PROMOTING PRIVATE SECTOR EMPLOYMENT

KOSOVO TOURISM SUPPLY SIDE SURVEY 2023

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RIINVEST INSTITUTI PËR HULUMTIME ZHVILLIMORE INSTITUTE FOR DEVELOPMENT RESEARCH

Prepared by:

Promoting Private Sector Employment (PPSE)

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Contents

1. Introduction

This report presents the findings of the annual PPSE survey with supply-side actors in the tourism sector in Kosovo, including accommodations, restaurants, attractions, tour operators, and more. The PPSE tourism supply-side survey was commissioned for the first time in 2018, covering 2017, and this is the seventh consecutive survey since then. The report primarily interprets the findings of 2023 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 reutilization of attractions, promotional activities in the international arena, and the entire sector's reorganization – all with the aim of generating new jobs in Kosovo.

Having accurate and up-to-date tourism data, as well as general market information, is key to the successful implementation of 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 valuable for policymakers, tourism service providers, and other stakeholders 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 analyzes 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 of which are very important for obtaining the intended information.

2.2. Enumerators

Around 30 enumerators have been recruited to conduct interviews with 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, along with some advice about the interviewing process. Additionally, 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 only those entities accessible to tourists. To compile the list of core supply-side actors, various online platforms were consulted. One priority was to interview the same entities as in the previous periods for credible and reliable year-on-year comparisons. Below is an explanation of how each population group was identified and the determined sample size.

- Tourist-accessible accommodations (including Airbnbs) were identified on Booking.com, Trivago, AirBnB, and Facebook; 137 of the identified accommodations were interviewed; 68 were accommodations only, whereas 69 were accommodations with restaurants.
- Restaurants were found on TripAdvisor and Gjirafa; 233 were interviewed.
- 19 attractions, 17 tour operators and 15 festivals/national events drawn from a list provided by PPSE were interviewed.
- In total, 421 face-to-face interviews were conducted.

Table 1 provides a comparison with previous years. It should be noted that several service providers interviewed in the previous years could not be interviewed in 2023, either because they closed their business or did not agree to participate in the survey. Some others, now listed on 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)	Number of Interviews (2023)
Accommodations with Restaurants	88	89	79	72	65	69
Accommodations	89	99	95	87	77	68
Restaurants	205	229	247	263	211	233
Attractions	32	17	30	26	22	19
Tour Operators	18	29	17	17	23	17
Festivals/National Events	36	32	31	-	24	15

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 2023 took place during August and September 2023. Each interview lasted about 30-40 minutes.

2.5. Data Processing and Analysis

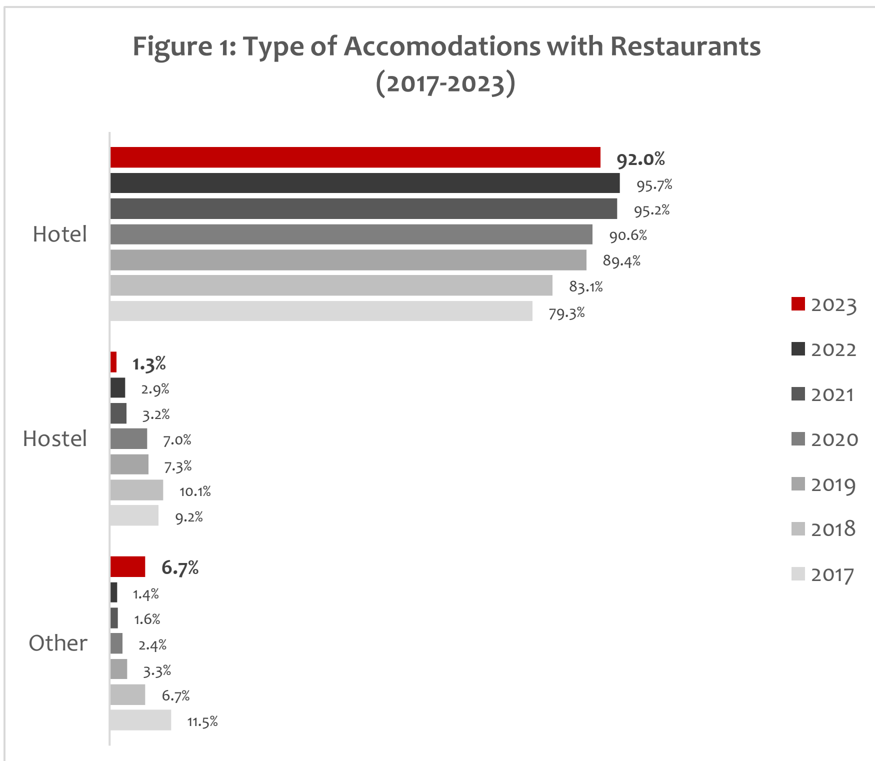
The collected data were inputted into Excel data sheets prepared specifically for this survey. Subsequently, the data were transferred to SPSS (software package), where they underwent further processing and analysis. All specification errors, checking errors, and tabulation errors were addressed before the final findings were generated.

3. Survey Findings

This section unveils the main findings generated from the survey with the core tourism supply-side actors, encompassing accommodations with restaurants, accommodations, attractions, tour operators, and festival/national events for 2023. 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, the 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]

The General Structure of Accommodations with Restaurants



In 2023, hotels accounted 92 percent of all Accommodations with Restaurants. The remainder consisted of hostels (1.3 percent) and other types of accommodation (6.7 percent). As seen in the Figure 1, historically hotels have been the predominant in this category, with the highest being 95.7% in 2022, and lowest at 79.3 in 2017. On the other hand, hostels and other accommodation types have had relatively a smaller share over the year, with slight percentage shifts from 2017 to 2023.

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

Number of Rooms, Prices, and Occupancy Rate

In 2023, the average number of single standard rooms in Accommodation with Restaurants was 12.8. For double standard rooms, the average was higher, at 15.9. The total number of single standard rooms (adjusted to include the whole population) amounted to 775, whereas the total number of double standard rooms was 1,673. Moreover, as Table 2 shows, there is a shift in the average of prices between 2022 and 2023. For double standard rooms, the average price increased from 56.8 EUR in 2022 to 60.9 EUR in 2023 whereas triple standard rooms showed a smaller price increase, rising from 78.3 EUR to 79.3 throughout the same period of time. For information about the other types of rooms and for comparisons with previous years, refer to Table 2.

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

		2017	2018	2019	2020	2021	2022	2023
Single Standard Rooms	Avg. # of Rooms	10.9	11.1	9.2	10.6	9.8	10.2	12.8
	Avg. Price (EUR)	40.1	39.4	39.4	39.3	45.0	50.3	50.4
	Total # of Rooms	1,035	1,109	1,171	1,015	824	754	775
Double Standard Rooms	Avg. # of Rooms	13.2	14.0	11.3	12.9	16.0	13.6	15.9
	Avg. Price (EUR)	45.8	48.6	54.2	51.1	53.5	56.8	60.9
	Total # of Rooms	1,671	1,870	1,504	1,477	1,727	1,661	1,673
Triple Standard Rooms	Avg. # of Rooms	4.2	4.4	6.8	6.6	6.0	8.6	5.2
	Avg. Price (EUR)	53.1	52.8	69.6	61.2	75.0	78.3	79.3
	Total # of Rooms	274	335	636	522	456	790	419
Quad Standard Rooms	Avg. # of Rooms	2.6	2.4	2.8	2.1	3.2	3.8	2.4
	Avg. Price (EUR)	49.5	68.8	91.5	65.7	118.1	125.1	117.9
	Total # of Rooms	62	63	77	58	130	150	148

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 previous years, see Table 3.

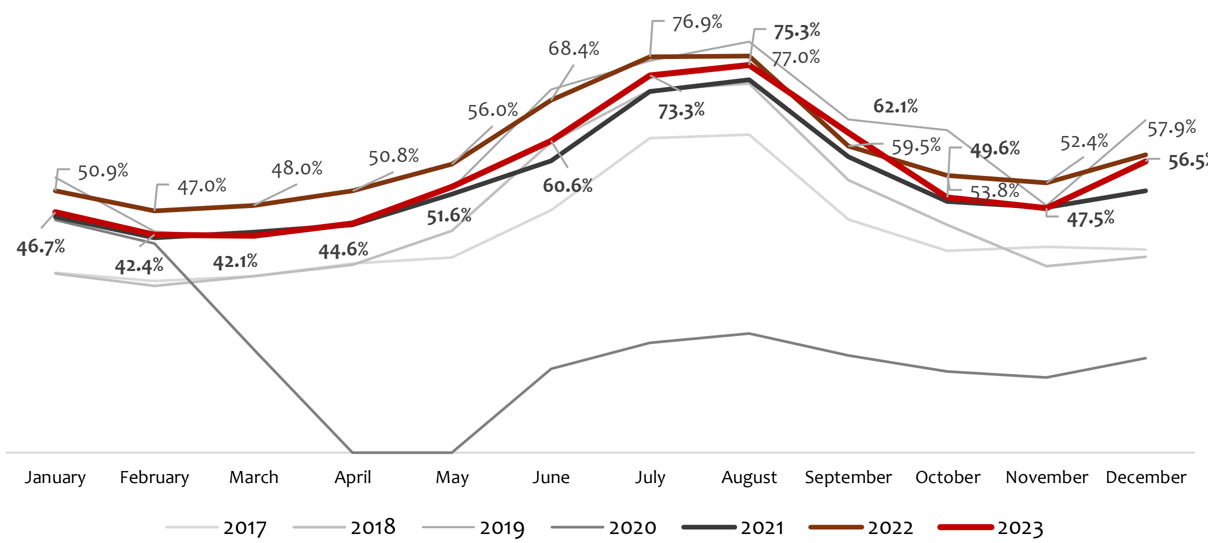
Table 3: Accommodations with Restaurants - Standard Rooms, by Main Regions

		Prishtina Region (2019)	Prishtina Region (2021)	Prishtina Region (2022)	Prishtina Region (2023)	Peja Region (2019)	Peja Region (2021)	Peja Region (2022)	Peja Region (2023)	Prizren Region (2019)	Prizren Region (2021)	Prizren Region (2022)	Prizren Region (2023)
Single Standard Rooms	Avg. Price (EUR)	52.2	52.5	60.1	63.9	34.8	41.1	44.3	46.3	27.8	39.4	46.8	44.2
	Total # of Rooms	516	498	512	436	94	150	144	132	225	135	145	243
Double Standard Rooms	Avg. Price (EUR)	66.1	68.8	72.5	73.7	39.9	49.1	52.1	59.53	37.3	46.2	57.3	59.4
	Total # of Rooms	888	945	899	835	218	261	246	230	368	456	488	439

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

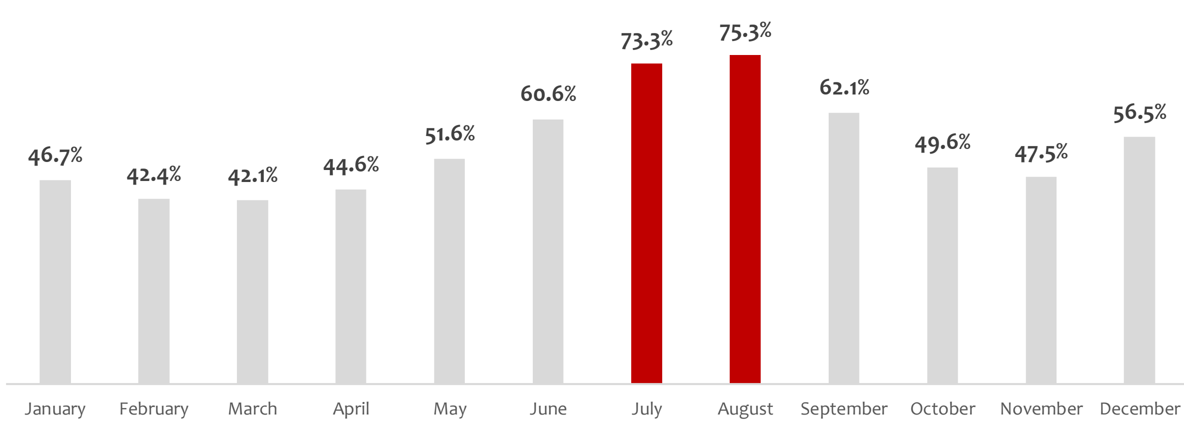
The occupancy rate in 2023 shows a steady trend, averaging around 56.5 percent at the end of the year, with monthly fluctuations. March had the lowest rate (42.1 percent) while the highest rate was recorded in August (73.3 percent).

Figure 3: Occupancy Rate (%) for Accommodations and Restaurants (2017-2023, monthly)

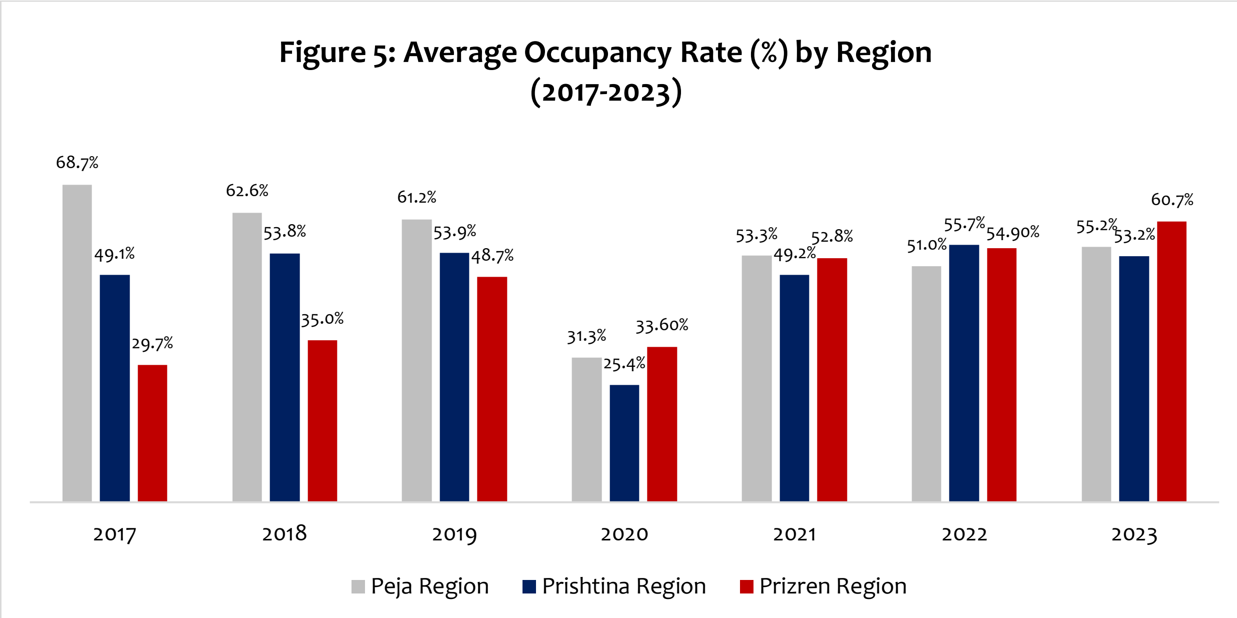


During 2023 a distinct seasonal trend is observed, with peak occupancy rates during the summer months and minimal rates in the winter months. For more details, see Figure 4.

Figure 4: Occupancy Rate (%) for Accommodations and Restaurants throughout all months in 2023



The average occupancy rate seems to be similar across the main regions in 2023. For detailed information, see Figure 5.



<u>Guests and their Behaviour</u>

The survey also examines the structure of guests and their duration of stay. In 2023, international guests constituted 4.0 percent of the overall visitors; diaspora, 23.4 percent; domestic visitors (with more than 20 km of travel), 15.6 percent; and local guests (less than 20 km of travel), 19.0 percent. For comparisons with previous years, refer to Figure 6. The average duration of stay in 2023 was 3.2 nights, which is higher compared to 2022 (2.9 nights).

Figure 6: Guest Composition by Origin (%) for Accommodations and Restaurants (2017-2023)

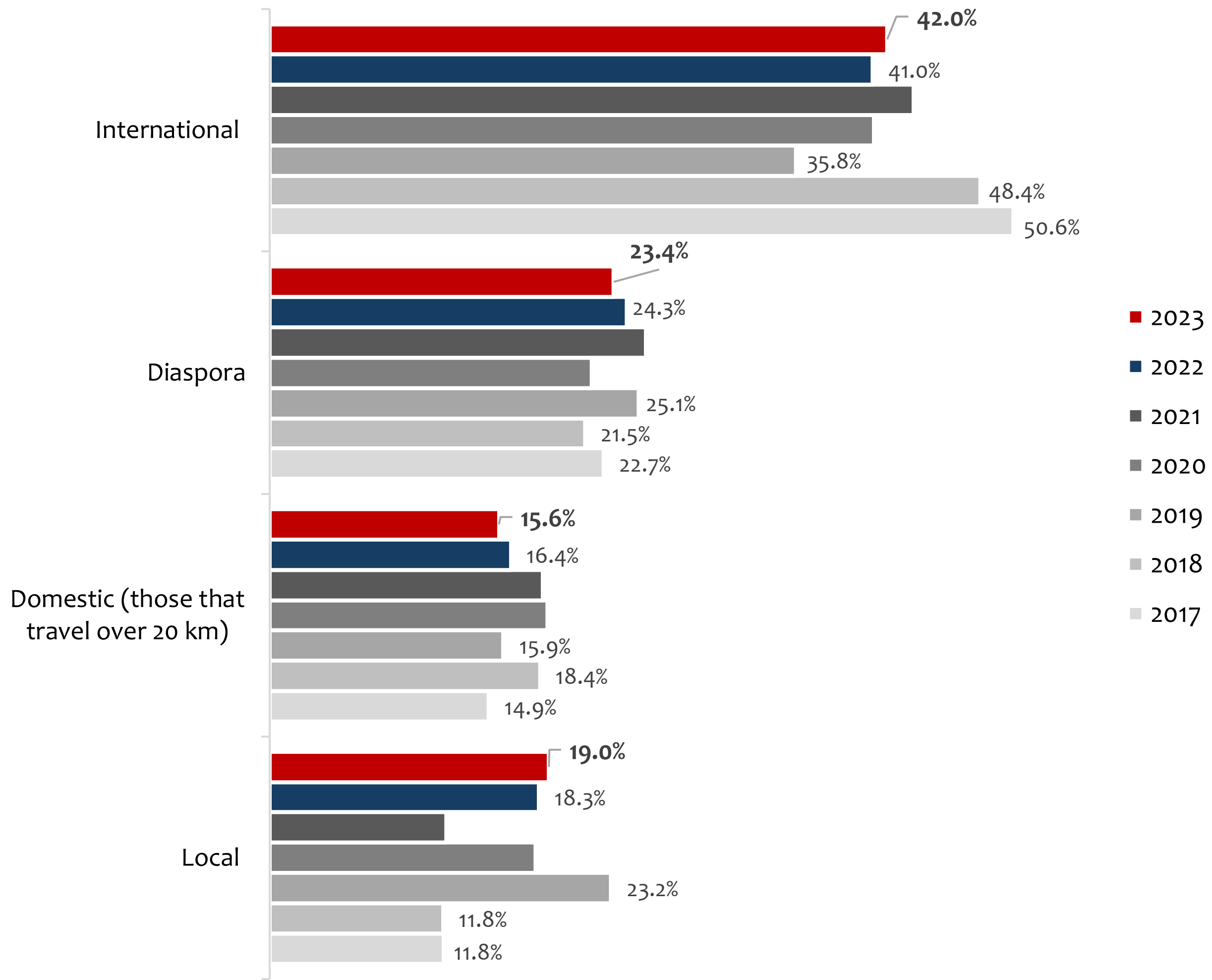
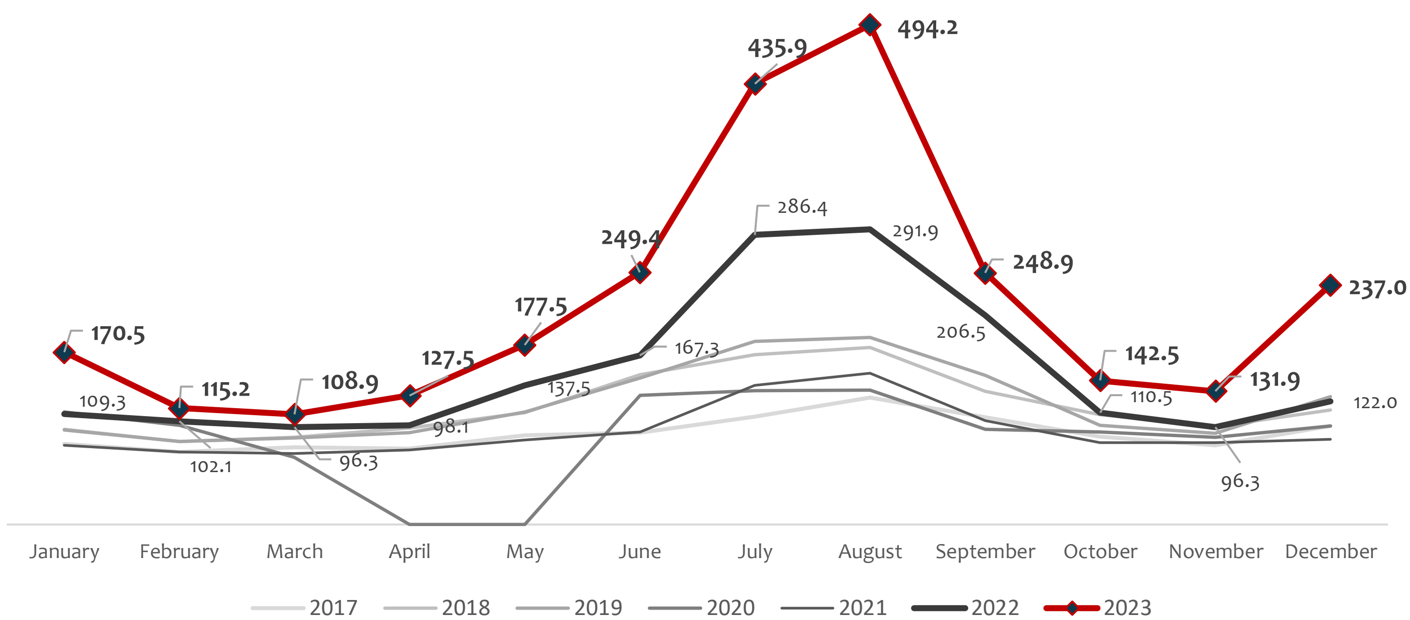


Figure 7 depicts the average monthly number of guests in Accommodation with Restaurants category from 2017 to 2023, with a focus particularly in the summer months. As seen in the figure below, in 2023 the average number of guests per day in this category of accommodations increased at 492.2 guests per day in August, far exceeding the 291.9 guests in August 2022. Figure 6 visually presents the detailed averages for the past seven years.

In 2023, the share of guests who came for food and drinks increased at 62.4 percent up from 61.8 percent in 2022. Furthermore, the average bill for this category in 2023 increased to 15.73EUR, up from 13.9 EUR in the previous year. On the other hand, the proportion of those who came for drinks only decreased slightly at 37.54 percent in 2023, compared to 38.0 percent in 2022, despite the increase in the average bill from 4.1 EUR in 2022 to 5.5 EUR in 2023.

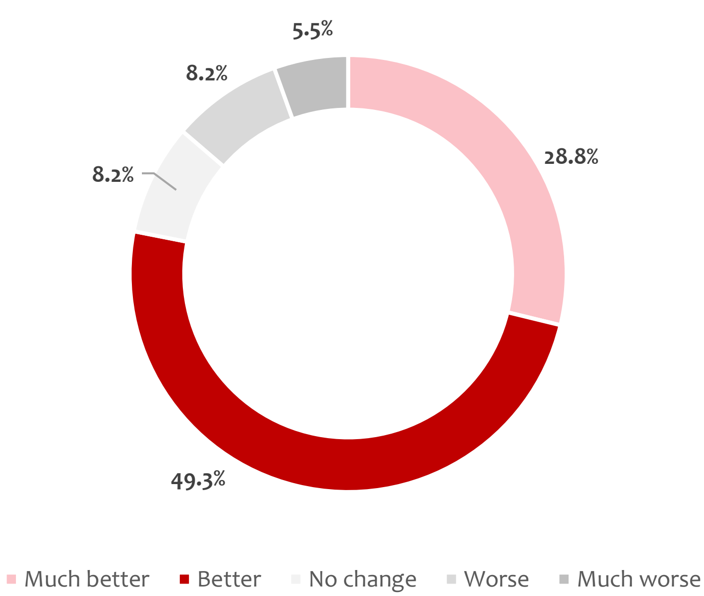
Figure 7: Average Monthly Guests in Accommodations with Restaurants (2017-2023)



Turnover and Investments

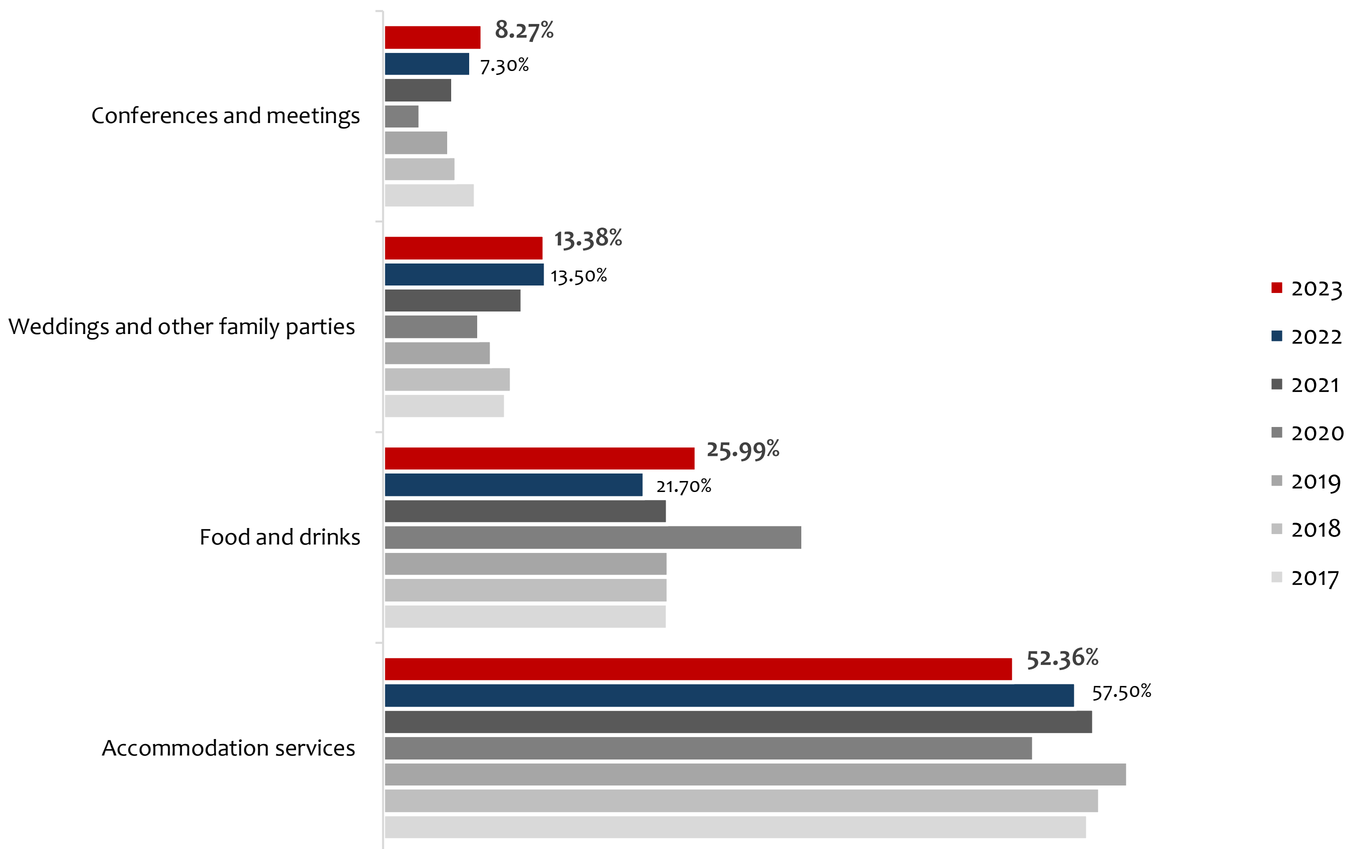
In terms of turnover, the overwhelming majority – 78.8 percent – reported having performed 'better' or 'much better' compared to 2022. 8.2 percent declared to have had no change, and only 8.2 percent said to have had a "much worse" performance (see Figure 8).

Figure 8: Turnover Changes Compared to 2022 in Accomodations with Restaurants (%)

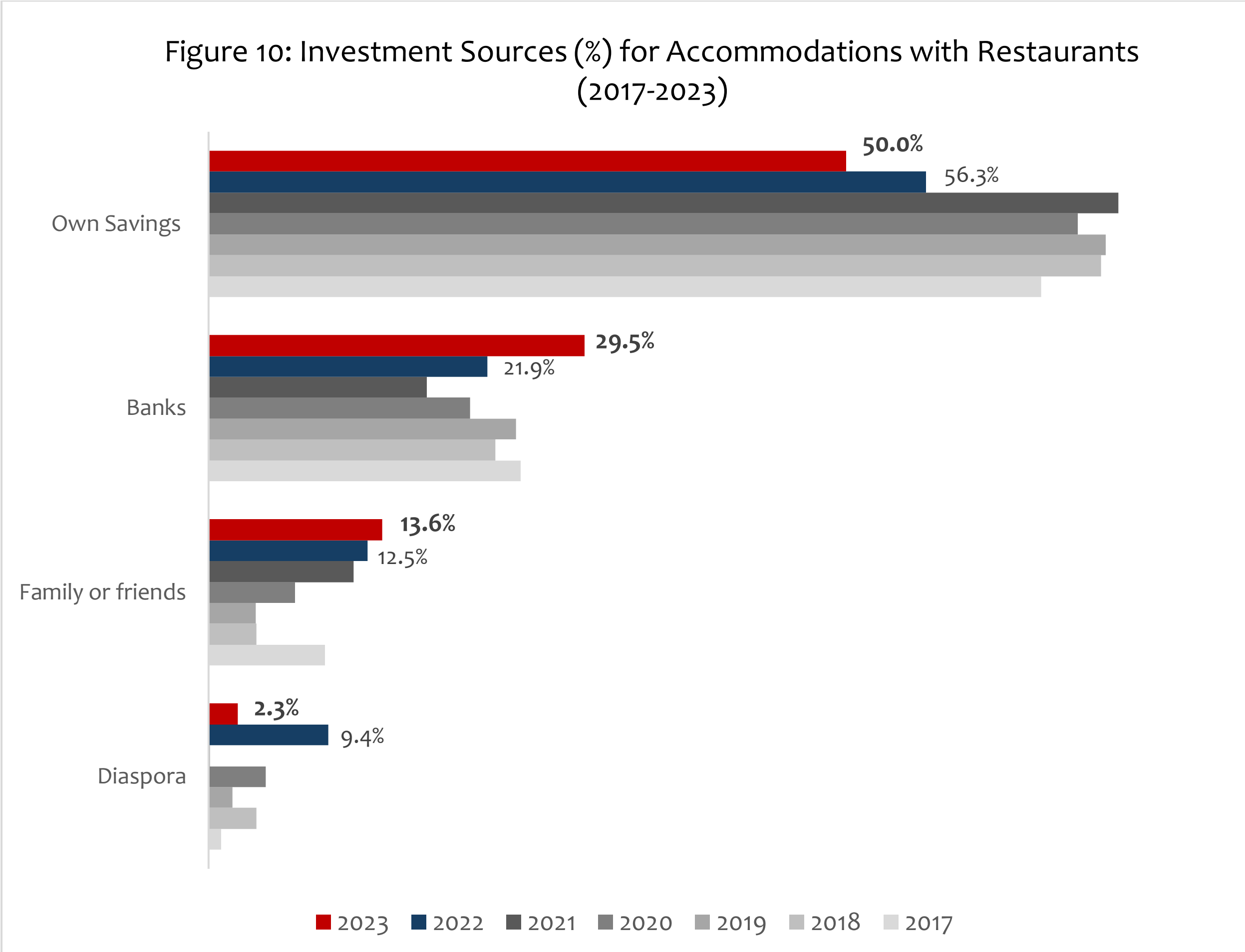


Further analysis reveals that in 2023, ‘*accommodation services*’ contributed 52.3 percent towards the overall turnover; ‘*food and drinks*’ 25.9 percent; ‘*weddings and other family parties*’ 13.3 percent, and ‘*conference and meetings*’ 8.2 percent. To draw comparisons with previous years, see Figure 9.

Figure 9: Turnover by Service Type (%) for Accommodations with Restaurants (2017-2023)



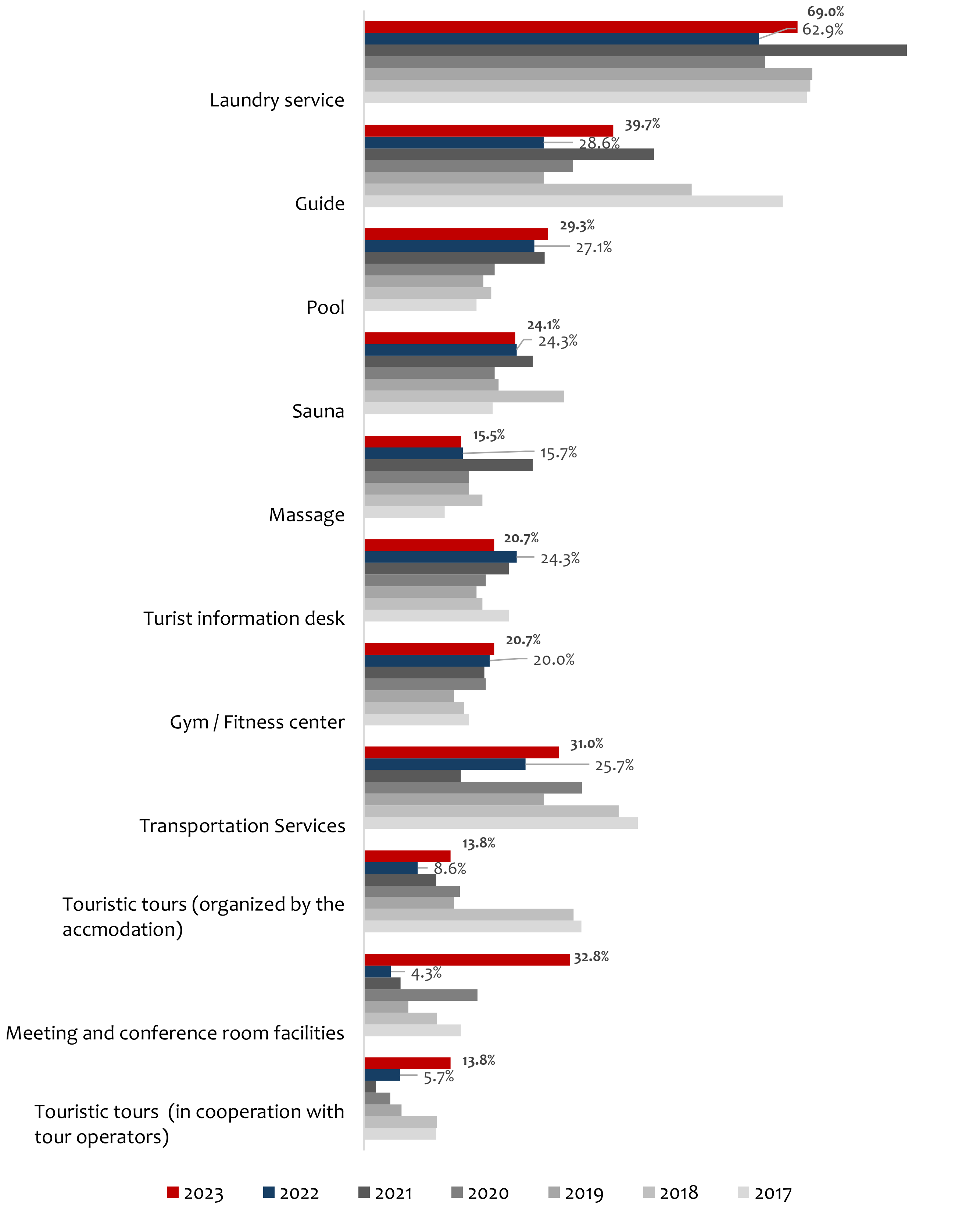
In 2023, 53.9 percent of the surveyed Accommodations with Restaurants declared to have made some investment, compared to 27.9 percent in 2022. In 2023, their investments were mostly financed through own savings (50.0 percent) and banks (29.5 percent). To see other investment sources and compare them with other years, refer to Figure 10.



Services Offered

When asked about the services offered in 2023, the most frequent answers turned out to be: laundry services (69.0 percent of cases), guide (39.7 percent), and pool (29.3 percent). For the other services offered by Accommodations with Restaurants in 2023 and those offered in the previous years, see Figure 11.

Figure 11: Services Offered for Accomodations with Restaurants 2017-2023 (in % of Cases)

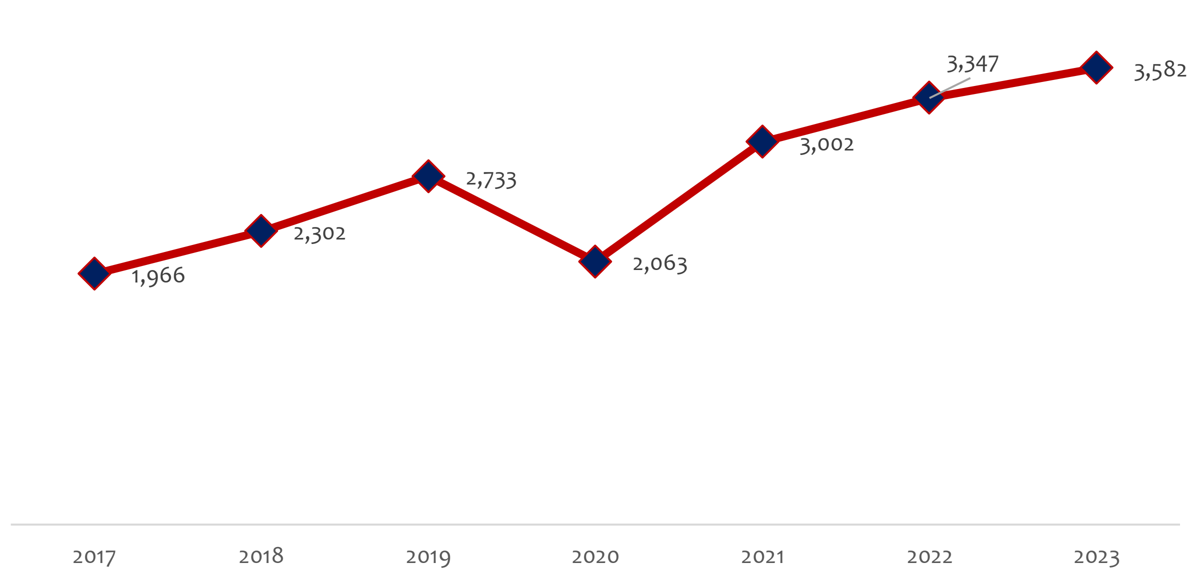


Employment

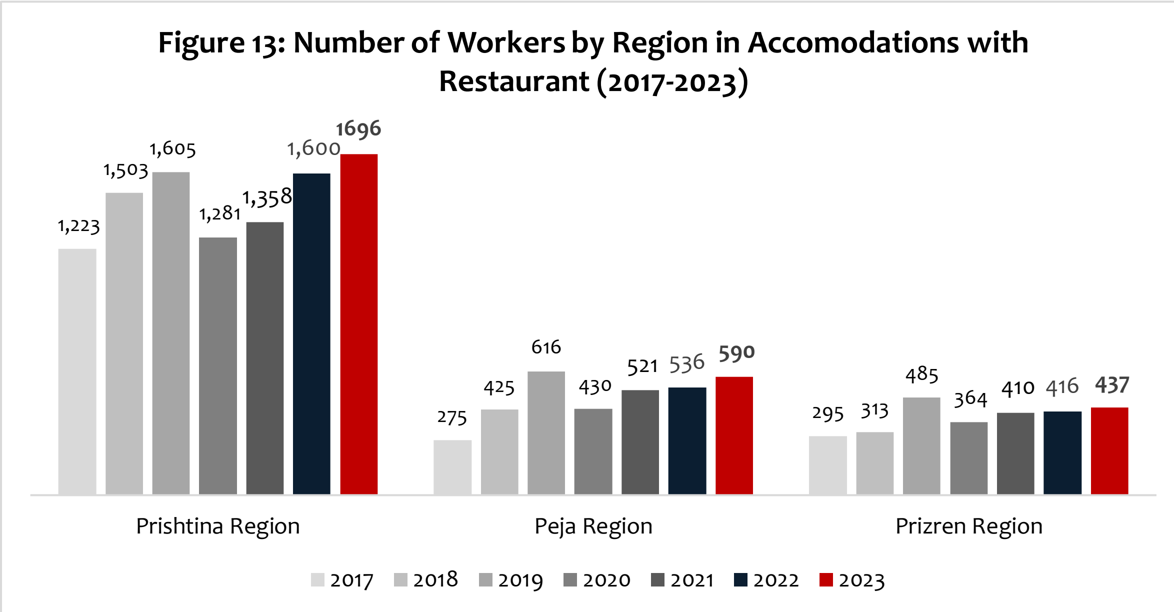
Recognizing the importance of the tourism sector in employment, extra efforts have been dedicated to this sub-section. To generate the total number of workers in the category of accommodations with restaurants, a population-based weighting approach was employed. The sample data were multiplied by a gross-up factor of 1.423 – meaning that the population includes 42.3 percent more entities. It is crucial to note that when calculating the factor, all Kosovo Accommodations with Restaurants listed on Booking.com, TripAdvisor, Gjirafa, and 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, was applied to Accommodations (without Restaurants) and Restaurants. This approach has been consistently applied for the seventh consecutive year, allowing for annual comparisons. It's 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 seven years, the number of workers in accommodations with restaurants marked an increase of around 70.2 percent (see Figure 12). The rise in employment followed the trend of the pre-pandemic years.

Figure 12: Number of Workers for Accomodations with Restaurants (2017-2023)



A breakdown of the findings by the top three regions shows that in 2023, Accommodations with Restaurants in Prishtina Region employed the largest number of workers, 1,696 in total. The number of workers in Peja Region and Prizren Region was significantly smaller, 590 and 437, respectively. In all cases, there has been a notable increase compared to 2022 (see Figure 13).



The following are some demographic characteristics of the workers employed in accommodations with restaurants in 2023. Men dominated with 72.3 percent. Out of all employed, 24.6 percent worked on a part-time basis. A disaggregation of data by ethnic background reveals that workers were predominantly Kosovo Albanians – 94.2 percent; the rest consisted of Bosnians, 2.6 percent; Turks, 1.5 percent; RAE, 0.5 percent; and others, 0.1 percent. In terms of the age group, those falling in the range of 25-44 constituted the majority with 61.6 percent. For more detailed information and to compare employment demographics with the other five years, refer to 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%	

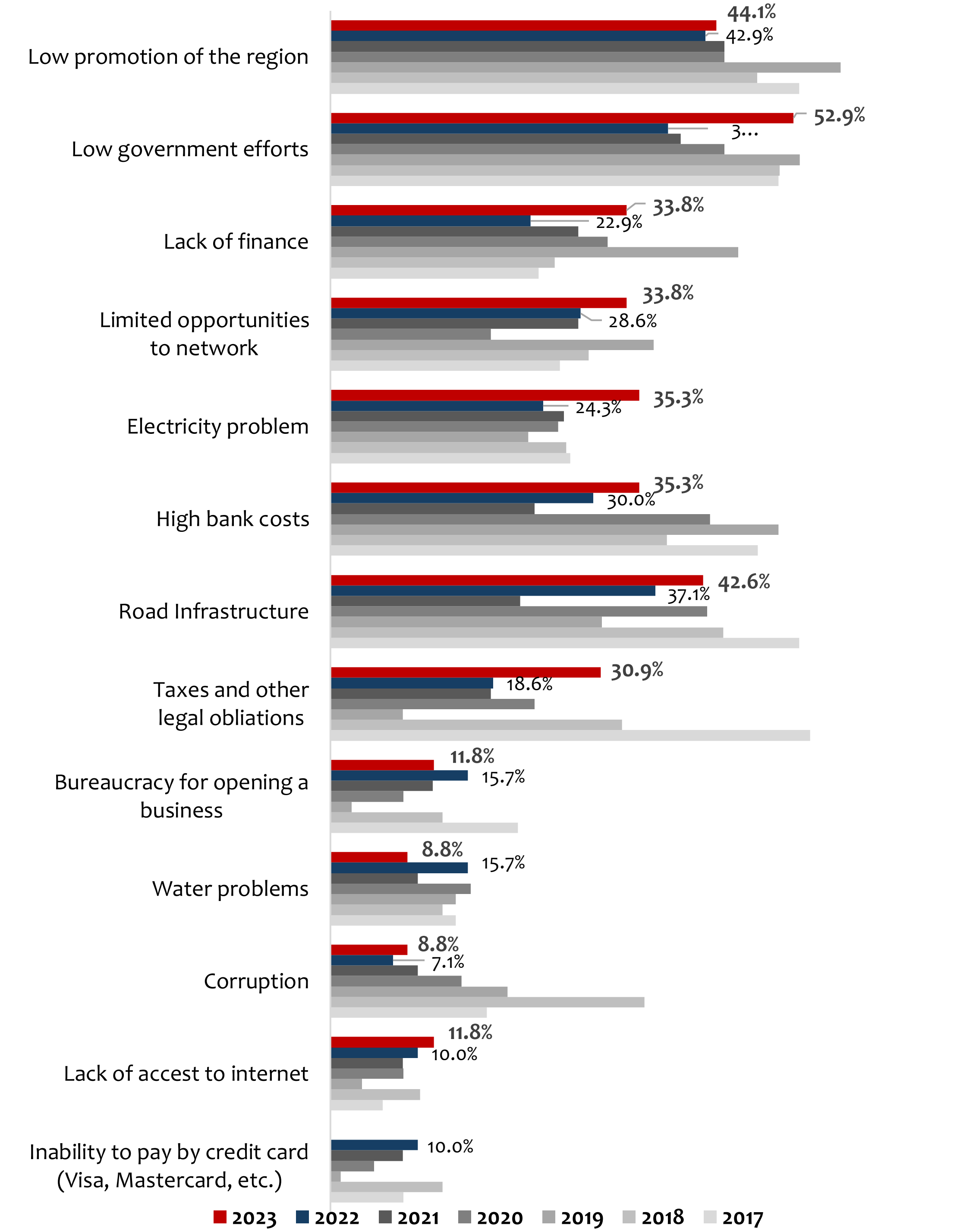
Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**Bosnians**	**Others**
	93.6%	1.4%	1.3%	0.8%	1.1%	1.8%
Age Group	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65<**
	26.0%	36.0%	22.3%	12.4%	3.0%	0.2%
2021						
Gender	**Men**			**Women**		
	62.5%			37.5%		
Full vs Part Time	**Full-Time (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**
	93.0%	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%
2022						
Gender	**Men**			**Women**		
	78.5%			21.5%		
Full vs Part Time	**Full-Time (Men)**		**Part-Time (Men)**	**Full-Time (Women)**	**Part-Time (Women)**	
	53.8%		24.8%	16.9%	4.5%	
Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**Bosnians**	**Others**
	95.6%	0.0%	1.8%	0.2%	2.2%	0.2%
Age Group	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65<**
	15.6%	32.5%	33.9%	14.0%	3.8%	0.2%
2023						
Gender	**Men**			**Women**		
	72.3%			27.7%		
Full vs Part Time	**Full-Time (Men)**		**Part-Time (Men)**	**Full-Time (Women)**	**Part-Time (Women)**	
	47.6%		24.6%	21.0%	6.7%	
Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**Bosnians**	**Others**
	94.2%	1.1%	1.5%	0.5%	2.6%	0.1
Age Group	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65<**
	18.21%	29.55%	32.14%	15.41%	4.27%	0.42%

Barriers

Accommodations with Restaurants were provided with a list of 12 likely barriers (predominantly external) and were asked to choose the most severe ones. In 2023, ranked as the top barrier was *'Low government efforts'* with 44.1 percent followed by *'Low promotion of the region'* with 44.1 percent. Other barriers such as *'lack* of finance' and *'limited networking opportunities'* remained concerns in both years, with a significant increase from 22.9 percent in 2022 to 33.8 percent in 2023, and from 28.6 percent in 2022 to 33.8 percent in 2023, respectively. For more detailed information and to make comparisons with the previous seven years, see Figure 14.

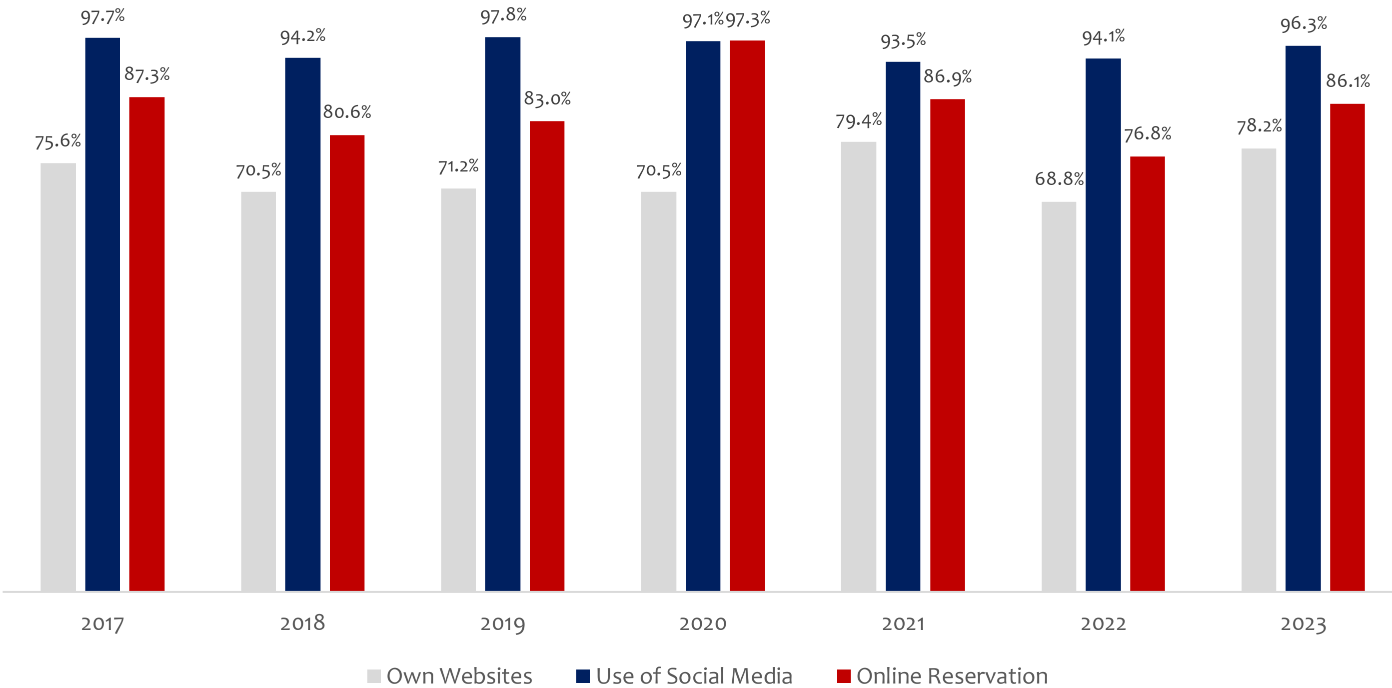
Digitalisation

Figure 14: Barriers to Business (%) for Accommodations with Restaurants (2017-2023)



To understand whether Accommodations with Restaurants have been catching up with recent digitalization trends as well as to assess the efficacy with which they are employing digital tools to enhance operational efficiency, the survey included a set of questions related to this subject. According to the data in 2023, 78.2 percent of Accommodations with Restaurants had their own websites. Furthermore, the vast majority, 93.3 percent, stated that they use social networks (mostly Facebook) to promote their business. When asking about online reservations, 86.1 percent claimed to have this option. Most of Reservations are made through booking.com. To compare with the previous seven years, refer to Figure 15.

Figure 15: Digitalization in Accommodations with Restaurants (%) (2017-2023)



3.2. Accommodations (without Restaurants)[3]

General Structure

In 2023, among all Accommodations, hotels dominated with 50.0 percent, followed by houses/villas/bungalows with 20.3 percent, Airbnb apartments with 12.2 percent and hostels with 10.8 percent. To compare with the other years, refer to Figure 16. Most of the Accommodations were located in Peja (39.2 percent), Prishtina (37.2 percent), and Ferizaj (5.4 percent), as seen in Figure 17.

Figure 16: Type of Accomodation in 2023 (in %)

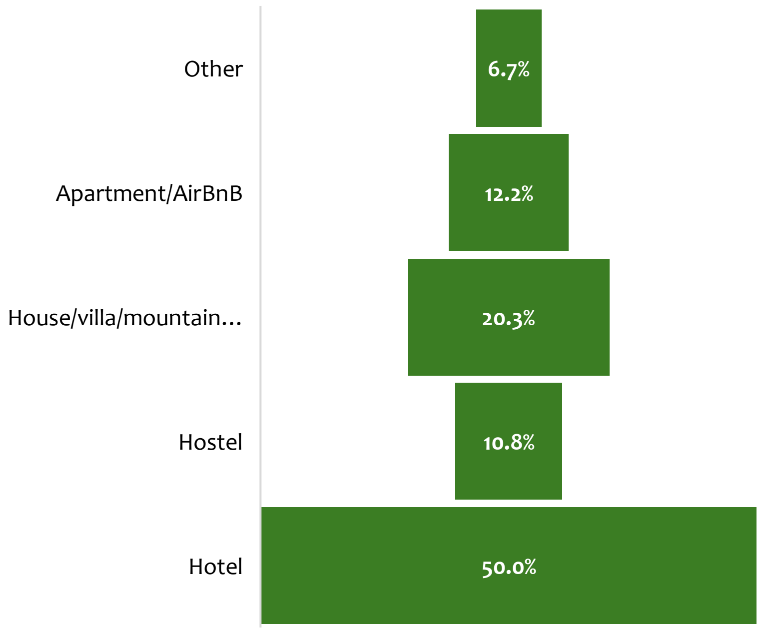
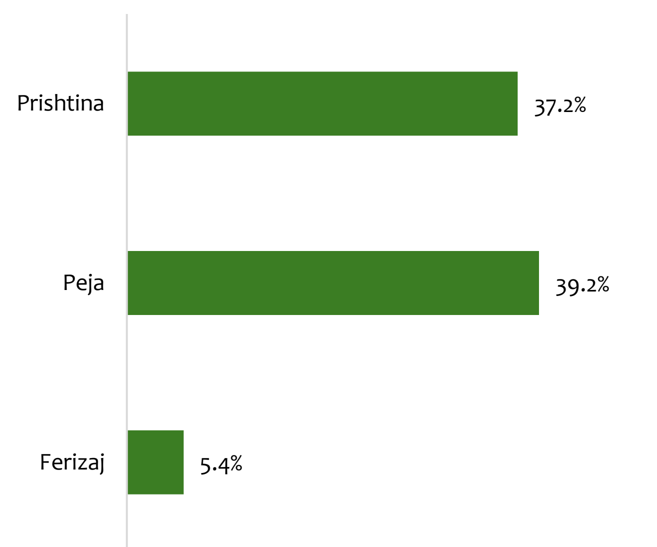


Figure 17: Accomodations, by Location, 2023 (in %)



Number of Rooms, Prices and Occupancy Rate

The survey findings show that in 2023, Accommodations had an average of 7.3 standard single rooms and 10.3 standard double rooms. In the same year, the total number of single and double standard rooms (adjusted to include the whole population) was 315. Notably, room prices increased across all categories in 2023 compared to previous years. With that being said, the average price for a single standard room rose from 33.9 EUR in 2022 to 36.7 EUR in 2023. Similarly, the average price for a double one rose from 47.1 EUR to 51.4 EUR in 2023. The most significant price increase was seen in Four-Bed Standard Rooms, which rose from 65.1 EUR in 2022 to 91.3 EUR in 2023. For more detailed information about the average number of rooms and prices, as well as to make comparisons with the previous years, refer to Table 5.

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

Table 5: Accommodations - Average Number and Price of Standard Rooms								
		2017	2018	2019	2020	2021	2022	2023
Single Standard Rooms	Avg. # of Rooms	10.05	8.6	9.1	7.2	7.9	6.1	7.3
	Avg. Price (EUR)	27.3	25.0	24.6	24.6	36.3	33.9	37.6
	Total # of Rooms	582	680	678	541	481	334	315
Double Standard Rooms	Avg. # of Rooms	7.6	8.3	10.5	10.6	8.8	8.1	10.3
	Avg. Price (EUR)	31.7	32.4	34.3	30.9	40.9	47.1	51.4
	Total # of Rooms	573	923	986	859	754	627	646
Triple Standard Rooms	Avg. # of Rooms	3.0	4.7	6.9	7.0	3.7	5.4	7.2
	Avg. Price (EUR)	43.6	40.1	45.7	34.5	50.0	60.9	66.1
	Total # of Rooms	127	263	380	360	263	350	339
Four-Bed Standard Rooms	Avg. # of Rooms	1.9	5.3	5.7	2.9	3.8	5.2	6.4
	Avg. Price (EUR)	49.9	50.3	62	44.9	60.8	65.1	91.3
	Total # of Rooms	70	127.3	174	115	96	192	160

In 2023, the occupancy rate in this category of accommodations averaged at 57.2 percent. The highest occupancy rate was in August (80.7%), while the lowest was in March (41.5%). For more detailed results and comparisons with the previous years, refer to Figure 18.

Figure 18: Monthly Occupancy Rate for Accommodations (%) (2017-2023)

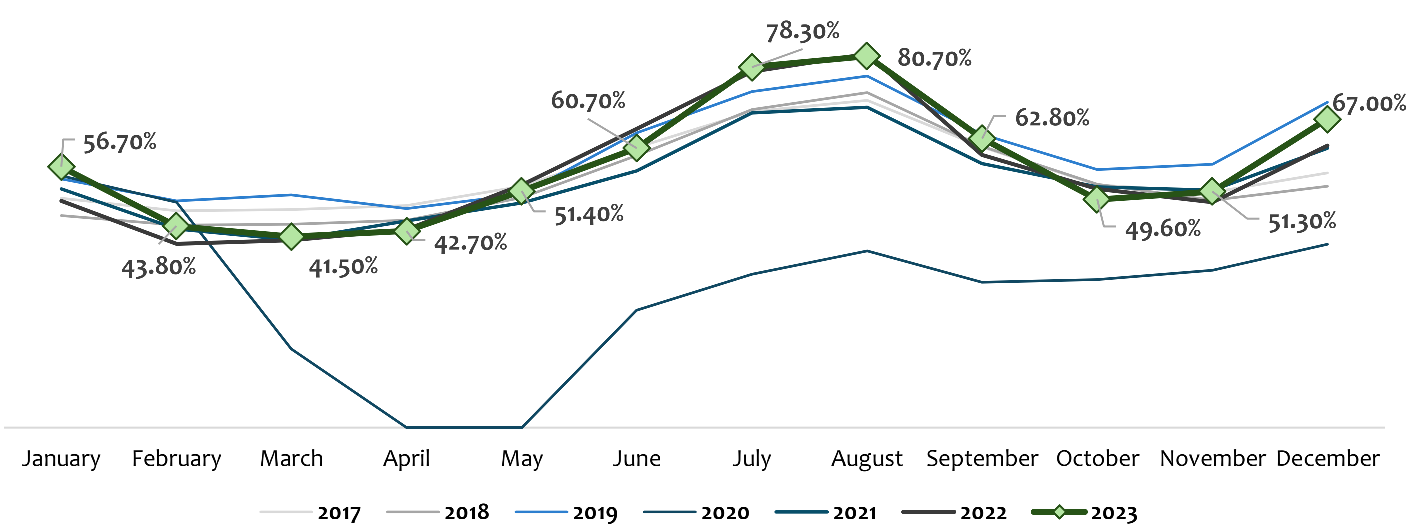
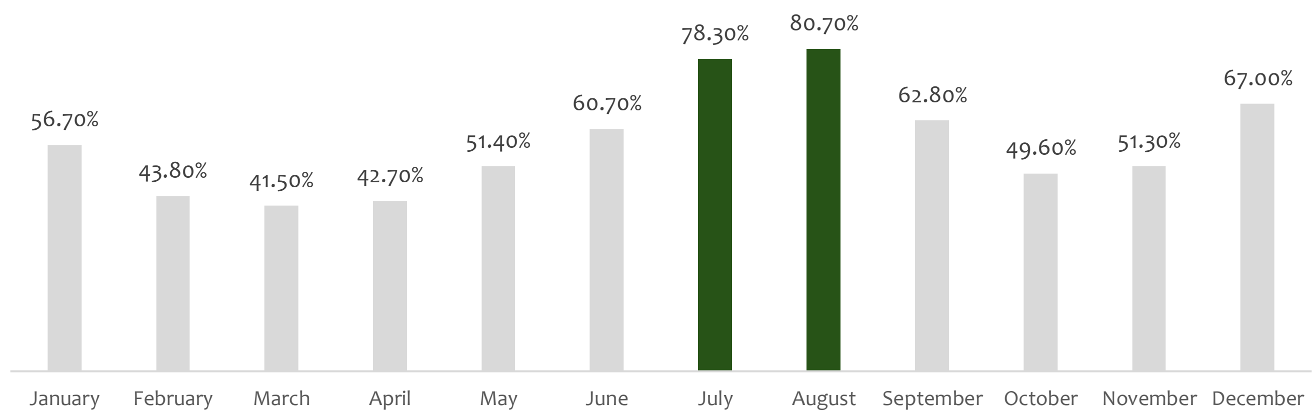


Figure 19 illustrates the occupancy rate (%) for accommodation across all months in 2023. As observed, the peak occupancy rate occur in July (78.3%) and August (80.7%), likely due to summer tourism.

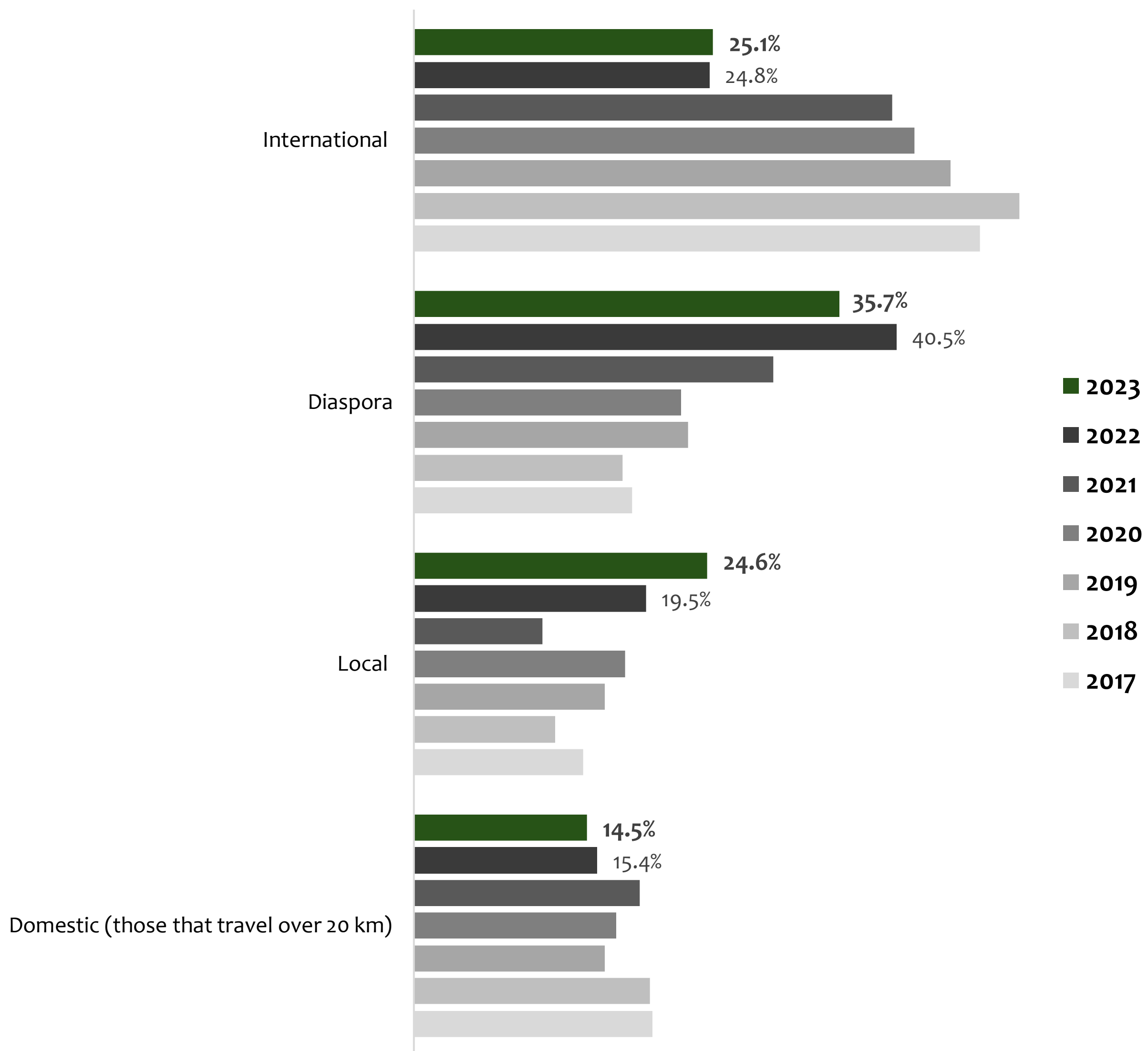
Figure 19. Occupancy Rate (%) for Accommodations throughout all months in 2023



<u>Guests and their Behaviour</u>

According to the data, in 2023, diaspora visitors accounted 35.7 percent of all visitors in Accommodations without Restaurants, followed by Internationals, 25.1 percent; Locals, 24.6 percent, and Domestic Visitors (with more than 20 km of travel), 14.5 percent. To compare data with previous years, refer to Figure 20. The number of nights spent averaged 6.7 in 2023, which is higher than ones in 2022 (5.6 nights).

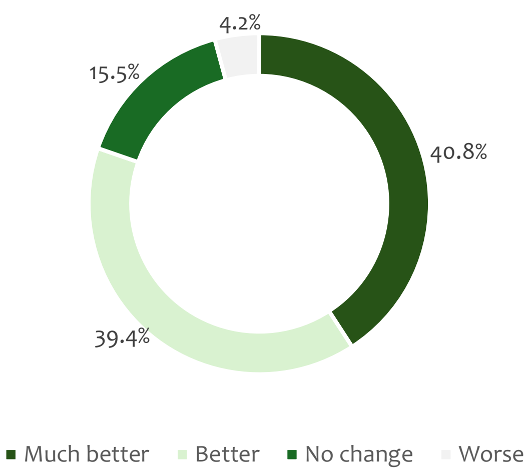
Figure 20: Guest Composition by Origin (%) for Accommodations (2017-2023)



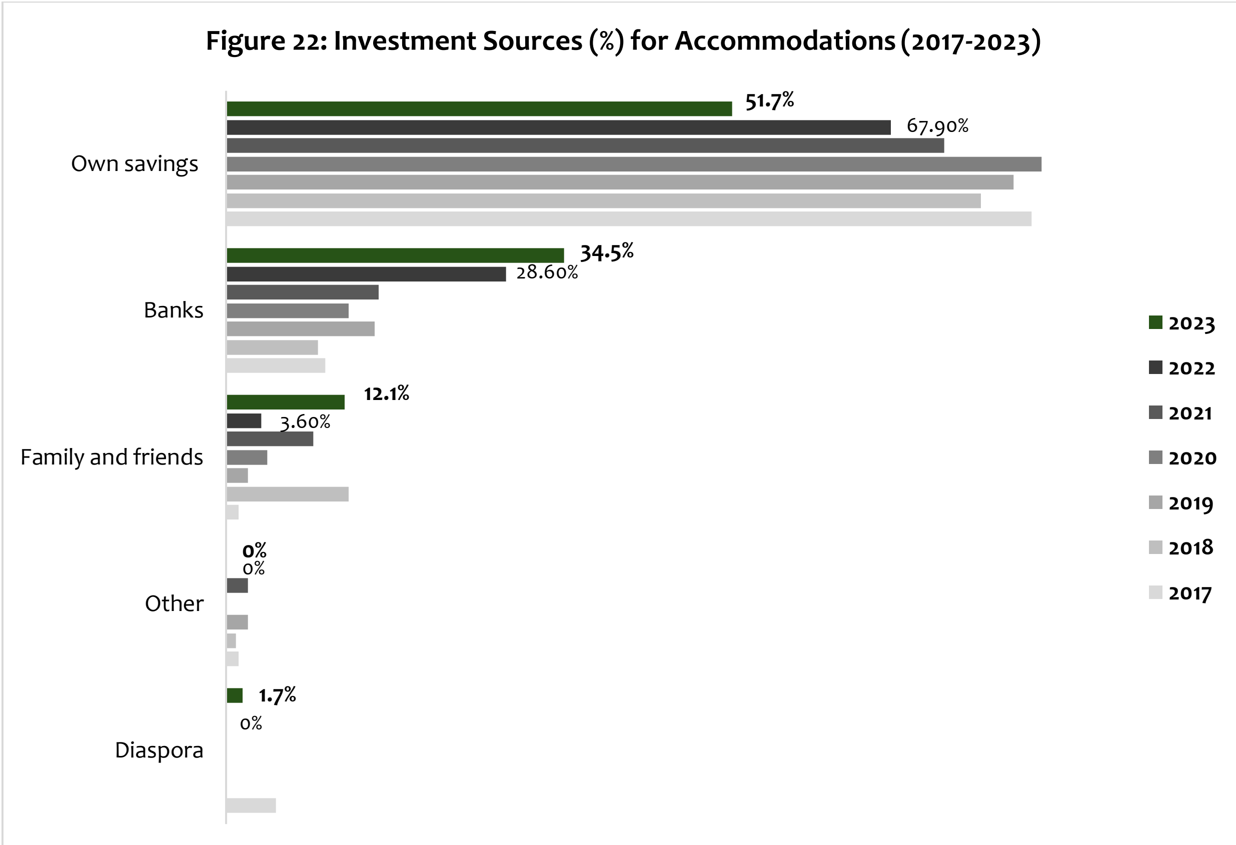
Revenue and Investments

The revenue findings reveal that in 2023, 40.8 percent of Accommodations reported having "much better" turnover compared to 2022, 39.4 percent "better", while 15.5 percent said they did not experience any change (see Figure 21).

Figure 21: Turnover Change (%) for Accommodations Compared to 2022



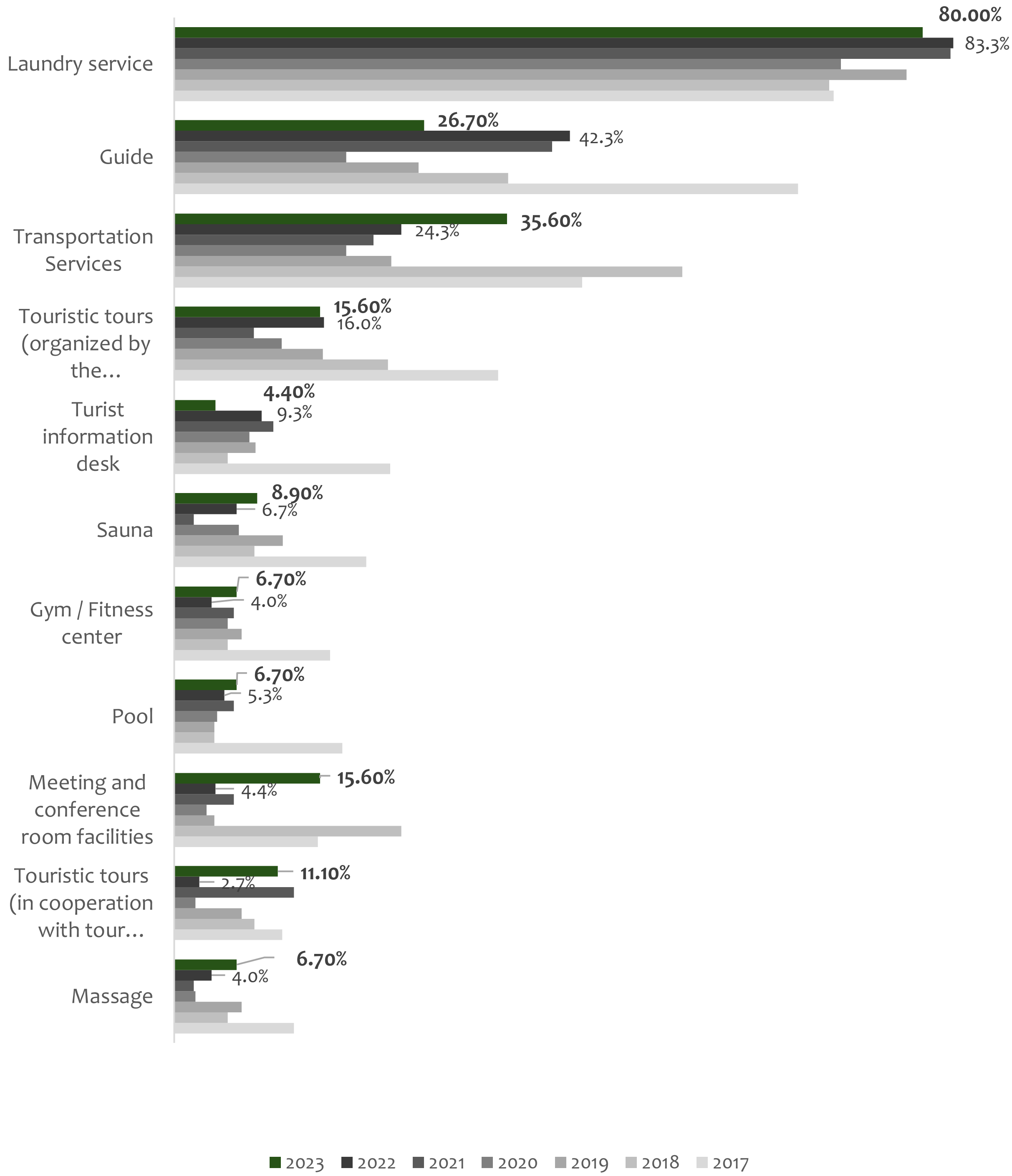
In response to the question about whether they have invested in their business in 2023, 59.6 percent of Accommodations said '*yes*'. Those who invested, financed their investment mostly from their own savings (51.7 percent). However, in 2023, the percentage of businesses using loans to finance their investments increased from 28.6 percent to 34.5 percent. To see the other sources of finance and compare with the previous years, refer to Figure 22.



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 (80.0 percent), Guide (26.7 percent), and Transportation Services (35.6 percent), were the most common services offered by Accommodations in 2023. To see other services provided in this year and to compare them with the previous years, refer to Figure 23.

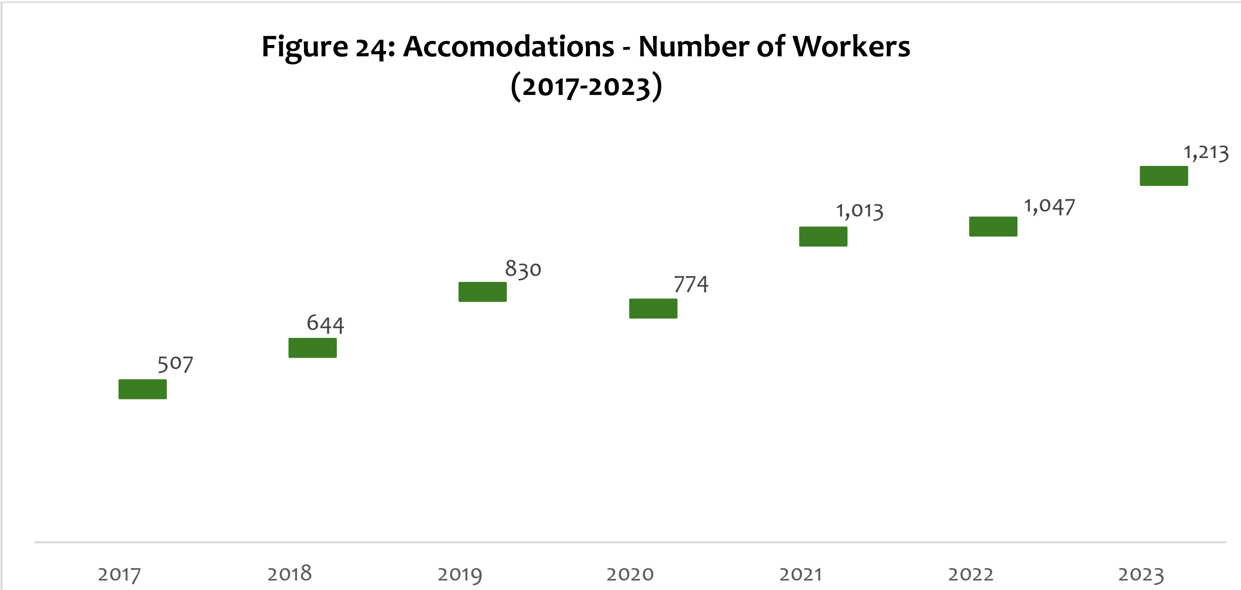
Figure 23: Services Offered in Accommodations (% of Cases, 2017-2023)



The findings further show that only 10.0 percent of Accommodations had special packages (i.e. for the weekend or vacation) in 2023, compared to 18.7 percent in 2022.

Employment

In 2022, the number of workers in accommodations stood at 1,213 more than double compared to 2017 (see Figure 24).[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.



The following are some employment demographics for Accommodations for 2023. Men comprised the majority (56.9 percent) of workers. Of all workers, 10.2 percent worked on a part-time basis. A breakdown of data by ethnicity shows that almost all workers were Kosovo Albanians, 98.6 percent.

[4] Gross up factor for accommodations~1.423

As per age groups, those in the 25-44 age group constituted the majority with 68.9 percent. For more detailed information and comparisons with the previous years, refer to Table 6.

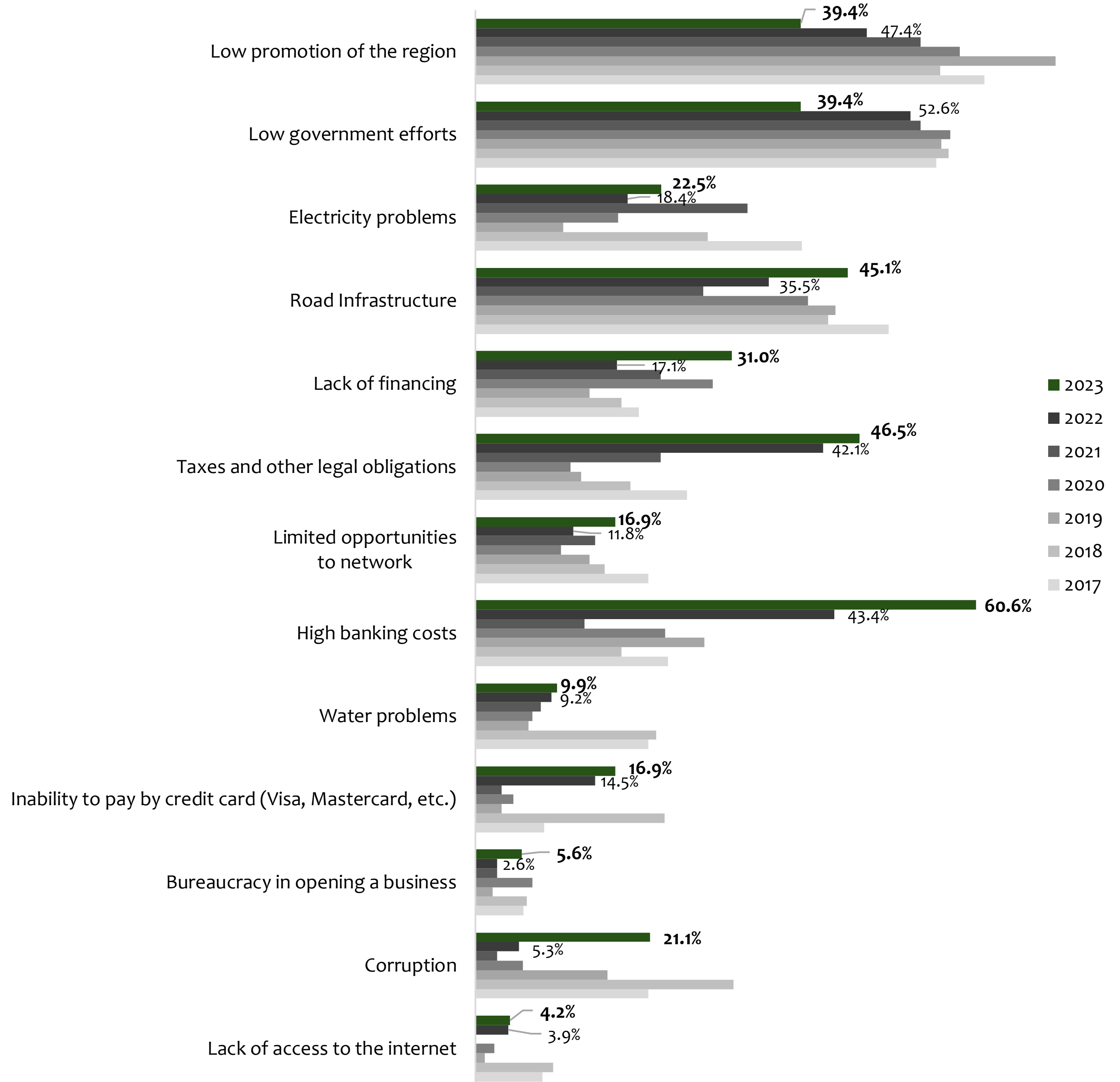
Table 6: Employment Demographics (Accomodations)						
2017						
Gender	**Men**			**Women**		
	65.5%			34.4%		
Full vs Part Time	**Full-Time (Men)**		**Part-Time (Men)**	**Full-Time (Women)**	**Part-Time (Women)**	
	51.4%		14.2%	28.9%	5.5%	
Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**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**
	96.7%	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%
2022						
Gender	**Men**			**Women**		
	74.4%			25.6%		
Full vs Part Time	**Full-Time (Men)**		**Part-Time (Men)**	**Full-Time (Women)**	**Part-Time (Women)**	
	45.8%		28.6%	14.3%	11.3%	
Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**Bosnians**	**Others**
	98.1%	0.0%	0.9%	0.5%	0.5%	0.0%
Age Group	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65<**
	16.1%	44.9%	24.8%	11.0%	2.8%	0.4%
2023						
Gender	**Men**			**Women**		
	56.9%			43.1%		
Full vs Part Time	**Full-Time (Men)**		**Part-Time (Men)**	**Full-Time (Women)**	**Part-Time (Women)**	
	46.7%		10.2%	38.5%	4.6%	
Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**Bosnians**	**Others**
	98.6%	0.0%	0.0%	0.1%	0.3%	1.0%
Age Group	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65<**
	18.5%	33.2%	37.7%	9.3%	1.1%	0.2%

Barriers to Doing Business

Accommodations were also enquired to choose the most pressing barriers to doing business. *'Low promotion of the region'* (39.4 percent), *'Low government efforts'* (39.4 percent), and *'electricity problems'* (22.5 percent) were perceived to be the most pressing operating barriers by accommodations in 2023. To see the other barriers to doing business and to compare them with the previous years, refer to Figure 25.

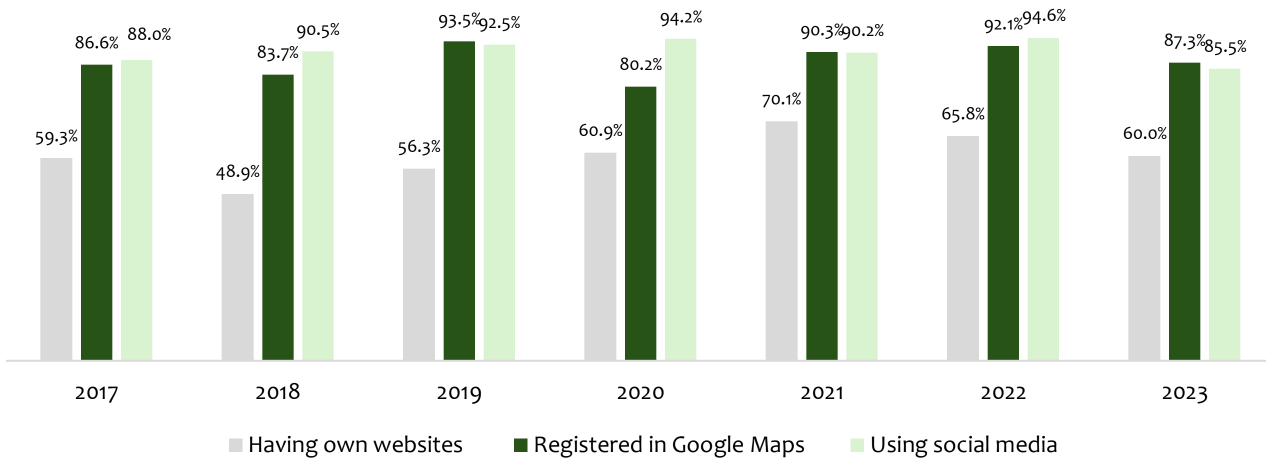
Figure 25: Barriers to Doing Business in Accommodations (% of Cases, 2017-2023)



Digitalisation

The survey findings reveal that 60.0 percent of accommodations had their own websites in 2023. The vast majority, 87.3 percent, were registered in Google Maps. A similar percentage, 85.5 percent, claimed to have used social media to promote their accommodations. To compare the data with the previous years, see Figure 26.

Figure 26: Accomodations - Digitalisation, 2017-2023 (in %)

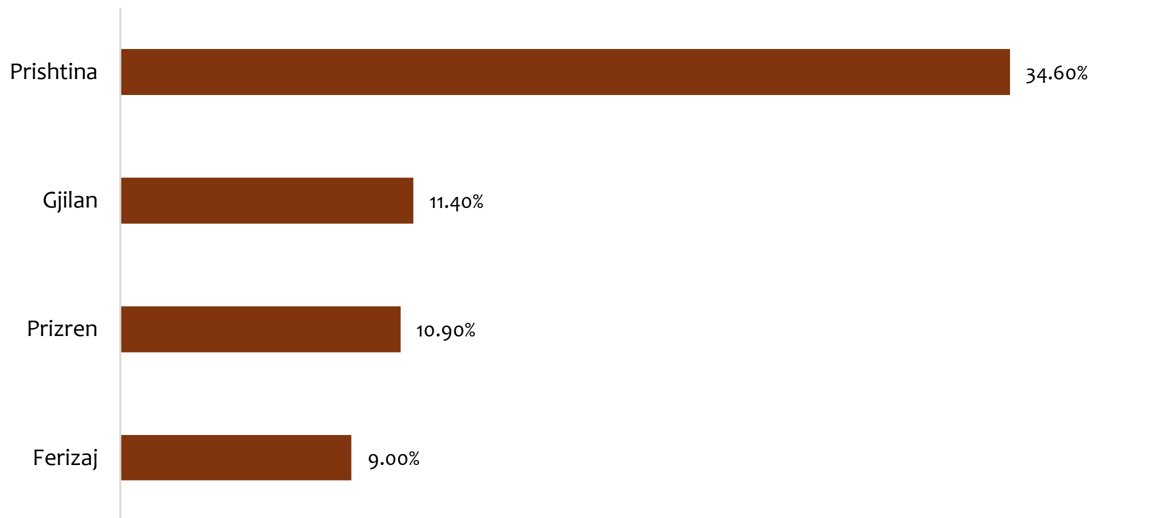


3.3. Restaurants

General Structure

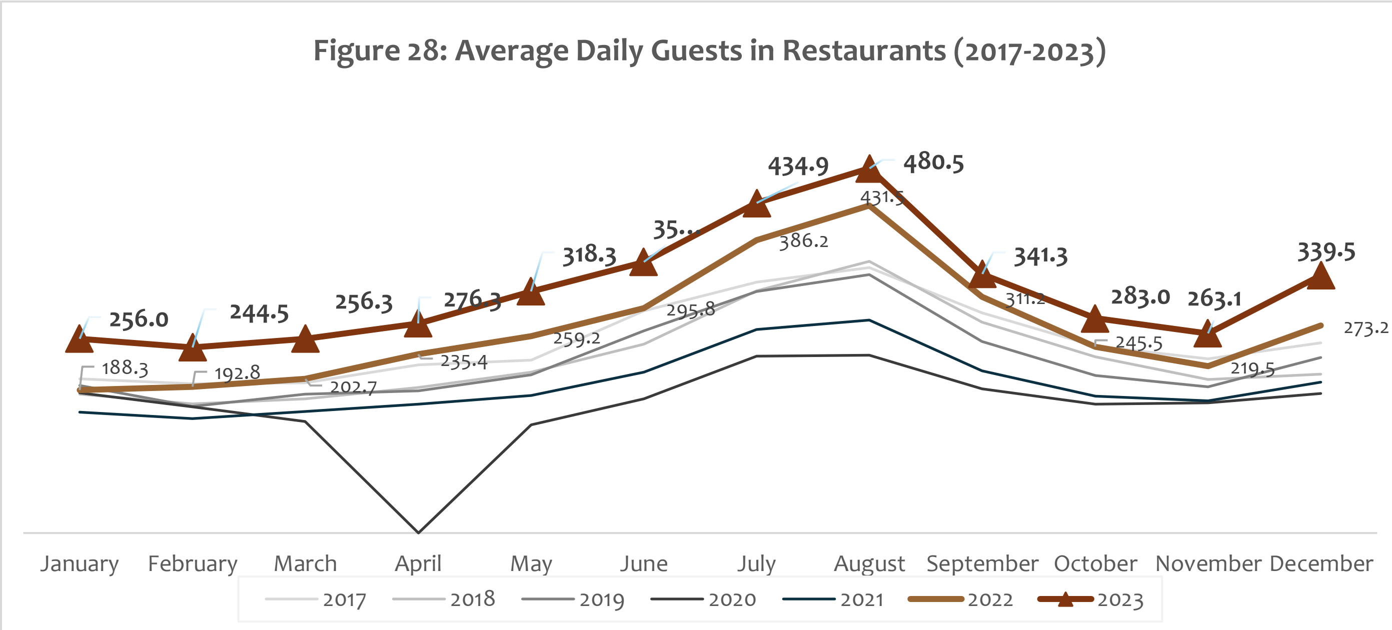
In 2023, Prishtina dominated with 34.6 percent of all restaurants in Kosovo, followed by Gjilan with 11.4 percent), Prizren with 10.9 percent, and Ferizaj with 9.0 percent – see Figure 27.

Figure 27: Restaurants, by Main Locations, 2023 (in %)

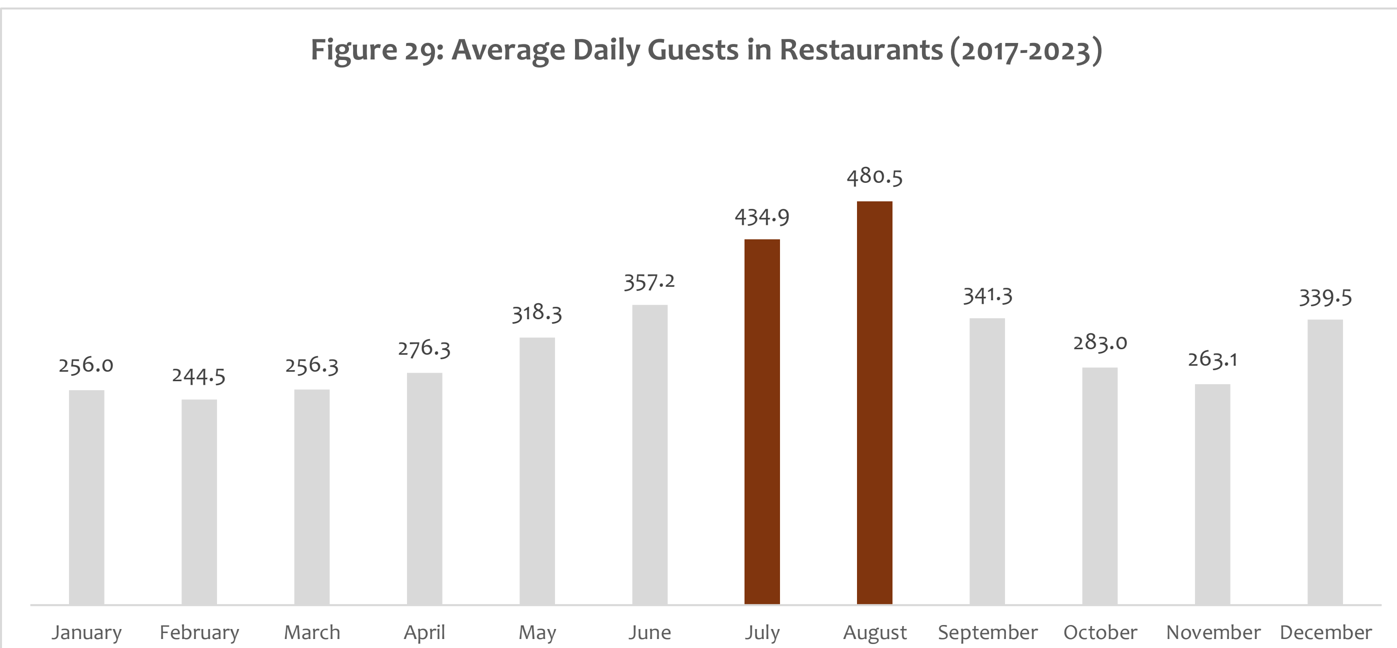


Guests and their Behaviour

Data shows that Restaurants had an average of 320.9 guests per day in 2023, marking an increase of 18.8 percent compared to 2022. August stood out as the busiest month, with an average of 480.5 guests per day. For more detailed information and to compare averages with those of the previous years, refer to Figure 28.



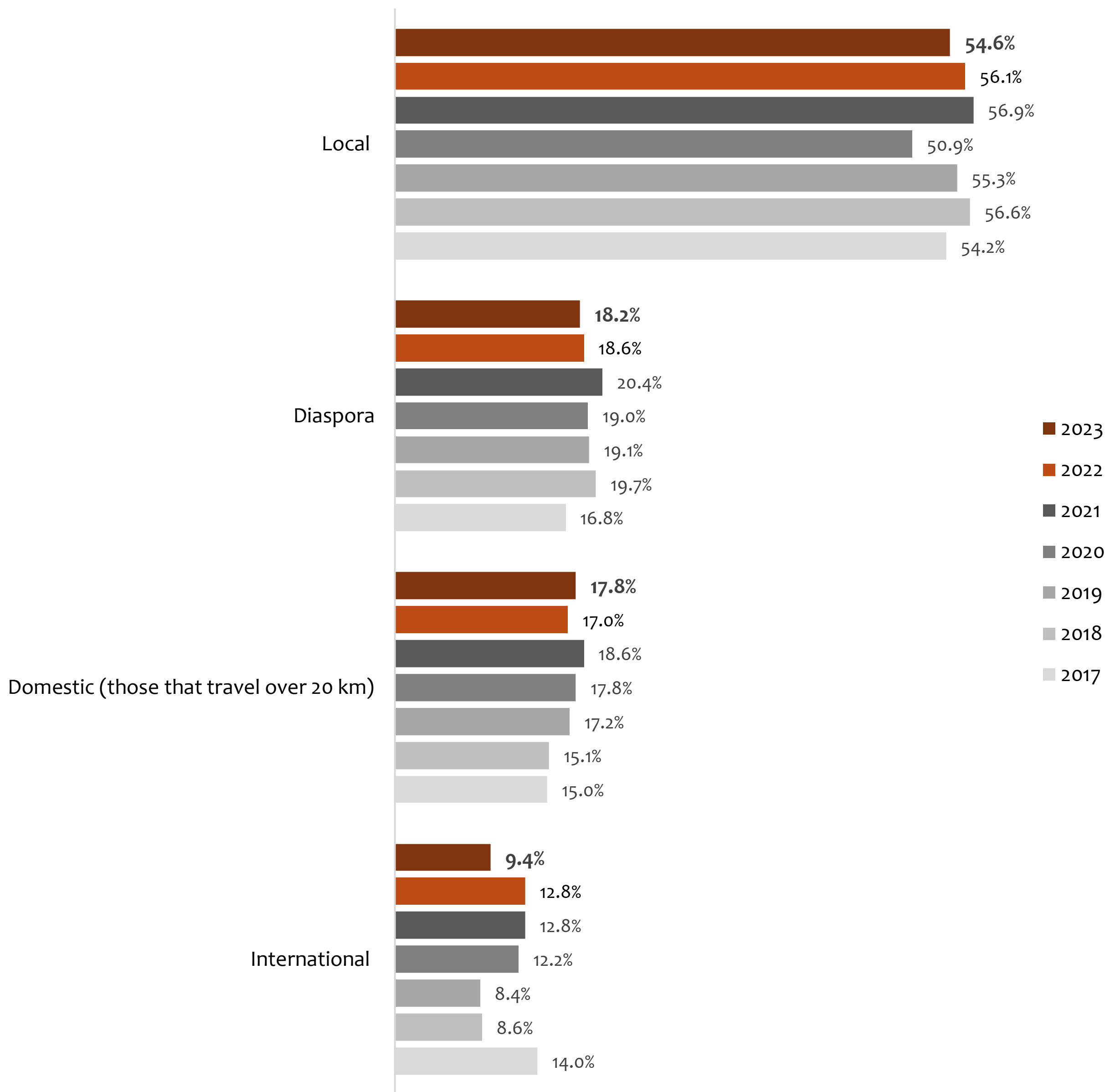
For more detailed information regarding average daily guests in Restaurant per 2023, see figure below (Figure 29)



The findings reveal that in 2023, 54.6 percent of the clientele in Restaurants consisted of locals; Others included the Diaspora (18.2 percent), Domestic Visitors (17.8 percent), and Internationals (9.4 percent). To make comparisons with the previous years, see Figure 30.

In addition, the data shows a steady trend of guests' preferences: in 2023, 60.9 percent (59.8 percent in 2022) of all of them went to restaurants for food and drinks, while the rest for drinks only. Moreover, a notable increase in average price per serving was observed. Guests consuming both, food and drinks spent on average 11.3 EUR, which compared to 2022 is higher (8.9 EUR in 2022), Similarly, those who came only for drinks spent 4.2 EUR on average, up from 3.9 EUR the previous year.

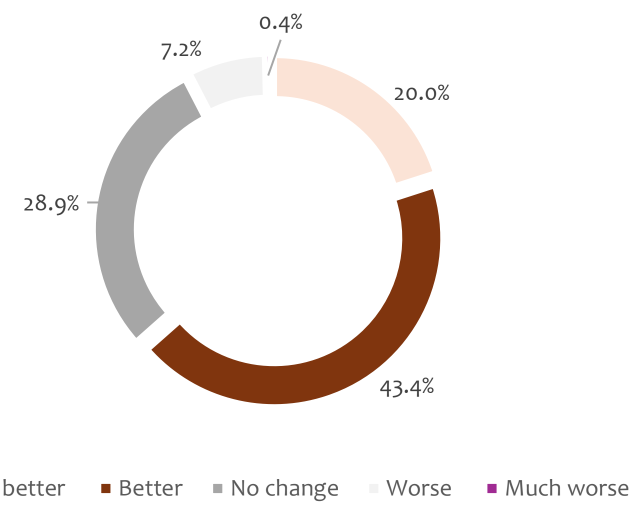
Figure 30: Restaurants - Composition of Guests (2017-2022), by Origin (%)



Revenues and Investments

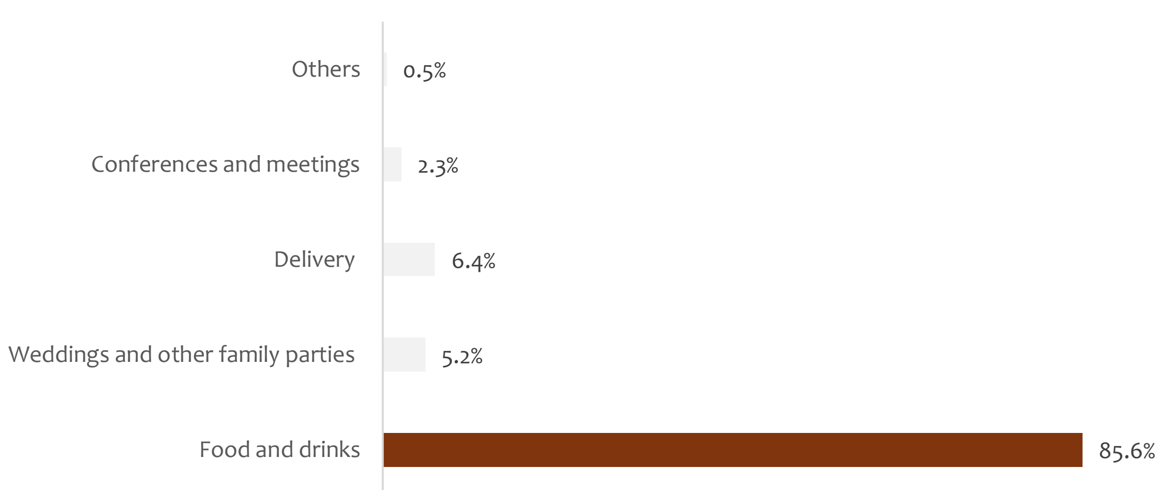
When asked about the changes in turnover compared to 2022, 63.4 percent of the Restaurants reported to have performed '*better*' or '*much better*'. On the other hand, 7.6 percent of them declared to have experienced the opposite; the rest said that they experienced no changes in turnover (see Figure 31).

Figure 31: Restaurants - Turover Changes Compared to 2022 (%)



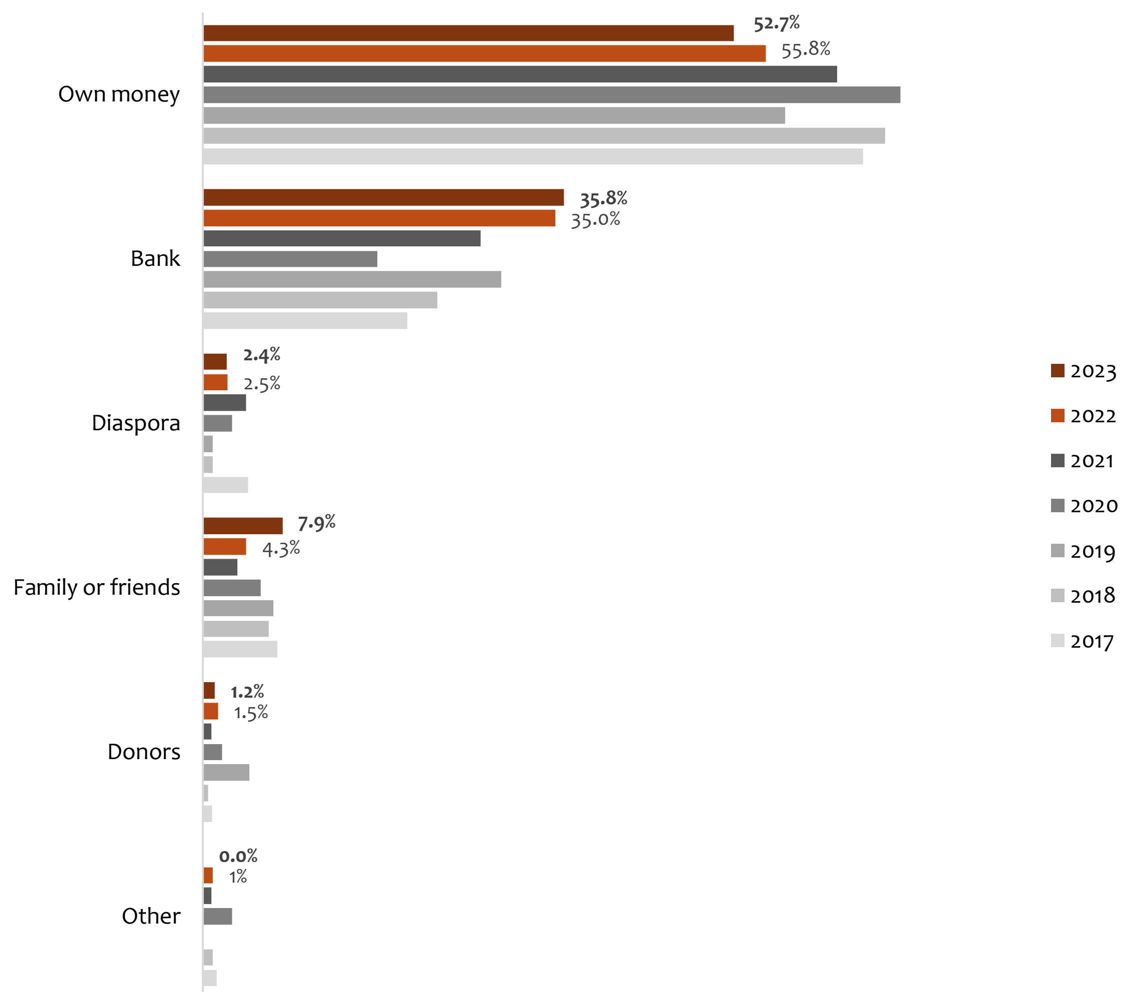
A further analysis on the composition of annual turnover shows that in 2023, food and drinks comprised the main source of revenue for Restaurants with 85.6 percent, accompanied by delivery services with 6.4 percent, weddings and family services with 5.2 percent, and conferences with 0.5 percent. For more details, see Figure 32.

Figure 32: Turnover (%) for Restaurants by Type of Service in 2023



Those who invested in 2023, financed their investment mostly from their 'own money' (52.7 percent). To see other sources of finance and to compare with the previous years, see Figure 33.

Figure 33: Sources of Investment at Restaurants (%) 2017-2023

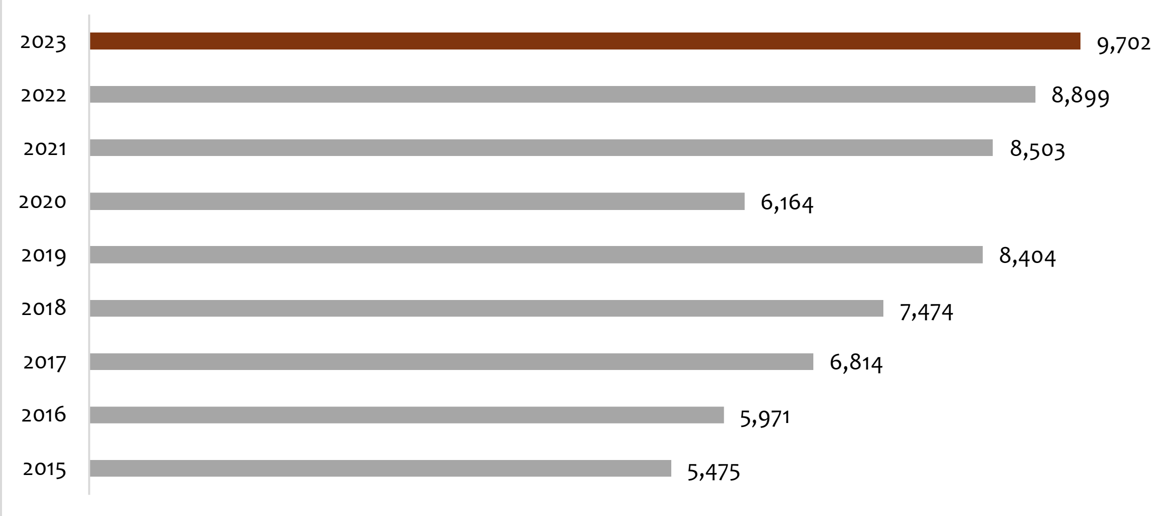


Employment

Employment in restaurants has been the highest in the past seven years, amounting to 9,705, increasing by 56.4 percent compared to 2015 (see Figure 34).[5]

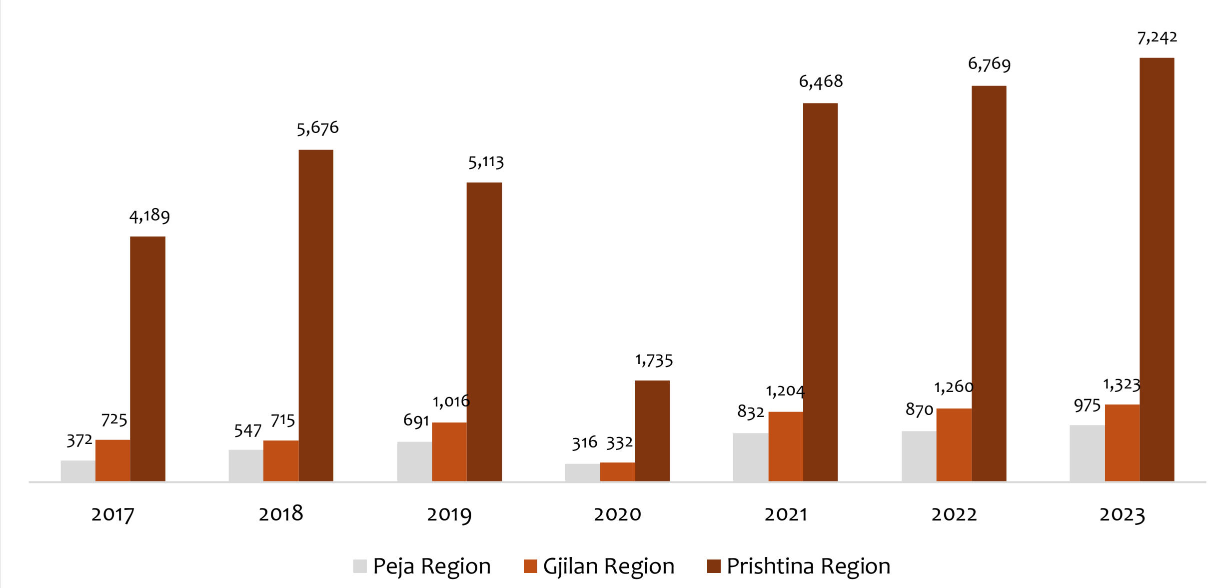
[5] Gross-up factor for restuarants~2.1644

Figure 34: Restaurants - Number of Workers, by Year (2015-2023)



A disaggregation of the data by the main regions reveals that Prishtina Region with 7,242 constituted the largest number of workers employed in restaurants in 2023, followed by Gjilan (1,325), and Peja (975). In all cases, the number of workers is the highest in the last seven years, referring to Figure 35.

Figure 35: Restaurants - Number of Workers by Region (2017-2023)



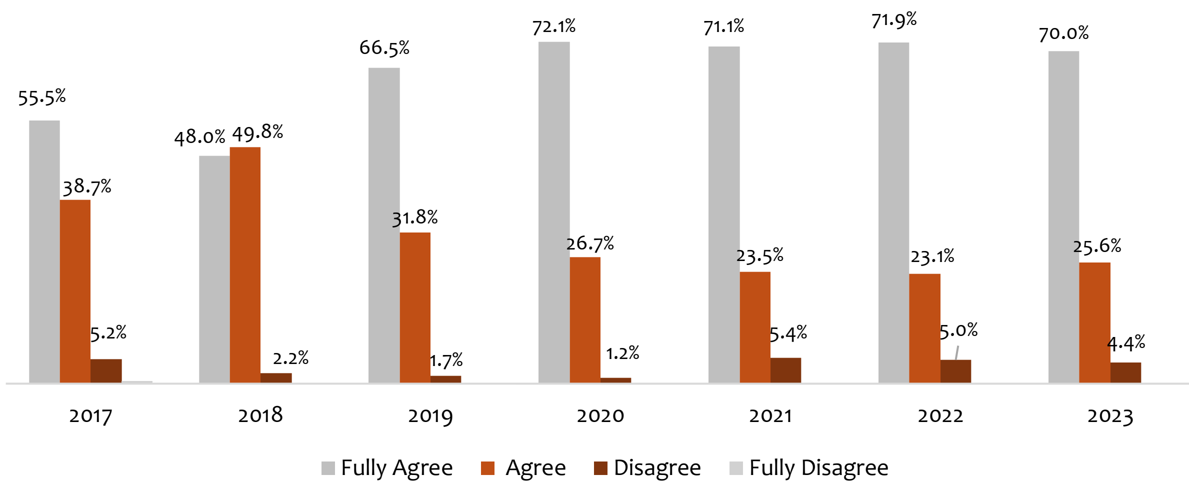
The following are some employment demographics for restaurants. Of all employed in 2023, the majority were men – 70.4 percent. Most of the workers, 58.8 percent, worked on a full-time basis. A negligible percentage (2.7 percent) was comprised of non-Kosovo Albanians. In terms of age, those falling between 15-34 make up the most common group with 72.08 percent. For more information and to make comparisons with the previous years, refer to 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%
2022						
Gender	**Men**			**Women**		
	75.7%			24.3%		
Full vs Part Time	**Full-Time (Men)**		**Part-Time (Men)**	**Full-Time (Women)**	**Part-Time (Women)**	
	57.1%		18.7%	19.9%	4.4%	
Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**Bosnians**	**Others**
	97.400%	0.3%	1.2%	0.3%	0.7%	0.1%
Age Group	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65<**
	28.0%	41.8%	19.2%	8.3%	2.7%	0.0%
2023						
Gender	**Men**			**Women**		
	70.4%			29.6%		
Full vs Part Time	**Full-Time (Men)**		**Part-Time (Men)**	**Full-Time (Women)**	**Part-Time (Women)**	
	58.8%		11.6%	25.4%	4.3%	
Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**Bosnians**	**Others**
	97.31%	0.18%	1.36%	0.80%	0.30%	0.06%
Age Group	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65<**
	26.07%	46.01%	19.31%	6.87%	1.70%	0.04%

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 2023, 95.6 percent either '*fully agree*' or '*agree*' with the statement, while the rest had an opposite view. See Figure 36 to compare the view of restaurants regarding this statement in previous years.

Figure 36: Level of Agreement (%) with the Statement: 'My Employees Have Enough Education to Fulfill My Needs' in Restaurants



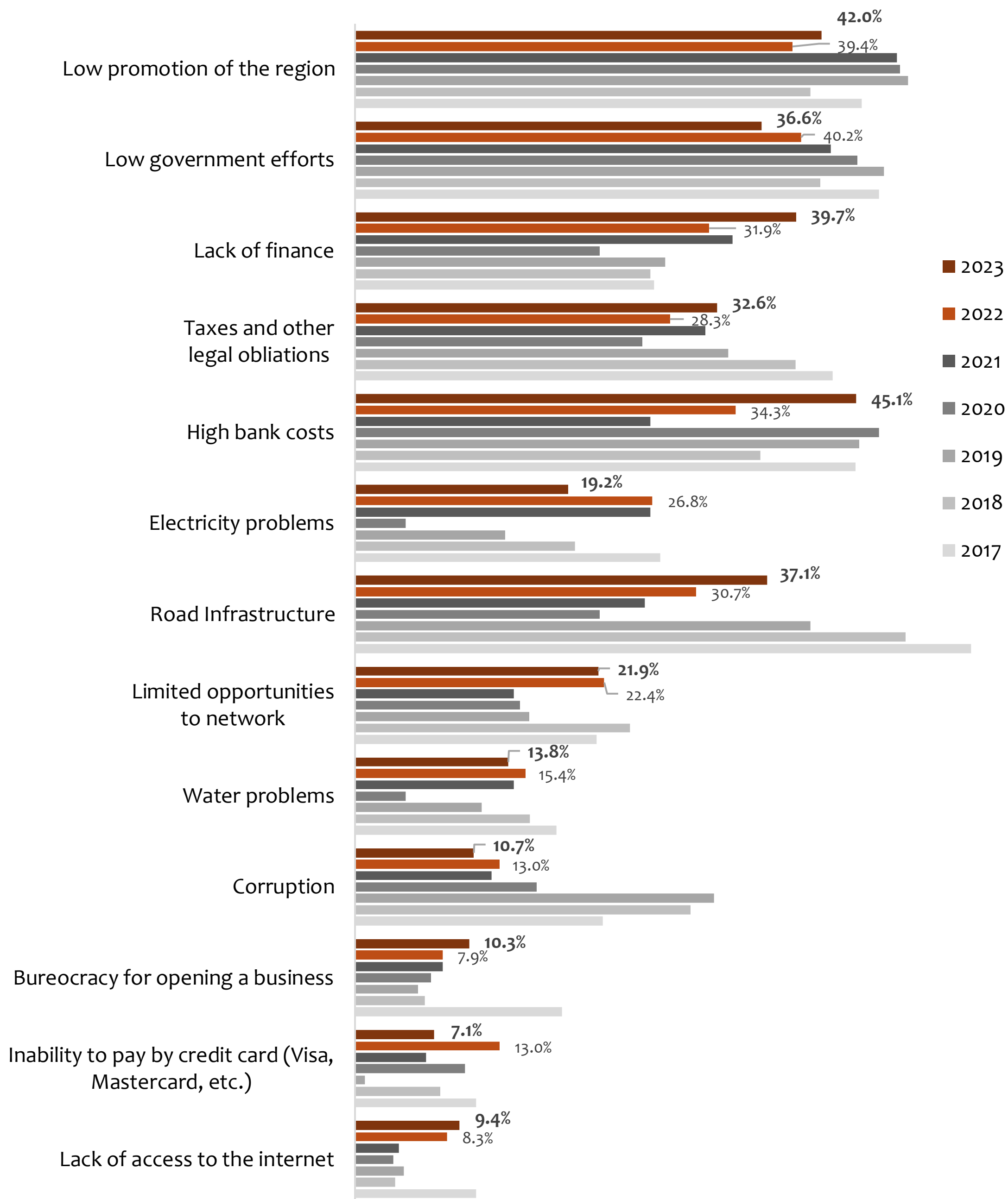
Supplies

In response to the question about the origin of supplies used in 2023, 51.4 percent of restaurants believed that they were local, compared to 50.5 percent in 2022. Supplies for their restaurant in 2023 were mainly sourced from wholesalers and supermarkets. Another finding reveals that restaurants have generally been satisfied with suppliers; 89.2 percent of restaurants declared to have been 'satisfied' or 'very satisfied' with their suppliers in 2023. For more information on the level of satisfaction and to compare data with the previous years, refer to Figure 37.

Barriers to Doing Business

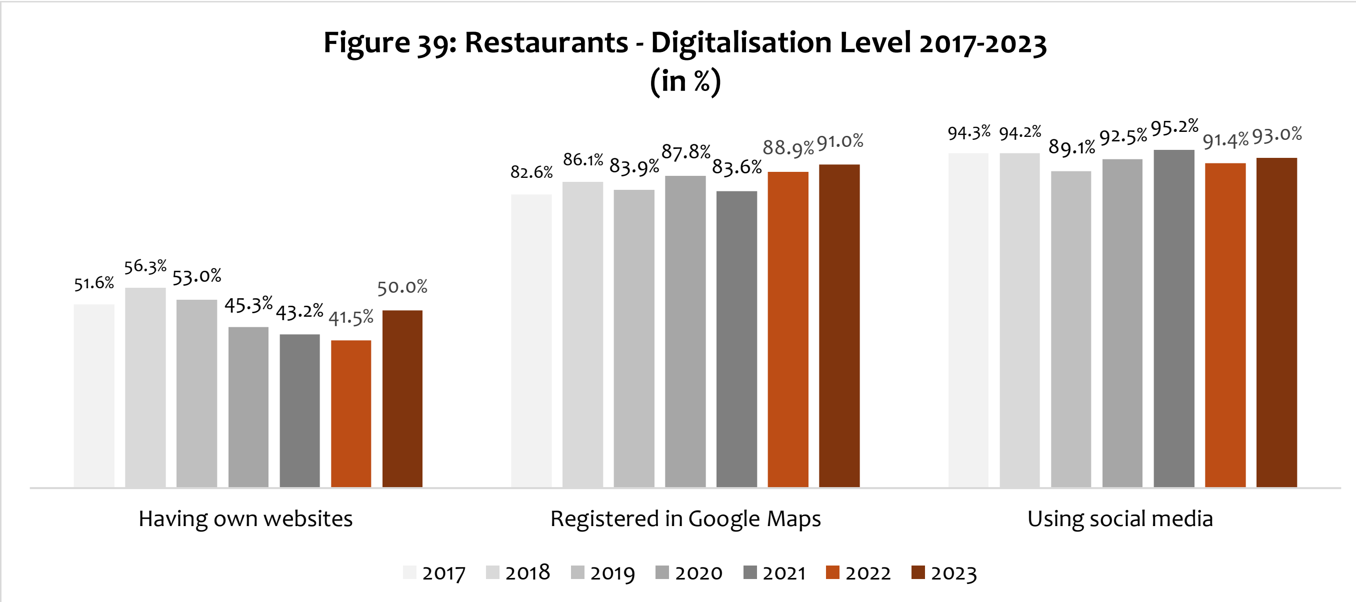
The potential barriers to doing business were also tested with restaurants. In 2023, it turned out that '*low government efforts*' with 42.0 percent, '*low promotion of the region*' with 36.6 percent, and '*lack of finances*' with 39.7 percent, were perceived to be the most severe operating barriers by respondents. For more detailed information and to make comparisons with the other years, see Figure 38.

Figure 38: Barriers of Doing Business at Restaurants (% of Cases) 2017-2023



Digitalisation

Of all Restaurants surveyed, 50.00 percent had their own websites in 2023, and 91.0 percent were registered on Google Maps. A higher percentage (93.00 percent) used social media to promote their services. To compare the data with the previous years, refer to Figure 39.

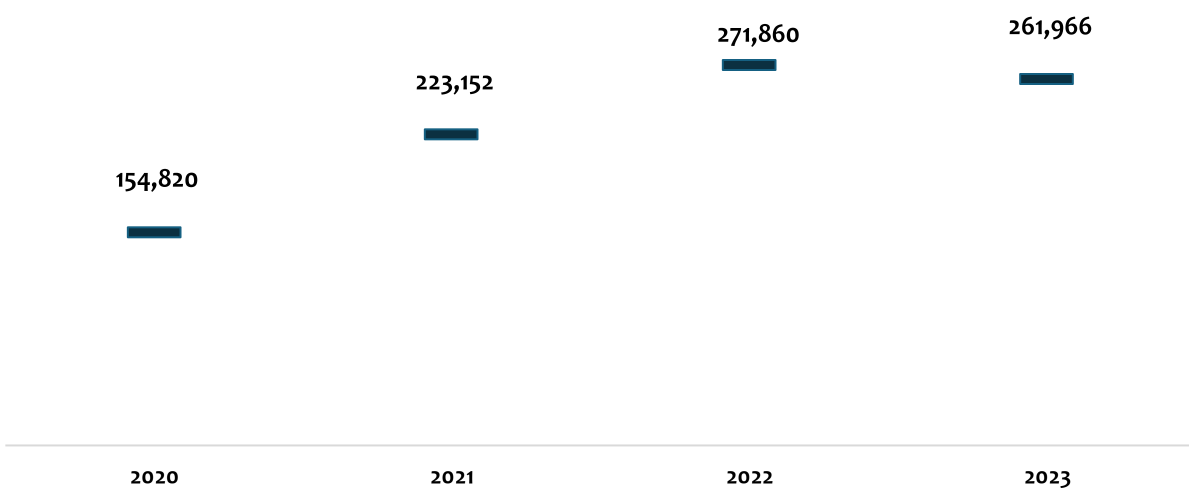


3.4. Attractions

Number of Visitors and their Characteristics

The total number of visitors to tourist attractions in 2023 stood at 261,966 – a decrease of 3.64 percent compared to 2022 (see Figure 40). This decline can likely be attributed to the fact that many citizens are opting to travel abroad instead. Furthermore, it should be noted that these figures were obtained exclusively from the attractions that were interviewed. Therefore, they do not represent the overall number of visits in the country but rather indicate a trend. This limitation is due to the lack of available information on the exact population landscape.

Figure 40: Attractions - Number of Visits (2020-2023)



In 2023, the composition of visitors to Attractions was predominantly comprised of Domestic Visitors (those traveling more than 20 km), accounting for 47.8 percent. They were followed by the Diaspora at 26.3 percent and International visitors at 26.3 percent. For comparisons with previous years, refer to Figure 39. Germans, Albanians, Turks, Americans, and others constituted the majority of visitors, as depicted in Figure 41.

Location

Figure 41: Attractions - Composition of Visitors, 2017-2022, by Origin (%)

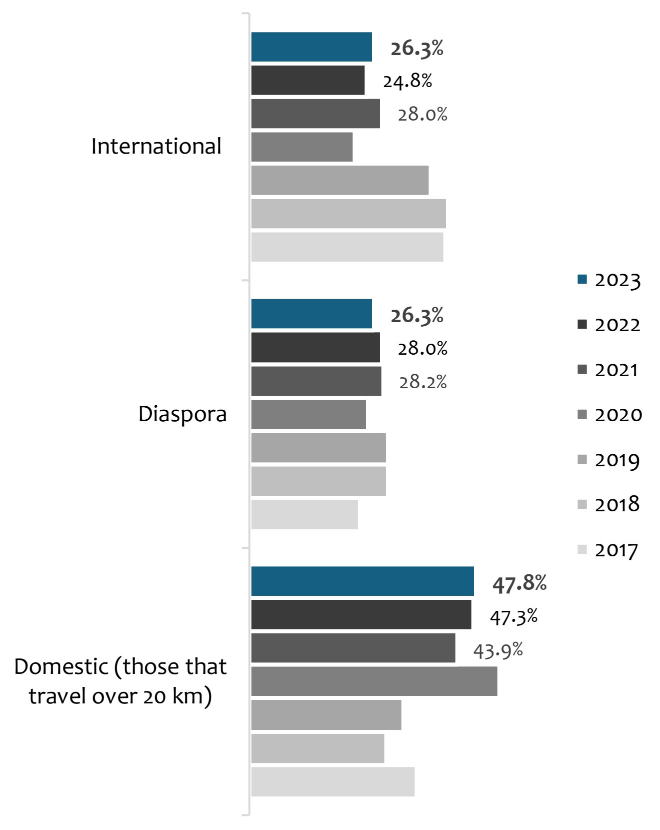
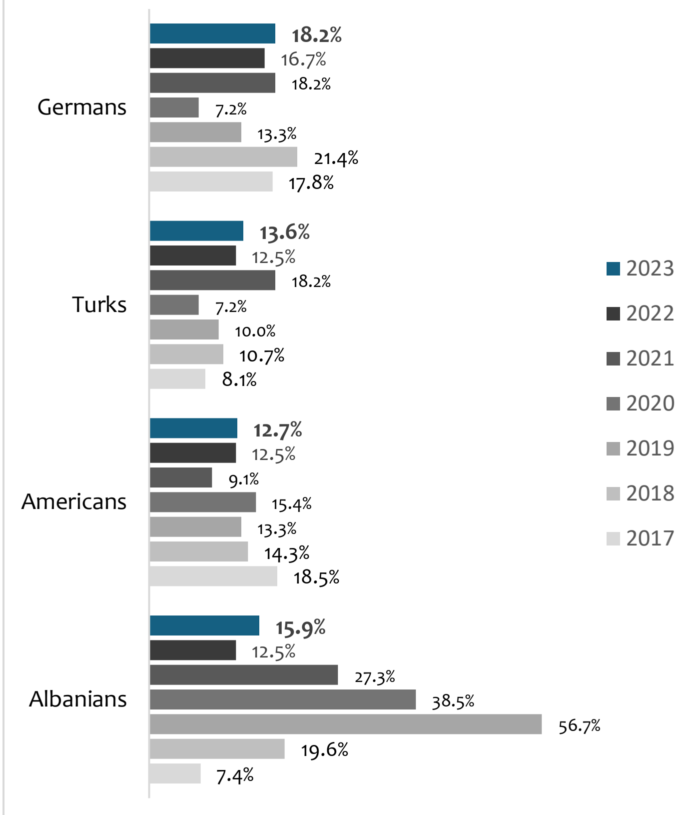
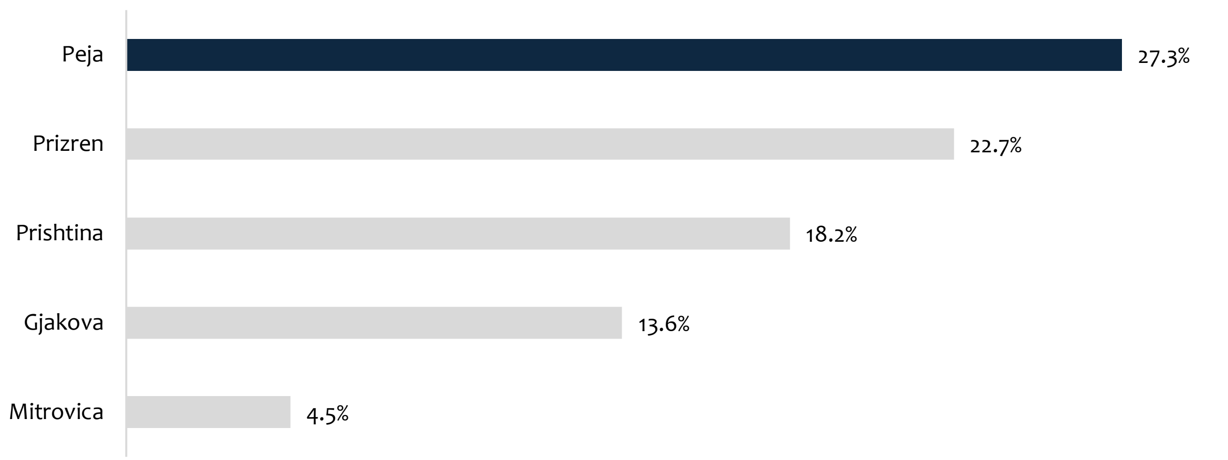


Figure 42: Attractions (2017-2023), by Origin of Visitors (in %)



The majority of surveyed attractions were located in Peja (27.3 percent) followed by, Prizren (22.7 percent) Prishtina (18.2 percent), Gjakova (13.6 percent), and Mitrovica (4.5 percent) (see Figure 43).

Figure 43: Attractions, by Top Five Locations, (in %)



<u>Employment</u>

In 2023, Attractions were predominantly staffed by male workers, comprising 83.3 percent of the workforce. Of the total workers employed in Attractions, 73.7 percent worked full-time. Non-majority communities constituted only 6.9 percent of all workers. In terms of age distribution, 59.7 percent of workers fell within the 25-44 age group. For more detailed results and comparisons with data from previous years, please refer to 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%	

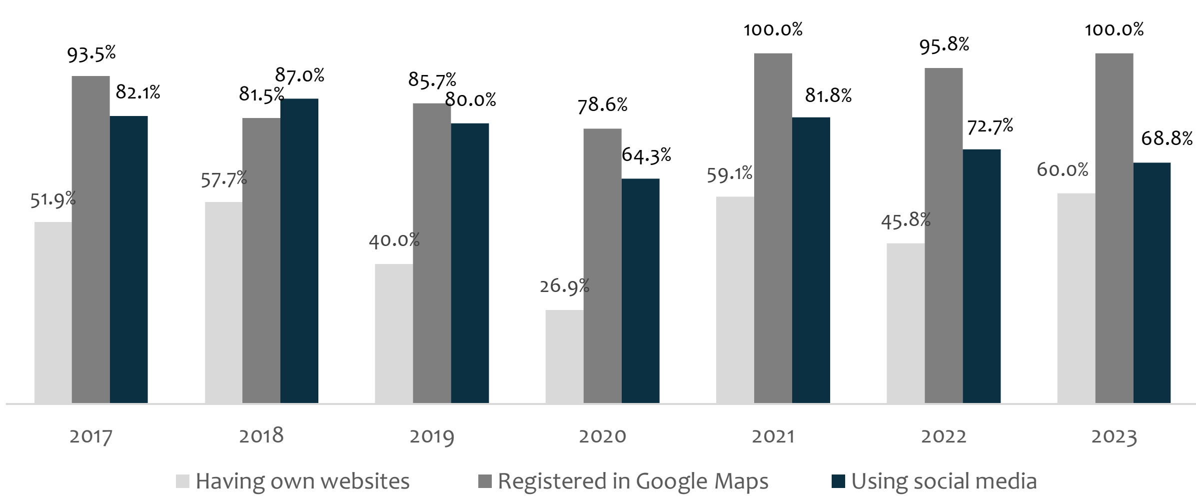
Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**Bosnians**	**Others**
	96.4%	0.0%	0.9%	0.9%	1.8%	0.0%
Age Group	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65<**
	4.8%	22.1%	47.1%	19.2%	6.7%	0.0%
2019						
Gender	**Men**			**Women**		
	47.3%			52.7%		
Full vs Part Time	**Full-Time (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%
2022						
Gender	**Men**			**Women**		
	70.5%			29.5%		
Full vs Part Time	**Full-Time (Men)**		**Part-Time (Men)**	**Full-Time (Women)**	**Part-Time (Women)**	
	58.0%		12.5%	27.8%	1.7%	

Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**Bosnians**	**Others**
	93.8%	1.1%	2.3%	0.0%	2.8%	0.0%
Age Group	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65<**
	6.7%	29.3%	28.8%	28.8%	5.3%	1.0%
2023						
Gender	**Men**			**Women**		
	83.3%			16.7%		
Full vs Part Time	**Full-Time (Men)**		**Part-Time (Men)**	**Full-Time (Women)**	**Part-Time (Women)**	
	63.2%		20.2%	10.5%	6.1%	
Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**Bosnians**	**Others**
	93.0%	3.1%	0.8%	1.5%	1.5%	0.0%
Age Group	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65<**
	6.9%	26.4%	33.3%	27.6%	5.8%	0.0%

Digitalisation

The findings indicate that in 2023, 60.0 percent of attractions had their own websites, and 100 percent of all Attractions were registered in Google Maps. Additionally, 68.8 percent claimed to have used social networks for promotional purposes. For comparisons with previous years, refer to Figure 44.

Figure 44: Attractions - Digitalisation Level, 2017-2023 (%)



3.5. Tour Operators

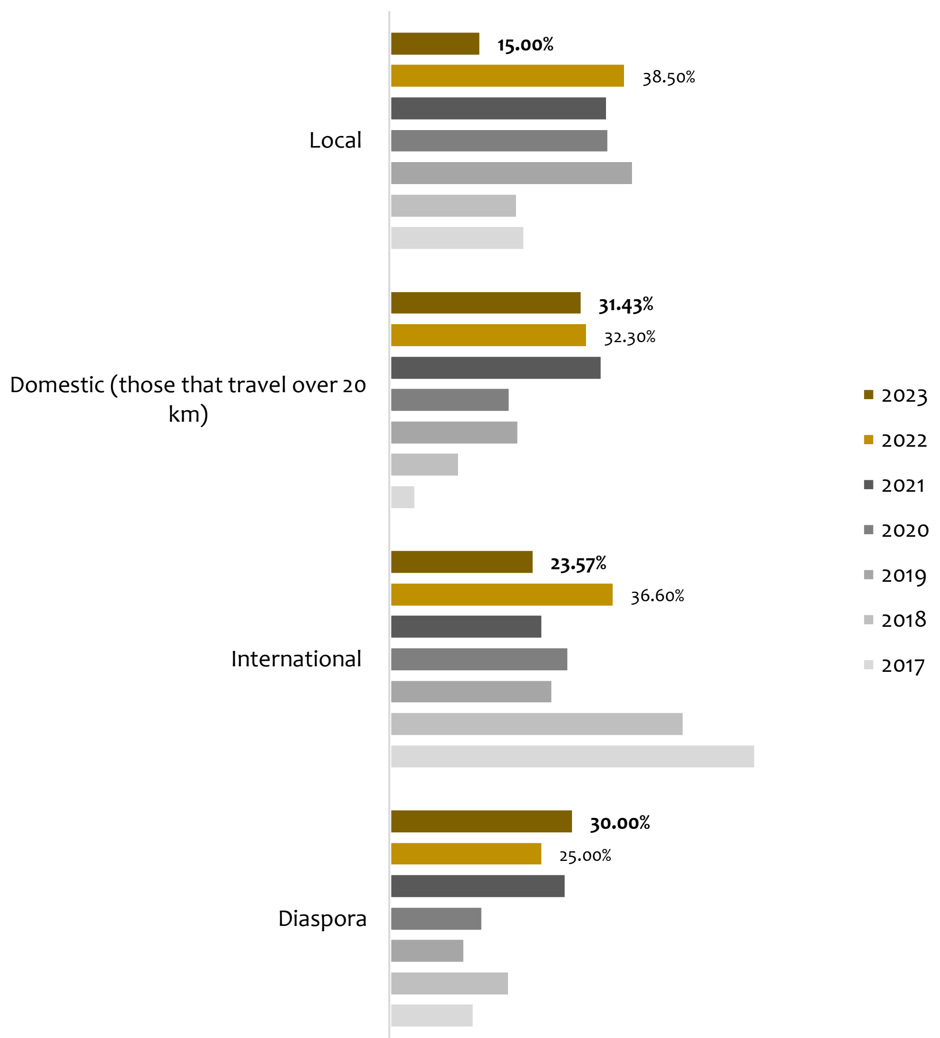
Tours, Prices, and Turnover

In 2023, 76.4 percent of tour operators worked with both outbound and inbound tourists, while the remainder exclusively served inbound tourists. The total number of tours sold in 2023 was 3,897.

Composition of Visitors

In 2023, the clientele of tour operators was primarily composed of domestic tourists accounting for 31.43 percent, and diaspora, making up 30.00 percent. For more detailed information and comparisons with other years, please refer to Figure 45.

Figure 45: Visitors by Origin (%) for Tour Operators (2017-2023)



Employment

The following presents some employment demographics for tour operators. The average number of employees working for tour operators was 5.6 in 2022, compared to 4.2 in 2021. The findings reveal that 67.4 percent of tour operator workers were men in 2022, and 63.8 percent were engaged on a full-time basis. All workers were Kosovo Albanians. Individuals aged between 25 and 44 comprised the majority of workers, accounting for 83.9 percent. For more information and comparisons with other years, please refer to 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%
2022						
Gender	Men			Women		
	67.4%			32.6%		
Full vs Part Time	Full-Time (Men)		Part-Time (Men)	Full-Time (Women)	Part-Time (Women)	
	39.9%		27.5%	23.9%	8.7%	
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<
	7.6%	52.5%	31.4%	8.5%	0.0%	0.0%
2023						
Gender	Men			Women		
	54.2%			45.8%		
Full vs Part Time	Full-Time (Men)		Part-Time (Men)	Full-Time (Women)	Part-Time (Women)	
	43.1%		11.1%	40.3%	5.6%	
Ethnicity	Kosovo Albanians	Kosovo Serbs	Turks	RAE	Bosnians	Others
	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	15-24	25-34	35-44	45-54	55-64	65<

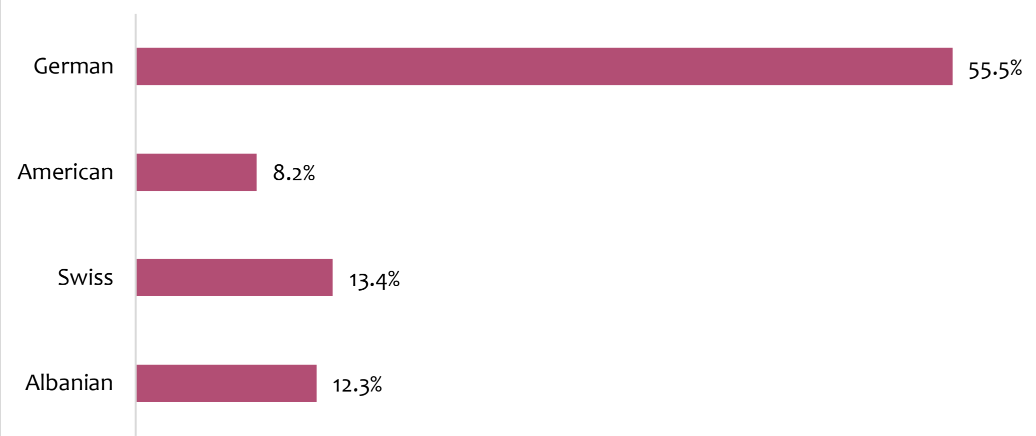
Age Group	7.4%	55.4%	31.4%	5.8%	0.0%	0.0%

3.6. National Events/Festivals

Number of Visitors and their Characteristics

In 2023, national events/festivals were dominated by locals with 47.5 percent, followed by diaspora with 21.7 percent, internationals with 11.8, and domestic visitors with 19.00 percent. In 2023, the majority of national events/festivals were German (55.5 percent), American (8.2 percent), Swiss (13.4 percent), and Albanian (12.3%). For more information, refer to Figure 46.

Figure 46: Nationality of Visitors to National Events/Festivals in 2023 (in %)



Prices

The ticket price for a festival in 2023 averaged 8.8 EUR, up from 6.7 EUR in 2022. When questioned about the average expenditures of foreign visitors per night in 2023, the representatives of events/festivals stated that it was 66.6 compared to 45.3 EUR in 2022.

Employment

In 2023, the majority (69.1 percent) of those employed in national events and festivals were men. Part-time workers accounted for 18.9 percent of the total employed, and non-Kosovo Albanians comprised only 5.2 percent. Workers aged between 15 and 34 constituted 72.2 percent of the total workforce. For more information and comparisons with other years, please refer to 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%
2022						

Gender	**Men**			**Women**		
	67.4%			32.6%		
Full vs Part Time	**Full-Time (Men)**		**Part-Time (Men)**	**Full-Time (Women)**	**Part-Time (Women)**	
	58.6%		8.8%	20.6%	12.0%	
Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**Bosnians**	**Others**
	92.6%	0.0%	1.3%	3.6%	2.5%	0.0%
Age Group	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65<**
	22.1%	52.8%	18.3%	6.3%	0.5%	0.0%
2023						
Gender	**Men**			**Women**		
	69.1%			30.9%		
Full vs Part Time	**Full-Time (Men)**		**Part-Time (Men)**	**Full-Time (Women)**	**Part-Time (Women)**	
	60.1%		8.9%	20.9%	10.0%	
Ethnicity	**Kosovo Albanians**	**Kosovo Serbs**	**Turks**	**RAE**	**Bosnians**	**Others**
	94.8%	0.0%	0.9%	2.7%	1.6%	0.0%
Age Group	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65<**
	32.6%	39.6%	19.1%	6.7%	2.0%	0.0%

4. Economic Impact

This section examines the economic impact of accommodations, Airbnb apartments, and restaurants in 2023, comparing the overall results with previous years. [6] Specifically, this section estimates the overall revenue generated by each actor. In addition, it provides the overall number of workers employed. However, 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 then multiplied by the average occupancy rate to calculate the total number of occupied rooms per year. To focus on tourism, the number of occupied rooms by locals was subtracted. The average prices, adjusted to account for superior rooms, were multiplied by the total number of occupied rooms per year (excluding locals), resulting in an estimated accommodation revenue from the sample. To ensure representativeness, a gross-up factor was applied. The overall sector revenue in 2023 amounted to 92.5 million EUR. The same approach was used to calculate the revenue of Airbnb apartments, which reached an estimated 22.7 million EUR in 2023. For more information on the main steps of the approach, refer to Table 11 and Table 12.

[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.

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**
408,800	846,435	277,035	79,935	41,245	49,275
(b) Average Occupancy Rate (%)					
57.20%					
(c) Number of Room-Nights Occupied per Year (a*b)					
Single Room	**Double Room**	**Triple Room**	**Quad Room**	**Vila**	**Other**
233,834	484,161	158,464	45,723	23,592	28,185
(d) Proportion of Room-Nights Occupied by Locals (%)					
19.00%					
(e) Number of Room-Nights Occupied per Year, Excluding Locals (c-d)					
Single Room	**Double Room**	**Triple Room**	**Quad Room**	**Vila**	**Other**
189,405	392,170	128,356	37,035	19,110	22,830
(f) Average Prices (€)**					
13,258,365	32,079,528	10,817,190	4,390,557	2,021,799	2,495,329
Single Room	**Double Room**	**Triple Room**	**Quad Room**	**Vila**	**Other**
70.0	81.8	84.3	118.6	105.8	109.3
(g) Estimated Accommodation Revenue from the Sample (€) Σ (e*f)					
65,062,768					
(h) Gross-Up Factor/Coefficient					
1.423					
(i) Estimated Accommodation Sector Revenue (€) (g*h)					
92,584,318					
*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**
7,665	16,060	1,825	1,095	7,665	-
(b) Average Occupancy Rate (%)					
73.05%					
(c) Number of Room-Nights Occupied per Year (a*b)					
Single Room	**Double Room**	**Triple Room**	**Quad Room**	**Vila**	**Other**
5,599	11,732	1,333	800	5,599	-
(d) Proportion of Room-Nights Occupied by Locals (%)					
11.10%					
(e) Number of Room-Nights Occupied per Year, Excluding Locals (c-d)					
Single Room	**Double Room**	**Triple Room**	**Quad Room**	**Vila**	**Other**
4,978	11,732	1,333	800	5,599	-
(f) Average Prices (€)**					
174,221.7	457,541.4	78,656.6	49,593.6	307,960.5	-
Single Room	**Double Room**	**Triple Room**	**Quad Room**	**Vila**	**Other**
35	39	59	62	55	0
(g) Estimated Accommodation Sector Revenue from the Sample (€) Σ (e*f)					
1,067,974					
(h) Gross-Up Factor/Coefficient					
21.3					
(i) Estimated Accommodation Sector Revenue (€) (g*h)					
22,747,842					

4.2. Restaurants

Similar to the approach for accommodations, the number of client visits in 2023 served as the initial figure. After excluding locals, this figure was then multiplied by the average price of food and drinks per visit on one hand, and the average price of drinks only on the other hand. This calculation resulted in the estimated revenue generated by the sampled restaurants. Following the application of the gross-up factor, the overall estimated restaurant revenue for 2023 was generated, amounting to 310.1 million EUR.

Table 13: Economic Impact – Restaurants	
(a) Number of Client Visits per Year	
30,309,600	
(b) Proportion of Locals (%)	
49.21%	
(c) Number of Client Visits per Year, Excluding Locals (a-b)	
15,394,246	
(d) Food and Drinks Towards Total Revenue (%)	
Food and Drinks	**Drinks Only**
60.4%	39.6%
(e) Average Price (€)	
Food and Drinks	**Drinks Only**
12.4	4.6
(f) Total Estimated Revenue from the Sample (€) (c*d*e)	
Food and Drinks	**Drinks Only**
115,296,744	27,981,197
(g) Gross-Up Factor/Coefficient	
2.1644	
(h) Estimated Restaurants Sector Revenue (€) Σ(f*g)	
310,110,775	

4.3. Overall Estimated Revenue and Employment

The overall estimated revenue from Accommodations, Airbnb Apartments, and Restaurants in 2023 increased by 27.04 percent compared to 2022. The most significant increase was observed in Airbnb revenue. For more detailed information, refer to Table 13.

Table 13: Estimated Revenue (€), 2017-2023				
Year	**Restaurants**	**Accommodations**	**Airbnb**	**Total**
v.2017	95,521,337	37,911,108	6,249,743	**139,682,188**
v.2018	140,712,183	42,384,201	7,460,332	**190,556,716**
v.2019	151,257,242	52,574,690	7,808,561	**211,640,493**
v.2020	101,450,527	20,870,416	2,309,075	**124,630,018**
v.2021	155,326,491	66,454,112	19,803,836	**241,584,439**
v.2022	225,697,849	85,424,400	23,769,438	**334,891,687**
v.2023	310,110,775	92,584,318	22,747,842	**425,442,935**

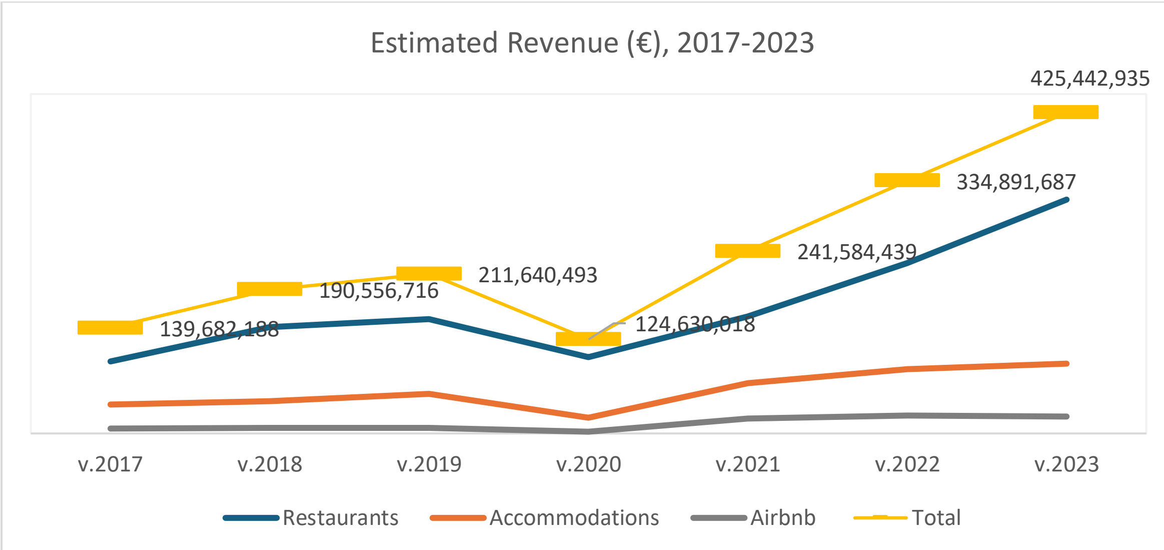


Table 13: Estimated Revenue %, 2017-2023				
Year	**Restaurants**	**Accommodations**	**Airbnb**	**Total**
v.2017	68.4%	27.1%	4.5%	100.0%
v.2018	73.8%	22.2%	3.9%	100.0%
v.2019	71.5%	24.8%	3.7%	100.0%
v.2020	81.4%	16.7%	1.9%	100.0%
v.2021	64.3%	27.5%	8.2%	100.0%
v.2022	67.4%	25.5%	7.1%	100.0%
v.2023	72.9%	21.8%	5.3%	100.0%