



PROMOTING
PRIVATE SECTOR
EMPLOYMENT

RESULTS OF
WESTERN KOSOVO TOURISM BASELINE SURVEY

Parku Kombetar
"Bjeshket e Nemuna"
National Park
"Prokletije"

R106

Peja
Пећ

R107

R201






 Schweizerische Eidgenossenschaft
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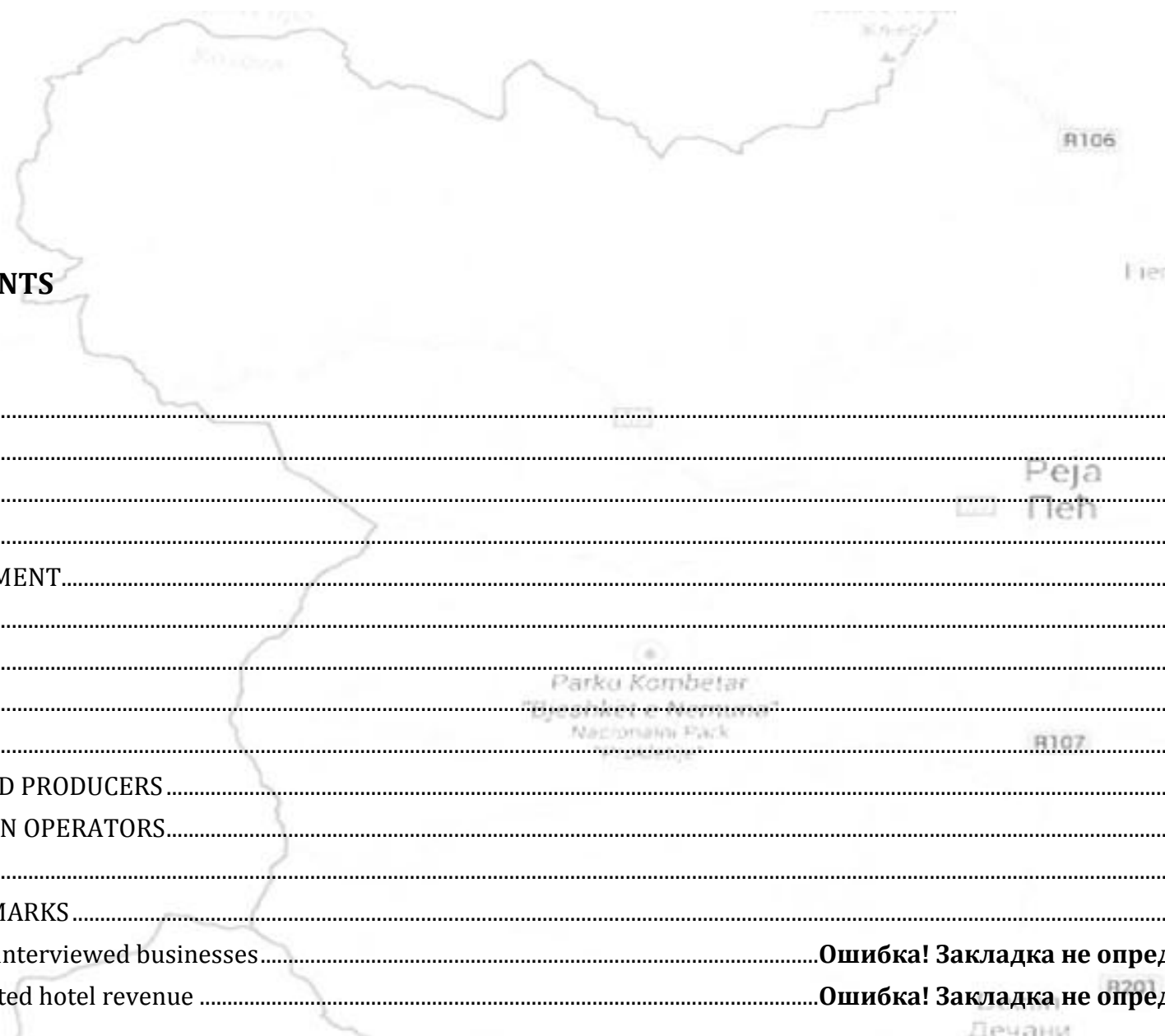
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This report was prepared by Riinvest Institute on behalf of the PPSE Project
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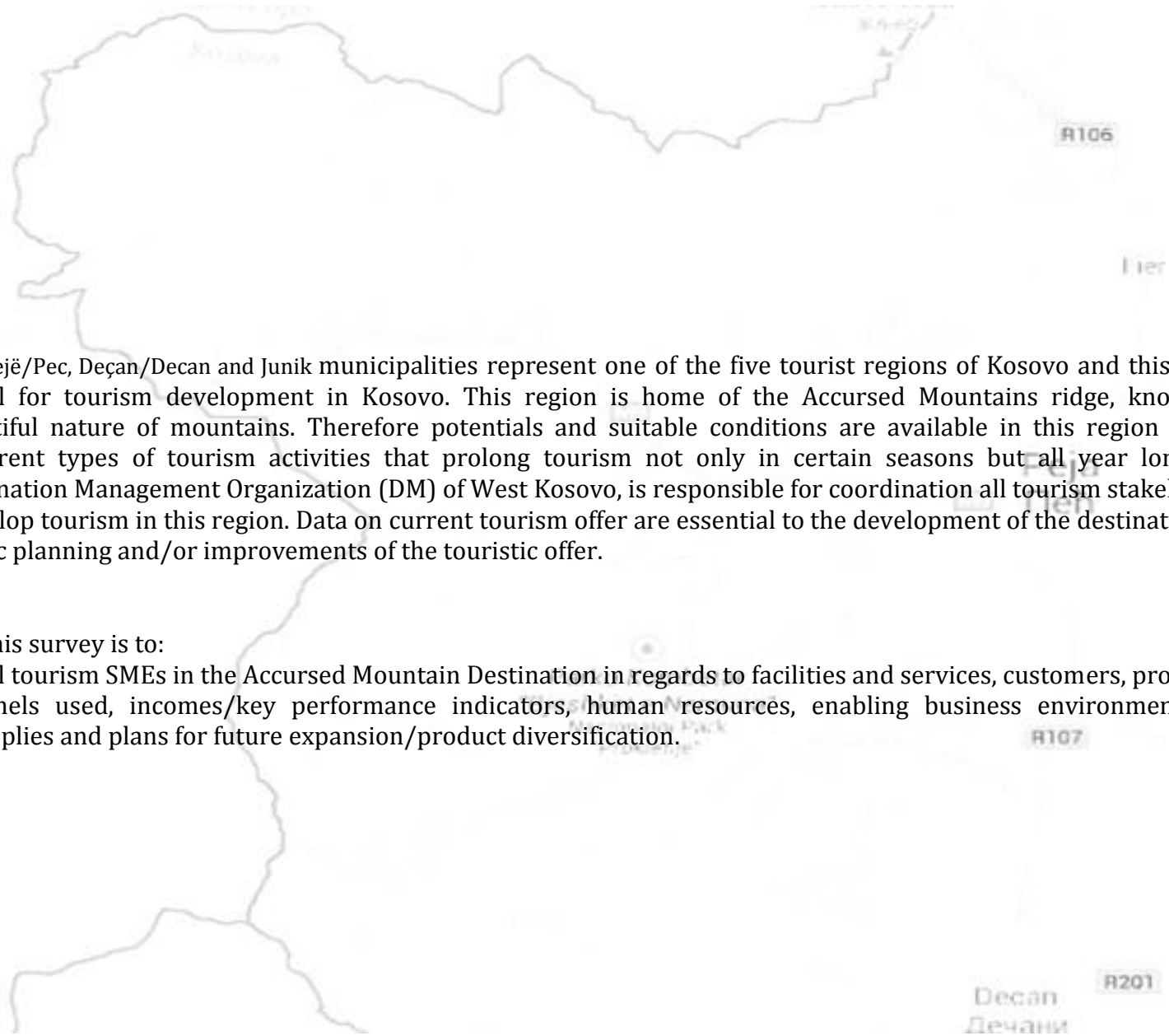


BACKGROUND

Western Kosovo or Pejë/Pec, Deçan/Decan and Junik municipalities represent one of the five tourist regions of Kosovo and this region offers many potential for tourism development in Kosovo. This region is home of the Accursed Mountains ridge, known for fascinating and beautiful nature of mountains. Therefore potentials and suitable conditions are available in this region for the development of different types of tourism activities that prolong tourism not only in certain seasons but all year long. The organization for Destination Management Organization (DM) of West Kosovo, is responsible for coordination all tourism stakeholders in joint efforts to develop tourism in this region. Data on current tourism offer are essential to the development of the destination and important for strategic planning and/or improvements of the touristic offer.

The key objective of this survey is to:

Measure and assess all tourism SMEs in the Accursed Mountain Destination in regards to facilities and services, customers, promotion and marketing channels used, incomes/key performance indicators, human resources, enabling business environment, eco-friendliness, input supplies and plans for future expansion/product diversification.



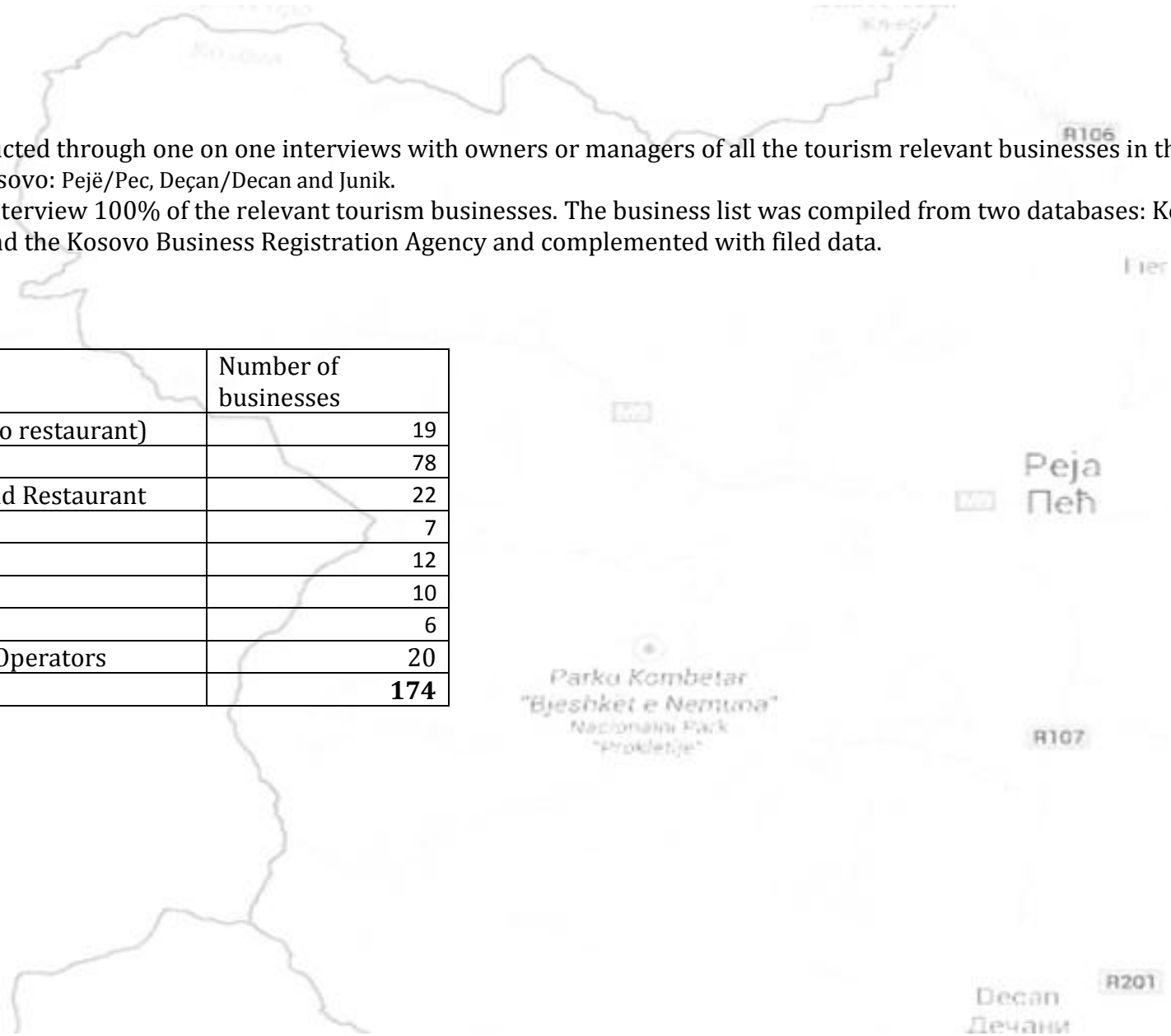
METHODOLOGY

The survey was conducted through one on one interviews with owners or managers of all the tourism relevant businesses in the Western Region of Kosovo: Pejë/Pec, Deçan/Decan and Junik.

This study aimed to interview 100% of the relevant tourism businesses. The business list was compiled from two databases: Kosovo Tax Administration and the Kosovo Business Registration Agency and complemented with filed data.

Sample Size:

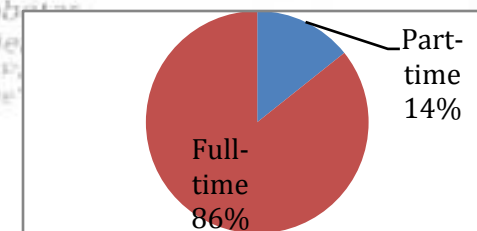
SECTOR	Number of businesses
1 Accommodation (no restaurant)	19
2 Restaurant	78
3 Accommodation and Restaurant	22
4 Transportation	7
5 Travel Agency	12
6 Tour Guides	10
7 Handicraft shop	6
9 Tourist Attraction Operators	20
TOTAL	174



EMPLOYMENT

Of the 174 tourism relevant businesses in the Western region of Kosovo that provided data, 123 provided data on their labor force. One major source of bias on this question is the high level of informal employment, making some businesses reluctant to answer honestly or refusing to respond.

Business Category	Number of businesses that provided information	Total number of employees	Female Part-time	Male Part-time	Total Part-Time	Female Full-time	Male Full-time	Total Full Time
Accommodation	9	72	7		7	26	39	65
Accommodation and restaurant	22	361	6	19	27	74	215	303
Handicraft shop	1	1				1		1
Restaurant	68	483	15	32	47	75	379	450
Tour guide	4	53	1	32	33	8	12	20
Tourist attraction operators	8	41	2	9	11	12	18	30
Transport	3	42		18	18	1	23	24
Travel Agency	8	41	2	9	11	6	24	30
Grand Total	123	1094	33	119	154	203	710	923



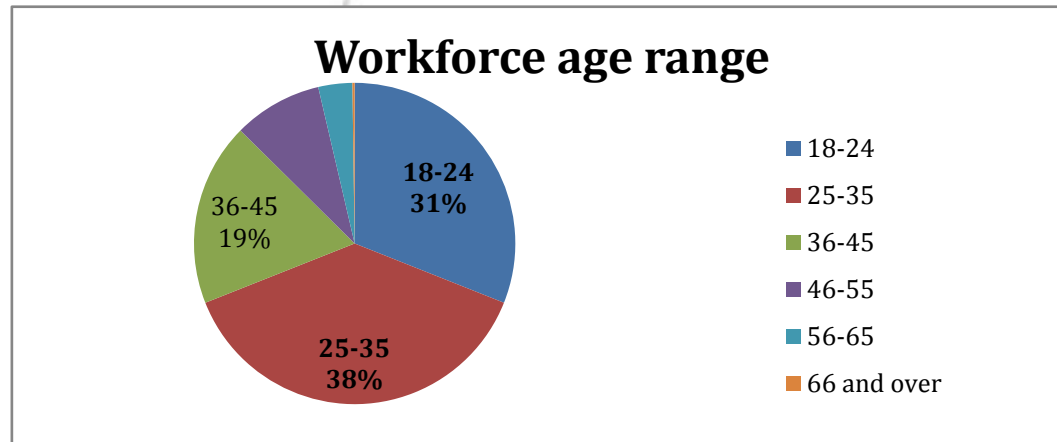
EMPLOYMENT – Family members

Employment of family members is very prevalent in the tourism sector. The following table shows the total number of male and female family members, and the number as percentage of the total workforce.

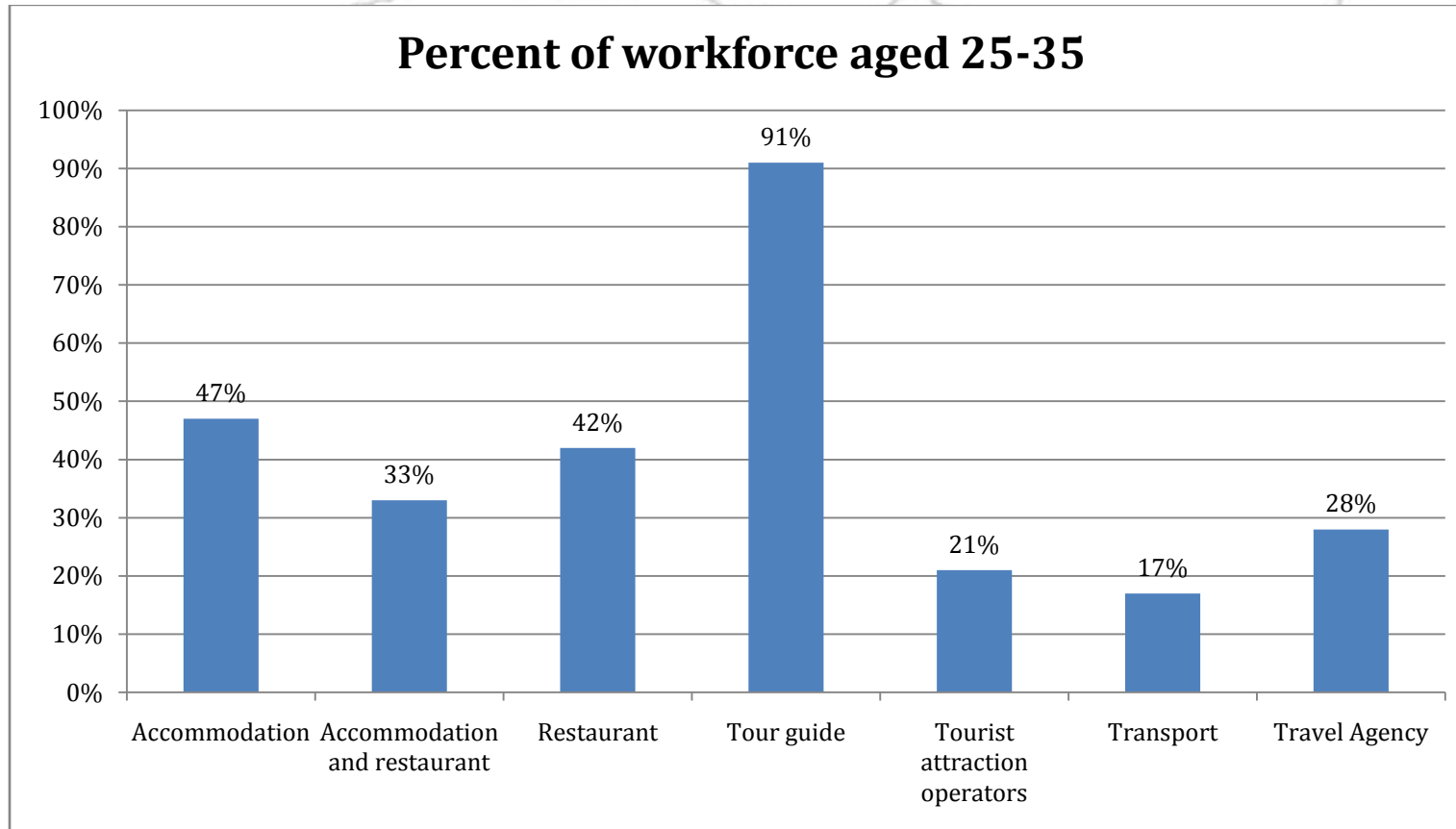
	Total Female labor	Total Male Labor	Family member female labor	Family member male labor	Percentage of total female workers that are family members	Percentage of total male workers that are family members	Percentage of total workforce that are family members
Accommodation	33	39	10	15	30%	38%	35%
Accommodation and restaurant	94	267	19	48	20%	18%	19%
Handicraft shop	1		1		100%		100%
Restaurant	84	410	41	138	49%	34%	36%
Tour guide	9	44	5	33	56%	75%	72%
Tourist attraction operators	14	27	3	1	21%	4%	10%
Transport	1	41		4	0%	10%	10%
Travel Agency	8	33	3	10	38%	30%	32%
Grand Total	244	861	82	249	34%	29%	30%

EMPLOYMENT – Workforce age range and nationality

The age workforce in the tourism sector in Western Kosovo is mostly young, with about 70 percent of employees falling in the 18-35 age range. The following tables give detailed overview of the workforce age by sector:



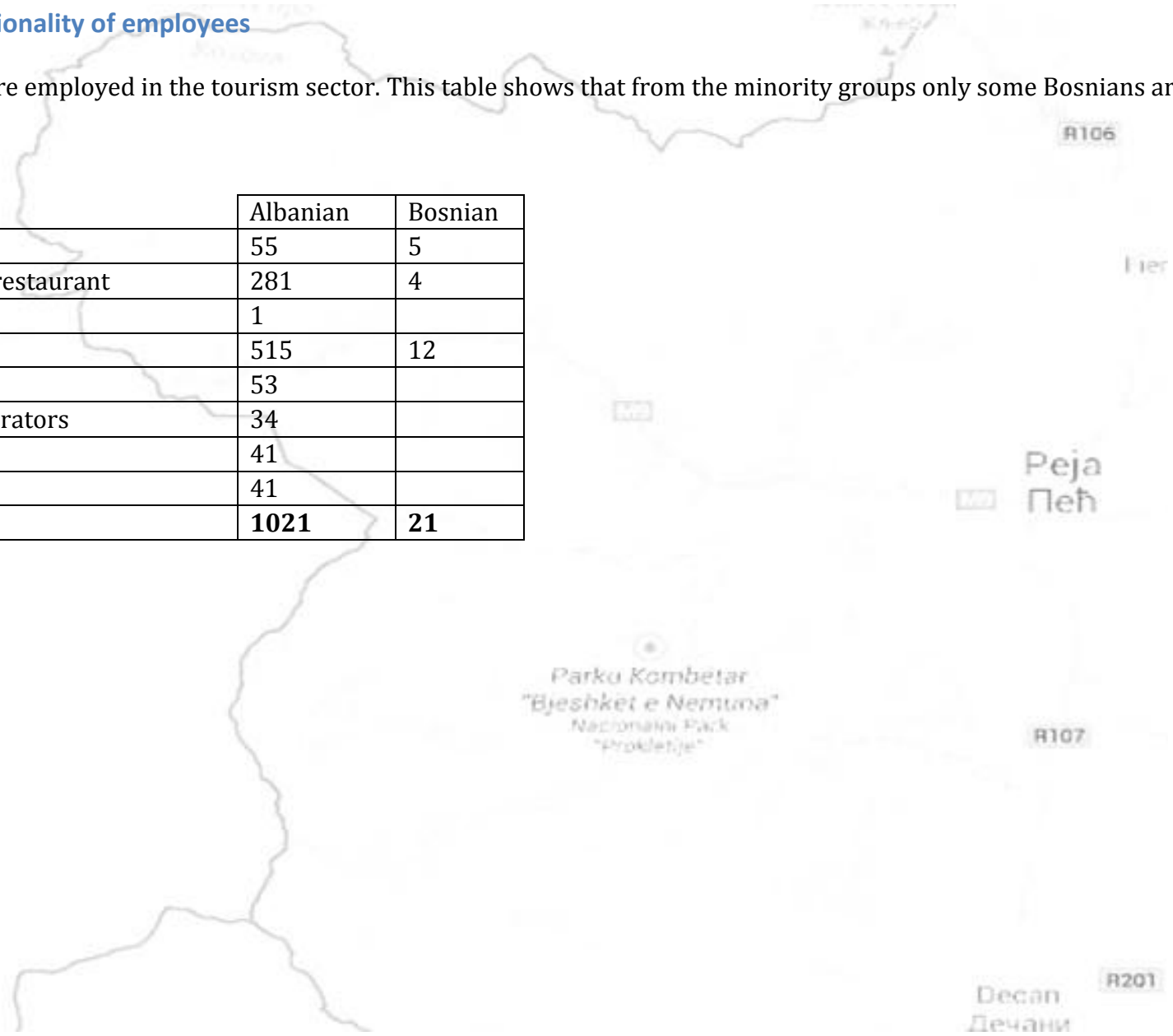
	18-24	25-35	36-45	46-55	56-65	66 and over
Accommodation	18%	47%	27%	6%	2%	
Accommodation and restaurant	31%	33%	18%	11%	8%	
Handicraft shop	100%					
Restaurant	37%	42%	14%	6%	1%	
Tour guide	4%	91%	4%			
Tourist attraction operators	50%	21%	24%	5%		
Transport	2%	17%	44%	29%	7%	
Travel Agency	10%	28%	36%	26%		

EMPLOYMENT – Workforce age range and nationality

EMPLOYMENT – Nationality of employees

Very few minorities are employed in the tourism sector. This table shows that from the minority groups only some Bosnians are employed.

	Albanian	Bosnian
Accommodation	55	5
Accommodation and restaurant	281	4
Handicraft shop	1	
Restaurant	515	12
Tour guide	53	
Tourist attraction operators	34	
Transport	41	
Travel Agency	41	
Grand Total	1021	21



EMPLOYMENT –Tourism management experience

The following table shows the experience and education of tourism related business managers or owners:

	My education has been focused on tourism related topics	I have received special tourism related training	I have owned/managed, or worked in tourism industry before – In Kosovo	I have owned/managed, or worked in tourism industry before – Abroad
Accommodation	4	13	4	1
Accommodation and restaurant	9	10	4	2
Handicraft shop	2	3	2	
Restaurant	11	40	14	6
Tour guide	3	5	1	
Tourist attraction operators	1	10	2	
Transport				
Travel Agency	2	5	5	
Grand Total	32	86	32	9

Staff positions with highest need to improve skills and knowledge?

8 Accommodation services providers said that the Position of manager needed improvement in skills and knowledge.

13 Restaurant services said the waiters needed improved skills, 28 restaurants said the kitchen staff, and 9 restaurant said managers needed improvement in skills and knowledge.

8 Accommodation and Restaurant services providers said the kitchen staff need improvement in skills, and 7 said the managers.

1 Travel Agency said that there is needs more professional drivers.

EMPLOYMENT – Satisfaction with employee qualification and training

The overwhelming majority of businesses agree that the workforce is skilled enough to perform their duties. However, the cause for this overconfidence in the quality of their staff could well be the result of lack of knowledge of quality benchmarks in the respective industry in other countries or economies. The businesses themselves, however, could well be cognizant of this fact but they have realistic expectations of their employees and their staff meet those expectations.

The workforce in tourism is skilled enough to complete my needs?	
	1 = Fully agree, 4 = Fully Disagree
Accommodation	1.3
Accommodation and restaurant	1.5
Handicraft shop	1.0
Restaurant	1.2
Tour guide	1.3
Tourist attraction operators	1.6
Transport	1.0
Travel Agency	1.0
Grand Total	1.3

EMPLOYMENT – Other than in-house training

Other than in-house training

13 Restaurant services providers claimed that they conduct trainings other than in-house training. The most common trainings were related to waiter and bartender professionalism. A few had trainings on catering, cooking, and customer relations.

10 Accommodation and Restaurant service providers said they train their employees through i.e. visits to top hotels abroad, management trainings, tourism related trainings, etc.

3 Accommodation providers said cooking and tour guide training

4 travel agencies provide trainings, mostly sales. One inbound tour operator has had training from the German DAB.

1 tour guide has received training on tour guiding, first aid, and other, *1* other tour guide has had a training/study visit in the US.

The staff of *1* accommodation service providers / Kulla have received training from a GIZ funded project and the Ministry of Culture.



EMPLOYMENT – Recruitment

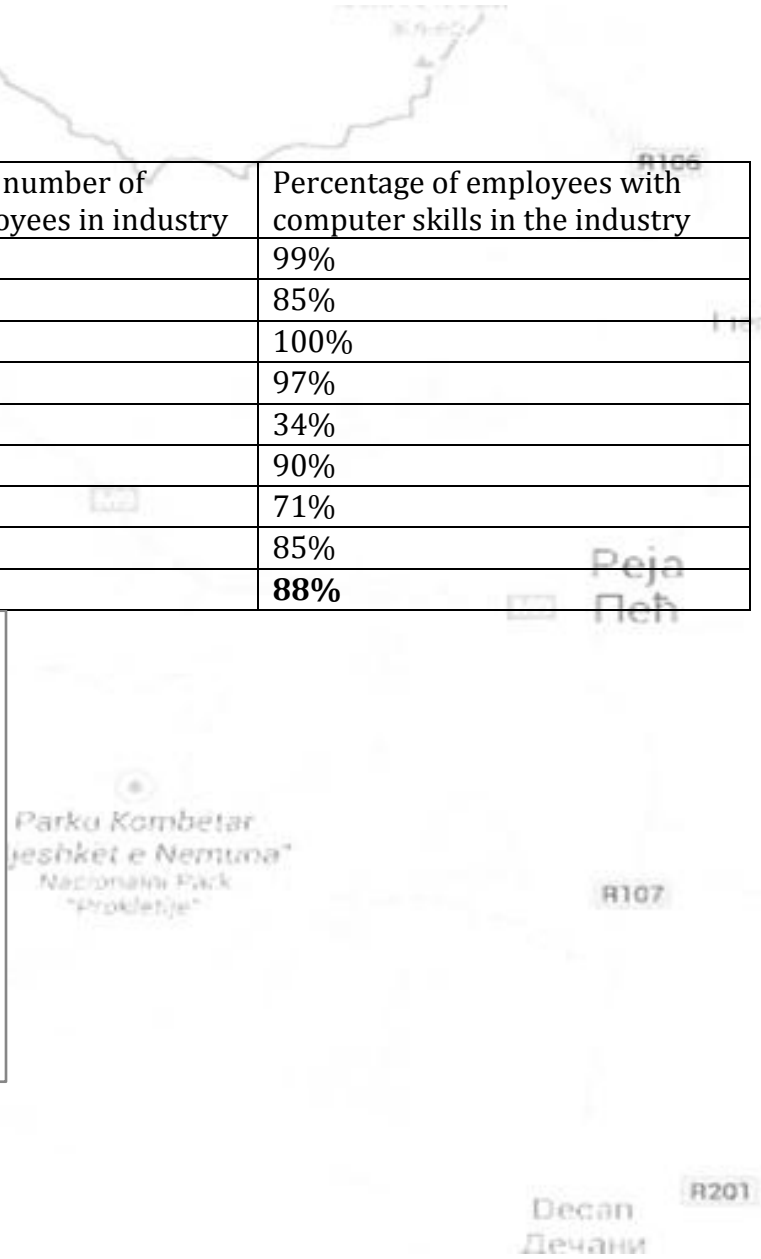
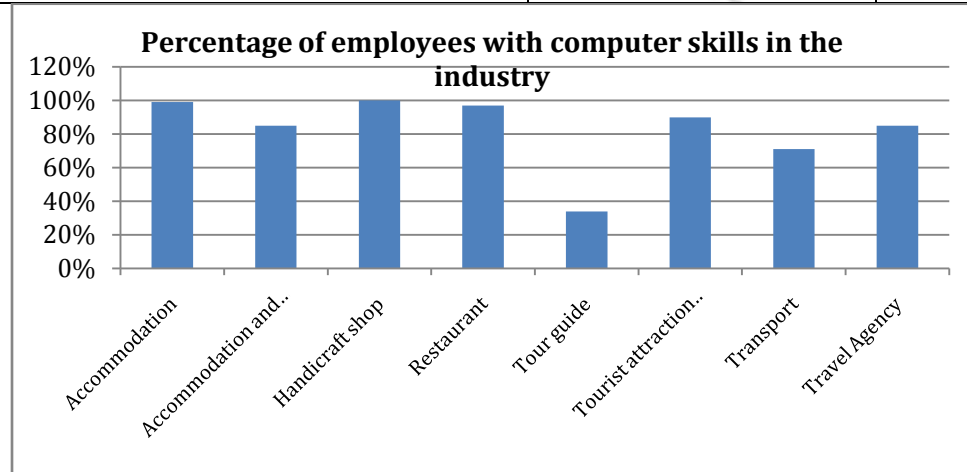
The following table shows the number of employees hired in 2013 in each industry, and the projected number that will be hired in 2014.

	New staff in 2013	New staff for 2014 (projected)	Projected numbers will increase employment by:	Will mostly hire:
Accommodation	2	6	8%	
Accommodation and restaurant	32	29	8%	Waiters, cooks, bartenders
Handicraft shop			0%	Waiter, cooks, maintenance
Restaurant	105	92	19%	Drivers/aid
Tour guide	1	2	4%	
Tourist attraction operators	11	3	7%	
Transport	8		0%	
Travel Agency	5	4	10%	
Grand Total	164	136	12%	

EMPLOYMENT – Computer skills

The majority of employees have sufficient computer skills (88%).

	Number of employees with computer skills	Total number of employees in industry	Percentage of employees with computer skills in the industry
Accommodation	71	72	99%
Accommodation and restaurant	307	361	85%
Handicraft shop	1	1	100%
Restaurant	467	483	97%
Tour guide	18	53	34%
Tourist attraction operators	37	41	90%
Transport	30	42	71%
Travel Agency	35	41	85%
Grand Total	966	1094	88%



EMPLOYMENT –Language skills

Owners or managers consider their employees to be sufficiently fluent in English, German, and Serbian.

	Number of employees that speak:			Total number of employees in industry
	English	German	Serbian	
Accommodation	12	1	5	72
Accommodation and restaurant	103	42	4	361
Handicraft shop	1			1
Restaurant	226	65	24	483
Tour guide	3	1		53
Tourist attraction operators	20	7	2	41
Transport	25		2	42
Travel Agency	15	8	4	41
Grand Total	405	124	41	1094

	Number of employees that speak language as a percentage of total		
	English	German	Serbian
Accommodation	17%	1%	7%
Accommodation and restaurant	29%	12%	1%
Handicraft shop	100%	0%	0%
Restaurant	47%	13%	5%
Tour guide	6%	2%	0%
Tourist attraction operators	49%	17%	5%
Transport	60%	0%	5%
Travel Agency	37%	20%	10%
Grand Total	37%	11%	4%

PROMOTION

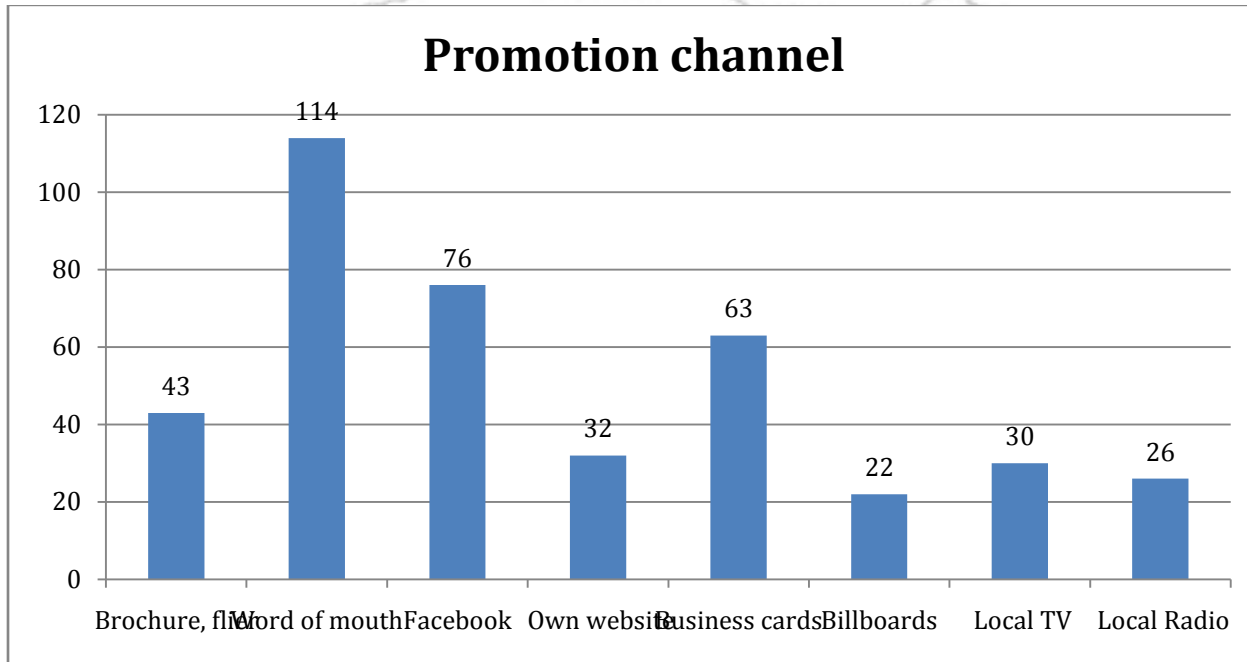
PROMOTION – Channels

The following promotional channels are used by the tourism business in the Western Region of Kosovo: The table shows the number of businesses in each industry that uses that particular channel.

	Brochure, flier	Word of mouth	Face book	Own website	Business cards	Billboards	Local TV	Local Radio	Other
Accommodation	6	13	10	6	7	3	7	1	4
Accommodation and restaurant	8	20	13	6	14	9	9	6	2
Handicraft shop		1							
Restaurant	10	46	27	3	18	4	8	11	1
Tour guide	7	9	9	8	4				2
Tourist attraction operators	5	10	5	2	6	2	1	2	1
Transport	2	6	1	1	4			1	1
Travel Agency	5	9	11	6	10	4	5	5	1
Grand Total	43	114	76	32	63	22	30	26	12

	Brochure, flier	Word of mouth	Face book	Own website	Business cards	Billboards	Local TV	Local Radio	Other
Accommodation	32%	68%	53%	32%	37%	16%	37%	5%	21%
Accommodation and restaurant	36%	91%	59%	27%	64%	41%	41%	27%	9%
Handicraft shop	0%	17%	0%	0%	0%	0%	0%	0%	0%
Restaurant	13%	59%	35%	4%	23%	5%	10%	14%	1%
Tour guide	70%	90%	90%	80%	40%	0%	0%	0%	20%
Tourist attraction operators	25%	50%	25%	10%	30%	10%	5%	10%	5%
Transport	29%	86%	14%	14%	57%	0%	0%	14%	14%
Travel Agency	42%	75%	92%	50%	83%	33%	42%	42%	8%
Grand Total	25%	66%	44%	18%	36%	13%	17%	15%	7%

PROMOTION – Channels



Most Popular local TV: TV Dukagjini, Top Iliria, TV Syri, ON-TV
Most Popular Local Radio: Top Iliria, Radio Dukagjini, Radio Peja
Other: Wikipedia, TripAdvisor



PROMOTION – Customer Satisfaction

94 of the 174 businesses evaluate their customers' satisfaction with their products/services

Almost all claim their customers are highly satisfied, and very few that they are satisfied. Almost none say that their customers are partly satisfied or dissatisfied.

The most recurring issues leading to complaints are road infrastructure, slow service, power outages, water supply.

	Count of businesses that evaluate customer satisfaction	Percent who said their customers are "Very satisfied" or "Satisfied"
Accommodation	17	97%
Accommodation and restaurant	20	99%
Restaurant	30	99%
Tourist attraction operators	9	94%
Transport	4	100%
Travel Agency	9	100%
Tour guide	5	97%
Grand Total	94	98%

PROMOTION – Turnover development

The following table shows how businesses have seen their turnover develop in the last couple years. The most frequent answers are that the turnover has been better than in the previous year, and only a few businesses have had a worse (and none much worse) turnover than in the previous years.

	Turnover on 2012, compared to 2011						Turnover on 2013, compared to 2012					
	Answered	Much Better	Better	About the same	Worse	Much worse	Answered	Much Better	Better	About the same	Worse	Much worse
Accommodation	84%	2	10	1	3		89%	8	5	4		
Accommodation and restaurant	95%	2	7	6	6		95%	1	8	10	2	
Handicraft shop	17%		1				17%		1			
Restaurant	54%	3	13	13	13		55%	2	14	17	10	
Tour guide	90%	2	6	1			90%	2	6	1		
Tourist attraction operators	60%	3	6	1	2		70%	3	7	2	2	
Transport	100%		3	3	1		100%		1	5	1	
Travel Agency	92%		4	7			92%	1	6	3	1	
	68%	12	50	32	25	0	71%	17	48	42	16	0

PROMOTION – Turnover development

The following table shows the turnover projection for 2014 as compared to 2013. The overwhelming majority believe it will be better or much better.

Projection for 2014, compared to 2013						
	Answered:	Much Better	Better	About the same	Worse	Much worse
Accommodation	89%	7	6	4		
Accommodation and restaurant	100%	11	9	2		
Handicraft shop	17%	1				
Restaurant	60%	4	26	9	7	1
Tour guide	90%	4	5			
Tourist attraction operators	65%	4	7	1	1	
Transport	100%	1	2	4		
Travel Agency	100%	3	8	1		
	74%	35	63	21	8	1

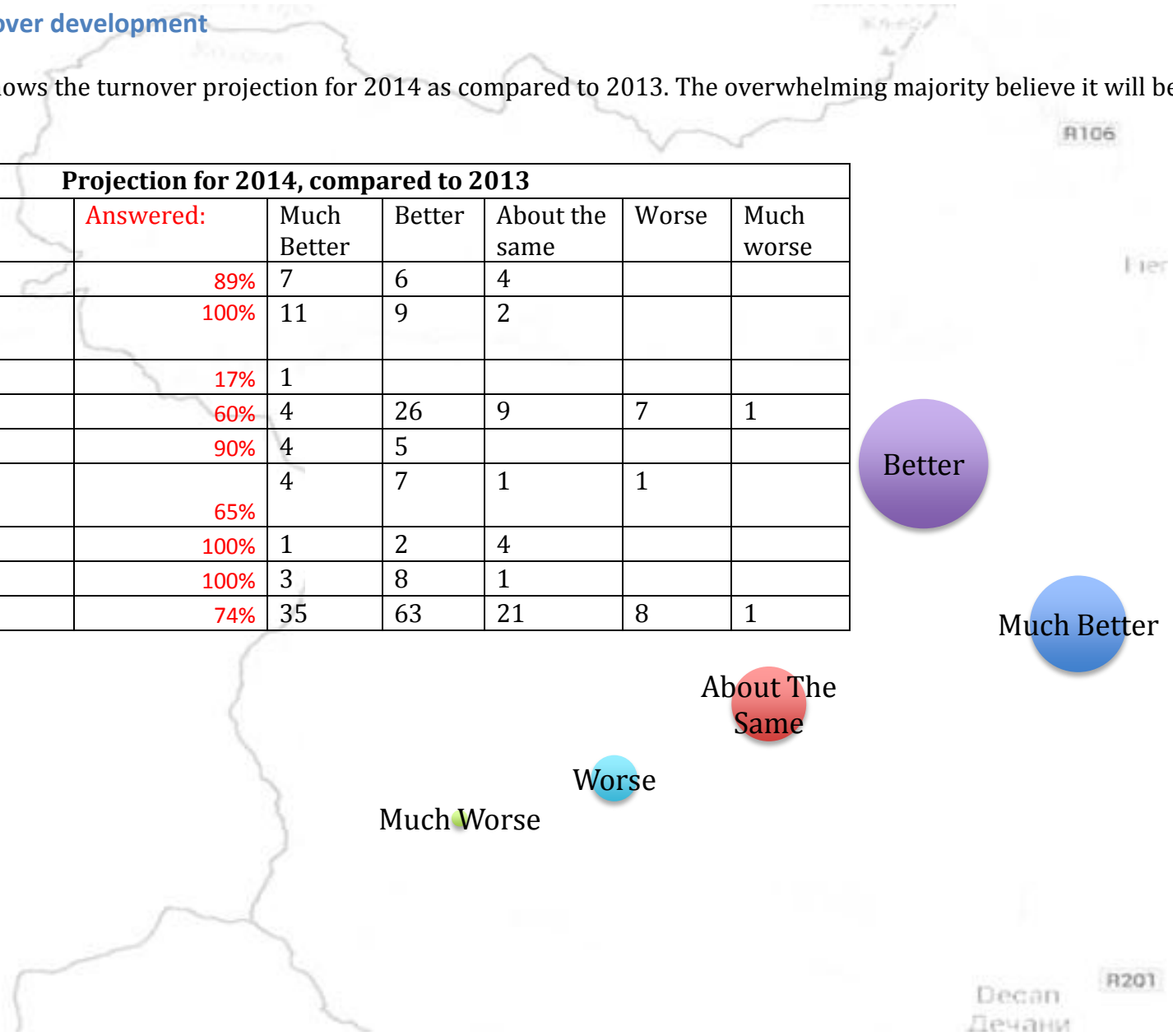
Better

Much Better

About The Same

Worse

Much Worse



PROMOTION – Investment

Investment in the past two years

Of the 60 Accommodation and Restaurant service providers that had made investments in the past two years, almost all of them had been in renovation and inventory. Few had invested in new services, such as wedding services, conference rooms, and other.

5 Transport service providers had invested in new vehicles.

10 Travel agencies had invested in buses (4), new offices (3), inventory (2), and marketing (1).

6 Tourist attraction operators had invested in restauration and conservation.

Investment in the next two years

Of the 54 Accommodation and Restaurant service providers that plan to make investments in the next two years, almost all of them plan to invest more in renovation and inventory. Few plan to invest in more capacity building, new services, adding a restaurant to their accommodation services, and adding accommodation to their restaurant services.

3 Transport service providers plan to expand their capacity and services.

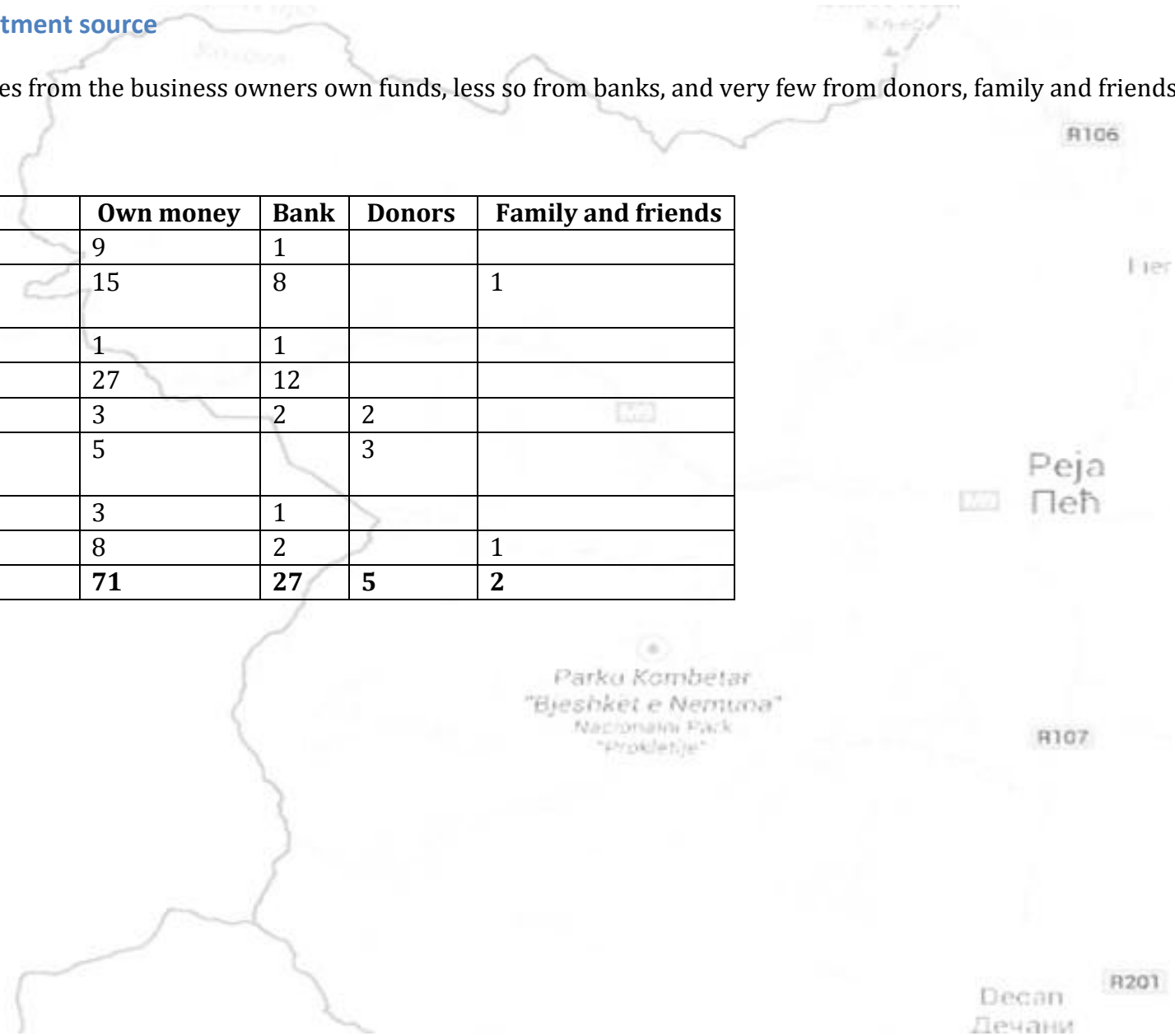
5 Travel agencies plan to invest in added office space (2), new buses (2), and promotion (1).

6 Tourist attraction operators plan to invest in restauration and conservation.

PROMOTION – Investment source

Most investment comes from the business owners own funds, less so from banks, and very few from donors, family and friends, and Disapora.

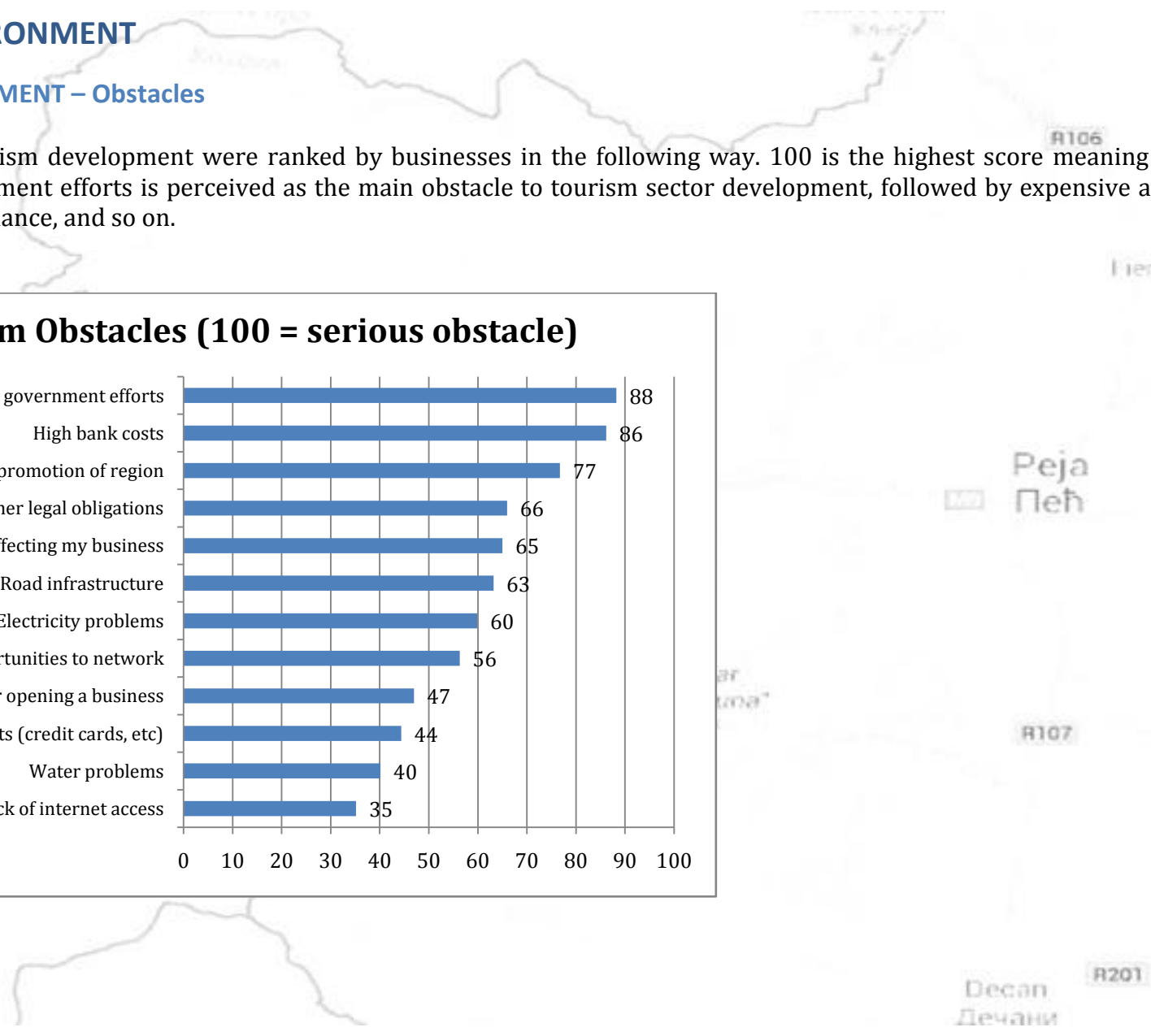
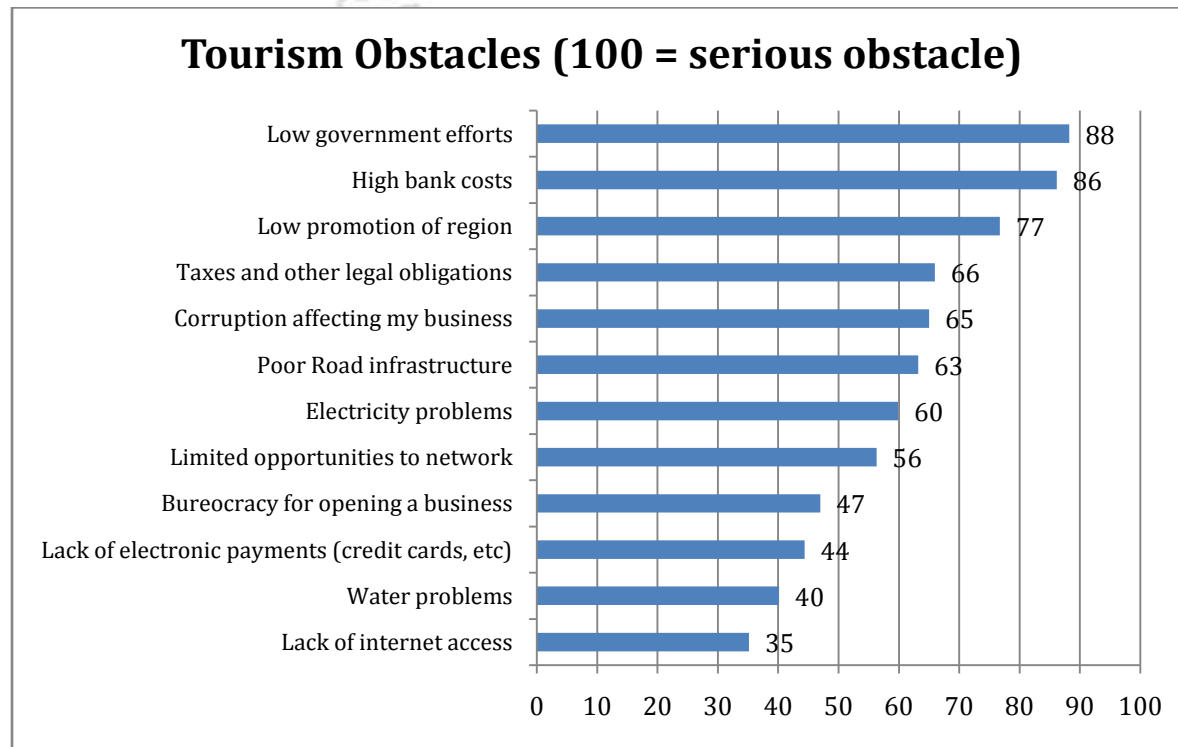
	Own money	Bank	Donors	Family and friends
Accommodation	9	1		
Accommodation and restaurant	15	8		1
Handicraft shop	1	1		
Restaurant	27	12		
Tour guide	3	2	2	
Tourist attraction operators	5		3	
Transport	3	1		
Travel Agency	8	2		1
	71	27	5	2



ENABLING ENVIRONMENT

ENABLING ENVIRONMENT – Obstacles

The obstacles of tourism development were ranked by businesses in the following way. 100 is the highest score meaning serious obstacle. Low government efforts is perceived as the main obstacle to tourism sector development, followed by expensive access to finance, public governance, and so on.



ENABLING ENVIRONMENT – Support development

Businesses were asked to choose two of the following that could be done to support the development of the tourism sector. The most frequent answers were “Better tourism planning” and “Better promotion and marketing”.

Which of these do you think would help most to support the development of the tourism sector?						
	Better tourism planning	Better coordination	Better promotion and marketing	More tourist attractions	Effective government tourism office	Better local regulations
Accommodation	10	7	11	3	2	2
Accommodation and restaurant	17	6	9	5	4	7
Handicraft shop		1		1		
Restaurant	35	13	20	8	6	25
Tour guide	4	4	9	3	1	
Tourist attraction operators	8	3	8	3	2	3
Transport	4	2	3	2	2	2
Travel Agency	7	4	4	3		4
Grand Total	85	40	64	28	17	43



ENABLING ENVIRONMENT – Other considerations

Are you happy with the work of the tourism office in your municipality?	
1 Highly satisfied	21
2 Satisfied	43
3 Partly satisfied	41
4 Dissatisfied	27

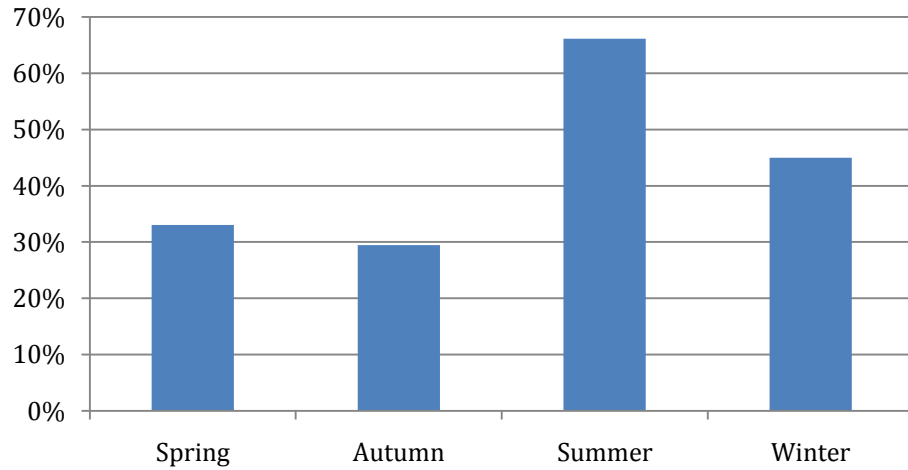
(100=highly satisfied)
47

82 businesses believed the new national park will bring benefits to their business, mainly through attracting a higher influx of tourists

ACCOMMODATION

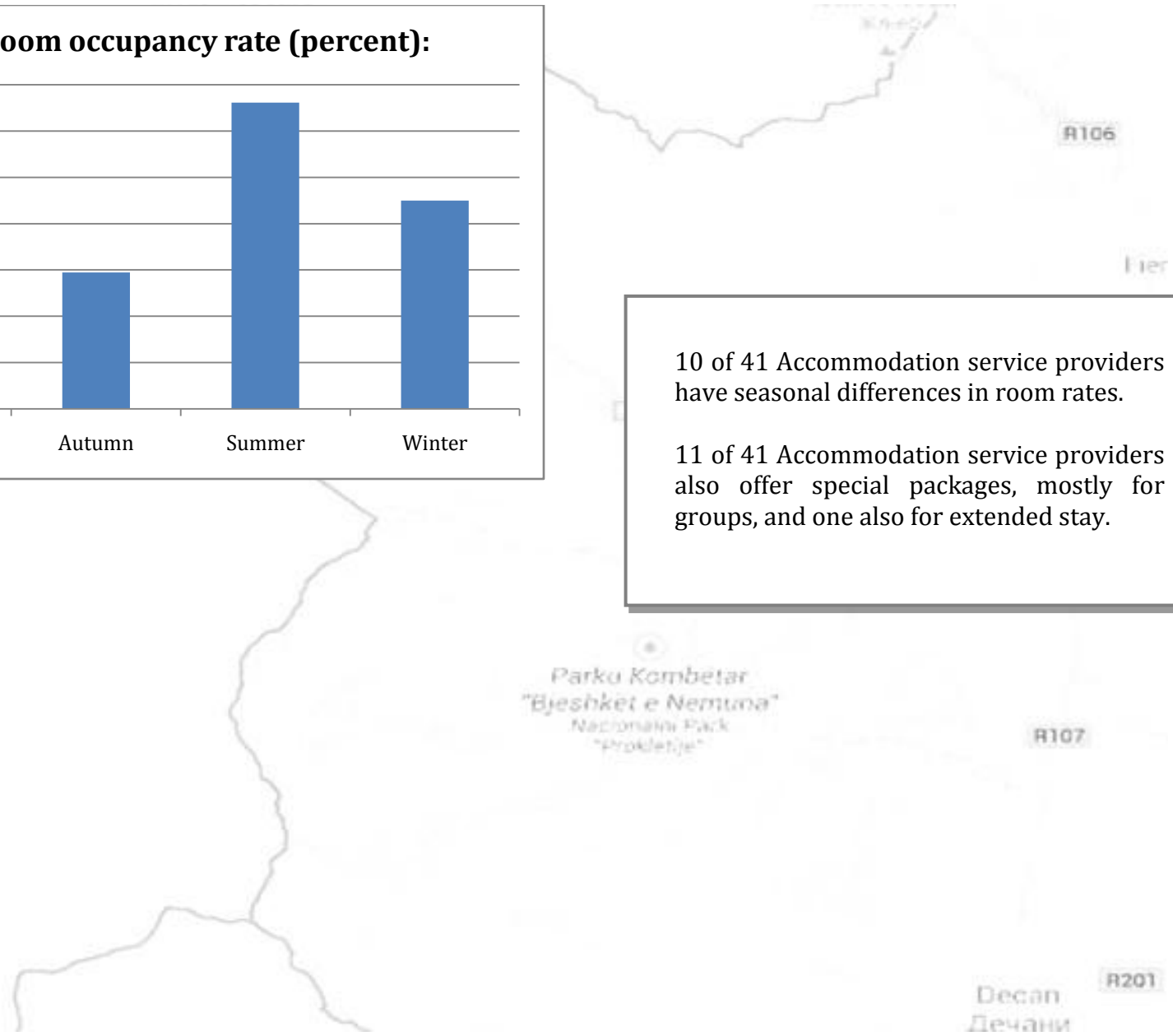
Total Accommodation	Hotel	Motel	Villa	Guesthouse	Mountain Hut	Bujtina
41	20	4	2	7	4	4

Average room occupancy rate (percent):



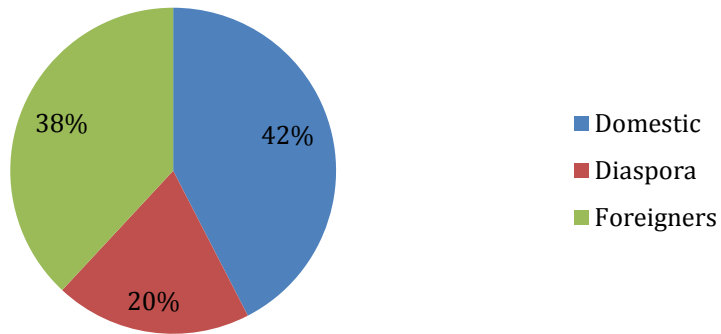
10 of 41 Accommodation service providers have seasonal differences in room rates.

11 of 41 Accommodation service providers also offer special packages, mostly for groups, and one also for extended stay.

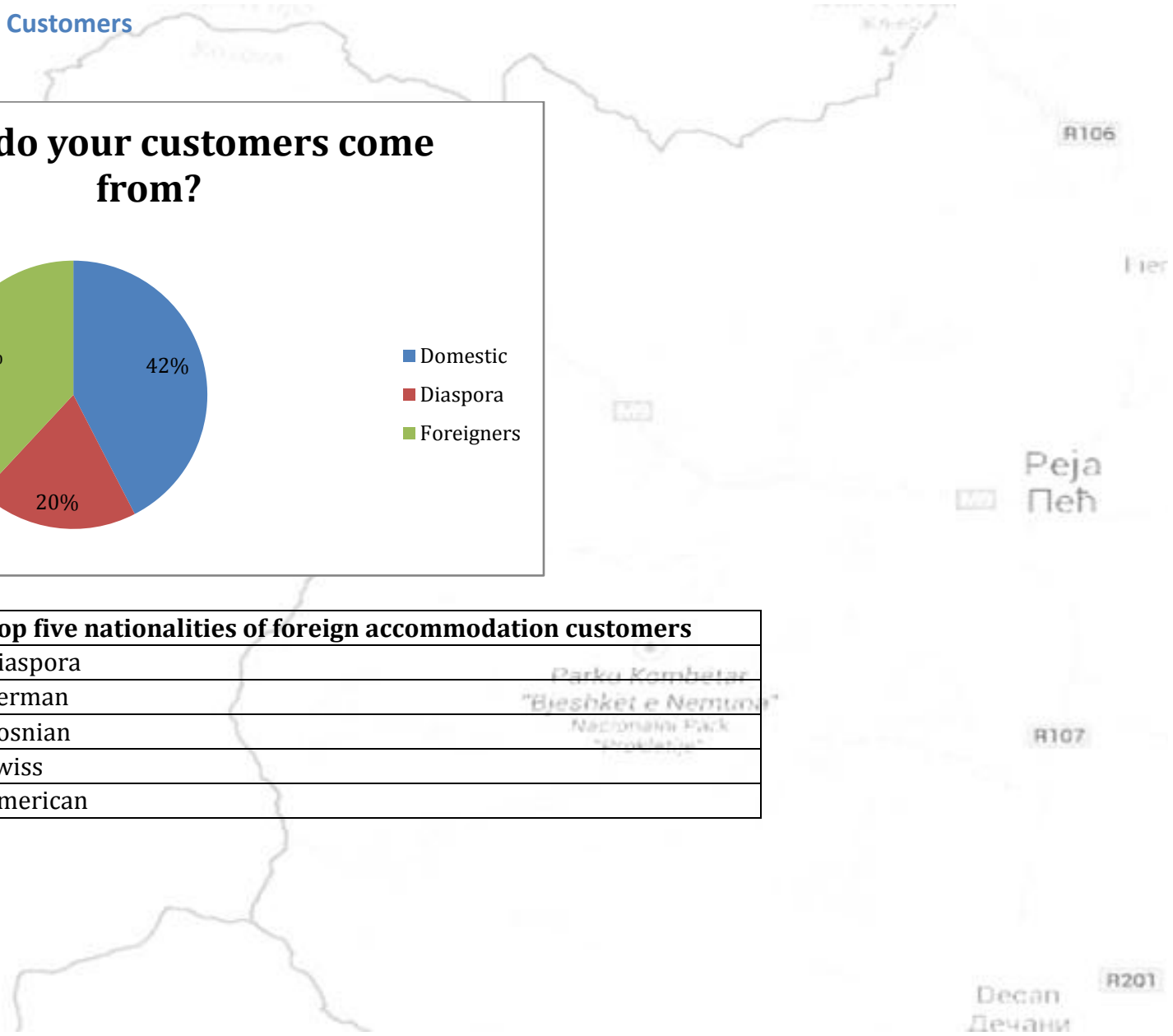


ACCOMMODATION - Customers

Where do your customers come from?



	Top five nationalities of foreign accommodation customers
1	Diaspora
2	German
3	Bosnian
4	Swiss
5	American



ACCOMMODATION – Services offered by accommodation providers

The following are some of the other services offered by accommodation providers:

	Number of accommodation providers offering the service	Percent of accommodation providers offering this service
Laundry service	7	17%
Internet access	31	76%
Transportation services	14	34%
Sauna	7	17%
Massage	2	5%
Gym / Fitness center	3	7%
Swimming pool	4	10%
Tour desk	4	10%
Tourist information desk	12	29%
Guide	11	27%
Business center	2	5%
Meeting and Conference room facilities	8	20%
Wedding services	3	7%

ACCOMMODATION – Economic impact

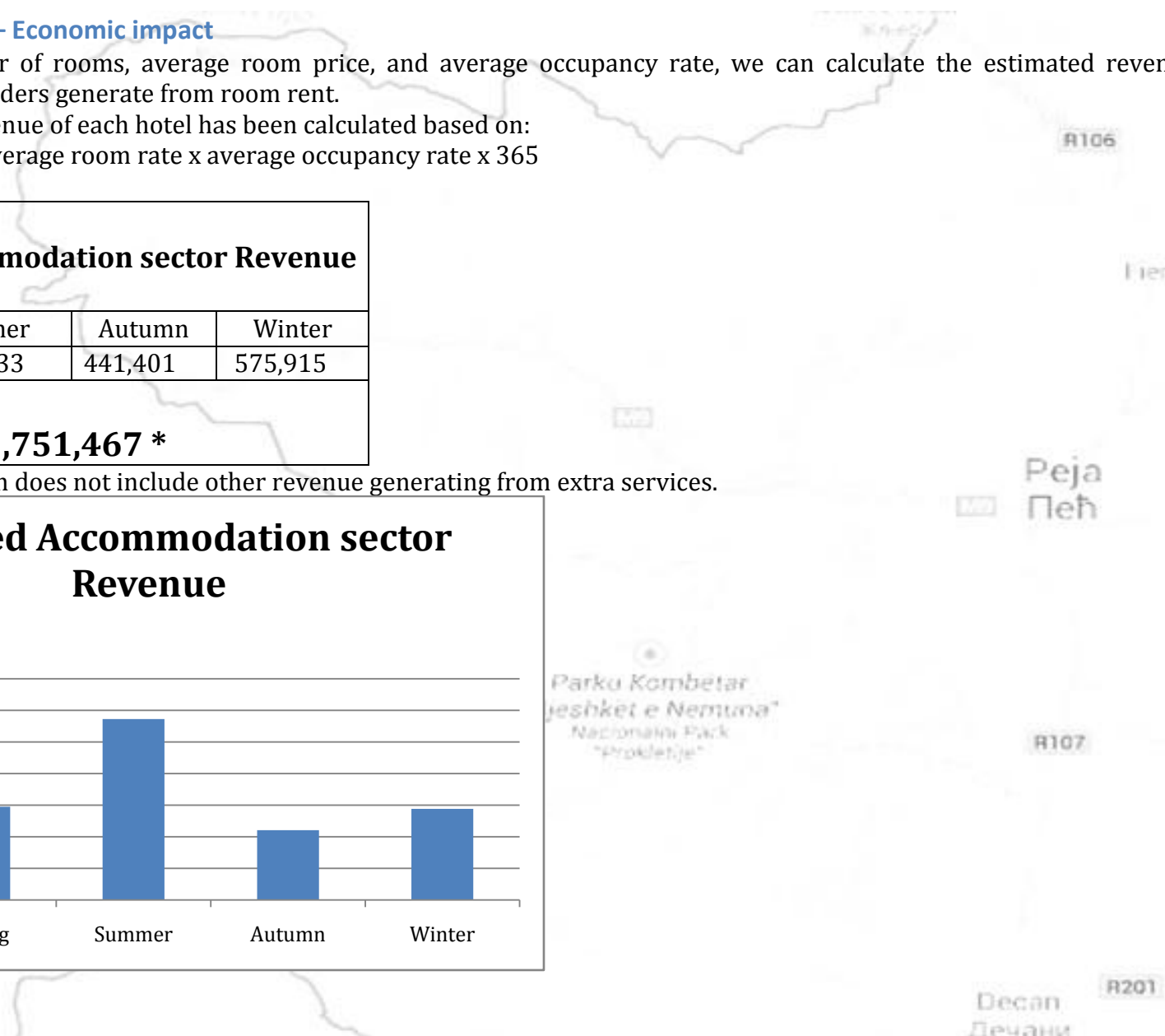
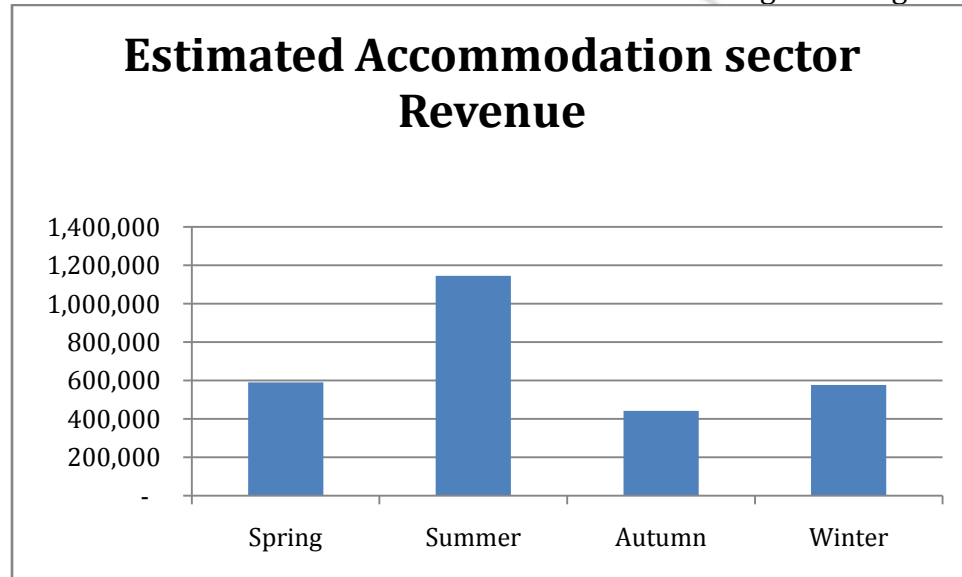
Based on the number of rooms, average room price, and average occupancy rate, we can calculate the estimated revenue that accommodation providers generate from room rent.

The annual room revenue of each hotel has been calculated based on:

Number of rooms x average room rate x average occupancy rate x 365

Estimated Accommodation sector Revenue			
Spring	Summer	Autumn	Winter
589,919	1,144,233	441,401	575,915
€ 2,751,467 *			

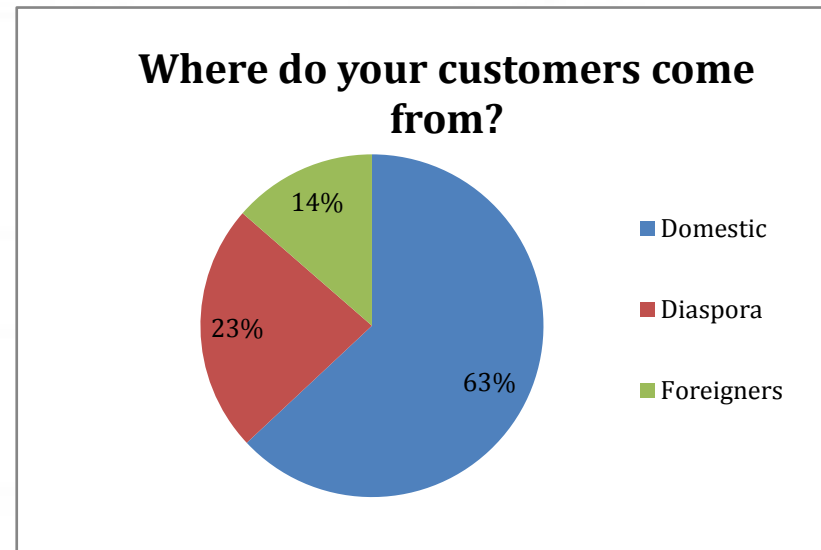
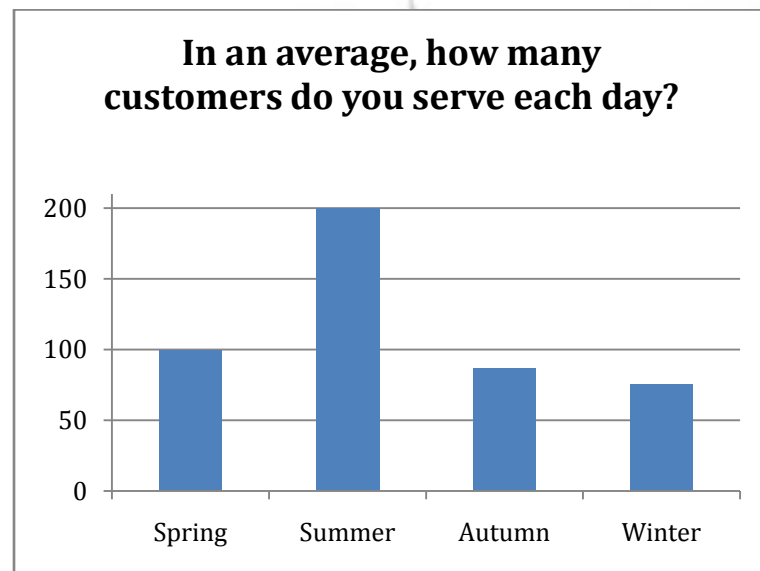
*Note: This calculation does not include other revenue generating from extra services.



RESTAURANTS

43.8%, on average, of customers have a meal at a restaurant. The number of customers spikes up during the summer, and the majority of customers are domestic, however, the percentage of foreigners and diaspora is large compared to other parts of Kosovo with no tourism activity.

Proportion of your customers that come to eat rather than drink only	Minimum price of meal	Maximum price of meal	Average price of meal
43.88%	2	20	5.1



RESTAURANT – Inputs

The following tables show where do restaurant service providers get their inputs, and how satisfied are they with these supplies. The restaurants get their supplies from a wide range of suppliers, and they seem satisfied with the input supplies.

Where from do you get the following input supplies?					
	1. Local producer/farmer	2. Local shop	3. From local supermarket	4. From wholesaler	5. Own Production
Meat	45	13	18	23	3
Fruits	19	8	29	22	7
Vegetables	16	12	35	29	8
Bread / Bakery	11	16	34	16	15
Cheese / Milk	38	7	34	23	4

How satisfied are you in general with the availability and quality of foodstuff input supplies?

	4 = Very Satisfied
Meat	3.8
Fruits	3.7
Vegetables	3.6
Bread / Bakery	3.8
Cheese / Milk	3.7

RESTAURANT –

Other services

What other services do you offer?

	Count	Minimum Capacity	Maximum Capacity	Average Capacity
Meeting room rental	17	18	450	114
Internet access	90			
Home delivery service / over the counter	50			
Catering service	52			

54 Restaurants (of 115) claimed they have other than 50-50 male-female composition of customers. The average percentage of male clients for these restaurants was 67 percent.

RESTAURANT – Economic Impact

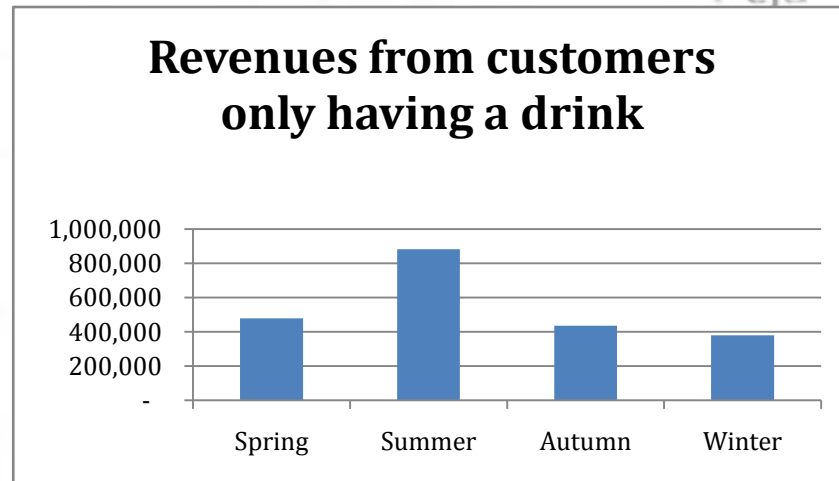
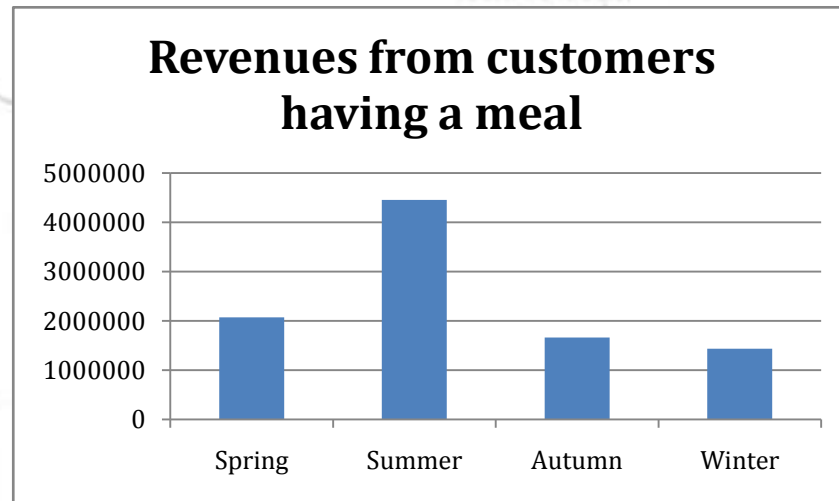
The total revenues generated by restaurant service providers is calculated with the following formula:
 Annual Revenues from customers having a meal =
 Total number of customers x percent taking a meal x average price when taking a meal

Revenues from customers having a meal			
Spring (March till May)	Summer (June till September)	Autumn (October / November)	Winter (December till February)
2,072,871	4,457,446	1,664,329	1,434,607
€ 9,629,253			

Annual Revenues from customers only having a drink =
 Total number of customers x percent only taking a drink

Revenues from customers only having a drink			
Spring (March till May)	Summer (June till September)	Autumn (October / November)	Winter (December till February)
478,899	883,003	435,305	379,741
€ 2,176,947 *			

*Note: The sum calculated based on the assumption of average price per drink of €1.



TOUR GUIDES

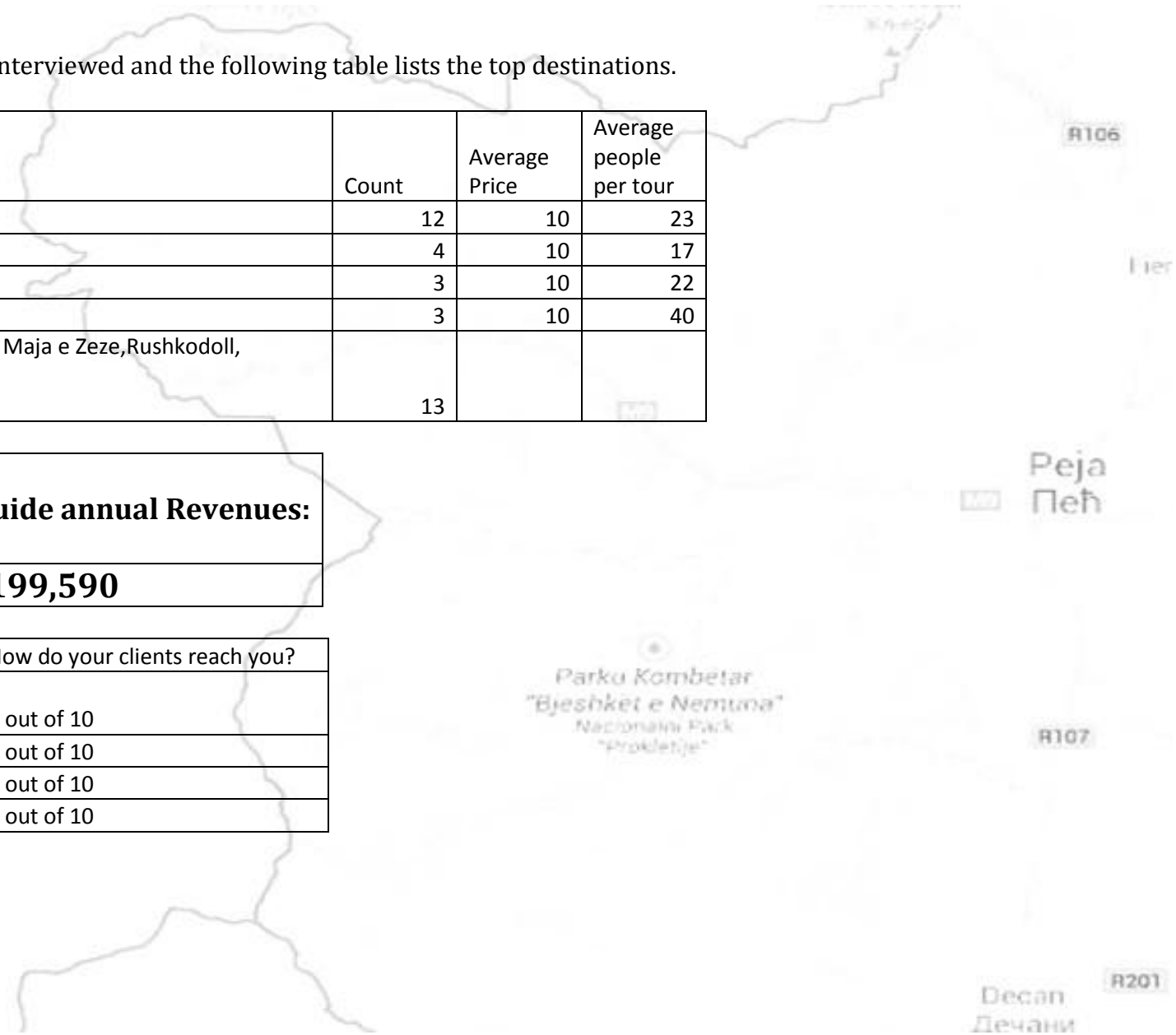
10 tour guides were interviewed and the following table lists the top destinations.

	Count	Average Price	Average people per tour
Rock climbing	12	10	23
Peaks of the Balkans	4	10	17
Via Ferrata	3	10	22
Walking	3	10	40
Other (Liqenati, Jezere, Maja e Zeze, Rushkodoll, Religious sites, Ski)	13		

Estimated tour guide annual Revenues:

€ 199,590

	How do your clients reach you?
Travel agencies	6 out of 10
Phone	3 out of 10
Tourist office	3 out of 10
Hotels	2 out of 10



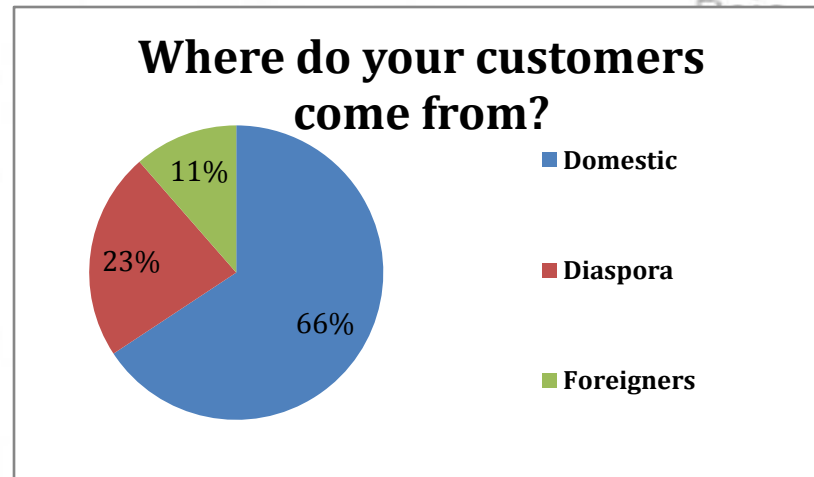
TRANSPORT

The list of transport service providers that have international customers:

		Taxis: trips during the day
1	Mini Bus (16 seat)	
2	Single Vehicle	3
3	Single Vehicle	4
4	Single Vehicle	3
5	Bus (50 seats, Minibus (20 seats), Van (10 seats)	
6	14 Taxi Vehicles	120
7	6 Taxi Vehicles	40

Estimated Revenues for 2 taxi companies and 3 individual taxi drivers:

€ 322,295

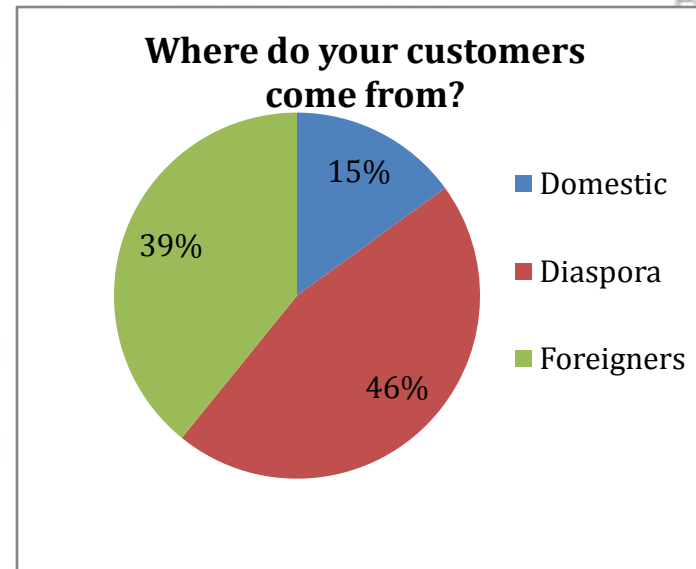


SOUVENIR SHOPS AND PRODUCERS

	Average price per unit	Unit
Qylymat (carpet)	65	square meter
Plis (traditional hat)	10	piece
Vek clothing (traditional clothing)	120	piece
Qiftelia (music instrument)	60	piece
Tentene (home decoration)	65	square meter

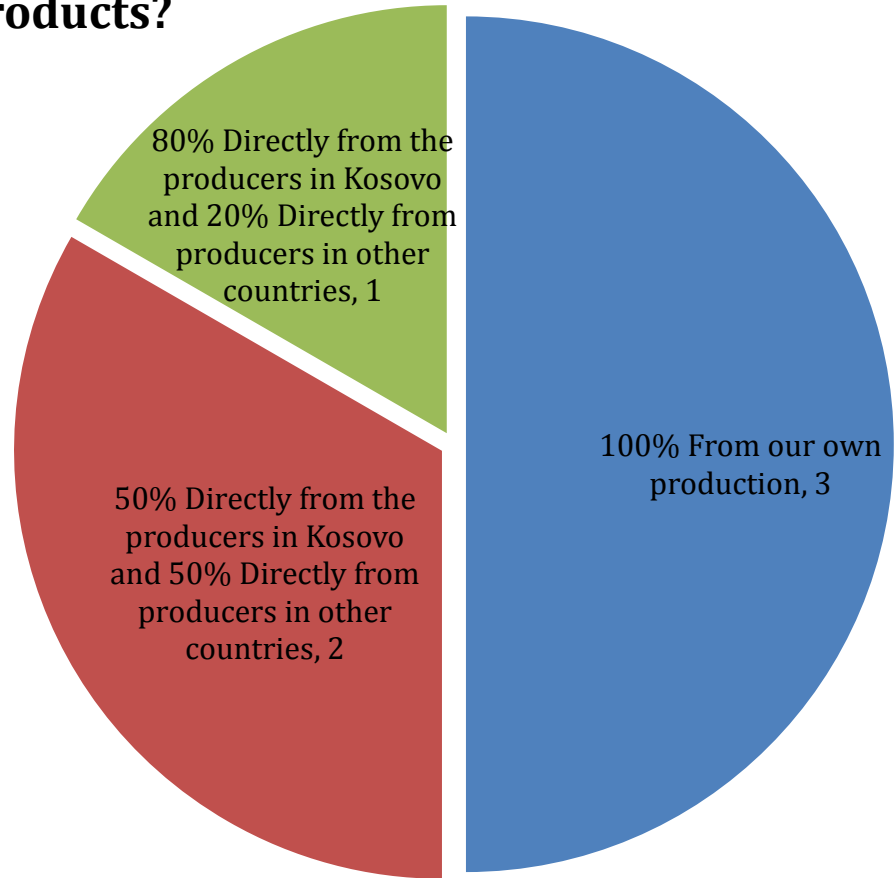


<p>Estimated Revenues for 6 handicraft shops:</p>
<p>€ 71,010</p>



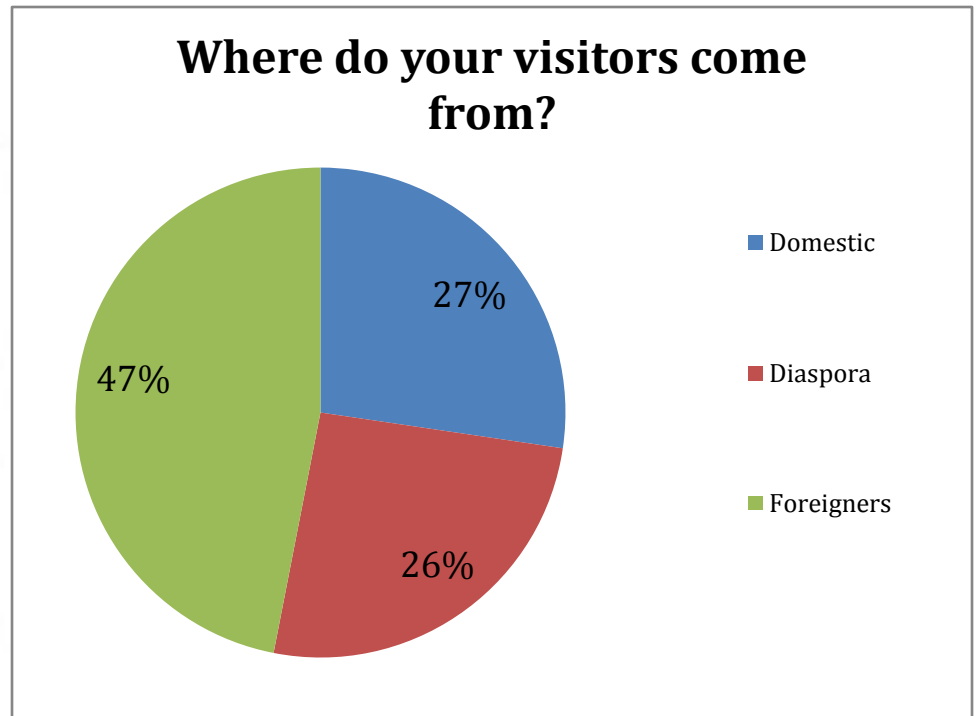
SOUVENIR SHOPS AND PRODUCERS

Where do you buy the products?



TOURIST ATTRACTION OPERATORS

Top visitor nationalities	Number of operators that have the nationality amongst their top five count
German	12
American	10
English	10
Italian	6
Swiss	6
French	5
Austrian	4
Turk	3



GENDER ANALYSIS

The data from the Kosovo Western Region tourism sector show that women are engaged in tourism services, however, the extent and the role that they play in this sector can be improved. Women make up only about a quarter of the workforce in the tourism sector of the Western Region, and are mostly engaged in non-professional work such as maintenance or kitchen. The following tables show the number of female employees, the ratio of women to men, and the main occupations held by women.

Business Category	Number of businesses that provided information	Total number of employees	Total Female	Female to Total Ratio
Accommodation	9	72	33	46%
Accommodation and restaurant	22	361	94	26%
Handicraft shop	1	1	1	100%
Restaurant	68	483	84	17%
Tour guide	4	53	9	17%
Tourist attraction operators	8	41	14	34%
Transport	3	42	1	2%
Travel Agency	8	41	8	20%
Grand Total	123	1094	244	22%

GENDER ANALYSIS

Main occupations held by women in the Western Kosovo tourism sector: The first table shows the number of responses on the qualitative (open ended) question on the types of work that women are mostly hired for, and the second table shows these number as a percentage of the total number of women hired in each category of tourism businesses.

	Administrative Assistant	Bar/waitress	Front desk/sales	Kitchen	Maintenance	Management	Other Professional
Accommodation				3	13	2	
Accommodation and restaurant	3	2	3	22	35	2	1
Handicraft shop			1				
Restaurant		7		50	20	2	
Tour guide			1				
Tourist attraction operators	4		1	1	1	6	
Transport							1
Travel Agency	3		2			1	1
Grand Total	13	9	8	76	69	13	5

	Administrative Assistant	Bar/waitress	Front desk/sales	Kitchen	Maintenance	Management	Other Professional
Accommodation				9%	39%	6%	
Accommodation and restaurant	3%	2%	3%	23%	37%	2%	1%
Handicraft shop			100%				
Restaurant		8%		60%	24%	2%	
Tour guide			11%				
Tourist attraction operators	29%		7%	7%	7%	43%	
Transport							100%
Travel Agency	38%		25%			13%	13%
Grand Total	5%	4%	3%	31%	28%	5%	2%

COMMENTS AND REMARKS

The Kosovo Western region tourism baseline survey managed to create a database of tourism relevant businesses with information which does not only serve for registry purposes, but also for analysis which can help policy-makers and donors tailor better policies to improve the sector.

The shortcomings are evident. The depth of information required from respondents and often the sensitivity of information makes the survey inevitably imperfect. For example, the high level of labor informality makes it difficult to extract from respondents the exact number of employees in the industry. Much data also that is never logged in has to be estimated, but the averages usually do not differ much from the real ones. A more thorough gender analysis would be necessary for the interventions in this regard, however, given the overwhelming amount of information required from respondents, it would risk the quality of the data and possibly not add much to this element.

The economic impact of the sector can be estimated for two main categories of businesses: accommodation and restaurant service providers. The number derived from capacity and occupancy rates are acceptable approximations in absence of any other tool to estimate the economic impact of the tourism sector. Given the small number of observations the economic impact cannot be properly calculated for the other categories, but the revenue generated from these other categories can be assumed to be trivial.

