aspects of stay in Albania, compared with the survey of 2018. Meanwhile, the quality of customs services (3.10) and accessibility of entry points (3.10) have significantly increased compared to 2018.

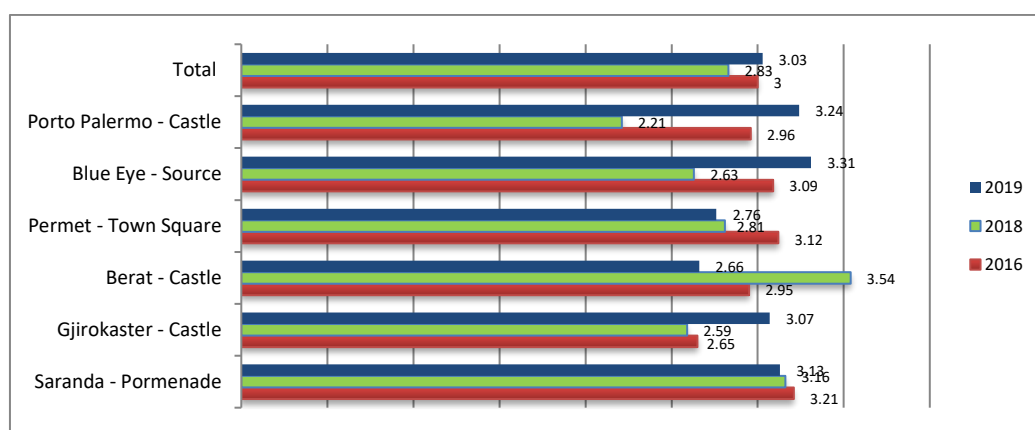
Table 12. Assessment of customs and immigration services at the point of entry, considering all destinations in Southern Albania

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

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

The graph below shows tourists' assessment on the quality of service at the entry points in Albania in 2019, compared to 2018 and the baseline study 2016.¹¹ Assessment was done on a scale 1- 4 with 1 (very bad) to 4 (very good). In general terms, there has been an increase in service quality satisfaction (from a mean rating of 2.84 to 3.02) at entry points in Albania, compared to a year ago. Interviewed tourists in Porto Palermo and Blue Eye are more satisfied than other destinations involved in the project. By making a critical assessment of the situation, the results signal an improvement in a number of aspects related to quality of service at border crossings, including time of service, communication, etc. Data analysis and comparison with the baseline study for each aspect of stay is presented below, taking into consideration only 2018 destinations and baseline study.

Figure 5. Customs and immigration services at point of entry 2016, 2018 and 2019¹²



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

¹¹ All relative estimates in the graphs below have excluded Orik and Benja in the analysis, in order to recalculate an overall average for those destinations that have been part of the study since 2016.

¹² Averages for 2018 and 2019 have been calculated considering only the 6 areas to maintain comparability with 2016.

2.3.2.2 Personal Safety and Friendliness of People

Personal safety is rated at the lowest levels in Berat (2.69) and Permet (2.89), while high perceptions of safety are expressed in Blue Eye (3.25) and Zvernec (3.24). Compared to 2018, there is a noticeable change in tourists' perceptions of personal safety, with a decrease of 30 % and 16 % in Berat and Gjirokastra compared to the previous year.

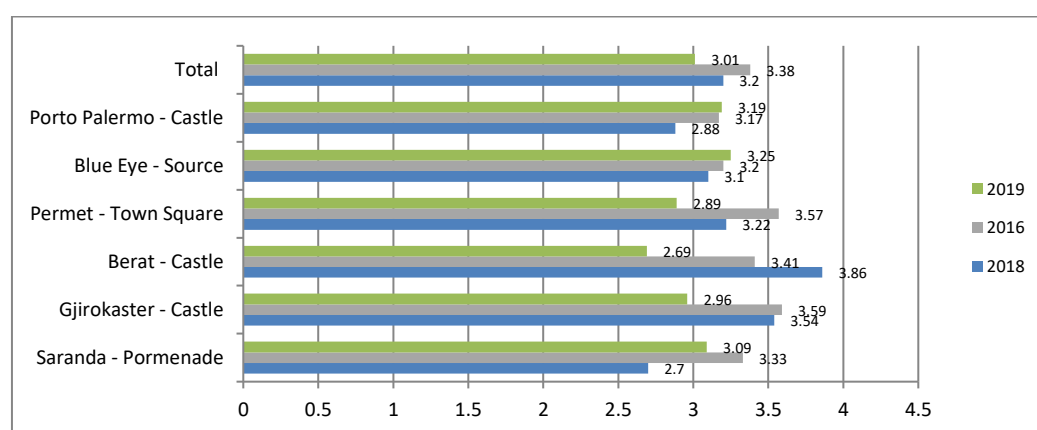
Table 13. Assessment of personal safety, considering all destinations in Southern Albania

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

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Personal safety has undergone a significant change and is now an active element of tourism, a must to act to protect tourists, their belongings, and the entire reputation of the industry.¹³ The overall assessment in personal safety shows a slight decrease (from 3.21 to 3.01) compared to the previous year. A decrease in personal security compared to the 2018 study is observed at the destinations of Permet, Berat and Gjirokastra. This result requires a more in-depth analysis to understand more specifically the dimensions of tourist's personal safety in order to examine their causes and treatment.

Figure 6. Personal Safety 2016, 2018 dhe 2019



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

To understand the behaviour according to tourist status, the table below reflects the opinions of national and international tourists on the issue of personal safety. In 2019, 33.3 % of local tourists admit that their personal safety is very bad/ bad compared to just 21.1 % of international tourists. In 2018 survey, it is noted that 40 % of local tourists admit that their personal safety is very bad/ bad compared to just 17 % of international tourists. So, local tourists feel more insecure than

¹³ Safety and security in the age of global tourism - István Kôvári – Krisztina Zimányi

international ones. Such result may also be due to the familiarization of domestic tourists with the internal situation in the country.

Table 14. Personal safety, disaggregated by tourist status 2016, 2018 and 2019

Status	2016			2018			2019		
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good	Very bad
Domestic	1.20%	3.30%	57.50%	38.10%	8.10%	31.90%	32.60%	27.40%	4.6%
International	1.00%	3.60%	48.00%	47.40%	2.90%	14.20%	30.80%	52.10%	1.2%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 15 presents a summary result of Table 14. Even in 2019, there is an increase in international tourists, who rated very bad/ bad personal safety in Albania. In 2018, only 17.10 % of international tourists expressed very bad/ bad rating for personal safety, while in 2019 this was accepted by 21.1 % of respondents.

Table 15. Personal safety, disaggregated by tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	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%
International	4.60%	95.40%	17.10%	82.90%	21.1%	78.9%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

The *friendliness of people* in Albania remains the highest rated aspect by the tourists. However, compared to 2018 and 2016, this indicator significantly declined about 14 %. Friendliness of the people was rated low by the tourists interviewed in Saranda and Berat area.

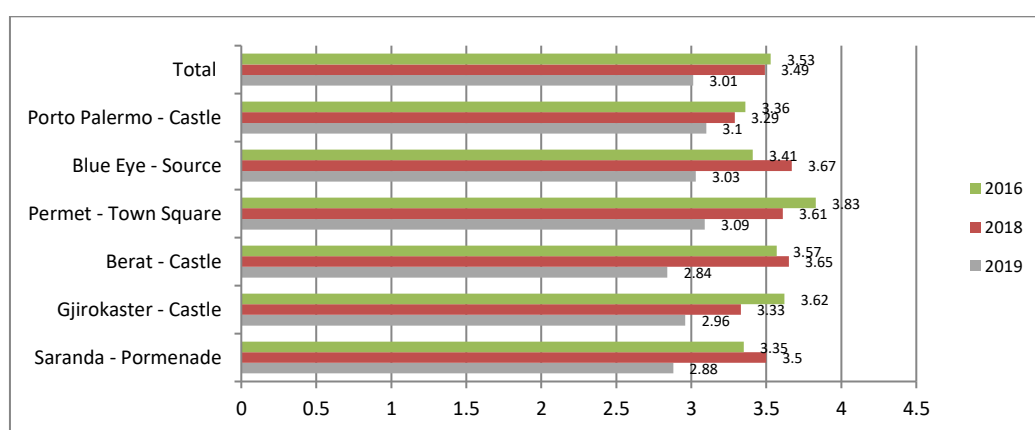
Table 16. Assessment of friendliness of people, considering all destinations in Southern Albania

Touristic destination	Friendliness of People		
	2016	2018	2019
Saranda- Promenade	3.35	3.50	2.88
Gjirokaster- Castle	3.62	3.33	2.96
Berat- Castle	3.57	3.65	2.84
Permet – Town Square	3.83	3.61	3.09
Blue Eye – Source	3.41	3.67	3.03
Porto Palermo - Castle	3.36	3.29	3.1
Zvernec – Church Entrance	3.53	3.35	2.94
Orik – Ancient City		3.45	2.88
Benja- Thermal Water		3.54	3.15
Total	2.99	3.50	3.01

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

According to interviews of tourists in the respective destinations the hospitality and friendliness of the people has decreased compared to a year ago (from 3.50 to 3.01). Tourists interviewed in the Saranda area have expressed more dissatisfaction about people's friendliness than other destinations.

Figure 7. Friendliness of the people 2016, 2018 and 2019



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

When disaggregated by tourist status for 2019, most international tourists declare that are more satisfied than domestic tourists (74.6 % of international tourists accept that the friendship of the people is very good/ good compared to 67.5 % of domestic tourists).

Table 17. Friendliness of the people, disaggregated by tourist status 2016, 2018 and 2019

Status	2016			2018			2019		
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good	Very bad
Domestic	1.80%	2.50%	46.50%	49.30%	2.90%	17.10%	32.10%	47.90%	2.5%
International	0.40%	3.20%	33.70%	62.70%	2.30%	7.30%	23.90%	66.60%	1.2%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

In general terms, the overall satisfaction of tourists toward the friendliness of Albanians, has experienced a slight decrease. What are to be highlighted as a concern, are the disaggregated results by tourists status. There is an increase with around 12.5 % in domestic tourists that admit the friendliness of Albanian people is very bad/ bad compared to 2018, while there is an increase with 16 % in international tourists that admit the friendliness of Albanian people is very bad/ bad compared to 2018 survey.

Table 18. Friendliness of the people, disaggregated by tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	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%
International	3.60%	96.40%	9.60%	90.50%	25.6%	74.6%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

2.3.2.3 National Cuisine/Drinks, Quality of Restaurants and Knowledge of Foreign Language

The traditional food in Albania is rated over the average rate (3.10). Tourists have expressed the highest level of satisfaction in Gjirokastra and this has been slightly increased with 10 % compared with 2018. Interviewed tourists in the area of Zvernec, Orik and Berat rated traditional food at a lower level compared to 2018.

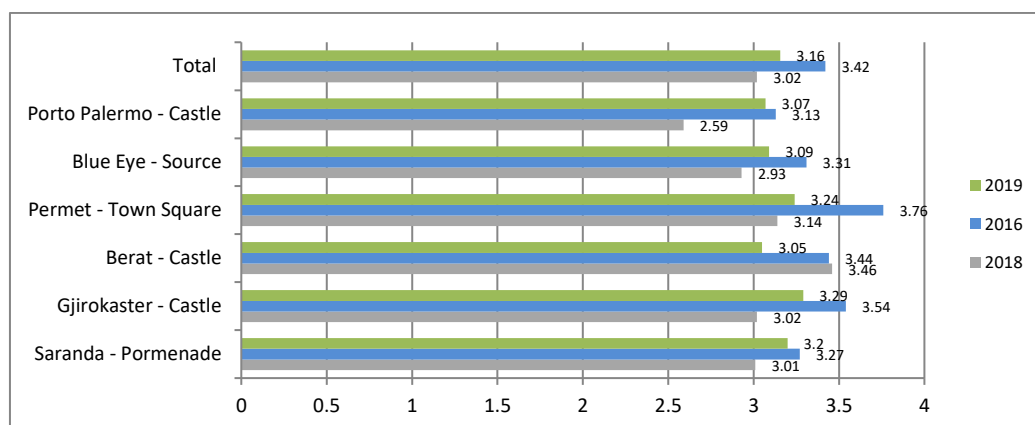
Local Gastronomy has received an increased level of tourists' satisfaction compared to 2018 survey. Less satisfied are the tourists interviewed in Berat, Porto Palermo and Blue Eye. It should be noted that the perception of tourists over Albanian gastronomy can be closely linked to the monetary value paid, which in certain cases do not go in the same line (tourists pay more compared to the value of the cuisine they experience).

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

Touristic destination	National Cuisine/Drinks		
	2016	2018	2019
Saranda- Promenade	3.27	3.01	3.20
Gjirokaster- Castle	3.54	3.02	3.29
Berat- Castle	3.44	3.46	3.05
Permet – Town Square	3.76	3.14	3.24
Blue Eye – Source	3.31	2.93	3.09
Porto Palermo - Castle	3.13	2.59	3.07
Zvernec – Church Entrance	3.41	3.07	2.84
Orik – Ancient City		3.18	2.94
Benja- Thermal Water		3.13	3.24
Total	3.42	3.05	3.10

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Figure 8. National cuisine/drinks 2016, 2018 and 2019



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

When disaggregated by tourist status, in 2019 international tourists turn out to be more satisfied than domestic tourists. This is also the result of facing new tastes not tried before from internationals. However, compared with 2018 there is a considerable decrease of domestic tourist percentage that thinks national cuisine/ drinks are very bad/ bad (from 41 % into 23.8 %). The same thing remains true for international tourist as well (from 21 % into 19.7 %).

Table 20. National cuisine/drinks, disaggregated according to tourist status 2016, 2018 and 2019

Status	2016				2018				2019			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	1%	3%	49%	48%	7%	34%	33%	26%	3.9%	19.9%	42.3%	33.9%
International	1%	2%	50%	46%	2.0%	19%	45%	34%	1.7%	18.0%	45.1%	35.2%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 21. National cuisine/drinks, disaggregated according to tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/Very good
Domestic	4%	97%	41%	59%	23.8%	76.8%
International	3%	96%	21%	79%	19.7%	80.3%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

In 2019 survey, *restaurant quality* has increased compared to the year before. Quality is reduced in Berat and Oriks area. Oriks has the lowest level of restaurant quality (2.88), while the other two destinations below 3 (maximum is 4) are Blue Eye and Zvernec. These results should serve as a message to the state authorities (Hygiene Inspectorate, Food Control Authority, etc.) to increase their supervision of Albanian restaurants. Blue Eye, Zvernec and Oriks also have the lowest rate of housing quality, compared to other destinations in 2019 survey.

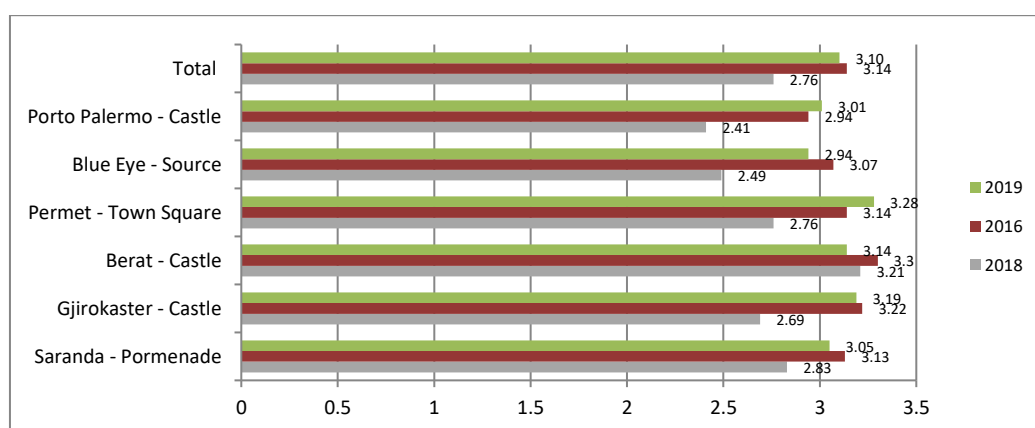
Table 22. Assessment of aspects of stay, considering all destinations in Southern Albania

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

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Tourists have assessed the quality of restaurants in touristic destinations with an average of 3.10 (out of 4) and evidently expressed more satisfied than one year ago. The lowest assessment was given from tourists interviewed in Blue Eye, Porto Palermo and Saranda.

Figure 9. Quality of restaurants 2016, 2018 and 2019



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Regarding the quality of restaurants, domestic tourists are less satisfied than international tourists. In 2019, 22.6 % of domestic tourists say the quality of restaurants is very bad/ bad compared to 20.6 % of international tourists who have the same opinion. It should be noted that there is a significant decrease in the number of tourists assessing the quality of restaurants negatively, compared with one year ago.

Table 23. Quality of restaurants disaggregated by tourist status 2016, 2018 and 2019

Status	2016				2018				2019			
	Very bad	Bad	Good	Very good	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%	2.6%	22.0%	51.1%	24.2%
International	1.60%	4.10%	68.10%	26.10%	5.10%	26.50%	47.40%	21.00%	0.7%	19.9%	45.1%	34.2%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 24. Quality of restaurants disaggregated by tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	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%
International	6%	94%	32%	68%	20.6%	79.4%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Quality of service has increased (from 2.78 to 3.10) compared to the 2018 study. Tourists are also asked about the quality of guides in Albania. For this aspect tourists expressed an average level of satisfaction and this rate has increased compared to a year ago (from 2.47 to 2.64). When it comes to knowledge of foreign language by service personnel, satisfaction remains almost at the same level (from 2.56 in 2018's survey to 2.89 in 2019's survey).

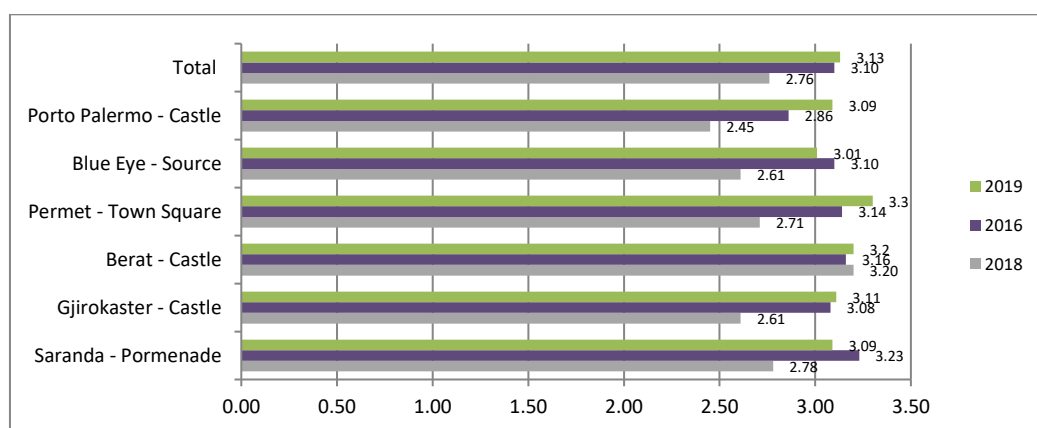
Table 25. Assessment of aspects of stay, considering all destinations in Southern Albania (1=Very Bad, 4=Very Good)

Touristic destination	Quality of Services (restaurants, hotels etc)		
	2016	2018	2019
Saranda- Promenade	3.23	2.78	3.09
Gjirokaster- Castle	3.08	2.61	3.11
Berat- Castle	3.16	3.20	3.20
Permet – Town Square	3.14	2.71	3.30
Blue Eye – Source	3.10	2.61	3.01
Porto Palermo - Castle	2.86	2.45	3.09
Zvernec – Church Entrance	3.09	2.93	2.92
Orik – Ancient City		3.07	2.99
Benja- Thermal Water		2.76	3.19
Total	3.10	2.78	3.10

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

One of the assessed dimensions of quality of restaurants in Albania is the quality of service provided. Tourists show a moderately higher assessment compared to one year ago (from 2.76 to 3.13) and such higher assessment stands for all the destinations, where tourists are interviewed.

Figure 10. Quality of services in restaurants, hotels etc 2016, 2018 and 2019



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

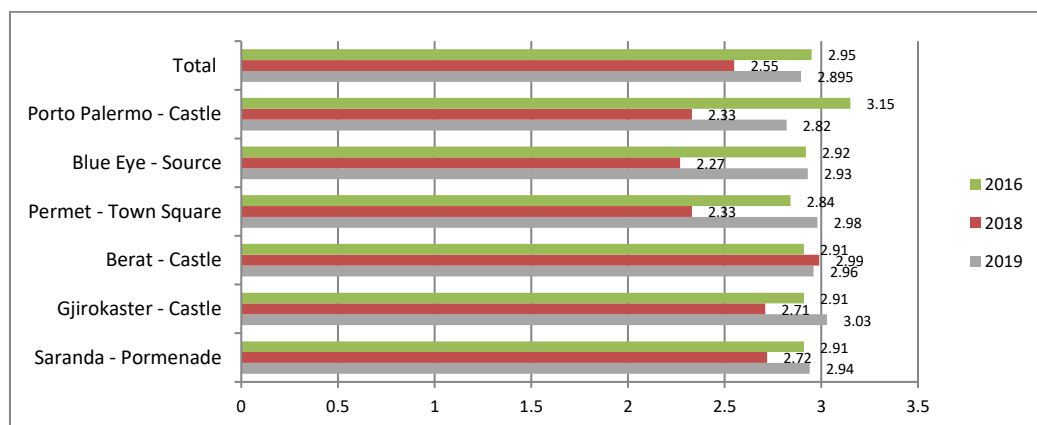
Another dimension that defines the quality of service is the recognition of foreign languages by staff. Tourists seem to be satisfied and this has been on the rise, compared to one year ago.

Table 26. Assessment of aspects of stay, considering all destinations in Southern Albania

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

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Figure 11. Degree of knowledge of foreign languages from the service personnel 2016, 2018 and 2019



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

2.3.2.4 Telecommunication, Local Transport, Payment Transactions and Quality of Guides

The quality of telecommunication has been rated with an average scale of 3.13. This indicator experienced a very low decrease with 0.13 points compared with previous year. It should be noted that the quality of telecommunication varies depending on the destination as far as not all part of Albania, are fully covered with the highest speed of internet. Tourists were more satisfied with *local transport* compared to last year (from 2.32 to 2.73). In terms of access to local transport, tourists rated the area of Zvernec and Saranda lower compared to other destinations included in the project. International tourists raise concerns about the lack of opportunity to *pay by bank card*, because in generally businesses are not equipped with POS.

Table 27. Assessment of aspects of stay, considering all destinations in Southern Albania

Touristic destination	Telecommunication (mobile, internet)			Convenience and access to local transport		
	2016	2018	2019	2016	2018	2019
Saranda- Promenade	2.65	3.12	2.59	2.83	2.85	2.57
Gjirokaster- Castle	3.26	3.36	2.71	2.47	2.21	2.68
Berat- Castle	3.11	3.32	3.22	2.73	2.29	2.84
Permet – Town Square	3.23	2.94	3.26	3.04	2.35	3.19
Blue Eye – Source	2.67	2.89	3.36	2.75	2.35	2.75
Porto Palermo – Castle	3.39	2.70	3.26	2.93	1.84	2.63
Zvernec – Church Entrance	3.06	2.90	3.03	2.84	2.34	2.45
Orik – Ancient City		2.99	3.59		2.31	2.92
Benja- Thermal Water		2.93	3.14		2.24	2.70
Total	3.06	3.00	3.13	2.80	2.32	2.73

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

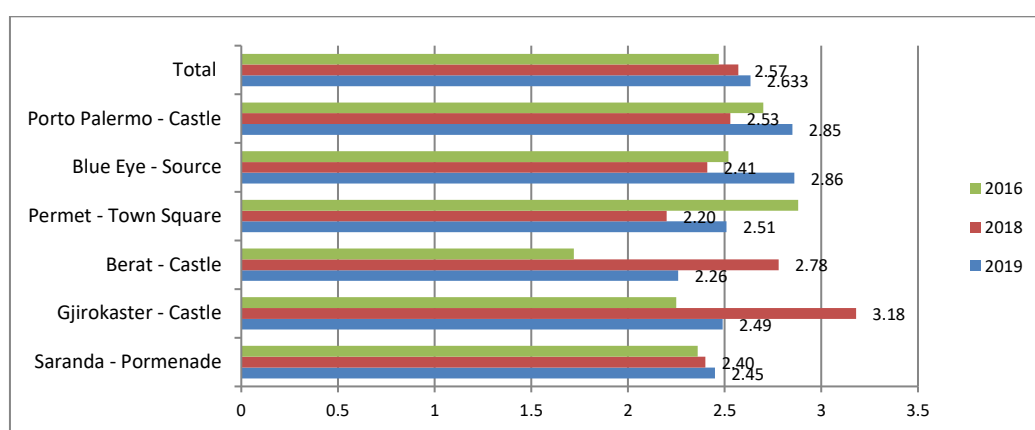
Table 28. Assessment of aspects of stay, considering all destinations in Southern Albania

Touristic destination	Convenience for payment transactions using cards (debit/credit)		
	2016	2018	2019
Saranda- Promenade	2.31	2.39	2.45
Gjirokaster- Castle	2.24	3.17	2.49
Berat- Castle	1.60	2.85	2.26
Permet – Town Square	2.95	2.13	2.51
Blue Eye – Source	2.55	2.38	2.86
Porto Palermo - Castle	2.79	2.60	2.85
Zvernec – Church Entrance	2.51	2.50	2.85
Orik – Ancient City		2.58	2.43
Benja- Thermal Water		2.47	2.84
Total	2.42	2.54	2.59

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

The possibility of making payments using bank cards is another aspect of staying, which in 2019 is estimated with a mean 2.63. The graph below shows that there has been an increase of satisfaction for this aspect during the project implementation compared to 2018 and baseline survey. However, tourists were generally not very satisfied with this practice in Albania, where the lowest levels during 2019 were accepted by tourists interviewed in Berat and Saranda. This result is expected, considering the very low spread of POS in these destinations. However, priority should be given to guaranteeing card payments as a way of reducing informality.

Figure 12. Convenience for payment transactions using cards (debit/credit) 2016, 2018 and 2019



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

The need to make payments through the use of debit/ credit cards is expected to be greater among international tourists. The results show that this is an equally important issue for the local tourist. In 2018 we saw a significant increase in the number of tourists, who complained about the low credit/ debit card transactions and referring to the following table for 2019 we see an improved situation of tourist suitability as domestic and international in transactions using bank cards.

Table 29. Convenience for payment transactions using debit/credit cards 2016, 2018 and 2019

Status	2016				2018				2019			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	17.10%	9.80%	56.10%	17.10%	34.70%	39.70%	19.80%	5.80%	18.2%	26.8%	39.5%	15.5%
International	24.30%	17.40%	47.20%	11.10%	18.50%	42.40%	26.10%	13.00%	13.4%	23.3%	43.8%	19.3%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 30. Convenience for payment transactions using debit/credit cards 2016, 2018 and 2019

Status	2016		2018		2019	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/Very good
Domestic	26.90%	73.10%	74.40%	25.60%	45%	55%
International	41.70%	58.30%	60.90%	39.10%	36.7%	63.3%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

The majority of tourists use guide services so they have a better understanding of the culture, history and other dimensions of a touristic destination. Regarding this aspect, tourists were asked about the quality of the guides, where they generally expressed a higher satisfaction (2.64 in 2019 compared to 2.49 in 2018). Legal initiative¹⁴ for the certification of tourist guides may have served in improving the quality of service provided to tourists.

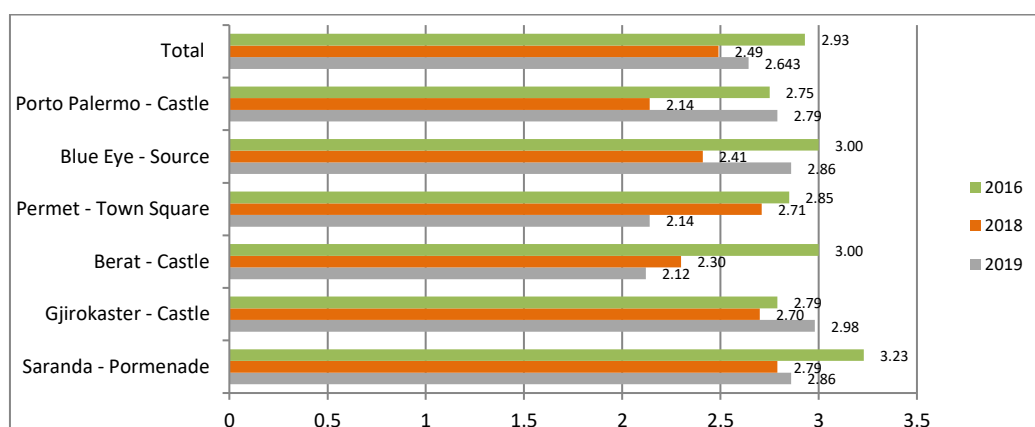
¹⁴Law no. 93/2015 for tourism https://mjedisi.gov.al/wp-content/uploads/2018/02/Ligi_93-2015.pdf.

Table 31. Assessment of aspects of stay, considering all destinations in Southern Albania (1=Very Bad, 4=Very Good)

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

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Figure 13. Quality of guides 2016, 2018 and 2019



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

When analyzing the quality of guides, according to tourist status, satisfaction has increased for both the international and domestic tourists. There is an improvement in tourists' satisfaction about the quality of guides, compared with one year ago.

Table 32. Quality of guides, disaggregated by tourist status 2016, 2018 and 2019

Status	2016				2018				2019			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	14.60%	19.50%	58.50%	7.30%	34.70%	39.70%	19.80%	5.80%	23.8%	18.0%	39.9%	18.3%
International	6.80%	9.90%	64.00%	19.30%	18.50%	42.40%	26.10%	13.00%	15.2%	19.2%	43.8%	21.7%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 33. Quality of guides, disaggregated by tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/Very good
Domestic	34.10%	66%	74%	26%	41.8%	58.2%
International	16.70%	83%	61%	39%	34.5%	65.5%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

2.3.3 Other Touristic Aspects 2016, 2018 and 2019¹⁵

In touristic destination as Benja, Porto Palermo, Zvernec, Orik and Blue Eye, tourists have been asked about several other aspects that relate mainly to cleanliness and infrastructure of the visited destinations. Tourists have been asked to give their assessment on a scale with 1 – very bad and 4 – very good.

2.3.3.1 Easiness to Find Information about the Site and Restaurants Facilities on the Site

The first aspect relates to *easiness to find information about the site* prior of visiting. The ease of finding information has *increased slightly* compared to one and three years ago and it can be attributed to the increase of the diversity of sources of information.

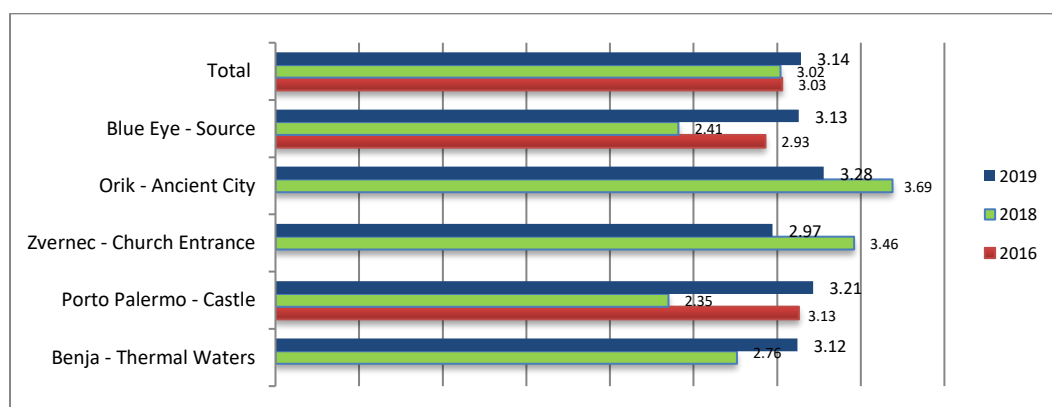
Table 34. Easiness to find information about the touristic sites

Touristic destination	Easiness to find information about the site		
	2016	2018	2019
Benja- Thermal Water		2.76	3.12
Porto Palermo - Castle	3.13	2.35	3.21
Zvernec – Church Entrance		3.46	2.97
Orik – Ancient City		3.69	3.28
Blue Eye- Source	2.93	2.41	3.13
Total	3.03	3.02	3.14

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

According to the tourists, it is much easier to find information about the Benja, Porto Palermo and Blue Eye site than for Zvernec and Orik, which have shown a slight decrease.

Figure 14. Easiness to find information about the touristic sites



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Even though the easiness to find information about the site prior of visiting is much better for international tourists (82.3 %) than for domestic tourists (76.6 %), comparing to one year ago, both international and domestic tourists have much easier to find information about the site prior of visiting.

¹⁵ In 2016 survey we have data only for Porto Palermo and Blue Eye sites.

Table 35. Easiness to find information about the touristic sites disaggregated by tourist status 2016, 2018 and 2019

	2016				2018				2019			
Status	Very bad	Bad	Good	Very good	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%	2.8%	20.6%	45.6%	31.0%
International	3.1%	5.6%	70.8%	20.5%	3.5%	32.5%	22.8%	41.2%	2.7%	15.0%	41.5%	40.8%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 36. Easiness to find information about the touristic sites disaggregated by tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	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%
International	8.7%	91.3%	36%	64%	17.7%	82.3%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

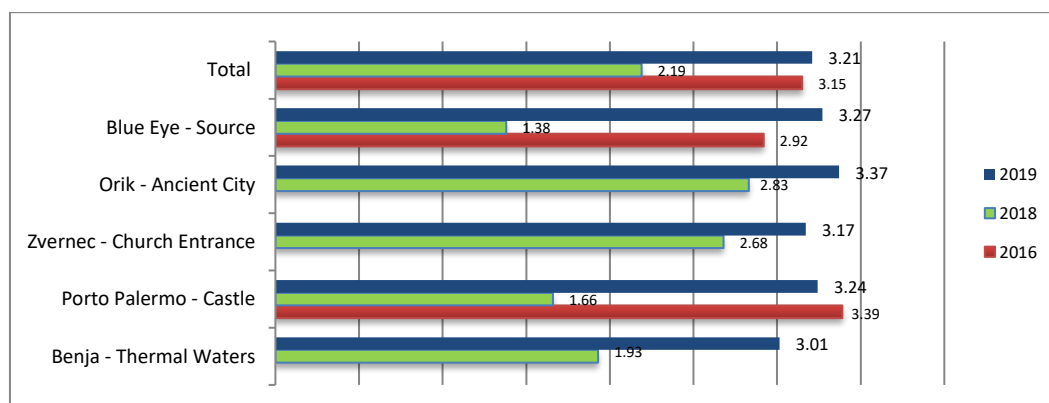
Besides the ease of finding information, the *ease of finding the destination* has also improved, compared to the previous year and the baseline study. Comparing to one year ago, in all destinations, tourists are much easier to find the site location (tourists in Benja have assessed it 3.01 in 2019 compared to 1.93 in 2018 survey; tourists in Porto Palermo have assessed it 3.39 in 2016, 1.66 in 2018 and 3.24 in 2019 survey; tourists in Zvernec have assessed the ease of finding location 3.17 in 2019 compared to 2.68 in 2018 survey; In Orik from 2.83 to 3.37 and in Blue Eye, the ease of finding location is assessed 2.92 in baseline study, 1.38 in 2018 and 3.27 in 2019 study).

Table 37. Easiness to find location about the touristic sites

Touristic destination	Easiness to find location of the site		
	2016	2018	2019
Benja- Thermal Water		1.93	3.01
Porto Palermo - Castle	3.39	1.66	3.24
Zvernec – Church Entrance		2.68	3.17
Orik – Ancient City		2.83	3.37
Blue Eye- Source	2.92	1.38	3.27
Total	3.15	2.19	3.21

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Figure 15. Easiness to find location of the touristic sites



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

For both, international and domestic tourists, compared to one year ago the ease of finding the site location is improved (Domestic tourists – from 68.3 % to 74.0 %; International tourists – from 69 % to 81.7 %).

Table 38. Easiness to find location of touristic sites disaggregated by tourist status 2016, 2018 and 2019

Status	2016			2018			2019		
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good	Very bad
Domestic	5.2%	10.4%	55.2%	29.2%	1.8%	29.9%	25.2%	43.1%	4.7%
International	2.4%	8.5%	56.7%	32.3%	2.9%	28.1%	18.9%	50.1%	2.3%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 39. Easiness to find location of touristic sites disaggregated by tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
Domestic	15.6%	84.4%	31.7%	68.3%	26.0%	74.0%
International	11%	89%	31.0%	69.0%	18.3%	81.7%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

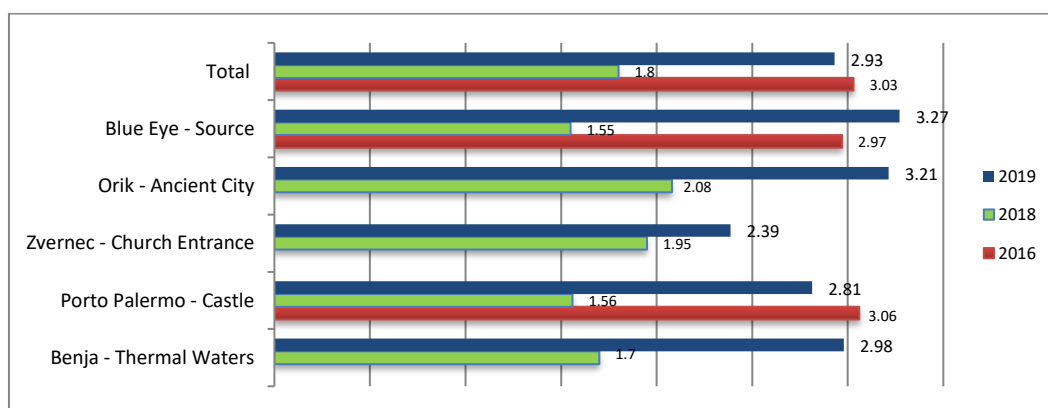
Quality of restaurants' facilities on the mentioned sites has been increased compared to one year ago (from 1.80 in 2018 to 2.93 in 2019).

Table 40. Quality of restaurants facilities about the touristic sites (1=Very Bad, 4=Very Good)

Touristic destination	Quality of restaurants facilities on site		
	2016	2018	2019
Benja- Thermal Water		1.70	2.98
Porto Palermo - Castle	3.06	1.56	2.81
Zvernec – Church Entrance		1.95	2.39
Orik – Ancient City		2.08	3.21
Blue Eye- Source	2.97	1.55	3.27
Total	3.03	1.80	2.93

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Figure 16. Quality of restaurants facilities about the touristic sites (1=Very Bad, 4=Very Good)



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

In 2019, 69.2 % of domestic tourists say that quality of restaurants is very good/good compared to 9.6% in 2018. So, the number of domestic tourists who assess the quality of restaurants

facilities very good/ good has been increased. Compared to one year ago, the number of international tourists who say that the quality of restaurants facilities is very good/ good has benn increased too, from 14 % to 76.9 %.

Table 41. Quality of reastaurants facilities disaggregated by tourist status 2016, 2018 and 2019

Status	2016			2018				2019				
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	7.3%	5.5%	80.0%	7.3%	42.5%	47.9%	9.6%	0.0%	12.0%	18.8%	40.9%	28.3%
International	1%	4%	77.8%	17.2%	30.1%	55.9%	14%	0.0%	6.9%	16.2%	44.4%	32.5%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 42. Quality of restaurants facilities disaggregated by tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/Very good
Domestic	12.7%	87.3%	90.4%	9.6%	30.8%	69.2%
International	5%	95%	86%	14%	23.1%	76.9%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

2.3.3.2 Quality of Walking Pathways and Signage Availability

The quality of infrastructure has been positively evaluated this year, having increased in value compared to the previous year. More specifically, the *quality of walking pathways* has been increased compared to one and three years ago (2.31 in 2016; 1.07 in 2018 and 2.75 in 2019).

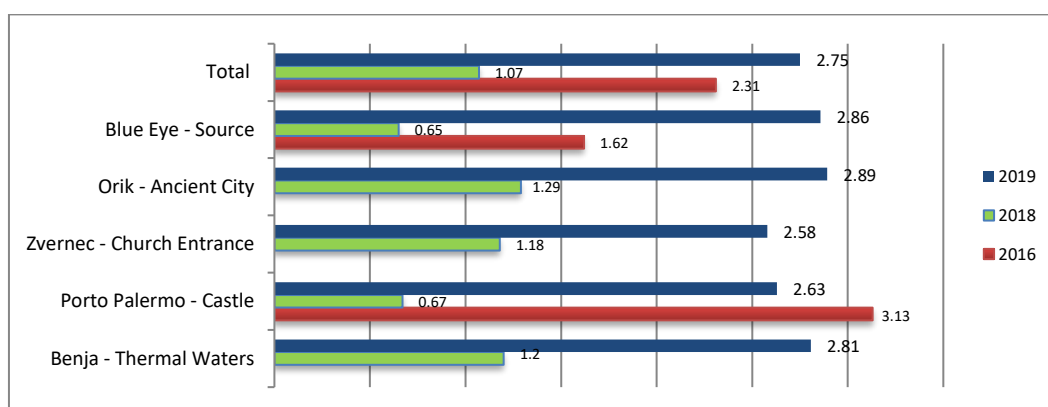
Table 43. Quality of the walking pathways about the touristic sites

Touristic destination	Quality of the walking pathways		
	2016	2018	2019
Benja- Thermal Water		1.20	2.81
Porto Palermo - Castle	3.13	0.67	2.63
Zvernec – Church Entrance		1.18	2.58
Orik – Ancient City		1.29	2.89
Blue Eye- Source	1.62	0.65	2.86
Total	2.31	1.07	2.75

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

As figure 17 shows, in all touristic sites (Benja, Porto Palermo, Zvernec, Orik and Blue Eye) the quality of walking pathways has been increased compared to 2018 survey, but slightly decreased compared to 2016.

Figure 17. Quality of walking pathways about the touristic sites



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

In 2019, the number of international and domestic tourists who evaluate the quality of walking pathways good/very good has been increased, compared to previous years.

Table 44. Quality of walking pathways disaggregated by tourist status 2016, 2018 and 2019

Status	2016				2018				2019			
	Very bad	Bad	Good	Very good	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%	15.3%	25.8%	40.9%	18.0%
International	25%	14.5%	47.4%	13.2%	16.2%	55.1%	27.3%	1.40%	8.5%	19.1%	41.8%	30.6%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 45. Quality of walking pathways disaggregated by tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	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%	58.9%
International	39.5%	60.5%	71.3%	28.7%	27.6%	72.4%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

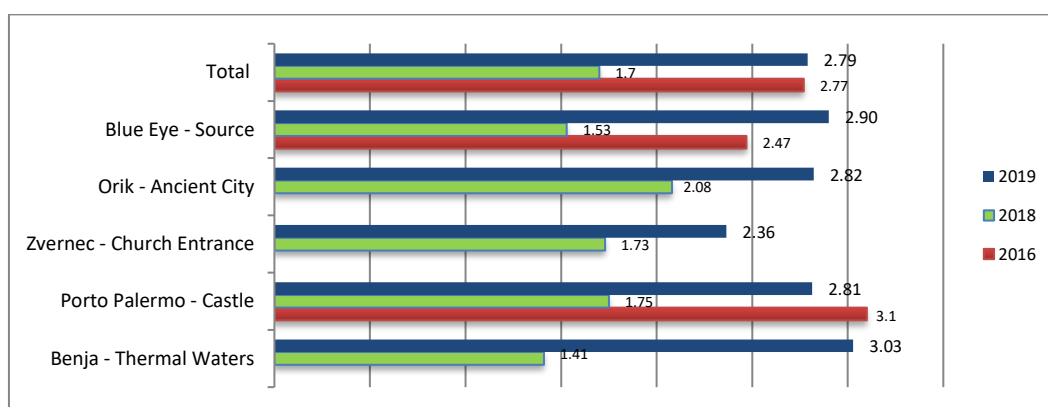
The *interpretation/ signage availability* is evaluated higher in value compared to previous years (2.77 in baseline study; 1.70 in 2018 study and 2.79 in 2019 study) except in Porto Palermo and Orik.

Table 46. Interpretation/ signage available about the touristic sites

Touristic destination	Interpretation/signage available		
	2016	2018	2019
Benja- Thermal Water		1.41	3.03
Porto Palermo - Castle	3.10	1.75	2.81
Zvernec – Church Entrance		1.73	2.36
Orik – Ancient City		2.08	2.82
Blue Eye- Source	2.47	1.53	2.90
Total	2.77	1.70	2.79

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Figure 18. Interpretation/ signage available about the touristic sites



Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Regarding the tourist status, the number of international and domestic tourists who say that Interpretation/ signage available is good/ very good, has been increased compared to one year ago but slightly decreased compared to 2016.

Table 47. Interpretation/ signage available disaggregated by tourist status 2016, 2018 and 2019

Status	2016				2018				2019			
	Very bad	Bad	Good	Very good	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%	9.7%	23.1%	43.4%	23.8%
International	6.3%	13.9%	67.8%	12%	10.1%	28.7%	25.8%	35.4%	6.0%	17.4%	54.2%	22.4%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 48. Interpretation/ signage available disaggregated by tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
Domestic	29.8%	70.2%	41.9%	58.1%	32.8%	67.2%
International	20.2%	79.8%	38.8%	61.2%	23.4%	76.6%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

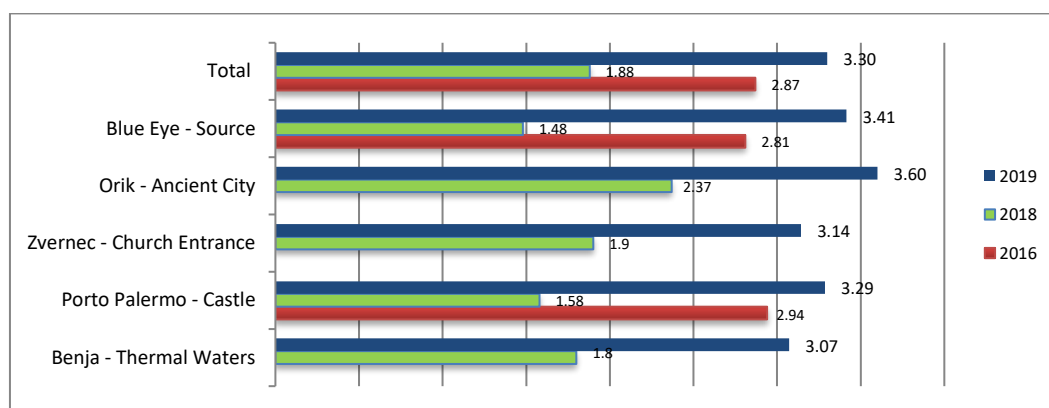
2.3.3.3 Level of Cleanliness of the Site, Quality and Availability of Toilets and Sanitation Facilities

Tourists have been asked about their satisfaction regarding the *level of cleanliness*. In total, compared to one year ago and baseline study the value of level of cleanliness is increased (2.87 in 2016, 1.88 in 2018 and 3.30 in 2019). Comparing to 2018 study, the level of cleanliness is increased in all touristic destinations (Benja, Porto Palermo, Zvernec, Orik and Blue Eye).

Table 49. Level of Cleanliness about the touristic sites

Touristic destination	Level of Cleanliness		
	2016	2018	2019
Benja- Thermal Water		1.80	3.07
Porto Palermo - Castle	2.94	1.58	3.29
Zvernec – Church Entrance		1.9	3.14
Orik – Ancient City		2.37	3.60
Blue Eye- Source	2.81	1.48	3.41
Total	2.87	1.88	3.30

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Figure 19. Level of Cleanliness about the touristic sites (1=Very Bad, 4=Very Good)

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

International and domestic tourists are more satisfied than one year ago about the level of cleanliness. In 2019 study, it results that 83.4 % of domestic tourists assess the level of cleanliness very good/ good compared to 84.7 % of international tourists.

Table 50. Level of Cleanliness disaggregated by tourist status 2016, 2018 and 2019

Status	2016				2018				2019			
	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good	Very bad	Bad	Good	Very good
Domestic	6.3%	21.1%	66.3%	6.3%	8.4%	33.5%	23.4%	34.7%	2.3%	14.3%	44.1%	39.3%
International	3.6%	14.5%	64.2%	17.6%	10.1%	28.7%	25.8%	35.4%	0.7%	14.6%	33.4%	51.3%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 51. Level of Cleanliness disaggregated by tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good	Very bad/ Bad	Good/ Very good
Domestic	27.4%	72.6%	41.9%	58.1%	16.6%	83.4%
International	18.1%	81.9%	38.8	61.2%	15.3%	84.7%

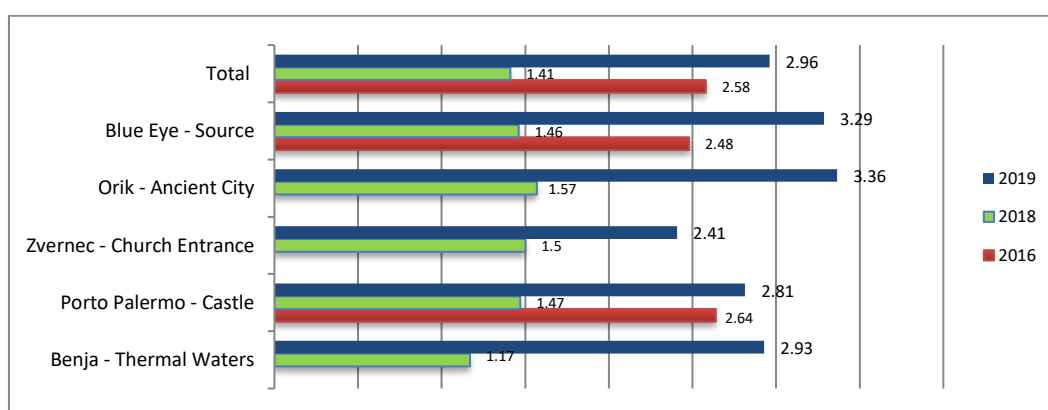
Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

In a value from 1 to 4, the quality of toilets and sanitation facilities, in 2019 is assessed 2.96 in total which is around two times higher compared with 2018.

Table 52. Quality, availability of toilets and sanitation facilities about the touristic sites

Touristic destination	Quality and availability of toilets and sanitation facilities		
	2016	2018	2019
Benja- Thermal Water		1.17	2.93
Porto Palermo - Castle	2.64	1.47	2.81
Zvernec – Church Entrance		1.5	2.41
Orik – Ancient City		1.57	3.36
Blue Eye- Source	2.48	1.46	3.29
Total	2.58	1.41	2.96

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Figure 20. Quality, availability of toilets and sanitation facilities about the touristic sites

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

When analyzing the quality of toilets and sanitation facilities disaggregated by tourist status, the results show an increase compared with one and three years ago.

Table 53. Quality, availability of toilets and sanitation facilities disaggregated by tourist status 2016, 2018 and 2019

Status	2016				2018				2019			
	Very bad	Bad	Good	Very good	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%	14.3%	18.3%	38.6%	28.8%
International	10.8%	15.7%	63.9%	9.6%	63.7%	32.5%	3.8%	0%	7.4%	16.4%	41.1%	35.1%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 54. Quality, availability of toilets and sanitation facilities disaggregated by tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	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%
International	26.5%	73.5%	96.2%	3.8%	23.8%	76.2%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

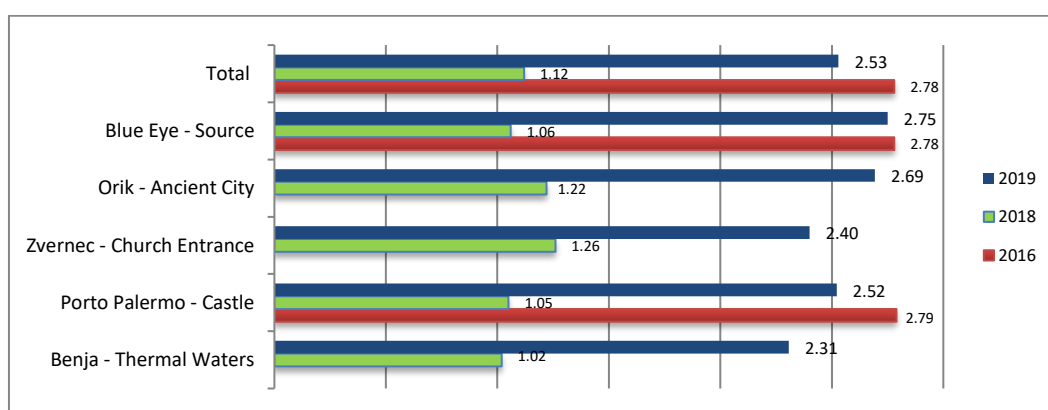
2.3.3.4 Facilities for Children

Tourists continue to express the highest dissatisfaction with *childcare facilities*, but this aspect has been improving compared with 2018. In 2019 tourists express a satisfaction more than the mean 2.0. Orik and Blue Eye results have the highest scores.

Table 55. Facilities for children about the touristic sites

Touristic destination	Facilities for children		
	2016	2018	2019
Benja- Thermal Water		1.02	2.31
Porto Palermo - Castle	2.79	1.05	2.52
Zvernec – Church Entrance		1.26	2.40
Orik – Ancient City		1.22	2.69
Blue Eye- Source	2.78	1.06	2.75
Total	2.78	1.12	2.53

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Figure 21. Facilities for children about the touristic sites

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

As Table 57 reveals, international tourists are more satisfied than domestic ones for 2019.

Table 56. Facilities for children disaggregated by tourist status 2016, 2018 and 2019

Status	2016				2018				2019			
	Very bad	Bad	Good	Very good	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%	23.5%	34.1%	29.1%	13.3%
International	8.2%	11.5%	70.5%	9.8%	12.5%	24.6%	44.9%	18.0%	13.4%	21.0%	54.4%	11.2%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Table 57. Facilities for children disaggregated by tourist status 2016, 2018 and 2019

Status	2016		2018		2019	
	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%	42.4%
International	19.7%	80.3%	37.1%	62.9	34.4%	65.6%

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

2.4 Information on Tourists' Expenditures

In order to analyse the real value of the touristic experiences, it will be necessary to make a financial calculation related to the average tourist expenditures during tourists' stay in project tourist's sites. The analysis of the monetary value spent is done through the financial calculation of the average tourist expenditure, including: the cost of tourist package, accommodation, food,

transportation and other activities. According to the results presented in the table below, in 2019 a tourist spent an average of 47.3 Euro/ day, which compared to 2018, there is a decreased by 5.7 Euro/day on average daily expenses (was 53 Euro/ day).

Table 58. Tourist's daily average expenditure 2016, 2018 and 2019 (EUR)

Touristic destination	Mean 2016	Mean 2018	Mean2019
Saranda - Pormenade	102.53	76.79	50.50
Gjirokaster - Castle	36.01	71.14	49.30
Berat- Castle	32.23	44.41	45.06
Permet- Town Square	13.68	41.64	39.05
Blue Eye- Source	60.23	39.27	49.49
Porto Palermo- Castle	21.38	45.64	51.79
Benja- Thermal Water		39.27	49.89
Zvernec- Churche Entrance		59.88	47.32
Orik – Antic City		60.66	54.43
Total	44.49	53.14	47.31

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

Largest average daily amount spent by interviewed tourists has declined from 2018 to 2019, of approximately 19 Euro/ day. In terms of gender analysis for 2019, we can conclude that females generally have lower daily expenditure than males in the respective tourist areas with the exception of two areas (Blue Eye and Orik), which results in female tourists higher spending than male tourists. However, average expenditures between male and female tourists have very small differences.

Table 59. Tourist's daily average expenditure 2016, 2018 and 2019 (EUR)

Touristic destination	Gender	Mean 2016	Mean 2018	Mean2019
Saranda – Pormenade	Male	129.74	81.16	52.58
	Female	61.73	72.54	48.93
	Total	102.53	76.79	50.50
Gjirokaster – Castle	Male	34.85	70.29	54.04
	Female	37.53	71.97	44.82
	Total	36.01	71.14	49.30
Berat – Castle	Male	38.51	41.05	45.53
	Female	23.92	47.08	44.50
	Total	32.23	44.41	45.06
Permet – Town Square	Male	17.44	44.25	39.63
	Female	11.28	39.39	38.36
	Total	13.68	41.64	39.05
Blue Eye – Source	Male	60.75	40.11	48.82
	Female	58.39	38.43	50.43
	Total	60.23	39.27	49.49
Porto Palermo – Castle	Male	21.01	48.49	53.07
	Female	22.06	41.49	49.91
	Total	21.38	45.64	51.79
Benja- Thermal Water	Male		40.11	51.12
	Female		38.43	48.00
	Total		39.27	49.89
Zvernec – Church Entrance	Male		57.9	47.46
	Female		61.91	47.21
	Total		59.88	47.32
Orik – Antic City	Male		58.11	52.43
	Female		63.21	56.80
	Total		60.66	54.43
Total		44.49	53.14	47.31

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

An analysis of tourist status shows that in 2018 in Saranda, Gjirokastra, Permet and Blue Eye international tourists spend more on average compared to domestic tourists. In Berat, domestic tourists spend on average twice as much as international tourists; while in Porto Palermo very slight differences were observed. During three years of study (baseline study, 2018 and 2019), in relative terms, it turns out that international tourists have higher daily average spending than domestic tourists in all tourist areas included in project, with the exception of Benja – Thermal waters, which turns out to be domestic tourists with higher average daily costs than international tourists. An analysis of tourist status for 2019 shows that the highest amount spent on average was in Orik by international tourists at the value of 57.47 Euro/ day, while for the same tourist site, domestic tourists interviewed stated that they spent on average 48.4 Euro/day, approximately 16 % less than international tourists. The biggest difference by tourist status is observed in Berat – Castle, where international tourists spend 25 % more than domestic tourists. The smallest differences are seen in Zvernec, with 6 % more daily average expenditure by international tourists compared to domestic tourists and only in the Benja – Thermal Water, daily average expenditure by domestic tourists are higher than international tourists (comparatively 8 %).

Table 60. Tourist's daily average expenditure, according to tourist status 2016, 2018 and 2019

Touristic destination	Tourist status	Mean 2016	Mean 2018	Mean 2019
Saranda – Pormenade	Domestic	61.97	63.67	45.78
	International	126.28	78.36	53.20
	Total	102.53	76.79	50.50
Gjirokaster – Castle	Domestic	13.40	62.67	45.66
	International	42.58	72.16	51.52
	Total	36.01	71.14	49.30
Berat – Castle	Domestic	3.82	80.00	38.13
	International	42.73	44.15	50.89
	Total	32.40	44.41	45.06
Permet – Town Square	Domestic	0.00	33.33	34.66
	International	30.39	44.52	41.72
	Total	13.50	41.64	39.05
Blue Eye – Source	Domestic	31.30	30.02	45.90
	International	79.80	43.23	51.36
	Total	60.70	39.27	49.49
Porto Palermo – Castle	Domestic	2.02	45.53	49.62
	International	30.40	45.7	53.67
	Total	21.16	45.64	51.79
Total		44.49	53.15	47.31

Source: Database 2016; ACER, Study 2018 Year I; Study 2019 Year II

In order to understand how the interventions implemented during the project have affected, tourists were asked how they rated their stay in Albania, where they rated 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 are excluded. In 2018 there are 1013 tourists who declare that they are very satisfied/ satisfied with their stay in Albania and only 68 tourists state that they are very dissatisfied/ dissatisfied. Meanwhile, in 2019 there are 1050 tourists who declare that they are very satisfied/ satisfied with their stay in Albania and only 72 tourists declare that they are very dissatisfied/ dissatisfied. Thus, there is an increase by 3.6 % of the tourists who say they are satisfied.

Table 61. Distribution of tourists according to their stay's satisfaction in Albania

	2018	2019
Very dissatisfied	16	16
Dissatisfied	52	56
Neutral	179	138
Satisfied	602	695
Very Satisfied	411	355
Total	1260	1260

Source: ACER, Study 2018, Year I; Study 2019 Year II

Table 62. Distribution of tourists according to their stay's satisfaction in Albania

	2018	2019
Dissatisfied	68	72
Neutral	179	138
Satisfied	1013	1050
Total	1260	1260

Source: ACER, Study 2018, Year I; Study 2019 Year II

Considering one of the project components related to strengthening local businesses, interviewers have counted the present businesses (formal and informal) in the studied sites. This category will be the main target in the business survey in the upcoming years. An approximate number is shown in Table 63, as below. Compared to a year ago, there is a 10 % increase in the number of businesses in Saranda, and 18 % in Gjirokastra. It is also linked to the high and growing number of tourists that Saranda and Gjirokastra expect each year. In Berat, meanwhile, there has been a sharp decline in the number of businesses from 38 last year to 32.

Table 63. Number of businesses related to tourism, 2018 and 2019

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

Source: ACER, Study 2018 Year I; Study 2019 Year II

Chapter 3. Summary of Focus Group Discussion Findings

3.1 Methodology of Qualitative Study

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, namely:

- Schedule of the meeting
- Information on the Project
- Key findings from the quantitative study
- List with orientation questions (*see Annex 2*).

3.2 Focus Group Discussion Findings

As part of the qualitative study, four Focus Group Discussions were conducted with about 51 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 64. Data for Focused Group Discussions

Location	Date	No. of Participants	Households	Businesses	Local Authorities
Berat	25/11/2019	11	4	5	2
Permet	25/11/2019	12	2	5	5
Gjirokastra	26/11/2019	11	6	2	3
Saranda	26/11/2019	14	5	4	5
Total		48	17	16	15
Total in %		100%	35.41%	33.33%	31.25%

Source: ACER, Qualitative Study 2019, Year II

According to discussions at the focused group, in all 4 cities, the implementation of the project has been good in those areas where there has been intervention but again the participants are expecting even more. A very small part of the works has finished, specifically the rehabilitation of the Berat Castle road and the improvement of lighting, the cobblestones in some of the main neighborhoods of Berat, rehabilitation of stairs in Saranda, improvement of the lighting in Permet center, rehabilitation of pavements in Gjirokastra Bazaar and some neighbourhood lighting. Municipality representatives informed about the continuity of the project and the areas where further interventions would take place. From the discussions, *the works that have been carried out so far have been evaluated to have a positive impact in general, even though there have been delays in*

implementation affecting tourism. In the area of Berat and Saranda there were remarks about the preservation of the originality of the works, so the historical-cultural characteristics of each specific neighborhood should have been preserved. They recommended that, *any infrastructure intervention within the project should pay close attention to the green areas.*

The infrastructure in the main neighborhoods in four cities has been positively evaluated, but there are major problems with the *sewage system*. There should be infrastructure intervention linking the city center with tourist areas or villages (*road connecting Permet with Leus village, with Benja, and Frasher village; roads connecting Gjirokastra with churches and historical-cultural areas*). According to the participants, the poor infrastructure does not fully utilize the potentials of each country, negatively affecting the satisfaction of tourists. Local transport was a major issue in each city, due to the quality of transport and the lack of signs to inform every tourist about the schedules.

"The sewage systems are not operational, it is enough to rain and the road turns into a river."

Household, Berat

"We have a miracle that God has given us, but there are no minimal interventions."

Business Representative, Permet

Main neighborhood lighting is appreciated in each city but needs improvement and lighting in other city neighborhoods. In all 4 cities, there has been a *significant increase in the number of tourists* in the last 3 years. Most of them are foreign tourists, especially in Saranda, but there has also been an increase in the influx of domestic tourists, most notably Berat and Permet. The tourist stay in city is relatively short. The meetings showed that the average stay is 1-2 days, despite the fact that tourists can spend more quality days in each touristic destination. The participants listed several reasons that lead to the tourists' short duration of stay:

Lack of information: In discussions held in four cities, there was an immediate need for the creation of a "guide book" or leaflet promoting tourist areas for each specific site. This way the tourist is informed about what each city has to offer (churches, museums, beaches, landscapes, tourist sites near the city) and chooses whether or not to visit them.

Activities in cities: In 2019 there was a lack of activities due to the political situation in the country (elections) and due to the continuity of work. In the afternoon and evening hours, tourists do not have many options to spend time. In Berat and Permet, it was identified that there are not many restaurants or bars that can stay open 24 hours. So, cities do not offer the liveliness required by tourists especially in the summer season.

Maintenance and Parking: In the cities of Berat and Saranda, there was a great need to place greater importance on local government for cleaning the place. The lack of public toilets was a problem encountered in each city. Parking was a major issue in Saranda, Permet and Berat.

Quality of Services: In four meetings, it was emphasized that the quality of service has increased compared to a year ago, but there is still a need for many improvements. Lack of qualified staff in bars/ restaurants/ hotels is present in every city and this is due to employment only during the tourist season. The urgent need for waitress/ bartender training was identified in order to provide the tourist with a high quality service. Businesses expressed the need for co-operation with the local government in order to provide free vocational courses.

In each discussion it resulted that measuring the influx of tourists in each city does not reflect the actual number of tourists, as this number is measured either by the number of tickets sold at the Castle/ Museums/ Culture House or in the case of Saranda the number of tourists is seen at the entry point of the port of Saranda. *In none of these cities, there is a system in which the actual number of tourists can be recorded.*

From the four conducted discussions, the quality of tourist guides this year has increased, but there are still unlicensed guides especially in the city of Berat. In the city of Saranda, it is noted that, there is an increase in tourist satisfaction with the tourist guides.

Some of the findings resulting from the qualitative study are summarized in the following table, classified according to the model with 3 components used in the quantitative study.

Table 65. Discussed topics during the qualitative study

COMPONENT	ISSUES ACCORDING TO EACH COMPONENT	EVALUATION	MAIN TOPICS DISCUSSED			
			Berat	Permet	Gjirokaster	Saranda
DIVERSIFICATION OF TOURISTIC ACTIVITIES	Local cuisine	Positive	Local cuisine is very well appreciated by Albanian and international tourists.	International tourists enjoy local cuisine.	Traditional cuisine is appreciated by tourist.	Tourists, especially international tourists, enjoy local cuisine.
	Touristic adventures	There is scarcity and dissatisfaction	Enriching touristic packages with new tours and / activities should promote growth and attractions for tourists to visit Berat.	“Permet has a rich terrain for various tourist adventures but is not used properly.”	The lack of infrastructure connecting the city with villages and tourist areas makes tourist adventures scarce.	Creating a tourism strategy that connects the city with the tourist areas to create new tourism activities.
	Cultural/musical/folkloric activities in the city	Lack of activities	This city has very little to do with the activities carried out by the local government. Increasing the presence of various activities that tourists can participate in in the city is indispensable.	There is a lack of musical and folk activities in the city.	Compared to last year the number of musical and cultural activities has increased. There is a vibrancy of activities in the country.	The city offers opportunities for many activities but they are few compared to what tourists want. More activities need to take place in the evening.
QUALITY OF PRODUCTS SERVICES AND HOSPITALITY	Access to places of cultural heritage	Moderate	Improvement of the road to positive forts but existing abandoned buildings can very well turn into a tourism service.	Poor infrastructure and limited access to cultural heritage sites.	Inside the city there is a positive access to cultural heritage sites. Poor infrastructure to the villages reduces access to cultural heritage sites in the surrounding area.	In general, tourists have access to cultural heritage sites.
	Degree of foreign language recognition	Low	Insufficient knowledge of English.	Lack of English knowledge by most of the staff.	Improvement from the previous year	Good but still insufficient knowledge of English.

INFRASTRUCTURE AND CLEANLINESS OF TOURISTIC DESTINATIONS	Quality of service	Low	Waiter training is needed to increase the quality of services.	Collaborate with relevant structures to provide training to service providers.	The quality of service has improved compared to last year but still needs improvement.	As employees are only kept during the tourist season, this always entails recruiting untrained staff.
	The quality of bars and restaurants	Moderate	Need for 24-hour bars and restaurants.	Need for more bars and restaurants in the city.	Bars and restaurants are positively valued in the city, but are also required to be kept open late into the night.	There are enough bars and restaurants but staff training and qualification is essential.
	Quality of walking pathways	Poor infrastructure	Waste cleaning, proper signage, street lighting, and road restoration in the tourist area are the most urgent interventions.	Improve infrastructure and set up signage boards.	Lighting, infrastructure and signaling are emergency interventions.	Road lighting and lack of green areas.
	Quality of roads nearby touristic sites	Poor infrastructure	Poor infrastructure on neighborhood roads and roads connecting the city with major villages.	Improvement of the more frequented tourist infrastructure remains an emergency for tourism.	Need to improve infrastructure connecting the city with tourist areas.	Dissatisfaction with the works on the stairs, saying the works did not preserve the old physiognomy.
	Parking	Difficulty in finding parking.	Tourists have difficulty finding parking spaces.	Limited access to parking.	New parking spaces have been opened.	Parking is another problem, and not only during the tourist season.
	Local Transport	Low	Very low quality of local transport.	The lack of schedule for the tourists who want to visit the surrounding area.	Poor transport quality and lack of timetables.	There is a need for local transport to be improved.

Source: ACER, *Qualitative Study 2019 Year II*

Focus Group Discussion resulted in some common concerns of family and local businesses. Table 66 summarizes the common barriers in Berat, Permet, Gjirokastra and Saranda, as well as the proposed solutions for each barrier.

Table 66. Common barriers and respective solutions in each municipality

COMMON BARRIERS	PROPOSED SOLUTION
Collaboration with local government	Supporting associations and businesses from local and central government with the goal of developing tourism and empowering the community.
Promotion from local government	Increasing the number of promotional activities, adding promotional materials, preparing calendars with all the activities offered to inform tourists.
Increasing the quality of services	Supporting businesses from local government to provide vocational courses for people employed in turist services.
Creating green areas and playgrounds for children	The more green areas and playgrounds a kid has in one city, the more it attracts family tourists and the third age group.
Road infrastrukture investments	Increasing investments in improving the roads that bring tourists to key tourist destinations, while preserving the architectural originality that characterizes every city.
Improvement of the sewage system	The new cobbles show a deterioration of the situation when there is rainfall, so it is recommended to improve the sewerage system.
Touristic packages	Involvement of new tourist activities in tourist packages in order to increase the interest of tourists to visit the city.
Parking	Creating new parking spaces to make it easier for tourists to access the city by car.

Source: ACER, Qualitative Study 2019 Year II

Detailed findings for each of the focused group discussions in Berat, Permet, Gjirokastra and Saranda are attached to **Annex 3**.

Chapter 4. Tourist Counting

4.1 Methodology of Tourist Counting

Based on the existing literature, there are several methods for visitor monitoring in touristic sites. Such methods include: i) direct observation, ii) video observation, iii) counting devices, iv) registration books, v) interviews etc. It is worth mentioning that most of these methods and instruments are not known in Albania and it is impossible to be used. From all the existing methods, taking into consideration the method used in the baseline study in 2016 and 2018 study (counting the tourists in real time during the same day and hour, in 9 selected touristic sites), the same method is used in 2019 survey. During field work, interviewers counted the influx of tourists in the studied site. Table 67 presents the average number of tourists in seven days of the week. It is noted that this number, does not accurately reflect the number of tourists who have stayed in that particular site, but an approximation of a daily trend on respective days.

4.2 Tourist Counting Findings

According to tourists counting in studied areas, coastal zone has the largest influx (Saranda), especially considering the time period when the survey has been conducted (August). In 2019, Blue Eye and Zvernec are the other two areas with the highest average number of tourists. Meanwhile in 2018, besides Saranda, the other two areas with the highest average number of tourists are Blue Eye and Gjirokastra. Permet, Benja and Porto Palermo, as one year ago, have the lowest average number of tourists, compared to the other destinations included in the project. Compared to 2018, the Berat and Porto Palermo have experienced a slight decline in the number of tourists' average.

Table 67. Average number of tourists during 7 days of the week, 2019

No.	Site	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	Gjirokastrë – Castle	142	186	250	240	165	140	142	180.71
3	Berat – Castle	113	120	115	62	75	158	116	108.42
4	Permet – Town Square	42	50	78	56	69	55	70	60
5	Benja – Thermal Water	70	82	110	113	42	56	69	77.42
6	Porto Palermo – Castle	90	86	70	60	112	95	82	85
7	Zvernec – Church Entrance	140	152	178	226	223	200	195	187.71
8	Orik – Ancient City	120	115	185	169	140	145	110	140.57
9	Blue Eye – Source	170	165	223	245	250	180	165	199.71

Source: ACER, Study 2019 Year II

Table 68. Average number of tourists 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

Conclusions and Recommendation

The conclusions listed below stemmed from the quantitative and qualitative study carried out regarding the assessment of the implementation of the PIUTD:

- International tourists are the majority of tourists in the country who enter Albania mainly through *airport* and land routes. Tourists are generally new visitors, who have never been to Albania. Meanwhile, it is increased the number of tourists visiting Albania more than once.
- The average tourist stay in Albania is estimated to be 8 days, even though there is a *decrease in the number of tourists staying on average 8 days* in one area, due to the lack of diversity of activities in the city.
- There is an *increase in the number of tourists visiting Albania by tourist packages*. However, tourism agencies should work to develop and promote tourism assets in Albania in order to enrich the packages and extend the tourist experience. This is linked to the tourists' short term of stay in the area, making the economic impact generated by tourism, negligible.
- *The low utilization of touristic potential* is noted in each site, due to the poor infrastructure that connects city centers with surrounding areas, especially with villages.
- *The overall level of tourist satisfaction has slightly declined compared to last year*. Among the most valued aspects are local cuisine, telecommunications, customs services and accessibility points.
- In 2019, tourists' dissatisfaction turns out to be: *poor infrastructure, credit card payment transactions, local transport and quality of guides*. These data were obtained from the survey of tourists on August 01-15, while also confirmed by focus groups.
- *Personal safety is positively assessed*, however the political situation (elections held this year) may have influenced tourists' perceptions.
- Concerning the *quality of services*, tourists point out several aspects that affect its quality: communication, foreign language knowledge and bank card payment. Declining satisfaction with the quality of service in hotels and restaurants is worrying and signals the need for action (such as by state inspectorates to control food quality, non-abuse of stated prices, etc.) to guarantee future quality.
- At the same time confirmed by the focus groups, tourists have expressed dissatisfaction with parking, the level of impurity, the lack of children's play areas, the quality of guides and local transport. Regarding the estimation of average daily expenses of tourists during their stay in Albania, it resulted that on average one tourist spends 47.08 Euro per day, 5.79 Euro less compared to last year.

Considering the data collected from the quantitative study and consultation of 51 stakeholders across the focus groups discussions, some recommendations are listed below with the purpose of leading to an increase in the number of tourists.

1. **Effective support of the business community:** According to the focus group discussions, it was highlighted as a barrier that prevents the development of tourism, lack of local and central government support for local business organizations in the form of grants or other forms of support. A fragmented effort by the business community to coordinate all efforts to promote local tourism is noted. Therefore, it is recommended that local and central government find the right tools for effective support of the business community.
2. **Improvement of infrastructure:** Quantitative and qualitative studies continue to present as a concern from the tourists' point of view but also from local actors, the lack of an adequate infrastructure (adequate roads, lighting, lack of access roads for some unexplored tourist areas, etc.) as a barrier which would affect an extension in length of tourists' stay. For this reason, the local and central government, and also the project itself, will have to progress with the implementation of planned interventions.
3. **Effective promotion of tourism values through a holistic approach:** The study's results indicate an effective lack of promotion of tourism values in Albania and more specifically of the studied destinations. This should be a coordinated effort between local, central government and business community, which is not happening at the right levels. For this reason, starting from the local government, it is necessary to intensify efforts by following a holistic approach to promote tourism. Municipalities should monitor the implementation of local tourism development strategies and build short-term, medium-term and long-term performance indicators.¹⁶
4. **Progressive advancement of project interventions:** According to data obtained from local stakeholders but also at project level, the last one has not made substantial interventions and may result in a change in tourist behavior. Mostly infrastructure interventions are not the most important aspects of project planned investments. In this regard, a progressive advancement of the implementation of interventions according to the needs identified in each areas, is recommended and assessment of the impact of such interventions.

¹⁶ Berat's strategy for tourism development <http://bashkiaberat.gov.al/strategjia-e-turizmit/>. There are no assessments for the implementation of this strategy.

Annex 1. Tourist survey's questionnaire

ID. Serial Number								
					d	d	m	m
Date of Interview								2 0 1 9
					h	h	m	m
Time of beginning								
Time of ending								
Duration of the interview								
Enter the number of refusing that have occurred. If not, enter 0.								
Name of enumerator								
SITE: Tourism site					1. Saranda – Promenade area 2. Gjirokaster – The castle 3. Berat – The castle 4. Permet – The town square 5. Blue Eye – The source 6. Porto Palermo – The castle 7. Benja Thermal waters 8. Porto Palermo – The castle 9. Zvernec – church entrance			
LANG: Questionnaire Language					1. Albanian 2. English 3. Italian			

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

A1	Gender	1. Male 2. Female
A2	Age	_____ years old.

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

B. MARKET INFORMATION

B1	Where did you obtain information about... <i>Select all that apply (Multiple)</i>	B1.1 Albania A. Radio B. Television C. Newspaper D. Magazine E. Internet F. Travel brochure G. Tour operator H. From a friend/relative I. Other	B1.2 SITE A. Radio B. Television C. Newspaper D. Magazine E. Internet F. Travel brochure G. Tour operator H. From a friend/relative I. Other	
B2	What touristic activities have you done or intend to do in the South of Albania?			
	Activity	B2.1 Have done?	<i>(IF B2.1=2)</i> B2.2 Intend to do?	<i>(IF H1=1)</i> B2.3 Evaluate in a scale from 1 to 5 the quality of your experience where 1=Very Poor and 5=Very good
	A. 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. Laying In the Beach	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	C. Visiting museums	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	D. 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
	E. Attending religious ceremonies	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	F. Attending festivals	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	G. Visiting (nearby) villages and communities	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	H. Visiting natural parks	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	I. Hiking/trekking/ biking	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	J. Adventure tourism such as: rafting, paragliding, water sports...	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	K. Shopping for souvenirs	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	L. Enjoying local gastronomy	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	M. Bar – cafes, night clubs	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5
	N. Water sports	1. Yes 2. No	1. Yes 2. No	1 2 3 4 5

B3	<p>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.</p> <p><i>Evaluate the quality of experience on a scale of 1 to 5 where 1=Very Bad and 5=Very good</i></p> <table border="1" data-bbox="220 376 1457 618"> <tr> <td>A. _____</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>B. _____</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>C. _____</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>D. Other: _____</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> </table>					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																																																																																						
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B4	<p>Ask all</p> <p>How would you evaluate the following aspects of your stay taking into consideration all Southern Albania?</p> <p><i>(Please circle the number of the answer that represents your evaluation of each factor)</i></p> <table border="1" data-bbox="220 891 1374 1749"> <tr> <th>Products, Services & Hospitality</th> <th>Very good</th> <th>Good</th> <th>Bad</th> <th>Very bad</th> </tr> <tr><td>A. Customs and immigration services at the point of entry</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>B. Convenience of the point of entry</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>C. Personal safety</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>D. Friendliness of the people</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>E. National cuisine/drinks</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>F. Quality of restaurants</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>G. Quality of lodging</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>H. Quality of service (in restaurants, hotels, etc.)</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>I. Accessibility to historical heritage sites</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>J. Interpretation of historical heritage sites</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>K. Interpretation/signage at historical heritage sites</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>L. Visitor information at historical heritage sites</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>M. Quality of guides</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>N. Degree of knowledge of foreign languages from the service personnel</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>O. Police services</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>P. Facilities for children</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>Q. Shopping opportunities</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>R. Telecommunications (mobile, internet...)</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>S. Convenience and access to local transport</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>T. Foreign exchange facilities</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> <tr><td>U. Convenience for payment transactions using cards (debit/credit)</td><td>4</td><td>3</td><td>2</td><td>1</td></tr> </table>					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
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B5	<p>In overall during all your stay in Southern Albania, taking into consideration all the aspects mentioned above, how would you evaluate your stay?</p> <table border="1" data-bbox="906 1749 1468 1906"> <tr> <td>1. Very dissatisfied</td> </tr> <tr> <td>2. Dissatisfied</td> </tr> <tr> <td>3. Neutral</td> </tr> <tr> <td>4. Satisfied</td> </tr> <tr> <td>5. Very satisfied</td> </tr> </table>					1. Very dissatisfied	2. Dissatisfied	3. Neutral	4. Satisfied	5. Very satisfied																																																																																																									
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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)

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

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 2019, compared to the baseline study conducted in 2016 and 2018 study. This study aims to identify the achievements from 2016 and 2018, 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

FOCUSED GROUP DISCUSSIONS Project for Integrated Urban and Tourism Development Tourists Survey, August-2019

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 (2019)

For more information contact:

Albania Center for Economic Research

Bylyre Serjanaj (Research Assistant)

researchassistant.bs@gmail.com

Tel: 0689011619

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 the study for the assessment of 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 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

The focus group discussion was held on 25/11/2019, at 09.00 in the Public Library Room of Berat and lasted about two hours. The meeting was moderated by M.Sc Bylyre Serjanaj and Amena Losha, based on a list of orientation questions divided into 3 categories: questions for family members, businesses and local government. The meeting was attended by 14 people, representatives from the Municipality-Tourism Sector, associations, businesses and households. Based on the orientation questions, but also on the experience of each of the participants with tourists, during the discussions were noted the positive side of the project's impact, as well as problems and recommendations for possible solutions/ improvements. The guests were provided with a set of materials: Agenda, Project Information, Key Findings and Orientation Questions. List of participants and photos from the meeting are attached to *Annex 4*.

Identification of Main Issues

Main Findings

- Project interventions have mainly started in the rehabilitation of the road leading from the city center to Berat Castle, and there are unfinished reconstruction of churches/ mosques and the cobbled through interventions of some of the main neighborhoods.
- However, the parking area around the Berat Castle area remains a problem.
- Over the last three years there has been a significant increase in the number of tourists, from 90 thousand in 2017 to 159 thousand in 2018 and 142 thousand (January- October, 2019).
- Data on the number of tourists are taken from the sale of tickets at the Castle, but their real number is always bigger.
- Tourists in Berat come mainly through Balkan itineraries, where staying in the city is generally not foreseen.
- In the focus group participants' opinion, the average stay of a tourist in Berat is 2 days or 1 night, and one of the two tourists is international. According to participants, the short-term stay is due to the lack of activities in the city that can lead to an extension of the tourist experience.
- Transport from the center to Berat Castle is fixed-schedule, which is more convenient for locals, while a tourist finds it difficult to adapt to the established schedule.
- Another problem is the setting of cobblestones, while not respecting the unique historical specifications of each neighborhood.

Project Knowledge:

In general, participants had knowledge about project development. As part of the project implementation, works on the Berat Castle road, cobbles and specific interventions made under the PIUTD were recognized. The implementation of the project was welcomed not only in terms of infrastructure improvement, but also in the impact that there was a basic intervention on this component, mainly to the satisfaction of the tourist. However, delays in the reconstruction of the church were identified, negatively affecting the attendance of religious activities.

- *Households, representatives of businesses, associations and representatives of local government are knowledgeable about the project development in the city of Berat.*

Households:

During the discussions it was noted that compared to the previous year there has been improvement in the lighting of some of the main streets and neighborhoods. The main focus to attract tourists, should be directed to historic centers. *"Tourist activities (music performances) are focused only on the city center and not on other areas around it"* - said one of the households. However, the city does not offer much for international and domestic tourists. The inner roads have no bars, which can be frequented until late hours. Problems have been encountered with the expropriations on the "Muzak Topia" road and have resulted in the project not being implemented. Another family member states: *"Concrete road to Berat Castle has left no room for rainwater drainage"*.

- *Undertaking entertainment and tourism activities is one of the main points of intervention in order to increase the interest of tourists.*
- *Rehabilitation of sewage system along the project roads, so as not to cause flooding during weather deterioration.*

Business:

Business representatives at the meeting belonged to the hotel-tourism field. Informality is a problem that can be encountered in the city of Berat, while the quality of services was rated much better than last year although there is still a need for improvement. Ongoing trainings for waiter / bartender staff (mainly for international language knowledge) and menu additions were the two key steps that businesses need to take. *"Inter-urban and urban transport leaves much to be desired"* - said one of the business representatives. International tourists do not have access to public transport since the schedules are not displayed and they do not know where to get information on bus departures from other cities to Berat and this effect in reducing the number of tourists in Berat city.

- *Supporting businesses from local and central government to develop tourism and empower the community.*
- *Staff training through professional courses offered by the Municipality.*
- *Adding businesses - restaurants and bars that can be frequented 24 hours.*
- *Enriching tourist packages with new tours / activities, as well as leaflet marketing that can be distributed at any tourist destination.*
- *Establish flexible schedules for the use of public transport and increase the quality of public transport within the city.*

Local Government:

The municipality has a particular focus on promoting local tourism. Tourism specialists point out that the project has not yet been completed and need time to look at the results and its impact on tourist satisfaction. *“Development of village roads with high tourist potential and lack of public toilets remains a problem”*- said one of the local government representatives. The municipality receives the data from the number of tickets sold in Kala, which is not the actual number of tourists visiting the city.

- *Development of a statistical register for tracking the real number of tourists.*
- *Arrangement of road infrastructure that connects the city with the surrounding villages.*
- *Construction of public toilets both in the city center and the tourist areas around it.*

3/2 Focus Group Discussion - Permet

Introduction

The Albanian Center for Economic Research (ACER) as part of the study for the assessment of 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 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

The focus group discussion was held on 25/11/2019, at 13:30 in offices of the Multifunctional Center in Permet and lasted about two hours. The meeting was moderated by M.Sc Bylyre Serjanaj and Amena Losha, 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, representatives from the Municipality-Tourism Sector, associations, businesses and households. Based on the orientation questions, but also on the experience of each of the participants with tourists, during the discussions were noted the positive side of the project's impact, as well as problems and recommendations for possible solutions/improvements. The guests were provided with a set of materials: Agenda, Project Information, Key Findings and Orientation Questions. List of participants and photos from the meeting are attached to **Annex 4**.

Identification of Main Issues

Main Findings

- In the context of project development, there has been minimal intervention only in placing the lights on the main road, while it is emphasized by the local government that the project has not yet started fully and there will be more investment next year.
- During the last three years there has been an increase in the number of tourists, from 9 thousand in 2017, 16 thousand in 2018 and 17 thousand in 2019.
- Information on the number of tourists visiting Permet is obtained from Infopoint and city hotels.
- This year the number of guest houses in Permet has increased.
- The average stay of a tourist in Permet is one or two days.

- It is emphasized that there is intervention in the development of the city but not by the project but by the locals and businesses in Permet itself.

Project knowledge:

The participants were knowledgeable about the development of the project. More detailed clarifications on the purpose of the Project and its components were explained. Street lighting in downtown Permet was the only intervention, emphasizing the need to improve lighting in other parts of the city. Participants also demanded more investment as there was more intervention in the country by private initiatives.

Households:

Just like last year, family members present at the meeting pointed out that emergency investment in Permet are improving the road only 1 km to the village of Leuze, the road that goes to Benja or Frasher village. These roads lead to important tourist areas but due to poor infrastructure is causing tourists to change their destinations. The inability of cars to pass on some important roads, the lack of trails and tourist packages were very basic and essential issues for tourism development.

- *Improving the infrastructure of the areas most frequented by tourists is urgent in Permet.*
- *Proper use of the natural resources offered by the city of Permet.*
- *Development of tourist paths and packages for promotion of the country.*

Businesses:

Business representatives point out that in the last 10 years there has been a huge increase of tourists visiting Permet. The largest numbers of visitors are international. Regarding the stay in Permet, business representatives said that tourists stay on average 1-2 days. *"Greater restorations and interventions have been done by us as entrepreneurs than by the project"* - said one participant of the businesses. Business representatives also assessed the improvement of infrastructure as the most urgent need of the city of Permet. The Church of Benje, which has been declared a protected area, has only 2 km of road to be reconstructed. Currently, due to inadequate infrastructure, tourist arrivals in the area have been reduced and if it continues in this situation then it will have a very negative impact on tourism in the city of Permet.

During the discussions, it was mentioned that stronger cooperation between local government and businesses is needed to make the right interventions in order to attract as many tourists as possible. Better marketing through leaflets, road signaling or tourist guides is required.

- *Improving infrastructure is the main intervention to be made by the tourism development project.*
- *Information on Permet tourist opportunities should be further promoted through leaflets or tourist guides.*

Local Government:

Regarding the role of the local government, the representatives stated that it is necessary to create a statistical register that tracks the number of tourists, as the real influx cannot be measured. Data on tourists is collected from the tourist information office and hotels / hostels, so there is no real number of visitors in this city.

- *A registry is needed to measure the real number of tourists visiting Permet.*
- *Waste cleaning was identified again as an urgent issue that needs improvement.*

- *Lack of parking place was another problem in the town of Përmet.*

3/3 Focus Group Discussion - Gjirokaster

Introduction

The Albanian Center for Economic Research (ACER) as part of the study for the assessment of 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 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

The focus group discussion was held on 26/11/2019, at 12:00 in the Eqerem Cabej University and lasted about two hours. The meeting was moderated by M.Sc Bylyre Serjanaj and Amena Losha, based on a list of orientation questions divided into 3 categories: questions for family members, businesses and local government. The meeting was attended by 14 people, representatives from the Municipality-Tourism Sector, associations, businesses and households. Based on the orientation questions, but also on the experience of each of the participants with tourists, during the discussions were noted the positive side of the project's impact, as well as problems and recommendations for possible solutions / improvements. The guests were provided with a set of materials: Agenda, Project Information, Key Findings and Orientation Questions. List of participants and photos from the meeting are attached to ***Annex 4***.

Identification of Main Issues

Main Findings

- Project interventions have begun with the rehabilitation of the Bazaar's cobblestone, lighting on the main roads and during this year work on the part of Gjirokastra Castle was still ongoing. These works, according to the participants' opinion, had a negative impact on the tourists and businesses as they could not pass through these areas.
- Information on the influx of tourists is obtained from ticket sales in the Castle and 4 Museums located in Gjirokastra. From this data it results that in 2018 the city of Gjirokastra had 113 228 visitors and for 2019, 113 358 visitors. So, there is an increase in the number of tourists in the city of Gjirokastra.
- The majority of tourists do not spend much money as they belong to the third age group.
- During this year, there is an artistic vibrancy in the city of Gjirokastra, which was missing in previous years and the Municipality of Gjirokastra has implemented a calendar for organizing specific activities in the city.

Project knowledge:

In general, participants were knowledgeable about project development. The participants were familiar with the works on the cobblestone of the Bazaar and the part of the Castle. Overall, the implementation of the project was welcomed and the municipality' specialists provided more information about the planned works in the city in the coming year.

Households:

The households appreciated positively the maintenance of the city, there were no problems with the impurity and parking, as new parking spaces were opened. Lighting of the main streets in the city was welcomed, but they expressed the need for lighting and reconstruction of neighborhood streets.

A problem expressed by family members was the need for as many green spaces as possible, where children could have fun. Participants from Municipality informed that there are plans for the creation of a children's playground in the future. This was also a problem for tourists because tourists who come with children find it impossible to entertain them.

The quality of public transport, according to family members, had not changed at all and there is a need for improvement. *"There are no timetables displayed where tourists can get information"* - said one of the family representatives.

- *It was recommended to create green and fun spaces (playground).*
- *It was recommended to improve the quality of public transport.*

Businesses:

The promotion of the city and its historical areas (museum, church, and fortress) is a key factor in improving and increasing the number of tourists in the city of Gjirokastra. One problem was the lack of information by tourists about the historical and cultural sites that this city carries. Quality of service (although improved from last year) was another issue supported by business representatives. *"It is a great fortune for us to have a university, and students with a degree in tourism, so they need to be more engaged and come up with new ideas to improve tourism in this country"* - was one of the business representative comments. There were constant comments about the behavior, hospitality and level of service provided by the hotel. There was a need for professional courses by the municipality to increase the quality of services in the country

- *Support from local government was recommended to improve the quality of service provided by staff.*
- *It was recommended to create a guidebook to inform tourists about the wealth of this place.*

Local Government:

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 placement of signage on the trails, the street lighting, the promotion of the place and local transport were also issues acknowledged by local government officials.

- *Creation of leaflets, guide book to promote the city and tourist areas of Gjirokastra.*
- *Placing tables regarding local transport schedules.*

3/4 Focus Group Discussion – Saranda

Introduction

The Albanian Center for Economic Research (ACER) as part of the study for the assessment of 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 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

The focus group discussion was held on 26/11/2019, at 09:00 in the Municipality Hall of Saranda and lasted about two hours. The meeting was moderated by M.Sc Bylyre Serjanaj and Amena Losha, based on a list of orientation questions divided into 3 categories: questions for family members, businesses and local government. The meeting was attended by 17 people, representatives from the Municipality-Tourism Sector, associations, businesses and households. Based on the orientation questions, but also on the experience of each of the participants with tourists, during the discussions were noted the positive side of the project's impact, as well as problems and recommendations for possible solutions / improvements. The guests were provided with a set of materials: Agenda, Project Information, Key Findings and Orientation Questions. List of participants and photos from the meeting are attached to *Annex 4*.

Identification of Main Issues

Main Findings

- The implementation of the project has started with the work on the stairs and street lighting. Participants emphasized the slow pace of work on the promenade.
- During the last two years there has been an increase in the number of tourists; 234 thousand tourists have entered at the entry point of the Port of Saranda, while for 2019 there are 780 thousand tourists in the city of Saranda and 750 thousand tourists in 2018.
- Data on the number of tourists are obtained from Butrint Park and Saranda Port, but this number does not reflect the actual influx of tourists.
- The majority of tourists are one-day tourists, or one night stays in the city, since the city does not offer many activities for attracting tourists.
- The capacity of hotels/ resort houses in Saranda has increased and is sufficient to respond to the number of tourists.

Project Knowledge:

The participants were aware of project development. Again, representatives of the Municipality gave more information about future works to be carried out in the city of Saranda and the tourist areas. Participants, as well as this year, were dissatisfied with the work on the stairs, saying the works did not preserve the old physiognomy. They expressed dissatisfaction with the delay in the works.

Households:

The stairs were a common problem for all participants. The sewage system around them was another problem expressed by the participants. *"There are no areas where children can play and there are no resting places for the elderly people"* - said one of the households. Managing the care of the territory (cleaning) was a major problem confirmed by each participant. Tourist activities are missing and a tourist in the city of Saranda has nothing to do more than two or three days.

- *It is recommended to create green areas for vacationers and children's parks.*
- *It is recommended reconstruction of the sewage system.*
- *The well-being of the place, as cleaning was a problem expressed by one of the households.*
- *There is a need for more tourist activities to attract tourists.*

Businesses:

The main problem expressed by business representatives was the low cooperation with the local government. *"The municipality closed my deckchairs in August 15, while I wanted to keep them until October"* - said one business representative. In this way, it shortens the season of beach tourism so it is a need to increase the length of time requiring for many tourist activities. On the beaches, participants note that it has been four years that they have not intervened to improve them. Parking is a significant problem in the city of Saranda, especially during the tourist season. Signage is missing in this city and marching becomes an undesirable activity. The quality of transport is again problematic as there is no timetable information. Creating a local website was an alternative expressed by a business representative.

- *Stronger cooperation between businesses and local government is recommended.*
- *Intervention on the beaches to make it more attractive and relaxing for tourists.*
- *Improved parking and signage.*

Local Government:

Representatives of the local government pointed out that tourism this year was also affected by the political situation (elections). However, there is an increase in the number of tourists in the city. There is no specific register for tourist counts but this is obtained as a result of access to Saranda Port and tickets to Butrint. It was acknowledged that activities were scarce and that the project was experiencing delays in its implementation.

- *Developing more tourist activities to attract tourists.*
- *Maintenance of the site and stronger cooperation with businesses.*

Annex 4. List of Participants and Photos of FGD

FOKUS GROUP - BERAT

25.11.2018. Berat

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Gjirokastra 26. 11. 2019

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