2021

# TOURISM SUPPLY SIDE SURVEY

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Agency for Development and Cooperation SDC

PPSE
PROMOTING PRIVATE SECTOR EMPLOYMENT

swisscontact

**Prepared by:**

**Promoting Private Sector Employment (PPSE)**

The PPSE Project is implemented by Swisscontact as the lead implementer, in a consortium with Riinvest Institute. It is funded by the Swiss Agency for Development and Cooperation in Kosovo (SDC)

# Contents

# 1. Introduction

This report presents the findings of the annual PPSE survey with supply-side actors of the tourism sector in Kosovo, which include accommodations, restaurants, attractions, tour operators, and attractions. The PPSE tourism supply-side survey was commissioned for the first time in 2018, covering 2017, and this is the fifth consecutive survey since then. This report mainly interprets the findings of 2021 and depicts the changes that occurred compared to the previous periods.

One of the priority sectors of the PPSE project is tourism. In this sector, the project predominantly focuses on facilitating the development of new tourism products, the reutilisation of attractions, promotional activities in the international arena, and the entire sector reorganization – all this in view of generating new jobs in Kosovo.

Having accurate and up to date tourism data, as well as general market information, is key for the successful implementation of the project activities. The annual supply-side survey is of paramount importance for PPSE, because it enables the team to monitor the growth trends of the tourism sector and to develop tailor-made interventions. It is also very valuable for policymakers, tourism service providers, and other stakeholders as well, for strategic planning processes and decision making in general.

The rest of this survey report is organized as follows. Section 2 provides an overview of the general methodology employed for data collection. Section 3 presents the survey's main findings and provides illustrations showing the annual changes. Section 4 analyses the economic impact of tourism, mainly by focusing on the revenue and employment generated by the key actors.

# 2. Methodology

This section presents the methodological approach used to conduct the survey. It describes the questionnaire design, selection and training of enumerators, sampling framework, data collection process, and data processing and analysis.

## 2.1. Questionnaire Design

For comparison purposes, the questionnaire used this year is almost the same as the one used in the first survey. The questionnaire mainly consists of multiple-choice and some open-ended questions – both very important to obtain the intended information.

## 2.2. Enumerators

Around 30 enumerators have been recruited to conduct the interviews with the tourism supply side actors. A one-day training session was organized to familiarize the recruited enumerators with the primary goal and specific needs of the survey. Detailed explanations were provided on the included variables and some advice about the interviewing process. In addition, a hands-on exercise was organized to evaluate whether the enumerators could follow the provided instructions.

## 2.3. Sample Design

At the outset, it should be made clear that during the sample selection process, the objective was to identify tourist-accessible entities only. To identify the list of the core supply side actors, various online platforms have been consulted. One priority was to interview the same entities as in the previous periods for the year-on-year comparisons to be credible and reliable. Below is the explanation of how each population group was identified and the sample size.

- Tourist-accessible accommodations (including Airbnbs) were identified on Booking.com, Trivago, AirBnB, and Facebook; 142 of the identified accommodations were interviewed; 77 were accommodations only, whereas 65 were accommodations with restaurants.
- Restaurants were found on TripAdvisor and Gjirafa; 211 were interviewed.
- 22 attractions and 23 tour operators and 24 festivals/national events drawn from a list provided by PPSE were interviewed.
- In total, 422 face-to-face interviews were conducted.

Table 1 provides shows the differences with the previous years. Note that some service providers interviewed in the previous years could not be interviewed in 2021, either because they closed their business or did not accept to participate in the survey. Some others, which are now listed in one of the tourist accessible platforms, have been added to the sample.

| Table 1: Distribution of Interviews | | | | | |
|---|---|---|---|---|---|
| **Type of Service Provider** | **Number of Interviews (2018)** | **Number of Interviews (2019)** | **Number of Interviews (2020)** | **Number of Interviews (2021)** | **Number of Interviews (2022)** |
| Accommodations with Restaurants | 88 | 89 | 79 | 72 | 65 |
| Accommodations | 89 | 99 | 95 | 87 | 77 |
| Restaurants | 205 | 229 | 247 | 263 | 211 |
| Attractions | 32 | 17 | 30 | 26 | 22 |
| Tour Operators | 18 | 29 | 17 | 17 | 23 |
| Festivals/National Events | 36 | 32 | 31 | - | 24 |

### 2.4. Field Work

The recruited enumerators conducted face-to-face interviews with owners or managers of the identified entities. The data collection process for 2021 took place during October and November 2022. Each interview lasted about 30-40 minutes.

### 2.5. Data Processing and Analysis

The collected data were inserted into excel data sheets prepared specifically for this survey. The data were then transferred to SPSS (software package), where they were further processed and analysed. All the specification errors, checking errors, and tabulation errors were addressed before the final findings were generated.

## 3. Survey Findings

This section reveals the main findings generated from the survey with the core tourism supply-side actors, including accommodations with restaurants, accommodations, attractions, tour operators, and festival/national events for 2021. It also compares these findings with those from previous years. Note that the annual changes should be interpreted with caution, as they may result from changes in the sample structure. The findings capture various internal and external aspects, including the general structure of the core supply side actors, composition of guests and their behaviour, turnover changes across years, employment-related matters, types of services offered, barriers to doing business, participation of supply actors in the digital world, and similar. It is noteworthy to mention, however, that these topics could not be applied in all cases due to the specific nature of some service providers.

### 3.1. Accommodations with Restaurants[1]

***<u>The General Structure of Accommodations with Restaurants</u>***

[1] This includes accommodations that have a restaurant attached to their business.

In 2021, 95.2 percent of all accommodations with restaurants were hotels. The rest were hostels (3.2 percent) and other accommodations (1.6 percent). To make comparisons with the other years, see Figure 1. Most of the interviewed accommodations with restaurants are located in Prizren (41.5 percent) and Prishtina (35.4 percent) (see Figure 2)

**Figure 1: Type of Accomodations with Restaurants, 2017-2021**

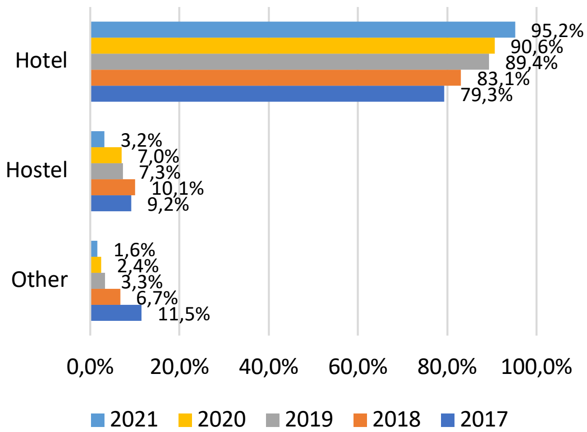
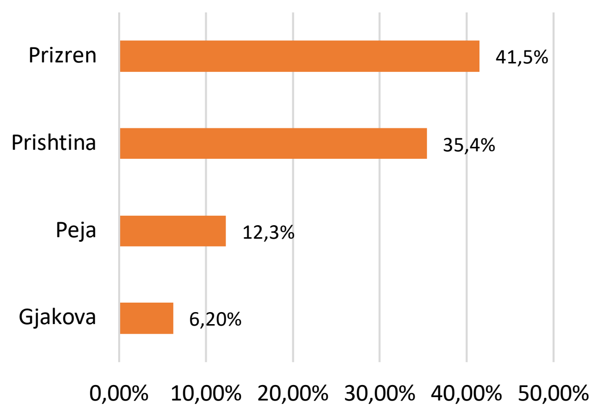



**Figure 2: Accomodations with Restaurants, 2021, by Top Locations (in %)**




***Number of Rooms, Prices, and Occupancy Rate***

In 2021, the average number of single standard rooms in accommodations with restaurants was 9.8. For double standard rooms, the average was higher, 16.0. The total number of single standards rooms (adjusted to include the whole population) amounted to 824, whereas the total number of double standard rooms was 1,727. The average price for a single standard room was 45.0 EUR, while for the double one stood at 53.3 EUR. For information about the other types of rooms and to make comparisons with the previous years, see Table 2. Furthermore, the findings show that in 2021 only 25.8 percent of accommodations with restaurants increased their prices in peak season; the rest kept their prices unchanged.

**Table 2: Accommodations with Restaurants - Average Number and Price of Standard Rooms**

| | | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|---|---|
| Single Standard Rooms | Avg. # of Rooms | 10.9 | 11.1 | 9.2 | 10.6 | 9.8 |
| | Avg. Price (EUR) | 40.1 | 39.4 | 39.4 | 39.3 | 45.0 |
| | Total # of Rooms | 1,035 | 1,109 | 1,171 | 1,015 | 824 |
| Double Standard Rooms | Avg. # of Rooms | 13.2 | 14.0 | 11.3 | 12.9 | 16.0 |
| | Avg. Price (EUR) | 45.8 | 48.6 | 54.2 | 51.1 | 53.5 |
| | Total # of Rooms | 1,671 | 1,870 | 1,504 | 1,477 | 1,727 |
| Triple Standard Rooms | Avg. # of Rooms | 4.2 | 4.4 | 6.8 | 6.6 | 6.0 |
| | Avg. Price (EUR) | 53.1 | 52.8 | 69.6 | 61.2 | 75.0 |
| | Total # of Rooms | 274 | 335 | 636 | 522 | 456 |

| | | | | | | |
|---|---|---|---|---|---|---|
| Quad Standard Rooms | Avg. # of Rooms | 2.6 | 2.4 | 2.8 | 2.1 | 3.2 |
| | Avg. Price (EUR) | 49.5 | 68.8 | 91.5 | 65.7 | 118.1 |
| | Total # of Rooms | 62 | 63 | 77 | 58 | 130 |

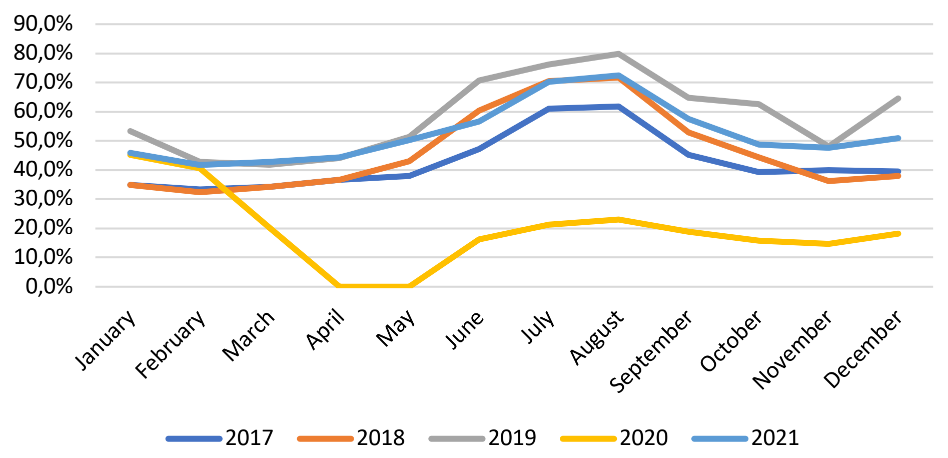
A disaggregation of the survey findings by the top three regions[2] reveals that Prishtina had the highest number of single and double standard rooms and the highest average prices. For more detailed information and to compare with 2017 and 2019, see Table 3.

**Table 3: Accommodations with Restaurants - Standard Rooms, by Main Regions**

| | | Prishtina Region (2017) | Prishtina Region (2019) | Prishtina Region (2021) | Peja Region (2017) | Peja Region (2019) | Peja Region (2021) | Prizren Region (2017) | Prizren Region (2019) | Prizren Region (2021) |
|---|---|---|---|---|---|---|---|---|---|---|
| **Single Standard Rooms** | Avg. Price (EUR) | 51.2 | 52.2 | 52.5 | 33.2 | 34.8 | 41.1 | 34.4 | 27.8 | 39.4 |
| | Total # of Rooms | 531 | 516 | 498 | 125 | 94 | 150 | 342 | 225 | 135 |
| **Double Standard Rooms** | Avg. Price (EUR) | 68.3 | 66.1 | 68.8 | 41.8 | 39.9 | 49.1 | 49.8 | 37.3 | 46.2 |
| | Total # of Rooms | 766 | 888 | 945 | 305 | 218 | 261 | 357 | 368 | 456 |

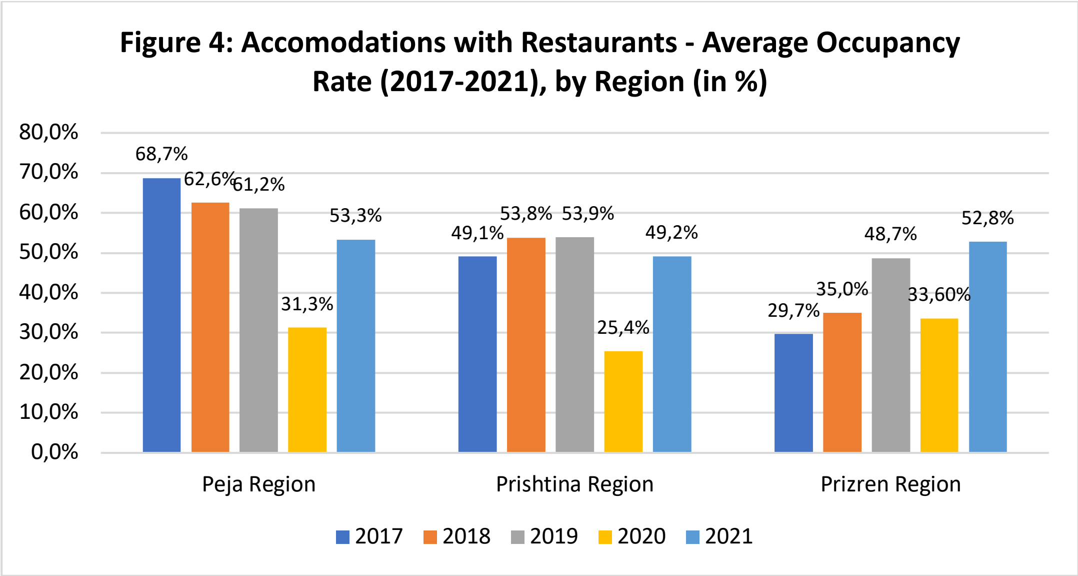
The annual occupancy rate in 2021 averaged 52.4 percent, varying from 41.7 percent in February to 72.4 percent in August, notably higher compared to 2020 but not yet at the level of 2019. For more detailed information, refer to Figure 3.

**Figure 3: Accomodations with Restaurants - Occupancy Rate (2017-2021), by Month (in %)**



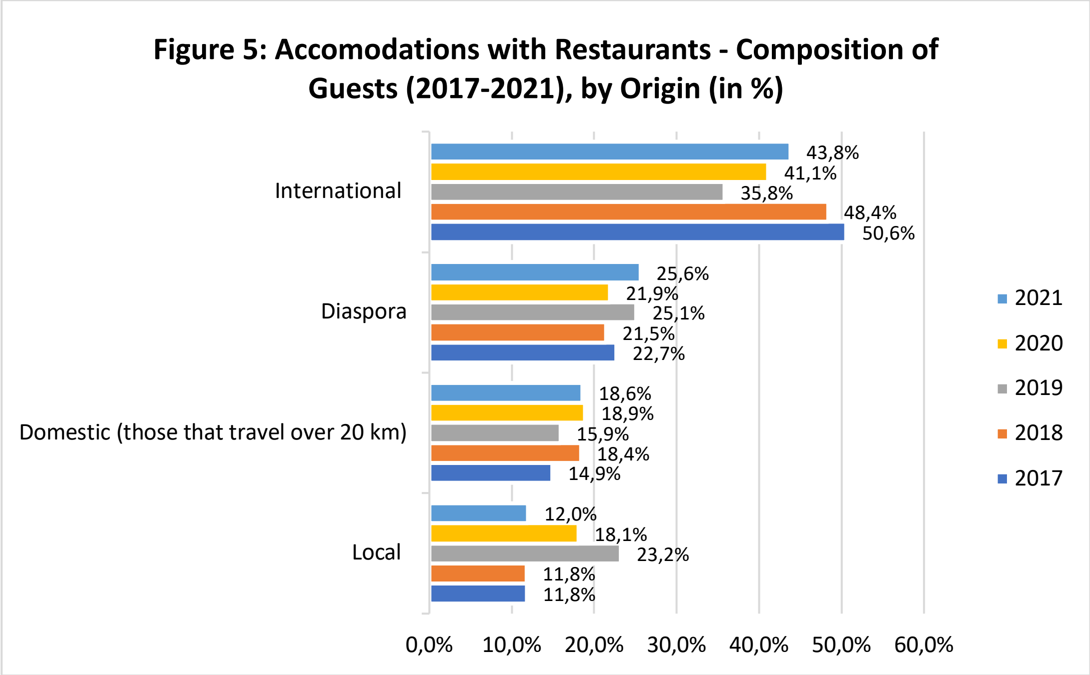

The average occupancy rate seems to be similar across the main regions 2021. For detailed information, see Figure 4.

[2] The other regions could not be considered here due to the small number of observations.

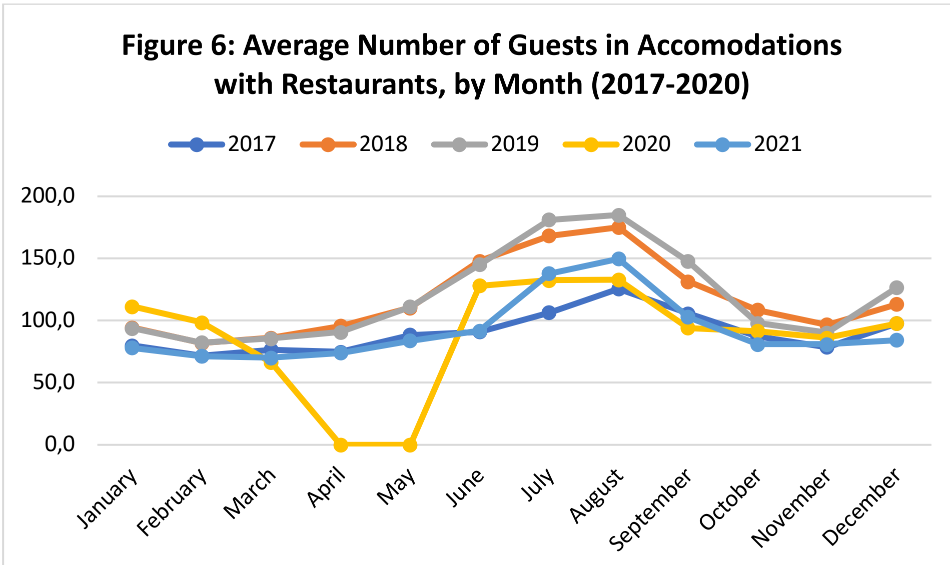



***Guests and their Behaviour***

The survey also looks into the structure of guests and their duration of stay. In 2021, internationals constituted 43.8 percent of the overall guests; diaspora, 25.6 percent; domestic visitors (with more than 20 km of travel), 18.6 percent; and local guests (less than 20 km of travel), 12.0 percent. To make comparisons with previous years, see Figure 5. The average duration of stay in 2021 was 2.9 nights, which is slightly lower compared to 2020 (3.4 nights).

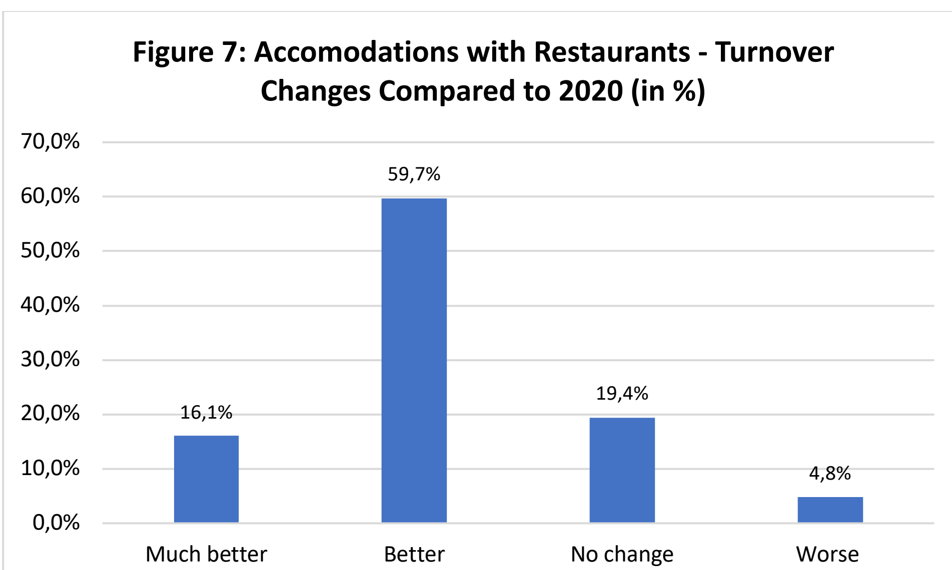


In 2021, the average number of guests in the restaurants of this category of accommodations stood at 90.2, higher by 5.6 percentage points compared to 2020. Like in previous years, August turned out to be the busiest month in 2021, with an average of 149.6 guests per day. Figure 6 visually presents the detailed averages for the past five years. The share of guests who came for food and drinks in 2021 stood at 54.8 percent, compared to 57.6 percent in 2020. The average bill for this category in 2021 was 12.8 EUR, up from 9.9 EUR in 2020. On the other hand, the proportion of those who came for drinks only stood at 45.2 percent in 2021, compared to 43.2 percent in 2020. The average bill for this category was 3.9 EUR in 2021, compared to 3.5 EUR in 2020.



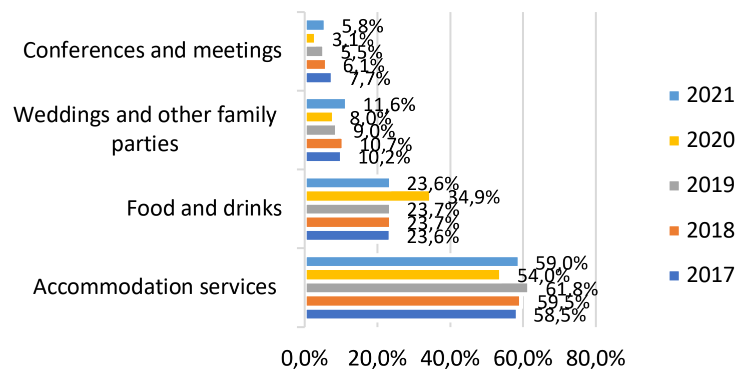

***Turnover and Investments***

In terms of turnover, the overwhelming majority – 75.8 percent – reported to have performed 'better' or 'much better' compared to 2020, 19.4 percent declared to have had no change, and only 4.8 percent said to have had a "worse" performance (see Figure 7).



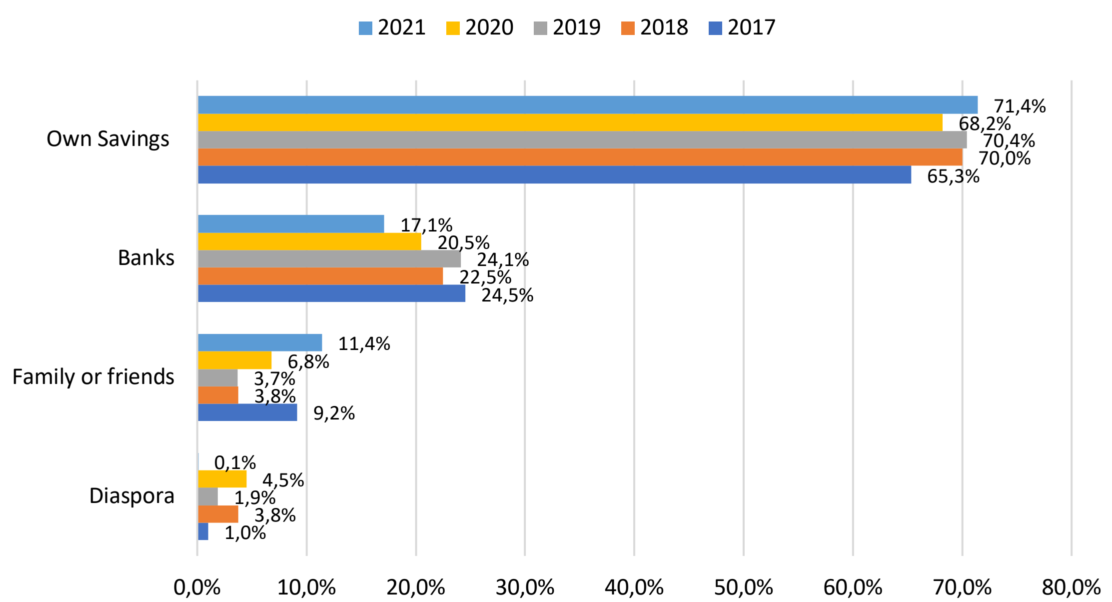
Further analysis reveals that in 2021, *'accommodation services'* contributed 59.0 percent towards the overall turnover; *'food and drinks'* 23.6 percent; *'weddings and other family parties'* 11.6 percent, and *'conference and meetings'* 5.8 percent. To draw comparisons with previous years, see Figure 9.

**Figure 9: Accomodations with Restaurants (2017-2021), Turnover by Type of Service (in %)**




Forty-two percent of the surveyed accommodations with restaurants declared to have made some investment in 2021, compared to 48.6 percent in 2020. In 2021, their investments were mostly financed through savings (71.4 percent) and banks (17.1 percent). To see other investment sources and compare them with other years, refer to Figure 10.

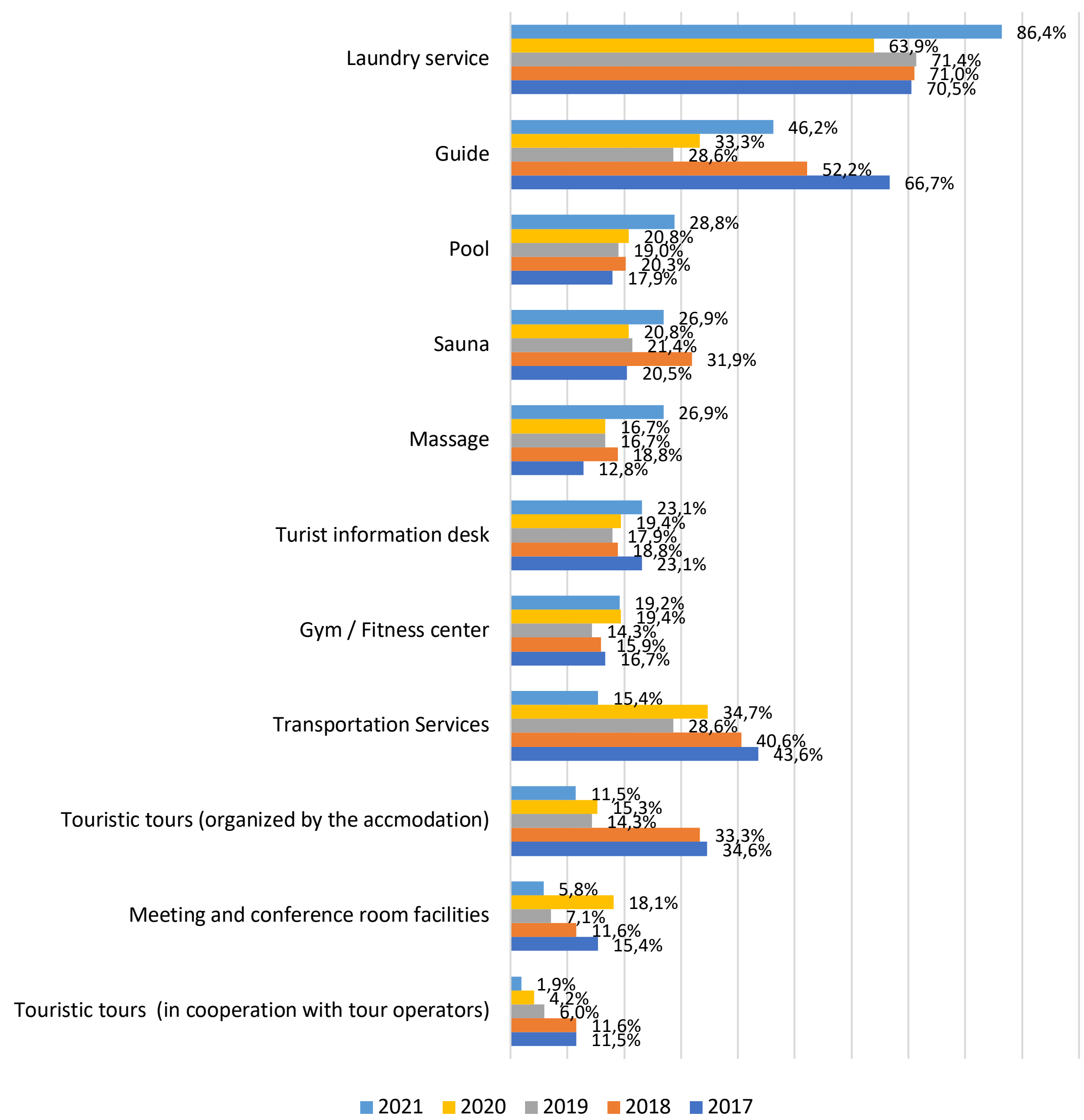
**Figure 10: Accomodations with Restaurants - Investments (2017-2021), by Source (in %)**



***Services Offered***

When asked about the services offered in 2021, the most frequent answers turned out to be: laundry services (86.4 percent of cases), guide (46.2 percent), and pool (28.8 percent). For the other services offered by accommodations with restaurants in 2021 and those offered in the previous years, see Figure 11.

**Figure 11: Accomodations with Restaurants - Services Offered, 2017-2021 (in % of Cases)**

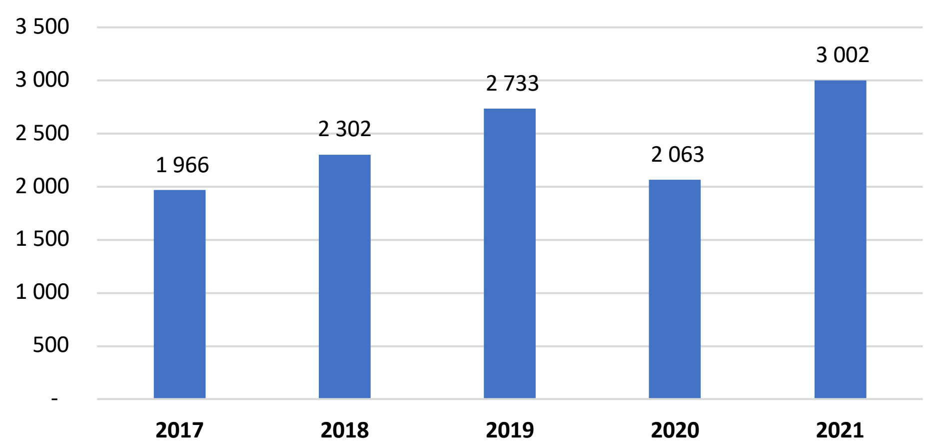


***Employment***

Knowing the importance of the tourism sector in employment, extra efforts have been put to this sub-section. In order to generate the total number of workers in the category of accommodations with restaurants, a population-based weighting approach was employed. The sample data were multiplied with a gross-up factor of 1.423 – which means that the population includes 42.3 percent more entities. Note that when calculating the factor, all Kosovo accommodations with restaurants listed in Booking.com, TripAdvisor, Gjirafa, and in other similar platforms have been taken into account. This is considered a tourism valid population by the researchers and the PPSE team. The same logic, with different gross-up factors though, was applied to accommodations (without restaurants) and restaurants. The same approach has been applied for the fifth consecutive year therefore allowing annual comparisons. It is worth noting that this approach could not be applied to attractions and tour operators due to the lack of population size data. Nonetheless, workers' demographic characteristics are described in each case.

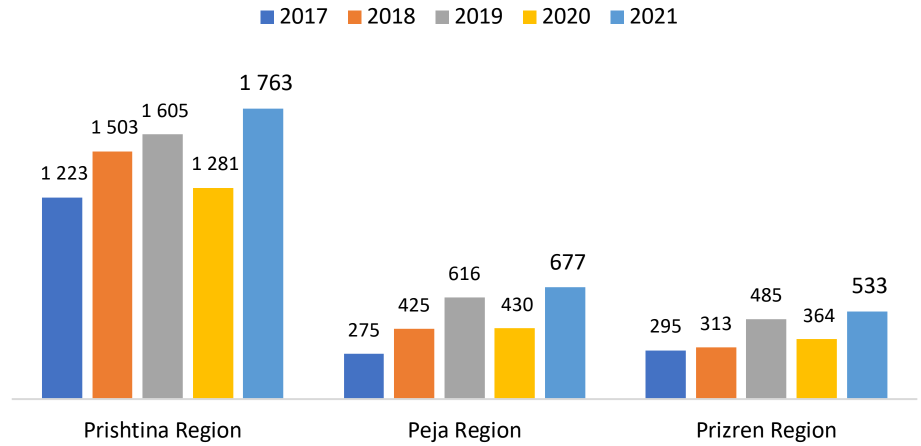
Employment findings show that in the past five years, the number of workers in accommodations with restaurants marked an increase of around 52.7 percent (see Figure 12). Employment in 2021 rebounded strongly, even surpassing the pre-pandemic years.

**Figure 12: Accomodations with Restaurants - Number of Workers (2017-2021)**




A breakdown of the findings by the top three regions shows that in 2021, accommodations with restaurants in Prishtina Region employed the largest number of workers, 1,763 in total. The number of workers in Peja Region and Prizren Region was significantly smaller, 677 and 533, respectively. In all cases, there has been a notable increase compared to 2020 (see Figure 13).

**Figure 13: Accomodations with Restaurants - Number of Workers (2017-2021), by Region**



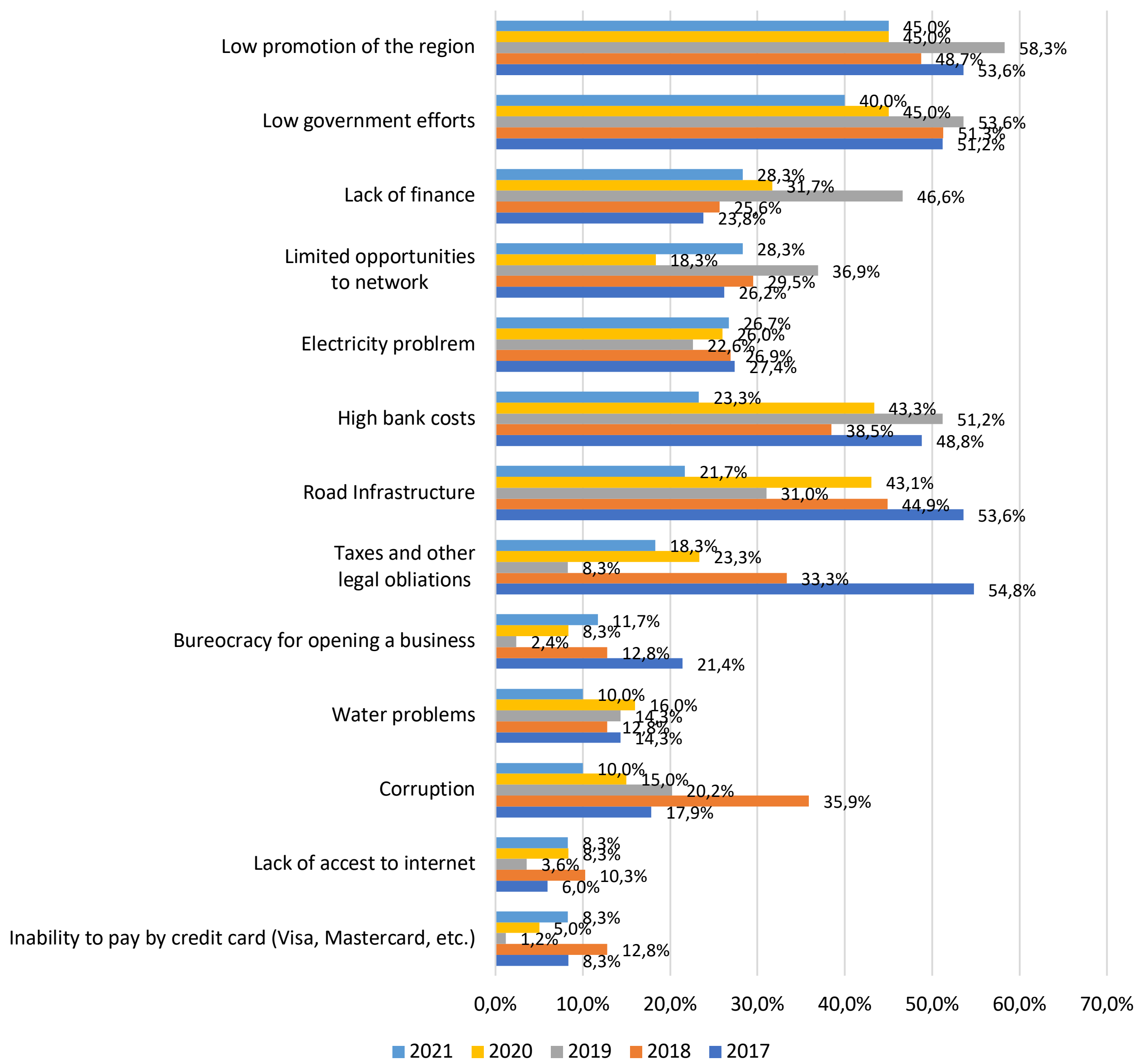

The following are some demographic characteristics on the workers employed in accommodations with restaurants in 2021. Men dominated with 62.5 percent. Out of all employed, only 12.3 percent worked on a part-time basis. A disaggregation of data by ethnic background reveals that workers were predominantly Kosovo Albanians – 93.0 percent; the rest consisted of Bosnians, 3.8 percent; Turks, 2.1 percent; RAE, 0.9 percent; Serbs, 0.1 percent; and others, 0.1 percent. As per the age group, those falling in the range 25-44 constituted the majority with 65.4 percent. For more detailed information and to compare employment demographics with the other four years, see Table 4.

| Table 4: Employment Demographics | | | | | | |
|---|---|---|---|---|---|---|
| **2017** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 61.5% | | | 38.5% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 51.6% | | 9.9% | 34.2% | 4.3% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 94.4% | 2.5% | 1.0% | 0.7% | 1.5% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 16.3% | 40.4% | 24.8% | 15.5% | 2.9% | 0.1% |
| **2018** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 63.8% | | | 36.2% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 55.9% | | 7.9% | 33.3% | 2.9% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 95.9% | 1.4% | 0.9% | 0.7% | 1.0% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 19.0% | 35.7% | 30.3% | 12.4% | 2.3% | 0.2% |
| **2019** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 62.2% | | | 37.8% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 56.6% | | 5.6% | 34.3% | 3.5% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 96.8% | 1.2% | 0.7% | 0.5% | 0.5% | 0.3% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 23.4% | 37.1% | 28.4% | 8.4% | 2.6% | 0.1% |
| **2020** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 61.5% | | | 38.5% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 54.3% | | 7.2% | 34.5% | 4.0% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 93.6% | 1.4% | 1.3% | 0.8% | 1.1% | 1.8% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 26.0% | 36.0% | 22.3% | 12.4% | 3.0% | 0.2% |
| **2021** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 62.5% | | | 37.5% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 53.8% | | 8.7% | 33.9% | 3.6% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 93.00% | 0.1% | 2.1% | 0.9% | 3.8% | 0.1% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 19.2% | 30.2% | 35.2% | 10.5% | 4.2% | 0.6% |

## ***Barriers***

Accommodations with restaurants were provided with a list of 12 likely barriers (predominantly external) and were asked to choose the most severe ones. *'Low promotion of the region'* with 45.0 percent and *'low government efforts'* with 40.0 percent, followed by *'lack of finance* with 28.3 percent were considered to be the most pressing barriers for 2021. For more detailed information and to make comparisons with the previous four years, see Figure 14.

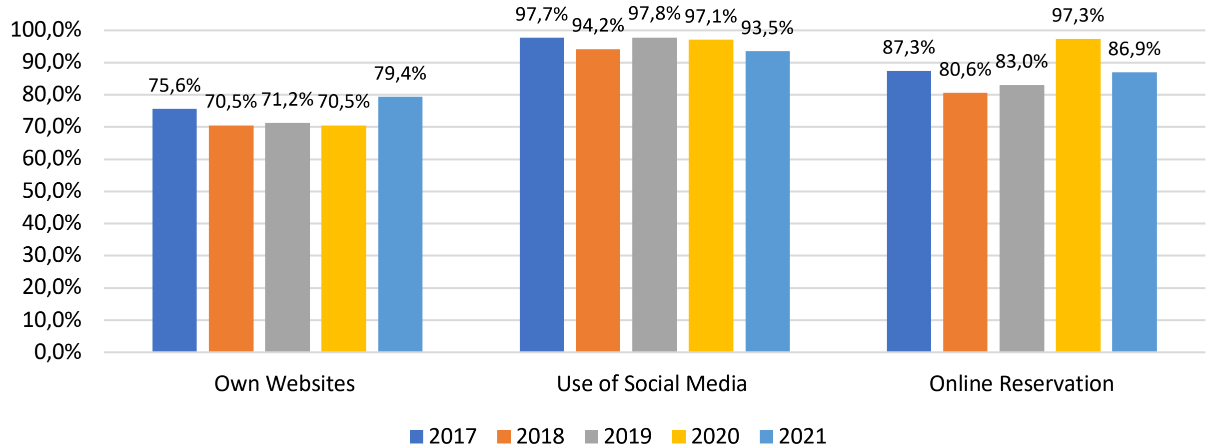
**Figure 14: Accomodations with Restaurants - Barriers to Doing Business (2017-2021)**



***Digitalisation***

To understand whether accommodations with restaurants have been catching up with recent digitalization trends, the survey included a set of questions related to this subject. One finding shows that in 2021, 79.4 percent of accommodations with restaurants had their own websites. Moreover, the overwhelming majority 93.5 percent reported that they use social networks (Facebook mostly) as a means to promote their business. In the question regarding online reservations, 86.9 percent claimed to have this option. Reservations are made mostly through booking.com. To compare with the previous four years, see Figure 15.

**Figure 15: Accomodations with Restaurants - Digitalisation, 2017-2021 (in %)**



## 3.2. Accommodations (without Restaurants)[3]

***General Structure***

In 2021, of all accommodations, hotels dominated with 50.6 percent, followed by hostels with 16.9 percent, Airbnb apartments with 15.6 percent, houses/villas/bungalows with 10.4 percent, and other accommodations with 6.5 percent. To compare with the other years, see Figure 16. Most of the accommodations were located in Prishtina (39.0 percent), Peja (29.9 percent), and Ferizaj (5.2 percent), see Figure 17

**Figure 16: Accomodations - Type of Accomodation 2017-2021 (in %)**

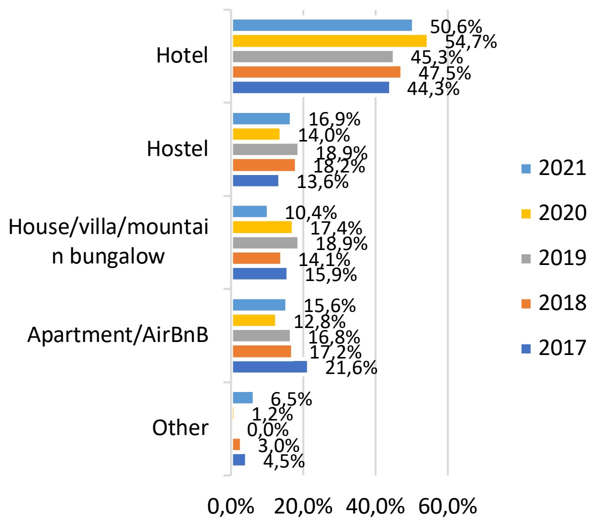
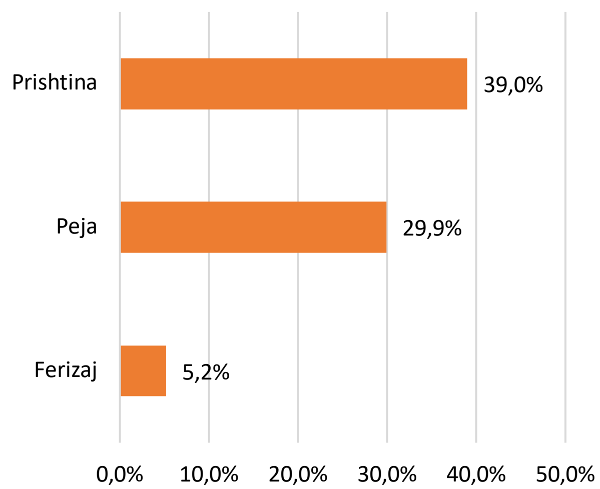



**Figure 17: Accomodations, by Location, 2021 (in %)**




***Number of Rooms, Prices and Occupancy Rate***

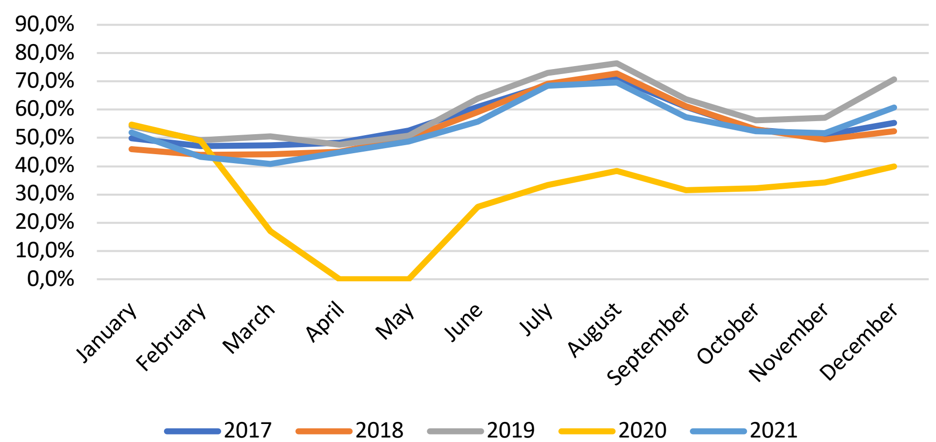
The survey findings show that in 2021, accommodations had an average of 7.9 standard single rooms and 8.8 percent standard double rooms. In the same year, the total number of single and double standard rooms (adjusted to include the whole population) was 481 and 754, respectively. The average price for a single standard room stood at 36.3 EUR, while for a double one at 40.9 EUR. For more detailed information about the average number of rooms and prices, as well as to make comparisons with the previous years, see Table 5.

[3] Different from the previous sub-section, this one reveals the findings of firms that provide accommodation services only (without restaurants).

| Table 5: Accommodations - Average Number and Price of Standard Rooms | | | | | | |
|---|---|---|---|---|---|---|
| | | 2017 | 2018 | 2019 | 2020 | 2021 |
| **Single Standard Rooms** | Avg. # of Rooms | 10.05 | 8.6 | 9.1 | 7.2 | 7.9 |
| | Avg. Price (EUR) | 27.3 | 25.0 | 24.6 | 24.6 | 36.3 |
| | Total # of Rooms | 582 | 680 | 678 | 541 | 481 |
| **Double Standard Rooms** | Avg. # of Rooms | 7.6 | 8.3 | 10.5 | 10.6 | 8.8 |
| | Avg. Price (EUR) | 31.7 | 32.4 | 34.3 | 30.9 | 40.9 |
| | Total # of Rooms | 573 | 923 | 986 | 859 | 754 |
| **Triple Standard Rooms** | Avg. # of Rooms | 3.0 | 4.7 | 6.9 | 7.0 | 3.7 |
| | Avg. Price (EUR) | 43.6 | 40.1 | 45.7 | 34.5 | 50.0 |
| | Total # of Rooms | 127 | 263 | 380 | 360 | 263 |
| **Four-Bed Standard Rooms** | Avg. # of Rooms | 1.9 | 5.3 | 5.7 | 2.9 | 3.8 |
| | Avg. Price (EUR) | 49.9 | 50.3 | 62 | 44.9 | 60.8 |
| | Total # of Rooms | 70 | 127.3 | 174 | 115 | 96 |

In 2021, the occupancy rate in this category of accommodations was similar to pre-pandemic years, averaging 53.8 percent. The highest occupancy rate was in August (69.6%), while the lowest in March (40.8%). For more detailed results and to make comparisons with the previous years, see Figure 18.

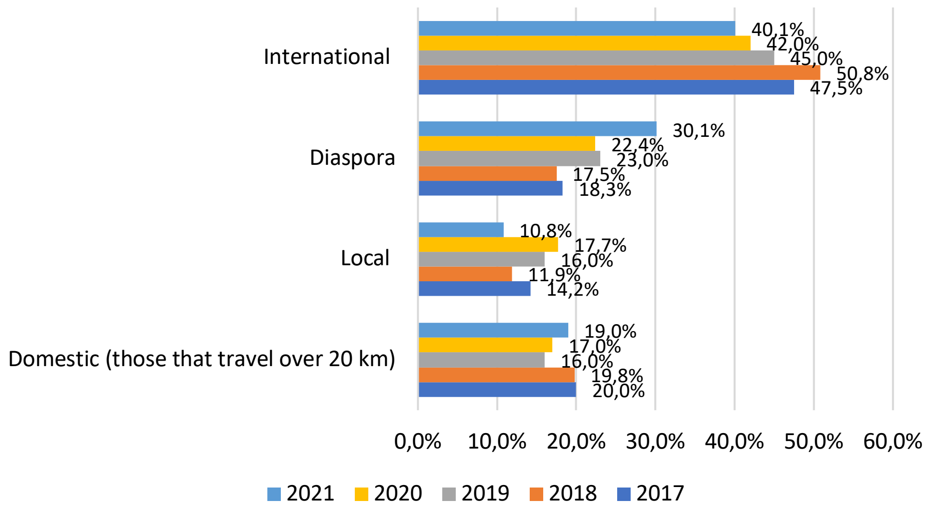
**Figure 18: Accomodations - Occupancy Rate (2017-2021), by Month (in %)**



## ***Guests and their Behaviour***

The survey findings reveal that in 2021 internationals comprised 40.1 percent of all visitors in accommodations without restaurants; diaspora, 30.1 percent; locals, domestic visitors (with more than 20 km of travel), 19.0 percent; and locals, 10.8 percent. To compare data with previous years, refer to Figure 19. The number of nights spent averaged 5.1 in 2021, compared to 3.7 in 2020.

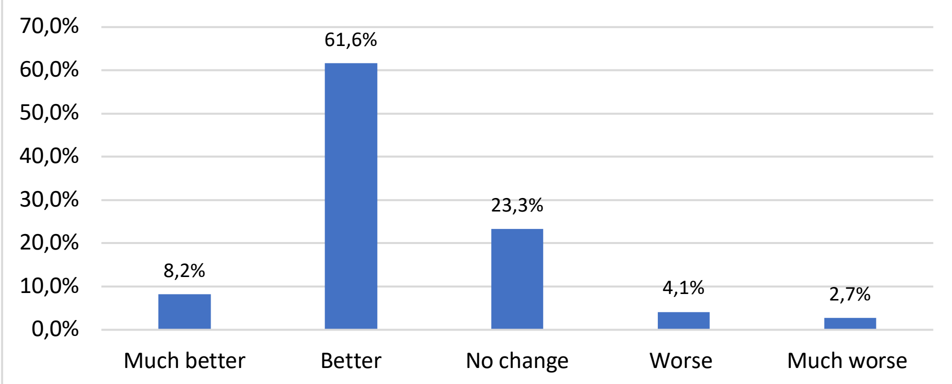
**Figure 19: Accomodations - Composition of Guests 2017-2021, by Origin (in %)**



***Revenue and Investments***

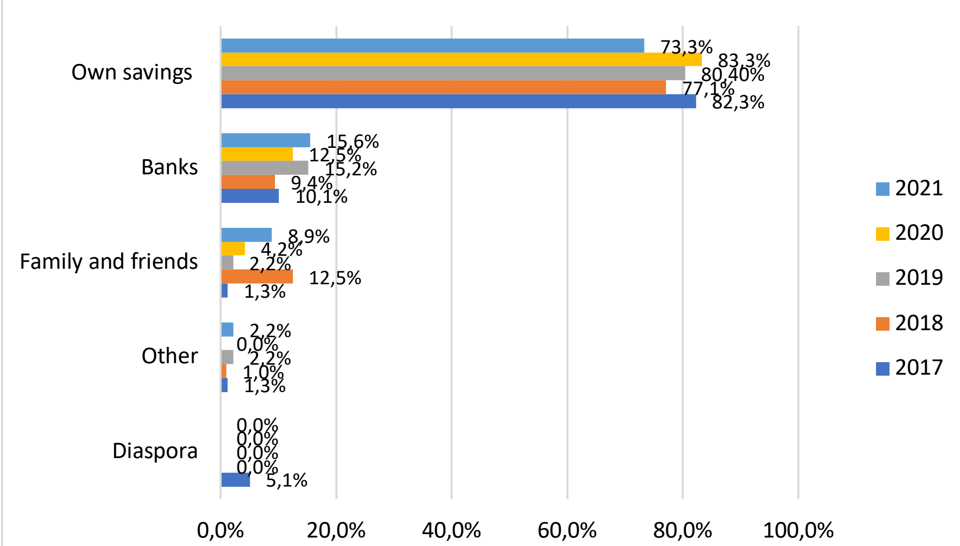
The revenue findings reveal that in 2021, 69.8 percent of accommodations reported having performed *"better"* or *"much better"* compared to 2020, while 6.8 percent performed *"worse"* or *"much worse."* The rest said they did not experience any change (see Figure 20).

**Figure 20: Accomodations - Turnover Change Compared to 2020 (in %)**



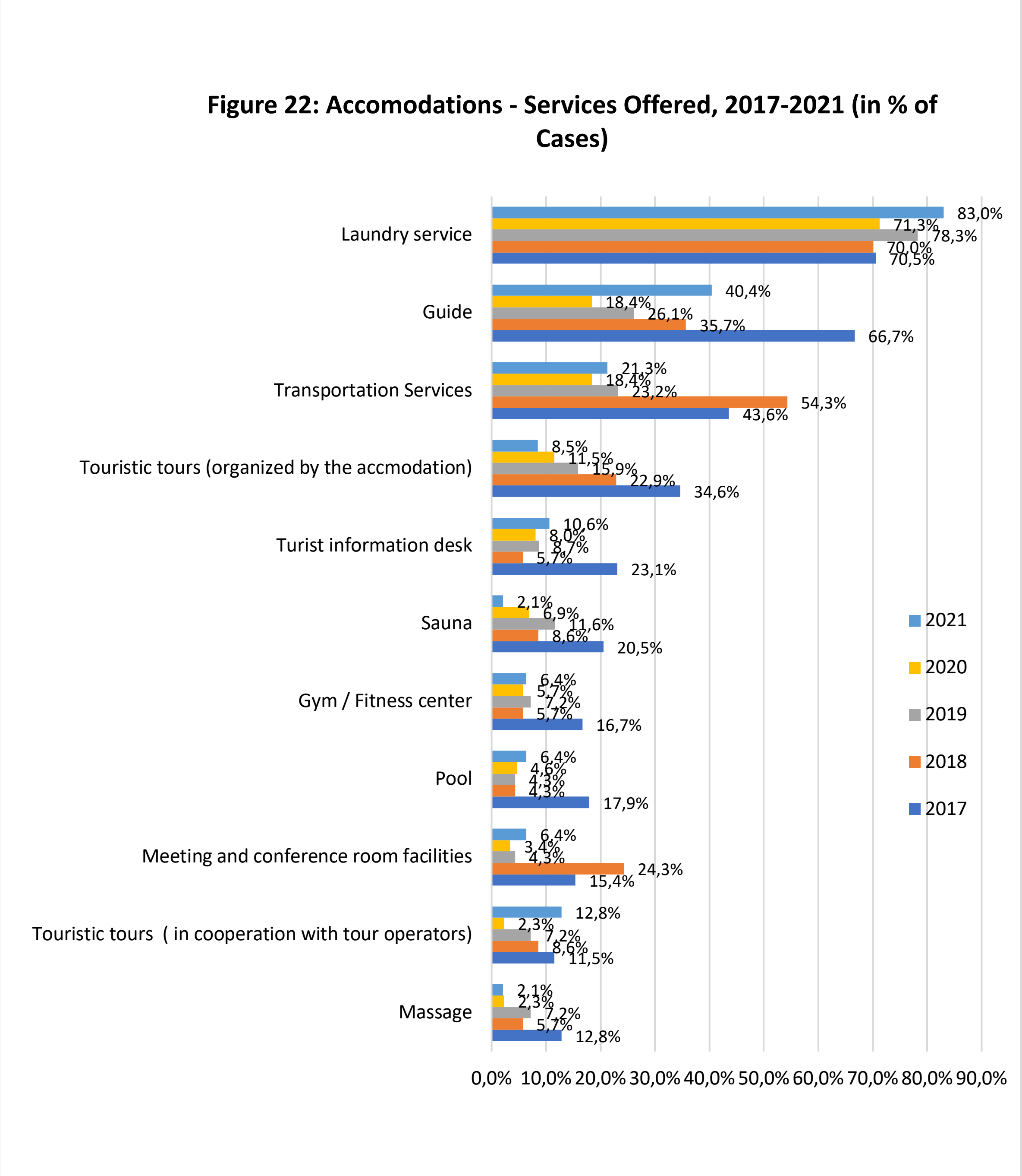

In response to the question about whether they have invested in their business in 2021, 55.6 percent of accommodations said *'yes'*. Those who invested, financed their investment mostly from their own savings (83.3 percent). To see the other sources of finance and compare with the previous years, refer to Figure 21. Another finding shows that 60.0 percent plan to invest in the next two years.

**Figure 21: Accomodations - Investments 2017-2021, by Source (in %)**



### ***Services Offered***

Accommodations were also provided with a list of common services and were asked to select the ones they offered. The findings reveal that laundry services (83.0 percent), guide (40.4 percent), and transportation services (21.3 percent), were the most common services offered by accommodations in 2021. To see other services provided in this year and to compare them with the previous years, refer to Figure 22.

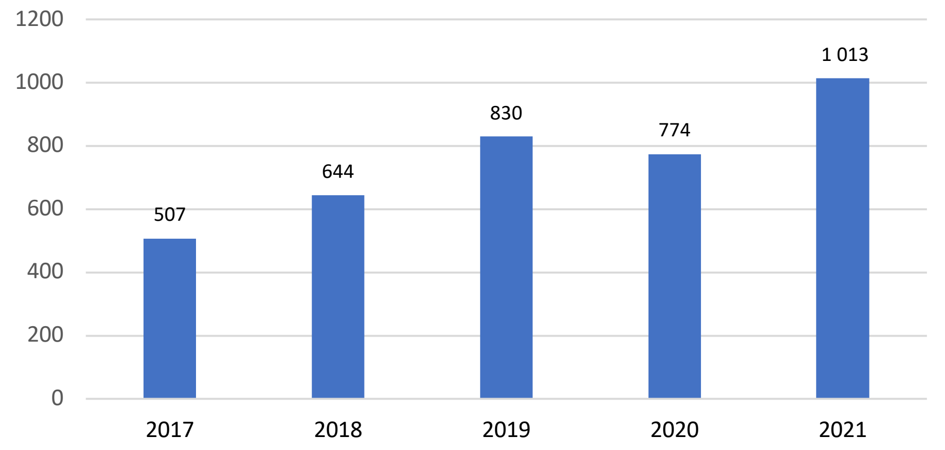


The findings further show that 10.8 percent of accommodations had special packages (i.e. for the weekend or vacation) in 2021, compared to 19.8 percent in 2020.

***Employment***

In 2021, the number of workers in accommodations stood at 1,013, increasing by 99.8 percent compared to 2017 (see Figure 23).[4] Employment increased every year with the exception of 2020 where there was a drop due to lockdowns imposed to curb the spread of the pandemic Covid-19.

**Figure 23: Accomodations - Number of Workers (2016-2021)**



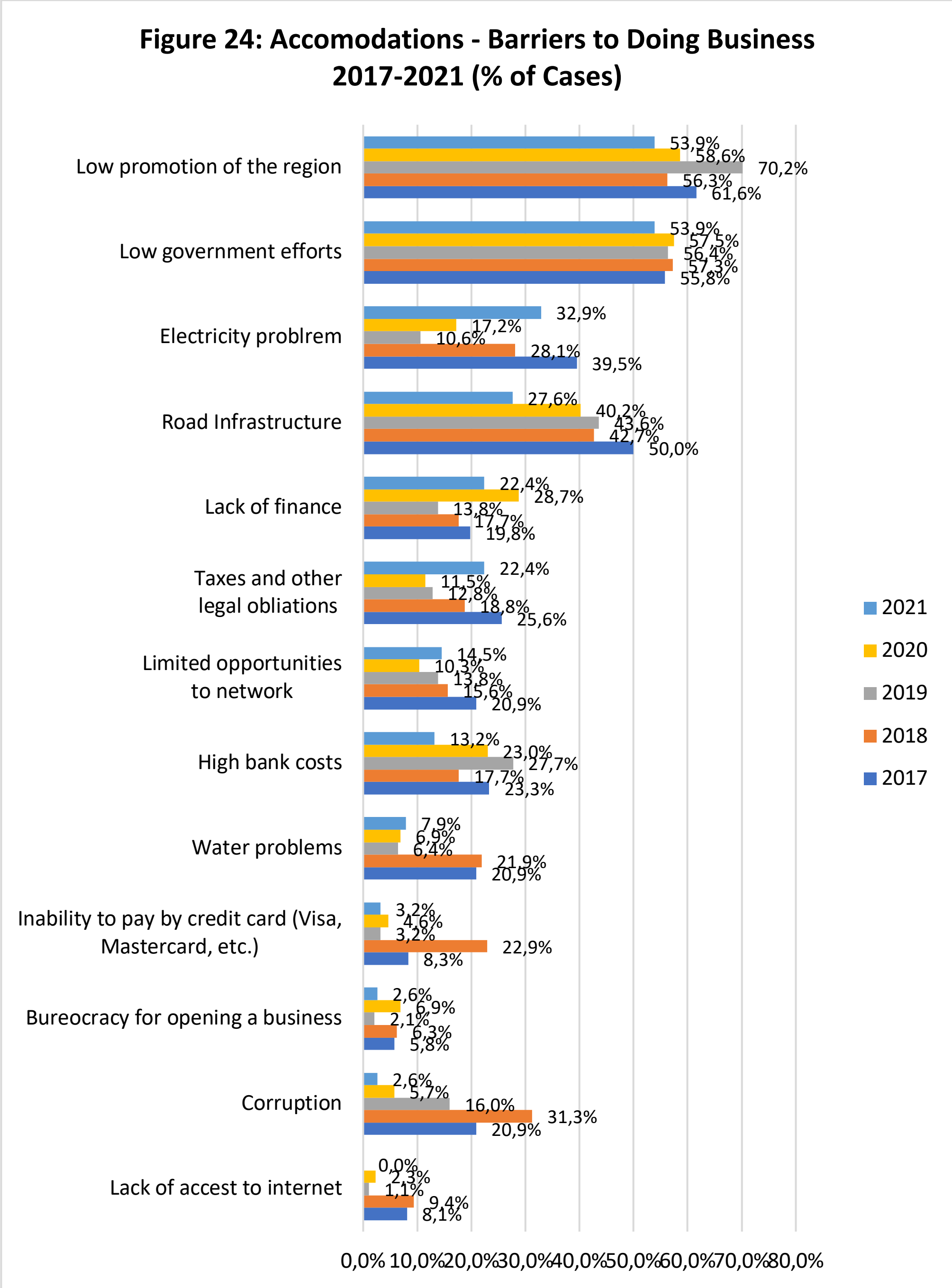

The following are some employment demographics for accommodations in 2021. Men comprised the majority (62.5 percent) of workers. Of all workers, 10.1 percent worked on a part-time basis. A breakdown of data by ethnicity shows that almost all workers were Kosovo Albanians, 96.7 percent. As per age groups, those at 25-44 age group constituted the majority with 57.4 percent. For more detailed information and to make comparisons with the previous years, see Table 6.

[4] Gross up factor for accommodations~1.423

| Table 6: Employment Demographics (Accomodations) | | | | | | |
|---|---|---|---|---|---|---|
| **2017** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 65.5% | | | 34.4% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 51.4% | | 14.2% | 28.9% | 5.5% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 99.1% | 0.0% | 0.0% | 0.4% | 0.5% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 13.8% | 42.5% | 28.3% | 13.2% | 1.7% | 0.4% |
| **2018** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 62.8% | | | 37.2% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 50.2% | | 12.6% | 31.8% | 5.4% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 99.4% | 0.0% | 0.2% | 0.4% | 0.0% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 15.3% | 48.7% | 22.1% | 12.1% | 0.6% | 1.2% |
| **2019** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 71.7% | | | 28.3% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 62.0% | | 8.5% | 26.8% | 1.5% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 98.6% | 0.0% | 0.5% | 0.3% | 0.3% | 0.3% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 13.1% | 51.5% | 25.2% | 8.9% | 1.3% | 0.0% |
| **2020** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 67.8% | | | 32.2% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 61.7% | | 6.0% | 30.5% | 1.7% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 98.4% | 0.0% | 0.2% | 0.7% | 0.7% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 11.4% | 44.8% | 27.0% | 13.4% | 3.5% | 0.0% |
| **2021** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 62.5% | | | 37.5% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 54.5% | | 8.0% | 35.4% | 2.1% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 96.700% | 0.2% | 0.6% | 1.0% | 1.5% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 16.9% | 32.0% | 25.4% | 17.8% | 7.4% | 0.4% |

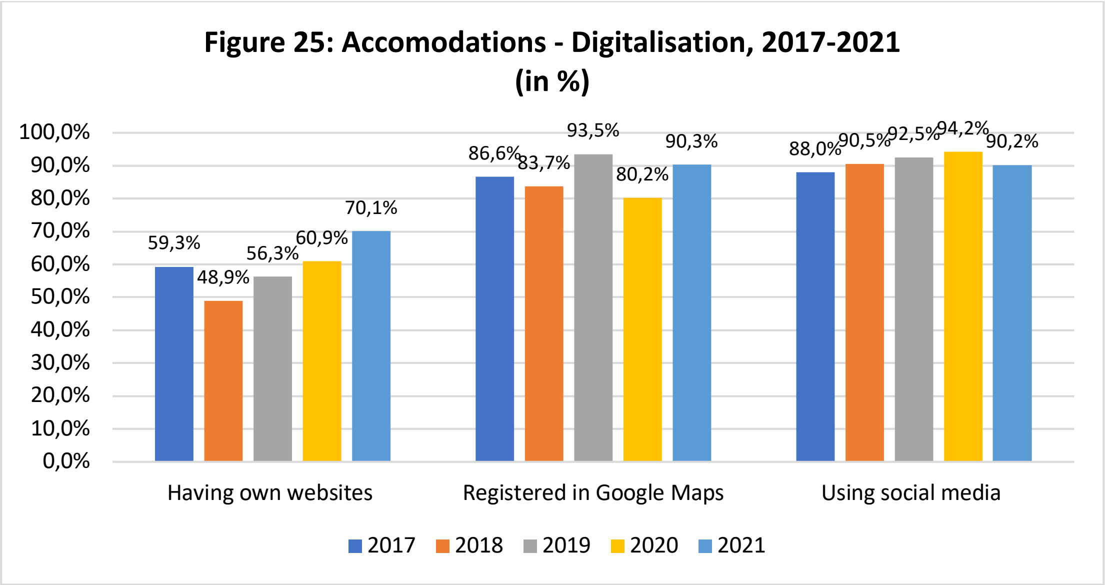
## ***Barriers to Doing Business***

Accommodations were also enquired to choose the most pressing barriers to doing business. '*Low promotion of the region*' (53.9 percent of all cases), *'low government efforts'* (53.9 percent), and '*electricity problems*' (32.9 percent) were perceived to be the most pressing operating barriers by accommodations in 2021. To see the other barriers to doing business and to compare them with the previous years, refer to Figure 24.



***Digitalisation***

The survey findings reveal that 70.1 percent of accommodations had their own websites in 2021. The vast majority, 90.3 percent, were registered in Google Maps. A similar percentage, 90.2 percent, claimed to have used social media to promote their accommodations. To compare the data with the previous years, see Figure 25.

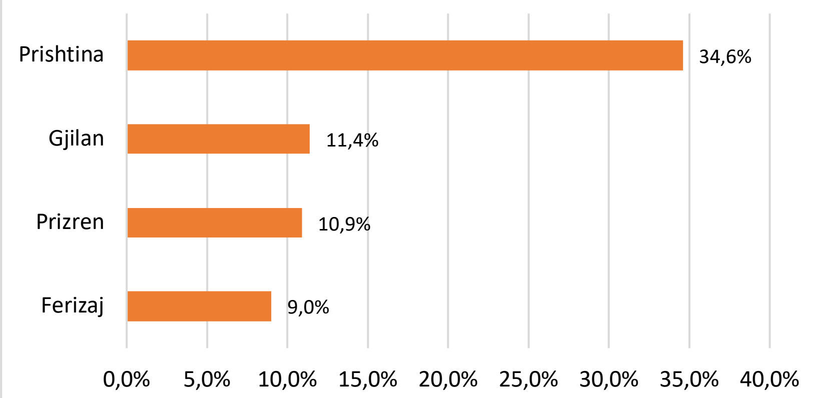


## 3.3. Restaurants

***General Structure***

In 2021, Prishtina dominated with 34.6 percent of all restaurants in Kosovo, followed by Gjilan with 11.4 percent), Prizren with 10.9 percent, and Ferizaj with 9.0 percent – see Figure 26.

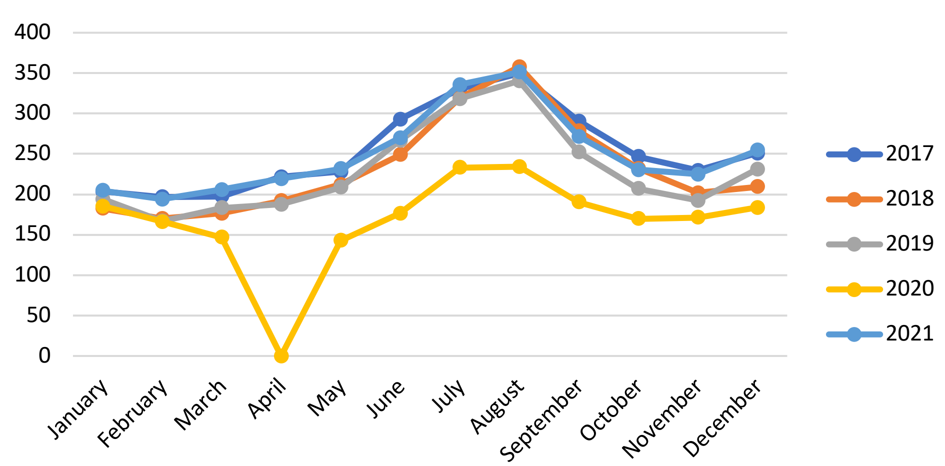
**Figure 26: Restaurants, by Main Locations, 2021 (in %)**




***Guests and their Behaviour***

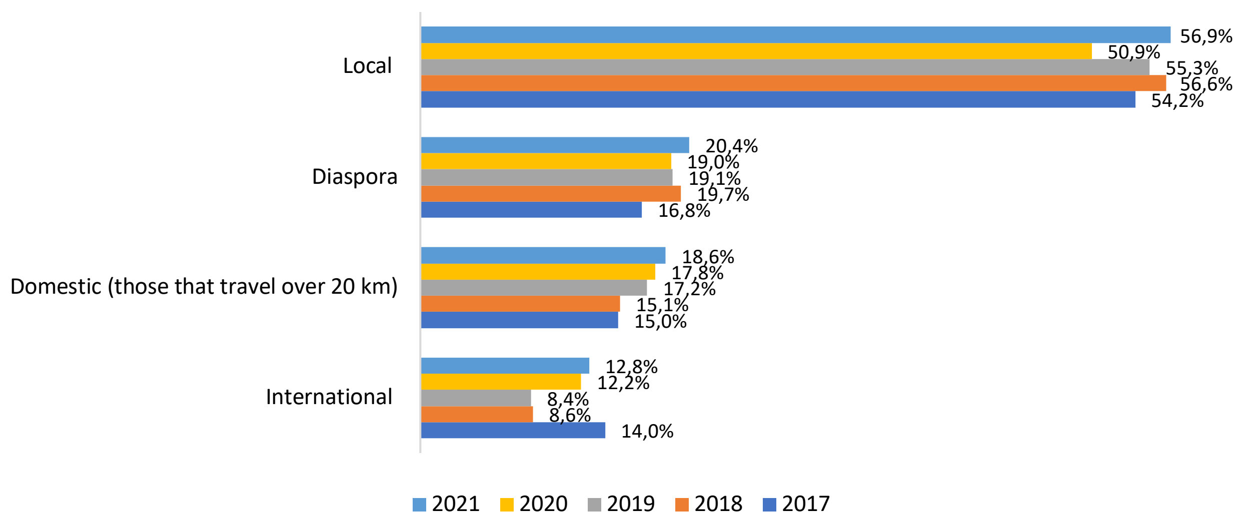
The findings show that restaurants had 249.5 guests per day, on average, in 2021, 36.8 percent more compared to 2020. During this year, the busiest months turned out to be July and August, with an average of 335.6 and 351.2 guests per day, respectively. For more detailed information and to compare averages with those of the previous years, refer to Figure 27.

**Figure 27: Restaurants - Number of Guests, 2017-2021 (Avg. per Day)**



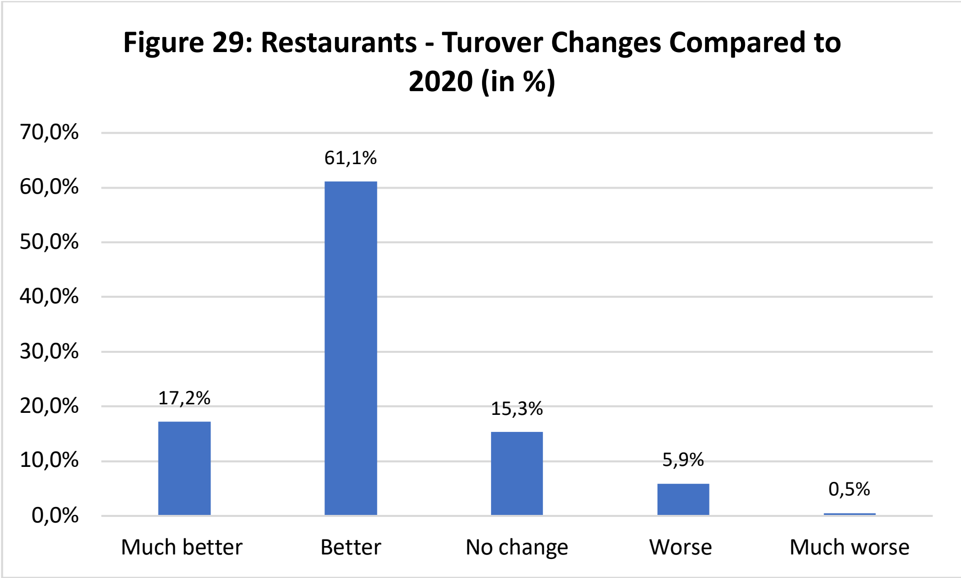
The findings reveal that in 2021, 56.9 percent of the clientele in restaurants consisted of locals; others included the diaspora (20.4 percent), domestic visitors (18.6 percent) and internationals (12.8 percent). To make comparisons with the previous years, see Figure 28. The data on restaurants show that in 2021, 60.6 percent (59.7 percent in 2020) of all guests went to restaurants for food and drinks, while the rest for drinks only. The average expenditures per serving of the former group amounted to 8.5 EUR (7.6 EUR in 2020), while the average of the latter was 3.6 EUR (2.7 EUR in 2020)

**Figure 28: Restaurants - Composition of Guests (2017-2021), by Origin (in %)**

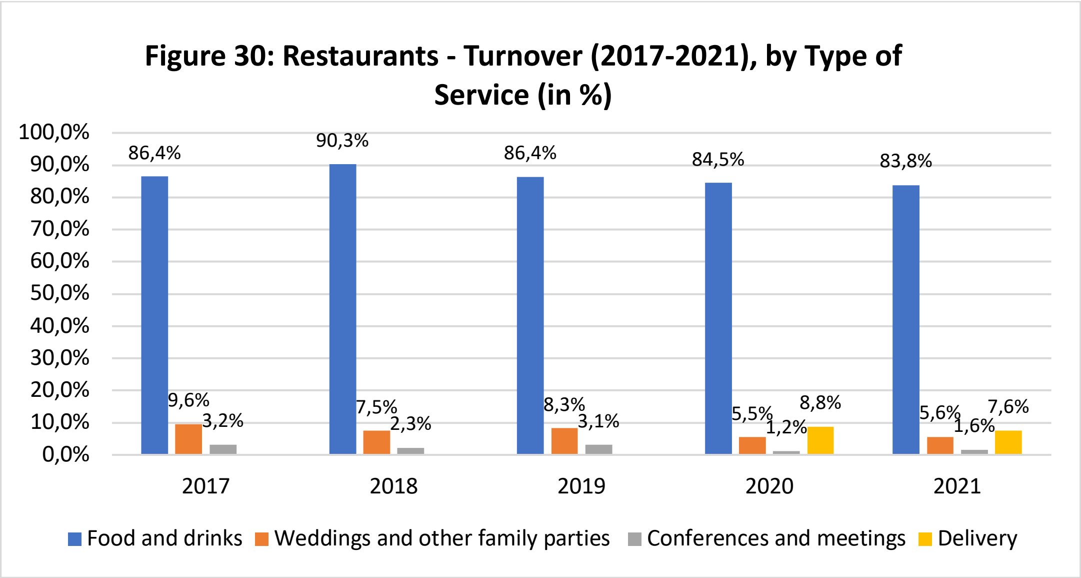



***Revenues and Investments***

When asked about the changes in turnover compared to 2020, 78.3 percent of the restaurants reported to have performed '*better*' or '*much better*'; on the other hand, 6.4 percent of them declared to have experienced the opposite; the rest said that they experienced no changes in turnover (see Figure 29).

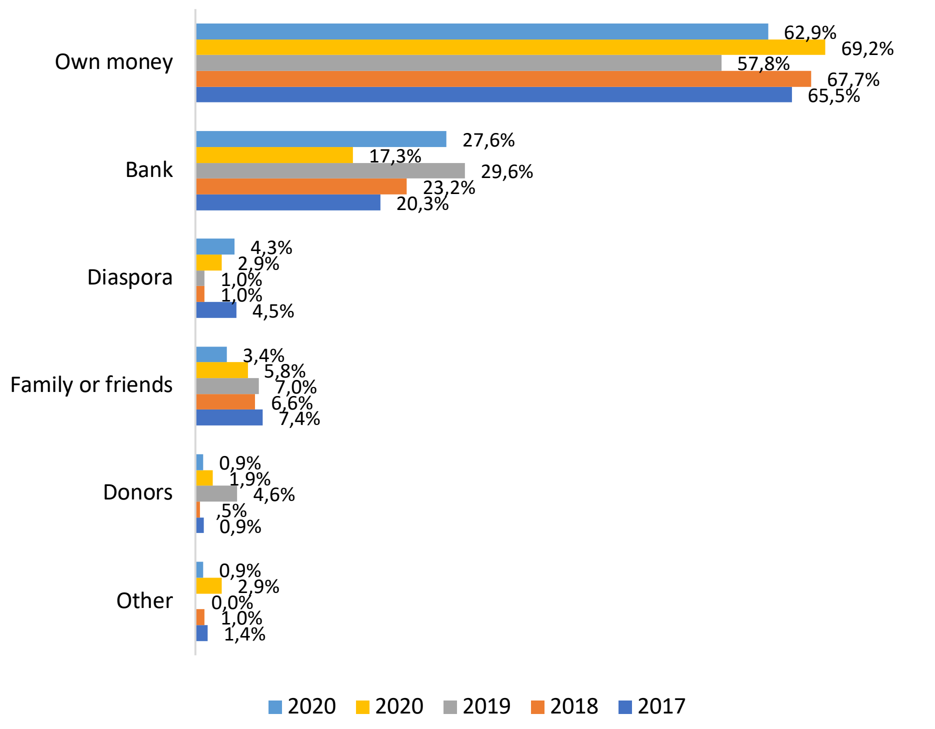



A further analysis on the composition of annual turnover shows that in 2021, food and drinks comprised the main source of revenue for restaurants with 83.8 percent, accompanied by delivery services with 7.6, weddings and family services with 5.6 percent, and conference and meetings with 1.6 percent. The option of delivery services was added in the last two surveys; therefore, comparisons cannot be made with the years before 2020. For more details, see Figure 30.



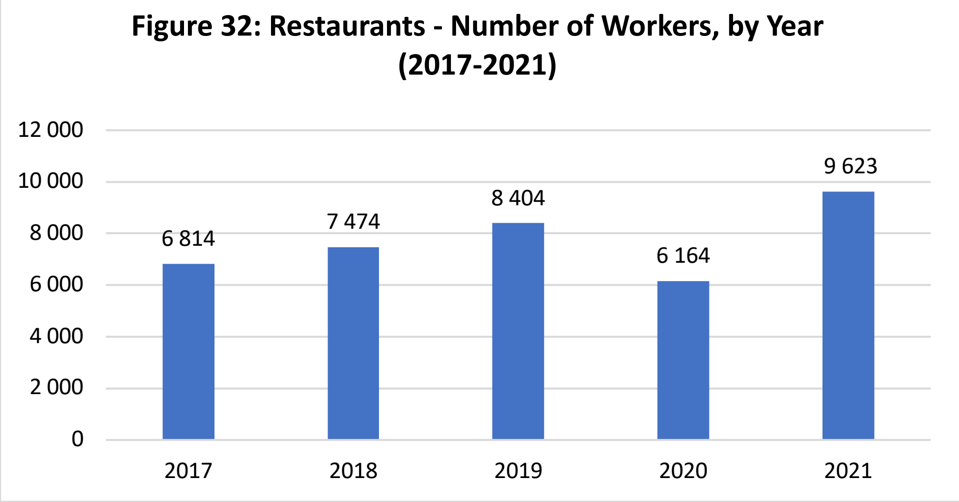

Of all restaurants, 43.2 percent claimed to have made some sort of an investments in 2021, compared to 36.0 percent in 2020. More than that, 43.9 percent, planned to make an investment in the upcoming two years. Those who invested in 2021, financed their investment mostly from their ‘own money’ (62.9 percent). To see other sources of finance and to compare with the previous years, see Figure 31.

**Figure 31: Restaurants - Sources of Investment, 2017-2021 (in %)**

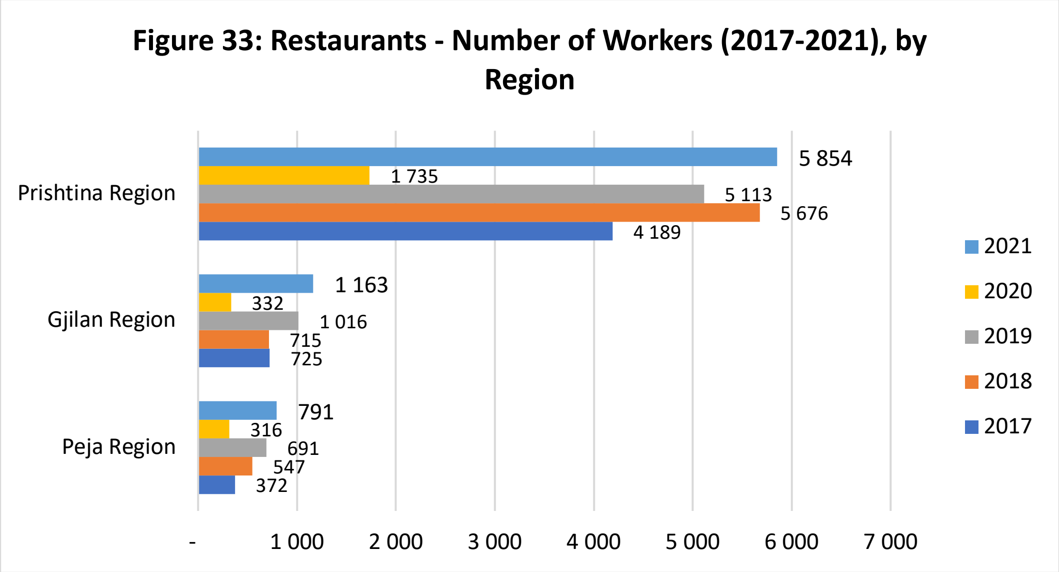


***Employment***

Employment in restaurants has been the highest in the past five years, amounting to 9,623 (see Figure 32).[5]




A disaggregation of the data by the main regions reveals that Prishtina Region with 5,113 constituted the largest number of workers employed in restaurants in 2021, followed by Gjilan (1,163), and Peja (791). In all cases, the number of workers is the highest in the last five years, refer to Figure 33.




[5] Gross-up factor for restuarants~2.1644

The following are some employment demographics for restaurants. Of all employed in 2021, the majority were men – 74.3 percent. Most of the workers, 80.7 percent, worked on a full-time basis. A negligible percentage (3.6 percent) was comprised of non-Kosovo Albanians. In terms of age, those falling between 15-34 make up the most common group with 72.5 percent. For more information and to make comparisons with the previous years, see Table 7.

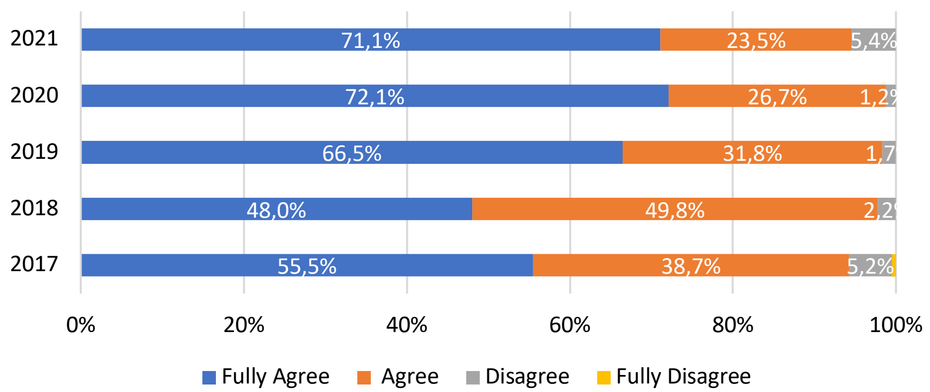
**Table 7: Employment Demographics (Restaurants)**

| | | | | | | |
|---|---|---|---|---|---|---|
| **2017** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 74.4% | | | 25.6% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 63.2% | | 11.2% | 21.3% | 4.3% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 98.9% | 0.1% | 0.5% | 0.2% | 0.3% | 0.1% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 34.1% | 42.0% | 19.0% | 4.1% | 0.9% | 0.0% |
| **2018** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 78.7% | | | 21.5% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 63.2% | | 15.2% | 18.9% | 2.6% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 98.2% | 0.3% | 0.5% | 0.5% | 0.5% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 23.8% | 55.2% | 16.3% | 3.9% | 0.7% | 0.0% |
| **2019** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 77.5% | | | 22.5% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 71.7% | | 5.8% | 19.6% | 2.8% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 98.1% | 0.2% | 0.4% | 0.6% | 0.6% | 0.1% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 22.0% | 48.4% | 20.3% | 7.9% | 1.4% | 0.0% |
| **2020** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 76.2% | | | 23.8% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 67.2% | | 9.0% | 21.7% | 2.1% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 98.5% | 0.1% | 0.4% | 0.5% | 0.4% | 0.1% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 24.3% | 46.2% | 19.9% | 8.2% | 1.2% | 0.2% |
| **2021** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 74.3% | | | 25.7% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 59.6% | | 14.7% | 21.1% | 4.6% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 96.4% | 0.1% | 1.3% | 0.3% | 1.8% | 0.1% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 29.7% | 42.9% | 17.9% | 7.4% | 2.1% | 0.1% |

.

Similar to the previous years' surveys, restaurants were asked to share their opinion in relation to the statement, *"My employees have enough education to fulfil my needs."* It turned out that in 2021, 94.6 percent either '*fully agree*' or '*agree*' with the statement, while the rest had an opposite view. See Figure 34 to compare the view of restaurants regarding this statement in previous years.

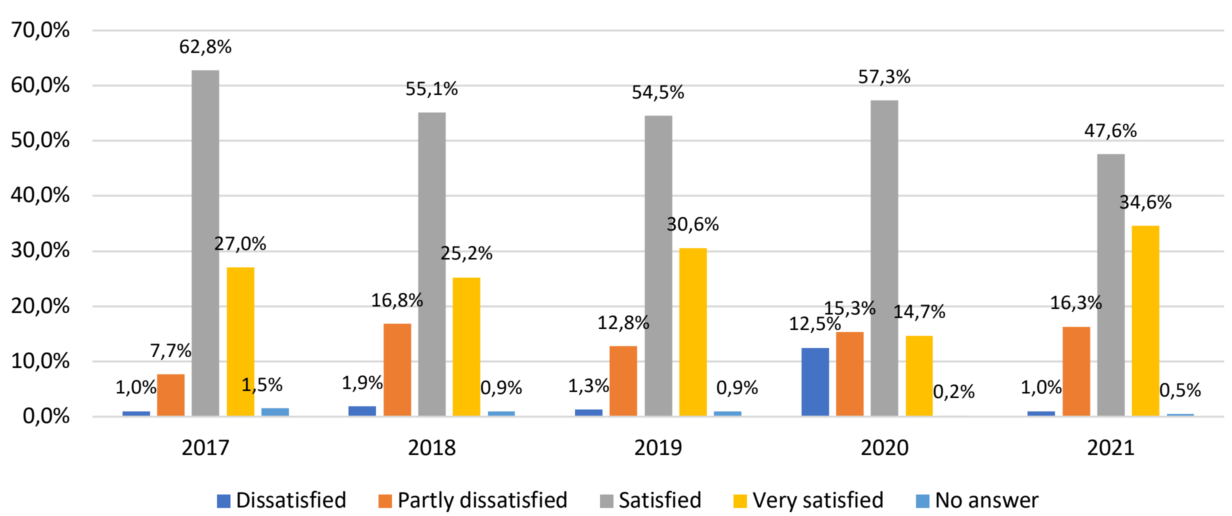
**Figure 34: Restaurants - Level of Agreement with the Following Statement: *"My employees have enough education to fulfil my needs."* (in %)**




## ***Supplies***

In response to the question about the origin of supplies used in 2021, 54.9 percent of restaurants believed that they were local, compared to 54.6 percent in 2020. Supplies for their restaurant in 2020 were mainly sourced from wholesalers and supermarkets. Another

**Figure 35: Restaurant - Level of Satisfaction with Suppliers, 2017-2021 (in %)**

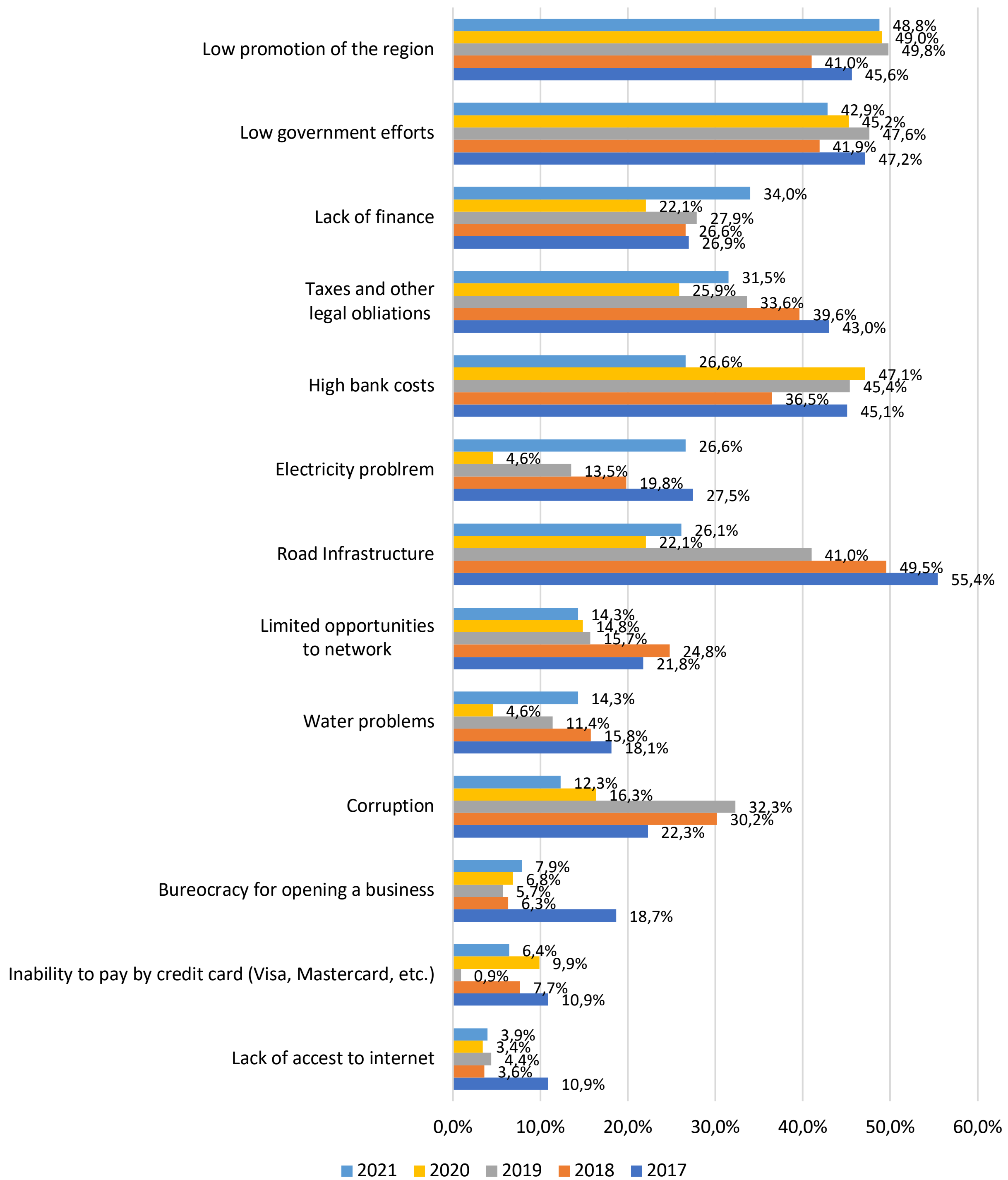


finding reveals that restaurants have generally been satisfied with suppliers; 82.2 percent of restaurant declared to have been *'satisfied'* or *'very satisfied'* with their suppliers in 2021. For more information on the level of satisfaction and to compare data with the previous years, refer to Figure 35.

***Barriers to Doing Business***

The potential barriers to doing business were also tested with restaurants. In 2021, it turned out that '*low promotion of the region'* with 48.8 percent, *'low government efforts'* with 42.9 percent, and *'lack of finance"* with 34.0 percent, were perceived to be the most severe operating barriers by respondents. For more detailed information and to make comparisons with the other years, see Figure 36.

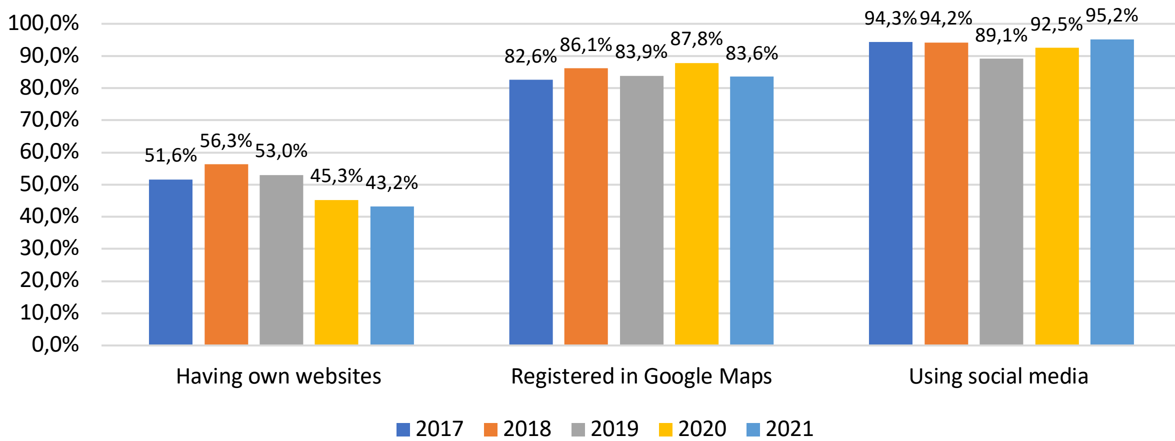
**Figure 36: Restaurants - Barriers to Doing Business, 2017-2021 (% of Cases)**



***Digitalisation***

Of all restaurants surveyed, 43.2 percent, had their own websites in 2021, and 83.6 percent were registered in Google Maps. A higher percentage (95.2 percent) used social media to promote their services. To compare the data with the previous years, see Figure 37.

**Figure 37: Restaurants - Digitalisation Level 2017-2021 (in %)**

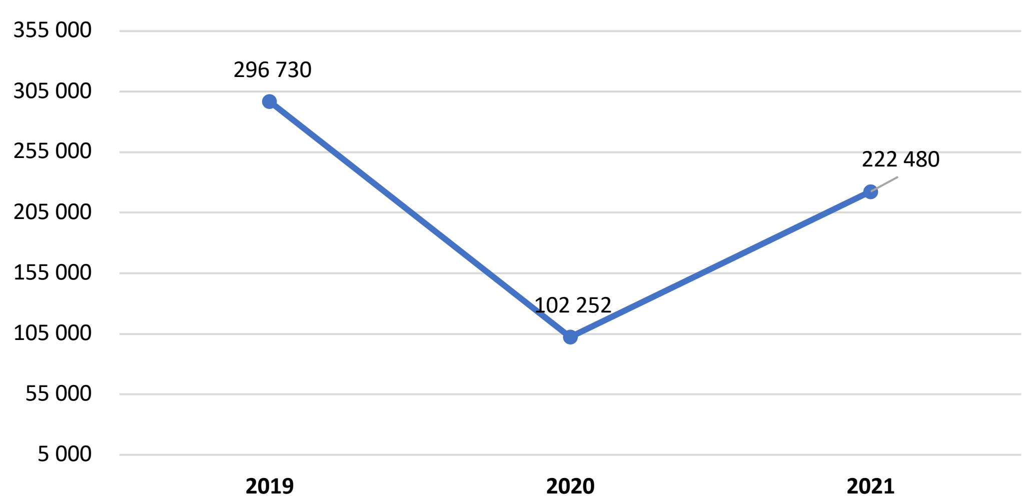



## 3.4. Attractions

***Number of Visitors and their Characteristics***

The total number of visitors in tourist attractions in 2021 stood at 60,280 – that is 118 percent higher compared to 2020 (see Figure 38). Note that these figures were taken from the interviewed attractions only. As such, they do not show the overall number of visits in the country but only indicate the trend. This is because there was no available information on the exact population landscape.

**Figure 38: Attractions - Number of Visits (2019-2021)**



In 2021, the structure of visitors in attractions was dominated by domestic visitors (those that travel more than 20 km) with 43.9 percent, followed by diaspora with and internationals with 28.2 percent each. To make comparisons with the previous years, see Figure 39. Similar to the other years, Albanians, Germans, Americans, and Turks made up the majority of visitors (see Figure 40).

**Figure 39: Attractions - Composition of Visitors, 2017-2021, by Origin (in %)**

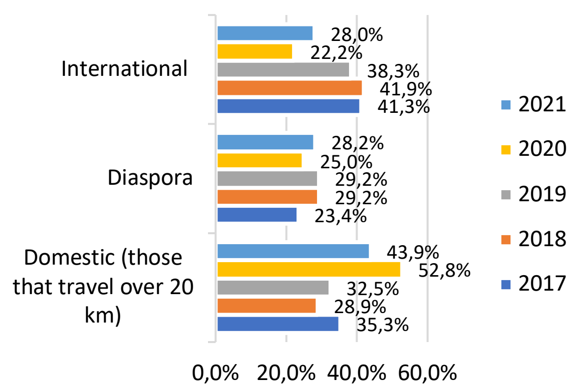
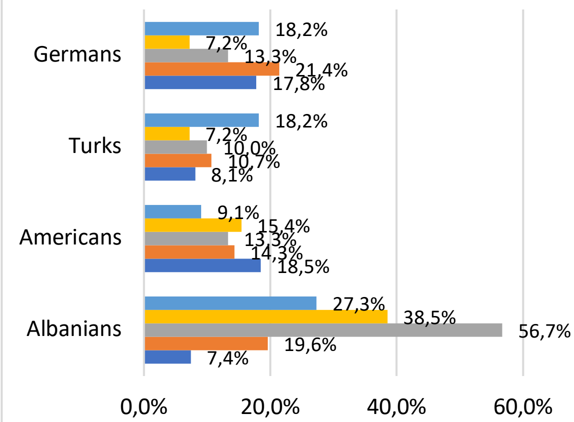


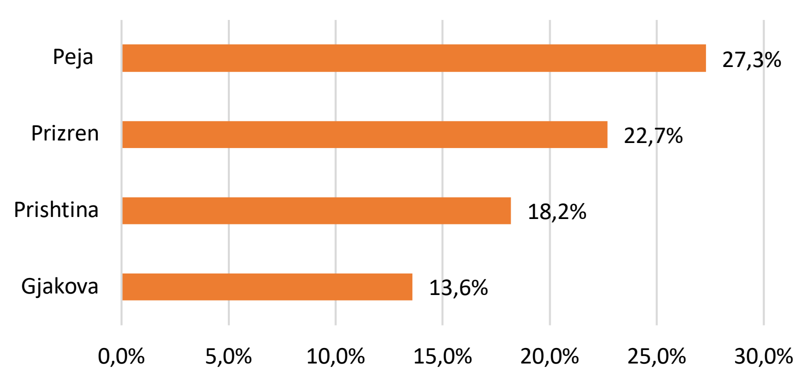

**Figure 40: Attractions (2017-2021), by Origin of Visitors (in %)**




***Location***

The majority of attractions surveyed were located in in Peja, Prizren, Prishtia and Gjakova (see Figure 41).

**Figure 41: Attractions, by Top Five Locations, 2021 (in %)**



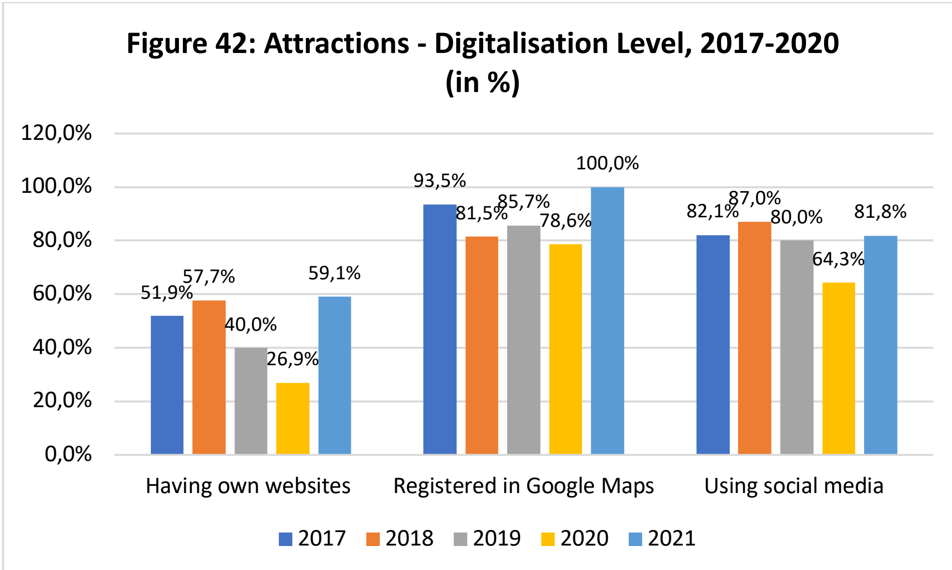

***Employment***

In 2021, attractions were dominated by man workers with 57.1 percent. All workers employed in attractions worked full time in that year. Non-majority communities constituted only 3.3 percent of all workers. As per age group, 50.8 percent were between 25-44. For more detailed results and to compare with the data from the previous years, see Table 8.

| Table 8: Employment Demographics (Attractions) | | | | | | |
|---|---|---|---|---|---|---|
| **2017** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 73.6% | | | 26.4% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 60.0% | | 13.6% | 24.4% | 2.0% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 84.3% | 13.2% | 0.9% | 0.9% | 0.6% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 13.7% | 28.9% | 36.5% | 14.4% | 5.3% | 1.1% |
| **2018** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 55.8% | | | 44.2% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 46.9% | | 0.4% | 51.6% | 1.1% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 96.4% | 0.0% | 0.9% | 0.9% | 1.8% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 4.8% | 22.1% | 47.1% | 19.2% | 6.7% | 0.0% |
| **2019** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 47.3% | | | 52.7% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 47.8% | | 8.0% | 33.6% | 10.6% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 96.7% | 0.7% | 0.4% | 0.7% | 1.5% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 5.9% | 26.2% | 38.7% | 18.4% | 10.5% | 0.3% |
| **2020** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 45.6% | | | 54.4% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 45.6% | | 0.0% | 54.4% | 0.0% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 97.1% | 0.8% | 0.4% | 0.4% | 1.3% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 7.3% | 21.5% | 35.0% | 23.6% | 12.6% | 0.0% |
| **2021** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 57.1% | | | 42.9% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 57.1% | | 0.0% | 42.9% | 0.0% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 95.2% | 1.1% | 1.1% | 0.5% | 2.1% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 3.9% | 17.2% | 33.6% | 36.7% | 7.0% | 1.6% |

***Digitalisation***

The findings reveal that 59.1 percent had their own websites in 2021, while 100.0 percent of all attractions were registered in Google Maps. Moreover, 81.8 percent claimed to have used social networks for promotional purposes. To make comparisons with the previous years, see Figure 42.




## 3.5. Tour Operators

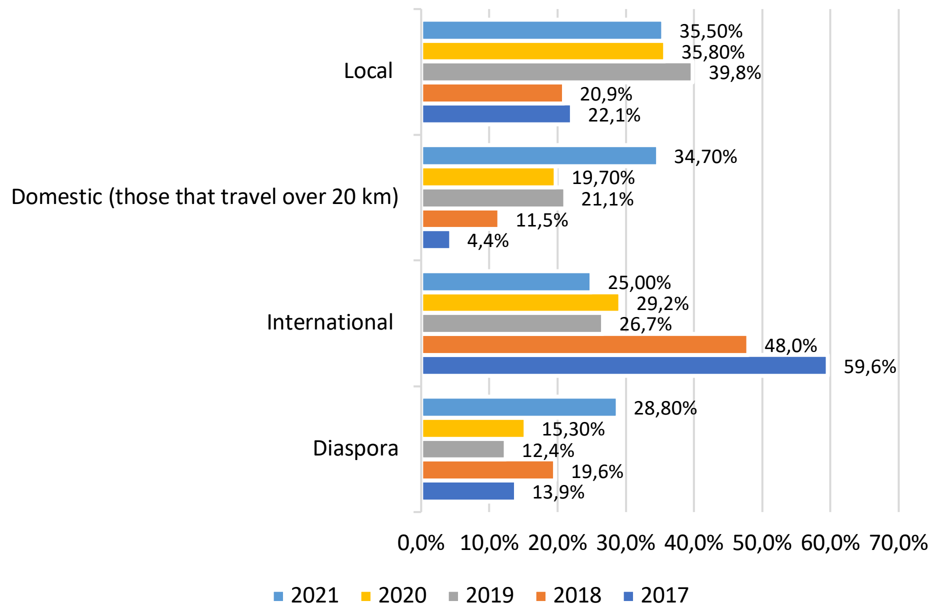
***Tours, Prices, and Turnover***

In 2021, 59.1 percent of tour operators worked with both outbound and inbound tourists, while the rest worked with inbound tourists only. In 2020, those that worked with inbound tourists dominated with around 70 percent. In 2021, the total number of tours sold stood at 2,172, compared to 1,854 in 2020

***Composition of Visitors***

In 2021, the clientele of tour operators mostly consisted of locals (35.5 percent) and domestic (34.7 percent). For more information and to compare with other years, see Figure 43.

**Figure 43: Tour Operators - Visitors (2017-2021), by Origin (in %)**




***Employment***

The following are some employment demographics for tour operators. The average number of employees working for tour operators was 4.0 in 2021, compared to 2.42 in 2020. The findings reveal that 52.1 percent of tour operator workers were men in 2021. 61.8 percent were engaged on a full-time basis. All workers were Kosovo Albanians. Those aged between 25-44 comprised the majority of workers, 80.8 percent. For more information and to compare with other years, see Table 9.

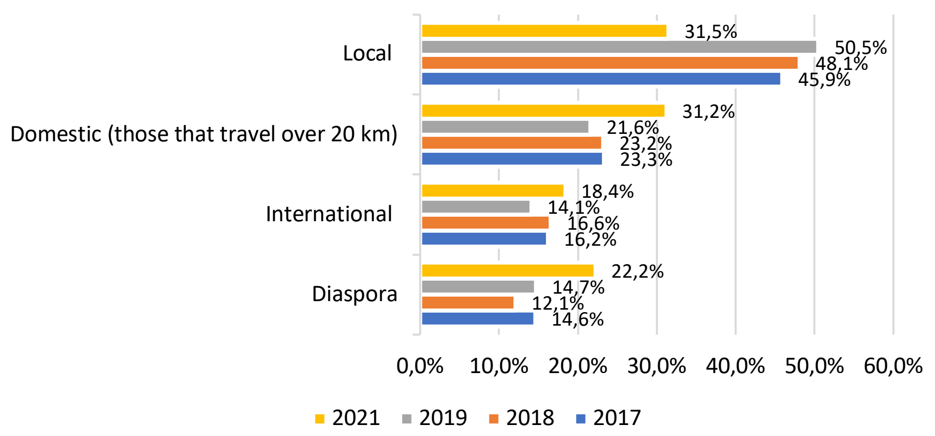
| Table 9: Employment Demographics (Tour-Operators) | | | | | | |
|---|---|---|---|---|---|---|
| **2017** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 59.2% | | | 40.8% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 23.7% | | 35.5% | 26.0% | 14.8% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 96.7% | 0.0% | 0.8% | 0.8% | 0.0% | 1.7% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 18.9% | 52.4% | 24.4% | 3.7% | 0.6% | 0.0% |
| **2018** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 69.9% | | | 30.1% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 33.3% | | 36.6% | 16.3% | 13.7% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 95.3% | 2.0% | 2.0% | 0.0% | 0.7% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 22.2% | 56.7% | 15.6% | 4.4% | 1.1% | 0.0% |
| | | | | | | |
| **2019** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 52.9% | | | 47.1% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 40.0% | | 12.9% | 38.8% | 8.2% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 97.6% | 0.0% | 1.2% | 0.0% | 1.2% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 16.4% | 58.2% | 20.9% | 3.0% | 1.5% | 0.0% |
| **2020** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 44.0% | | | 56.0% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 40.5% | | 3.6% | 48.8% | 7.1% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 98.8% | 0.0% | 1.2% | 0.0% | 0.0% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 14.7% | 57.4% | 22.1% | 2.9% | 2.9% | 0.0% |
| **2021** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 52.1% | | | 47.9% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 30.9% | | 21.3% | 30.9% | 17.0% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 100.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 10.8% | 48.3% | 32.5% | 8.3% | 0.0% | 0.0% |

## 3.6. National Events/Festivals

***Number of Visitors and their Characteristics***

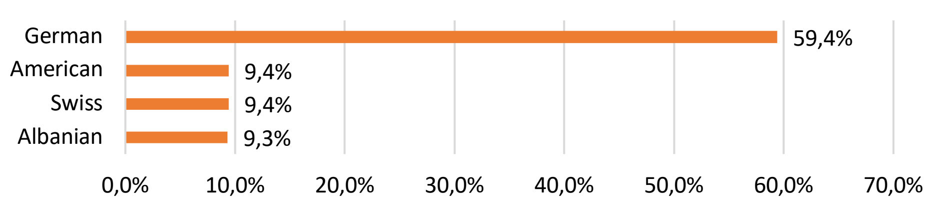
In 2021, national events/festivals were dominated by locals with 31.5 percent, followed by domestic visitors with 31.2 percent, diaspora with 22.2 percent, and internationals with 18.4 percent. To compare with the previous years, see Figure 44. Note that there were no festivals and national events in 2020 due to the pandemic measures, hence that year is not included in the analysis.

**Figure 44: National Events/Festivals - Visitors (2017-2021), by Origin (in %)**




In 2021, the majority of national events/festivals were German (59.4 percent), American (9.4 percent), Swiss (16.1 percent), and Albanian (9.3%). For more information, refer to Figure 45.

**Figure 45: National Events/Festivals, by Nationality of Visitors, 2011 (in %)**




***Prices***

The ticket price for a festival in 2021 averaged at 5.9 EUR, compared to 7 EUR in 2019. When asked about the average expenditures of visitors per night in 2021, the representatives of events/festivals said that it was 19.8.6 EUR, compared to 13.6 EUR in 2019.

## ***Employment***

The majority (74.6 percent) of those employed in national events and festivals in 2021 were men. Those working part-time accounted for 15.8 percent of all employed. Non-Kosovo Albanians comprised a negligible percentage (2.6 percent). Those aged between 15-34 constituted 66.1 percent of all workers. For more information and to make comparisons with the other years, see Table 10.

**Table 10: Employment Demographics (Events/Festivals)**

| | | | | | | |
|---|---|---|---|---|---|---|
| **2017** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 70.6% | | | 29.4% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 25.7% | | 44.9% | 9.1% | 20.3% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 98.9% | 0.5% | 0.3% | 0.1% | 0.5% | 0.1% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 18.5% | 59.6% | 20.3% | 1.5% | 0.2% | 0.0% |
| **2018** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 70.9% | | | 29.1% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 26.7% | | 44.2% | 11.3% | 17.8% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 96.1% | 0.5% | 0.9% | 1.7% | 0.8% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 35.9% | 58.4% | 5.6% | 0.0% | 0.0% | 0.0% |
| **2019** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 68.4% | | | 31.6% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 51.0% | | 17.5% | 22.4% | 9.2% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 98.7% | 0.3% | 0.3% | 0.5% | 0.2% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 31.2% | 55.2% | 10.2% | 3.0% | 0.4% | 0.0% |
| **2021** | | | | | | |
| **Gender** | **Men** | | | **Women** | | |
| | 74.6% | | | 25.4% | | |
| **Full vs Part Time** | **Full-Time (Men)** | | **Part-Time (Men)** | **Full-Time (Women)** | **Part-Time (Women)** | |
| | 61.9% | | 12.7% | 22.3% | 3.1% | |
| **Ethnicity** | **Kosovo Albanians** | **Kosovo Serbs** | **Turks** | **RAE** | **Bosnians** | **Others** |
| | 97.4% | 0.0% | 0.7% | 1.2% | 0.7% | 0.0% |
| **Age Group** | **15-24** | **25-34** | **35-44** | **45-54** | **55-64** | **65<** |
| | 30.8% | 35.3% | 20.3% | 11.3% | 2.1% | 0.3% |

## 4. Economic Impact

This section examines the economic impact of accommodations, Airbnb apartments, and restaurants in 2021 and compares the overall results with the previous years. [6] Specifically, it estimates the overall revenue generated by each actor. In addition, it also provides the overall number of workers employed. This approach could not be extended to include the other two supply-side actors of the value chain due to their unknown population size.

### 4.1. Accommodations

The starting point of this economic analysis was the total number of available room-nights per year. This figure was multiplied by the average occupancy rate to generate the total number of occupied rooms per year. Since this report focuses on tourism, locals were subtracted. The average prices (adjusted by taking into account the superior rooms as well) have been multiplied by the total number of occupied rooms per year, excluding locals. This produced an estimated accommodation revenue from the sample. To make it representative, a gross up factor was applied. The overall sector revenue in 2021 amounted to **66.4 mil. EUR.** The same approach was used to generate the revenue of Airbnb apartments as well. The estimated revenue by this category of accommodations in 2021 reached **19.8 mil. EUR.** For more information on the main steps of the approach, see Table 11 and Table 12.

| Table 11: Economic Impact – Accommodations (Excluding Airbnb Apartments) | | | | | |
|---|---|---|---|---|---|
| (a) Number of Available Room-Nights per Year* | | | | | |
| Single Room | Double Room | Triple Room | Quad Room | Vila | Other |
| 344,560 | 713,210 | 185,785 | 60,225 | 48,180 | 95,265 |
| (b) Average Occupancy Rate (%) | | | | | |
| 53.10% | | | | | |
| (c) Number of Room-Nights Occupied per Year (a*b) | | | | | |
| Single Room | Double Room | Triple Room | Quad Room | Vila | Other |
| 182,961 | 378,715 | 98,652 | 31,979 | 25,584 | 50,586 |
| (d) Proportion of Room-Nights Occupied by Locals (%) | | | | | |
| 11.40% | | | | | |
| (e) Number of Room-Nights Occupied per Year, Excluding Locals (c-d) | | | | | |
| Single Room | Double Room | Triple Room | Quad Room | Vila | Other |
| 162,104 | 335,541 | 87,406 | 28,334 | 22,667 | 44,819 |
| (f) Average Prices (€)** | | | | | |
| 8,048,452 | 21,743,060 | 5,908,614 | 2,541,543 | 2,356,240 | 6,102,099 |
| Single Room | Double Room | Triple Room | Quad Room | Vila | Other |

[6] In the case of accommodations with restaurants, one portion of the revenue was allocated to accommodations and the other was allocated to restaurants. The division was made based on the declarations provided in the survey.

| | | | | | |
|---|---|---|---|---|---|
| 49.65 | 64.8 | 67.6 | 89.7 | 103.95 | 136.15 |
| **(g) Estimated Accommodation Revenue from the Sample (€) Σ (e*f)** | | | | | |
| 46,700,008 | | | | | |
| **(h) Gross-Up Factor/Coefficient** | | | | | |
| **1.423** | | | | | |
| **(i) Estimated Accommodation Sector Revenue (€) (g*h)** | | | | | |
| **66,454,112** | | | | | |

*It excludes Airbnb apartments
**Adjusted by taking into account the prices of superior rooms

| Table 12: Economic Impact – Airbnb Apartments | | | | | |
|---|---|---|---|---|---|
| **(a) Number of Available Room-Nights per Year*** | | | | | |
| **Single Room** | **Double Room** | **Triple Room** | **Quad Room** | **Vila** | **Other** |
| 9,490 | 14,965 | 1,460 | 1,460 | 11,680 | 5,840 |
| **(b) Average Occupancy Rate (%)** | | | | | |
| 62.90% | | | | | |
| **(c) Number of Room-Nights Occupied per Year (a*b)** | | | | | |
| **Single Room** | **Double Room** | **Triple Room** | **Quad Room** | **Vila** | **Other** |
| 5,969 | 9,413 | 918 | 918 | 7,347 | 3,673 |
| **(d) Proportion of Room-Nights Occupied by Locals (%)** | | | | | |
| 9.80% | | | | | |
| **(e) Number of Room-Nights Occupied per Year, Excluding Locals (c-d)** | | | | | |
| **Single Room** | **Double Room** | **Triple Room** | **Quad Room** | **Vila** | **Other** |
| 5,384 | 8,491 | 828 | 828 | 6,627 | 3,313 |
| **(f) Average Prices (€)**** | | | | | |
| **133,259.6** | **371,459.9** | **23,193.6** | **45,558.8** | **265,069.7** | **231,936.0** |
| **Single Room** | **Double Room** | **Triple Room** | **Quad Room** | **Vila** | **Other** |
| 24.8 | 43.8 | 28.0 | 55.0 | 40.0 | 70.0 |
| **(g) Estimated Accommodation Sector Revenue from the Sample (€) Σ (e*f)** | | | | | |
| 1,070,478 | | | | | |
| **(h) Gross-Up Factor/Coefficient** | | | | | |
| **18.5** | | | | | |
| **(i) Estimated Accommodation Sector Revenue (€) (g*h)** | | | | | |
| **19,803,836** | | | | | |

## 4.2. Restaurants

Similar to the case of accommodations, the number of client visits in 2021 was taken as an initial figure. After excluding locals, this figure was multiplied by the average price of food and drinks per visit on the hand, and the average price of drinks only, on the other hand. This produced the estimated revenue generated by the sampled restaurants. After applying the gross up factor, the overall estimated restaurant revenue for 2020 was generated, which stands at **155.3 mil. EUR.**

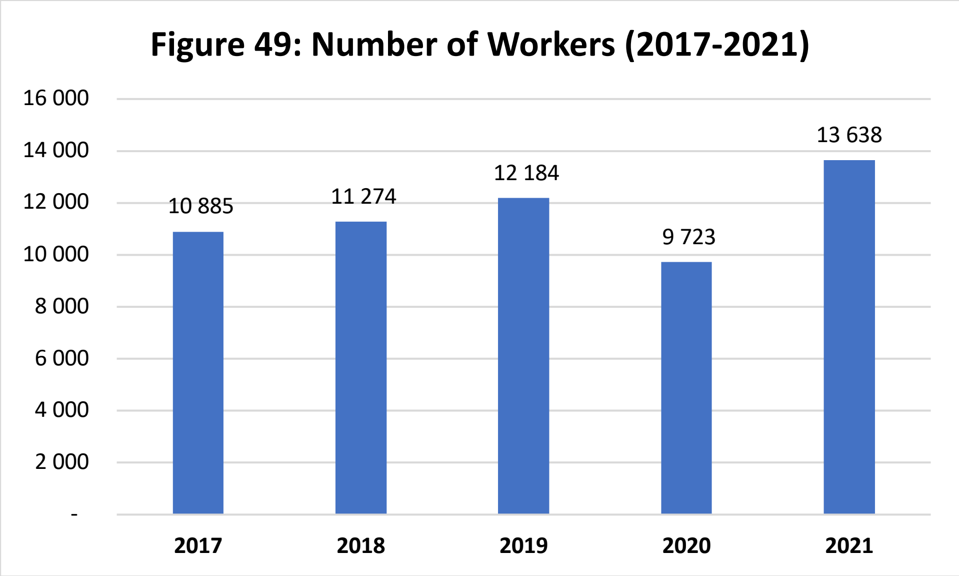
| Table 13: Economic Impact – Restaurants | |
|---|---|
| **(a) Number of Client Visits per Year** | |
| 23,230,388 | |
| **(b) Proportion of Locals (%)** | |
| 54.80% | |
| **(c) Number of Client Visits per Year, Excluding Locals (a-b)** | |
| 10,500,136 | |
| **(d) Food and Drinks Towards Total Revenue (%)** | |
| **Food and Drinks** | **Drinks Only** |
| 59.9% | 40.1% |
| **(e) Average Price (€)** | |
| **Food and Drinks** | **Drinks Only** |
| 9.0 | 3.6 |
| **(f) Total Estimated Revenue from the Sample (€) (c*d*e)** | |
| **Food and Drinks** | **Drinks Only** |
| | |
| 56,606,231 | 15,157,996 |
| **(g) Gross-Up Factor/Coefficient** | |
| **2.1644** | |
| **(h) Estimated Restaurants Sector Revenue (€) Σ(f*g)** | |
| **155,326,491** | |

## 4.3. Overall Estimated Revenue and Employment

The overall estimated revenue from accommodations, Airbnb apartments, and restaurants in 2021 increased by 93.8 percent compared to 2020, continuing the positive trend that had been occurring before the pandemic. The most notable increase was noted in Airbnbs. For more detailed information, see Table 13.

| Table 13: Estimated Revenue (€), 2017-2021[7] | | | | |
|---|---|---|---|---|
| **Year** | **Accommodations** | **Airbnb Apartments** | **Restaurants** | **Total** |
| 2017 | 37,911,108 | 6,249,743 | 95,521,337 | **139,682,188** |
| 2018 | 42,384,201 | 7,460,332 | 140,712,183 | **190,556,716** |
| 2019 | 51,761,870 | 7,808,561 | 158,555,621 | **218,126,052** |
| 2020 | 20,870,416 | 2,309,075 | 101,450,527 | **124,630,018** |
| 2021 | 66,454,112 | 19,803,836 | 155,326,491 | **241,586,460** |

The overall number of workers in 2021 in the three tourism categories altogether stood at 13,638, higher by 56.1 percent when compared to 2020 (see Figure 49).




## 4.4. Overall Estimated Revenue and Employment

Labour productivity, measured as revenue per employee, marked an increase in the three main categories in the past five years. In restaurants, the increase was 15.1 percent, from 12,617 EUR in 2017 to 14,528 EUR in 2021; in accommodations and restaurants, 12.7 percent, from 19,931 EUR in 2017 to 22,475 EUR in 2021; and in accommodations, 18.1 percent, from

[7] In the case of accommodations with restaurants, one portion of the revenue was allocated to accommodations and the other was allocated to restaurants. The division was made based on the declarations provided in the survey.

28,650 EUR in 2017 to 33,856 EUR in 2021. Salaries increased, too, in all categories. In restaurants, salaries increased by 22.8 percent, accommodations with restaurants by 11.8 percent, and accommodations only by 31.3 percent (see Figure 50)

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