

# 2022 KOSOVO TOURISM SUPPLY SIDE SURVEY



Schweizerische Eidgenossenschaft  
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Confederazione Svizzera  
Confederaziun svizra

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**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)

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## 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 sixth consecutive survey since then. The report primarily interprets the findings of 2022 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 20 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; 146 of the identified accommodations were interviewed; 71 were accommodations only, whereas 75 were accommodations with restaurants.
- Restaurants were found on TripAdvisor and Gjrifa; 254 were interviewed.
- 24 attractions, 22 tour operators and 23 festivals/national events drawn from a list provided by PPSE were interviewed.
- In total, 469 face-to-face interviews were conducted.

Table 1 provides a comparison with previous years. Note that some service providers interviewed in the previous years could not be interviewed in 2022, 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	71
Accommodations	89	99	95	87	77	75
Restaurants	205	229	247	263	211	254
Attractions	32	17	30	26	22	24
Tour Operators	18	29	17	17	23	22
Festivals/National Events	36	32	31	-	24	23

**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 2022 took place during August and September 2022. 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.

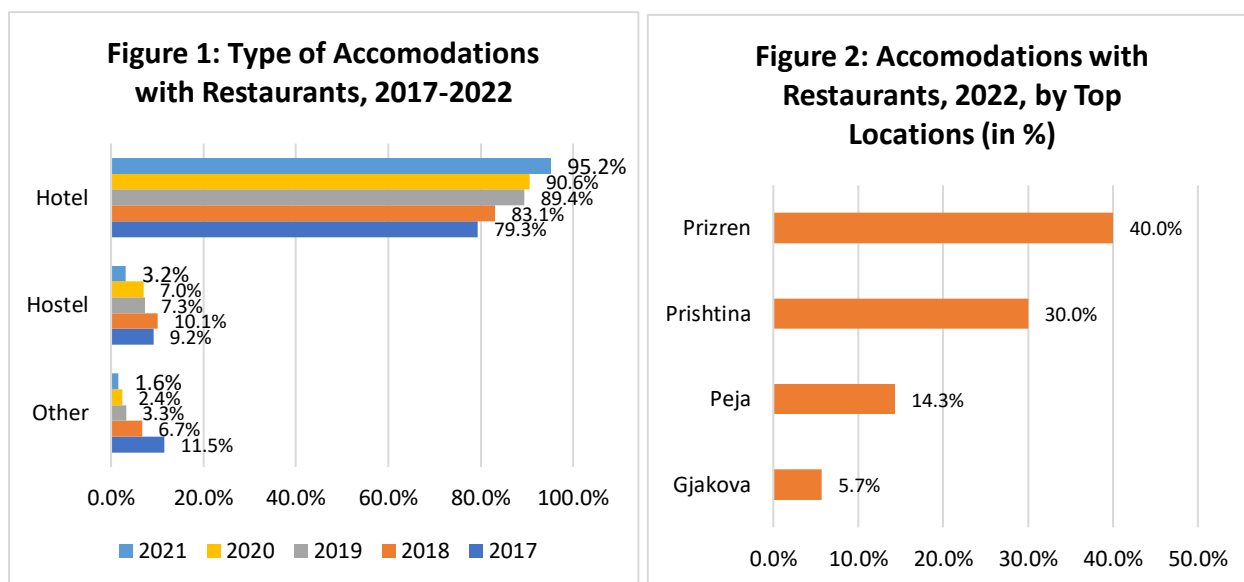
### 3. Survey Findings

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 2022. 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 behavior, 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<sup>1</sup>

##### ***The General Structure of Accommodations with Restaurants***

In 2022, 95.7 percent of all accommodations with restaurants were hotels. The remainder consisted of hostels (2.9 percent) and other accommodations (1.4 percent). To compare with other years, refer to Figure 1. The majority of the interviewed accommodations with restaurants are situated in Prizren (40.0 percent) and Prishtina (30.0 percent) (refer to Figure 2). The latter figure should be interpreted with caution since it represents the number of interviews per location, and therefore, it may not necessarily reflect the actual distribution of accommodations.



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

In 2022, the average number of single standard rooms in accommodations with restaurants was 10.2. For double standard rooms, the average was higher at 13.6. The total number of single standard rooms (adjusted to include the whole population) amounted to 754, whereas the total number of double standard rooms was 1,661. The average price for a single standard room was 50.3 EUR, while for the

<sup>1</sup> This includes accommodations that have a restaurant attached to their business.

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

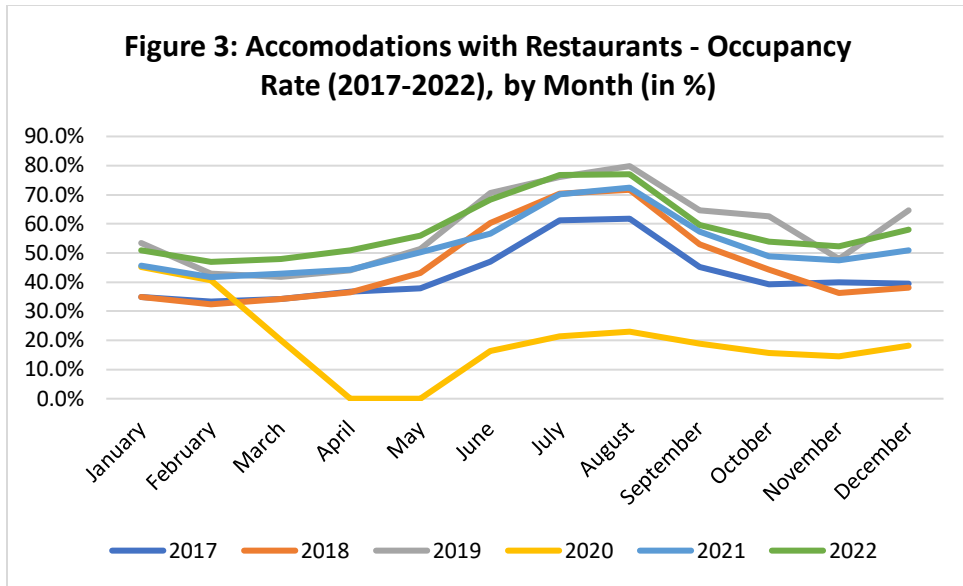
A disaggregation of the survey findings by the top three regions<sup>2</sup> reveals that Prishtina had the highest number of single and double standard rooms and the highest average prices. For more detailed information and to compare with 2019 and 2021, see Table 3.

Table 3: Accommodations with Restaurants - Standard Rooms, by Main Regions										
		Prishtina Region (2019)	Prishtina Region (2021)	Prishtina Region (2022)	Peja Region (2019)	Peja Region (2021)	Peja Region (2022)	Prizren Region (2019)	Prizren Region (2021)	Prizren Region (2022)
Single Standard Rooms	Avg. Price (EUR)	52.2	52.5	60.1	34.8	41.1	44.3	27.8	39.4	46.8
	Total # of Rooms	516	498	512	94	150	144	225	135	145
Double Standard Rooms	Avg. Price (EUR)	66.1	68.8	72.5	39.9	49.1	52.1	37.3	46.2	57.3
	Total # of Rooms	888	945	899	218	261	246	368	456	488

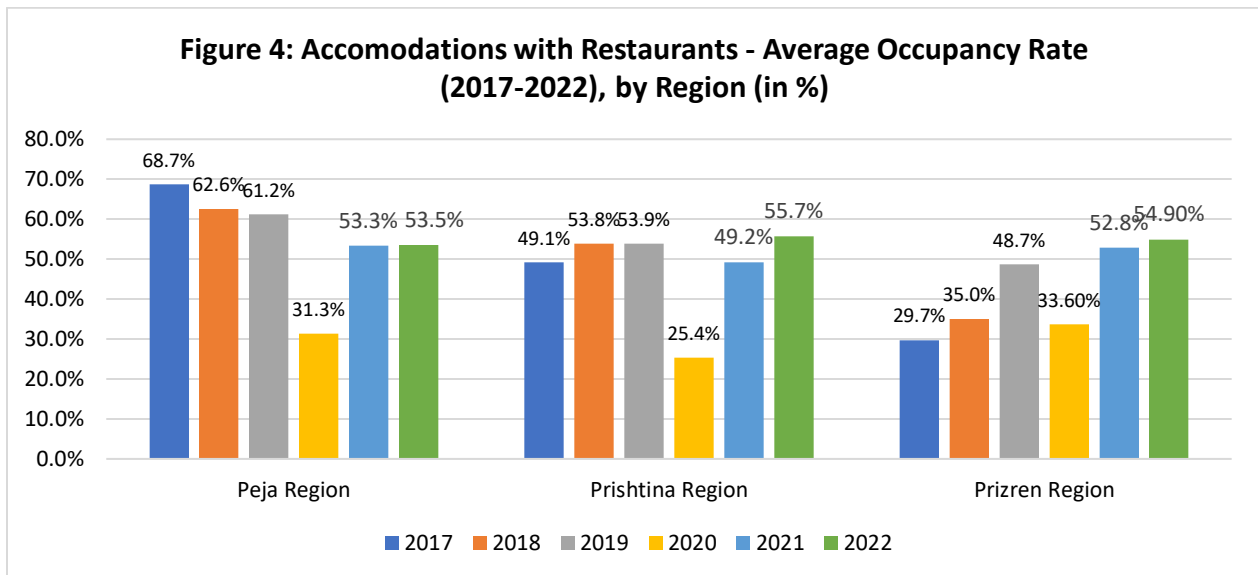
The annual occupancy rate in 2022 averaged 58.2 percent, ranging from 47.0 percent in February to 77.0 percent in August. This average rate was higher than in 2021 and almost identical to that of 2019. For more detailed information, refer to Figure 3.

<sup>2</sup> The other regions could not be considered here due to the small number of observations.





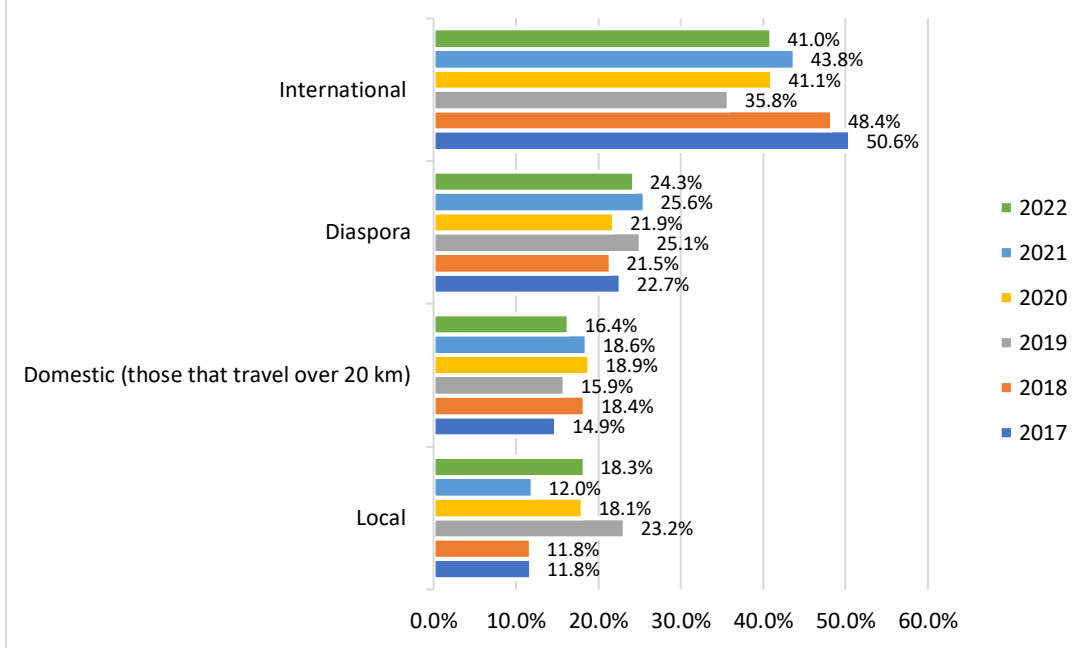
The average occupancy rate seems to be similar across the main regions 2022. For detailed information, see Figure 4.



**Guests and their Behaviour**

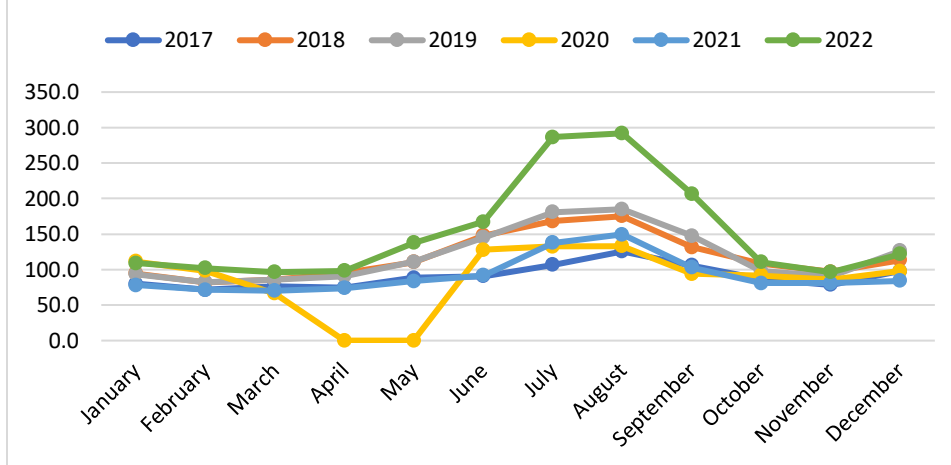
The survey also examines the structure of guests and their duration of stay. In 2022, international guests constituted 41.0 percent of the overall visitors; diaspora, 24.3 percent; domestic visitors (with more than 20 km of travel), 16.4 percent; and local guests (less than 20 km of travel), 18.3 percent. For comparisons with previous years, refer to Figure 5. The average duration of stay in 2022 was 2.9 nights, which is lower compared to 2021 (3.4 nights).

**Figure 5: Accomodations with Restaurants - Composition of Guests (2017-2022), by Origin (in %)**



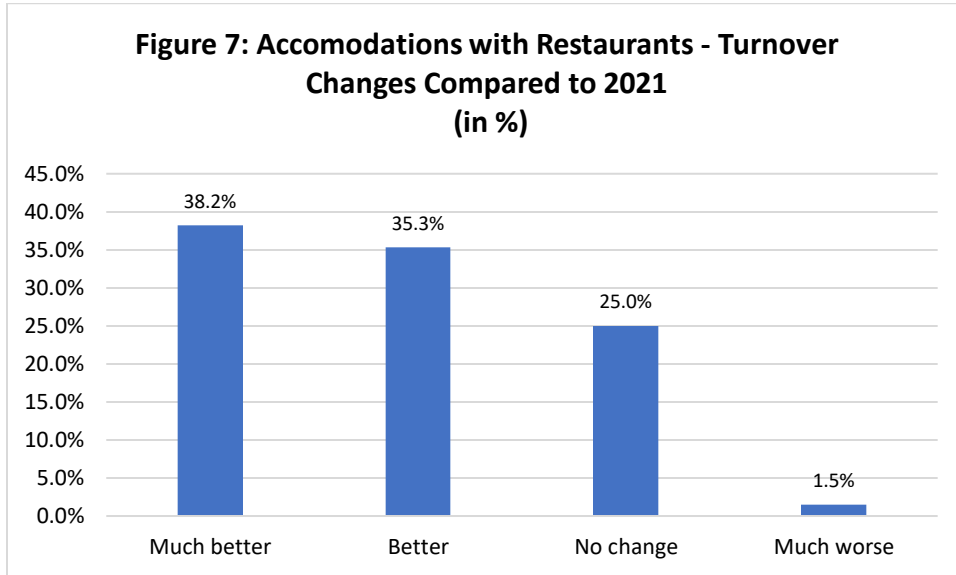
In 2022, the average number of guests per day in the restaurants of this category of accommodations stood at 152.2, higher by 65 percent compared to 2021. Like in previous years, August turned out to be the busiest month in 2022, with an average of 291.9 guests per day. Figure 6 visually presents the detailed averages for the past six years. The share of guests who came for food and drinks in 2022 stood at 61.8 percent, compared to 54.8 percent in 2021. The average bill for this category in 2022 was 13.9 EUR, up from 12.8 EUR in 2021. On the other hand, the proportion of those who came for drinks only stood at 38.0 percent in 2022, compared to 45.2 percent in 2021. The average bill for this category was 4.1 EUR in 2022, compared to 3.9 EUR in 2021.

**Figure 6: Average Number of Guests in Accomodations with Restaurants, by Month (2017-2022)**

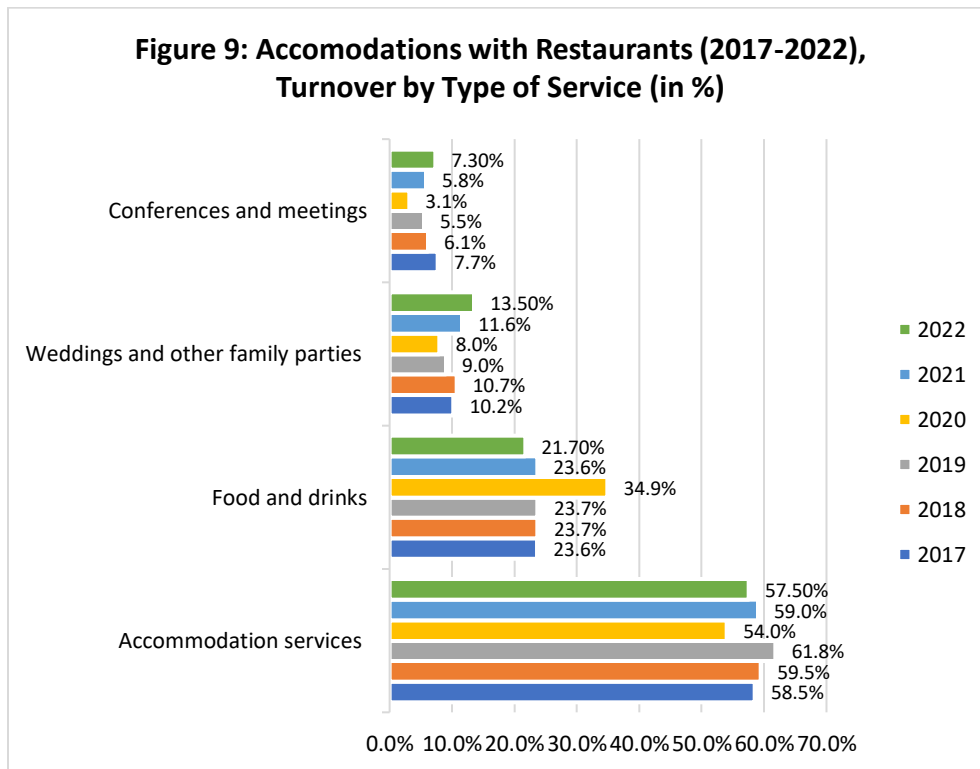


**Turnover and Investments**

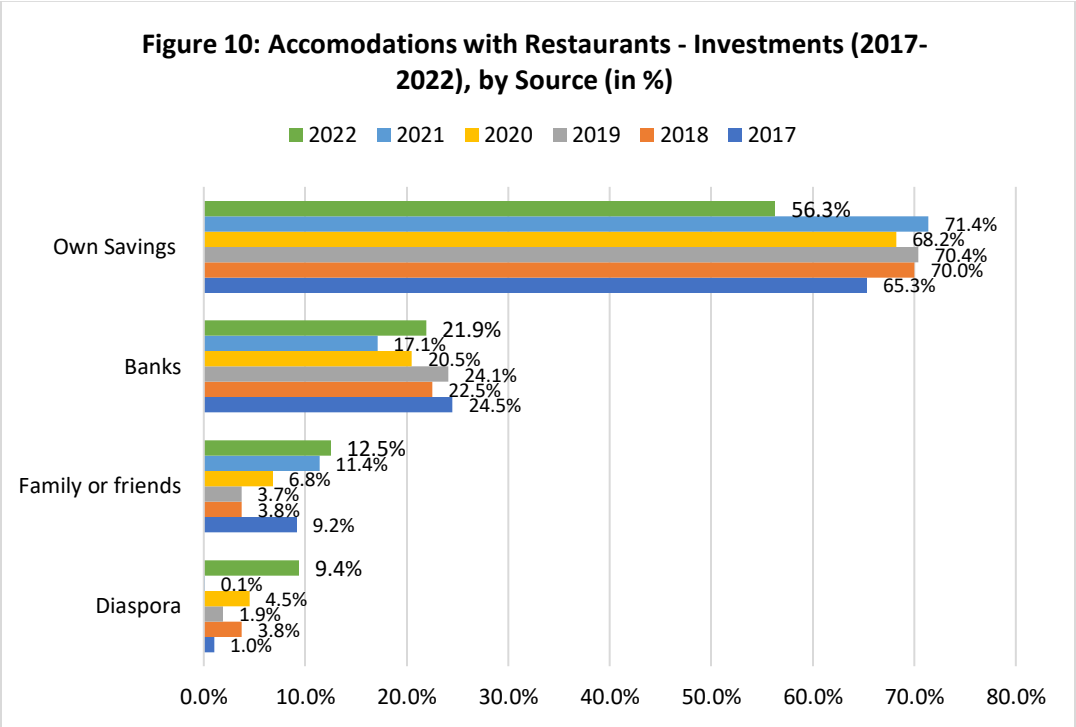
In terms of turnover, the overwhelming majority – 73.5 percent – reported having performed 'better' or 'much better' compared to 2021. 25.4 percent declared to have had no change, and only 1.5 percent said to have had a "much worse" performance (see Figure 7).



Further analysis reveals that in 2022, ‘accommodation services’ contributed 57.5 percent towards the overall turnover; ‘food and drinks’ 21.7 percent; ‘weddings and other family parties’ 13.5 percent, and ‘conference and meetings’ 7.3 percent. To draw comparisons with previous years, see Figure 9.



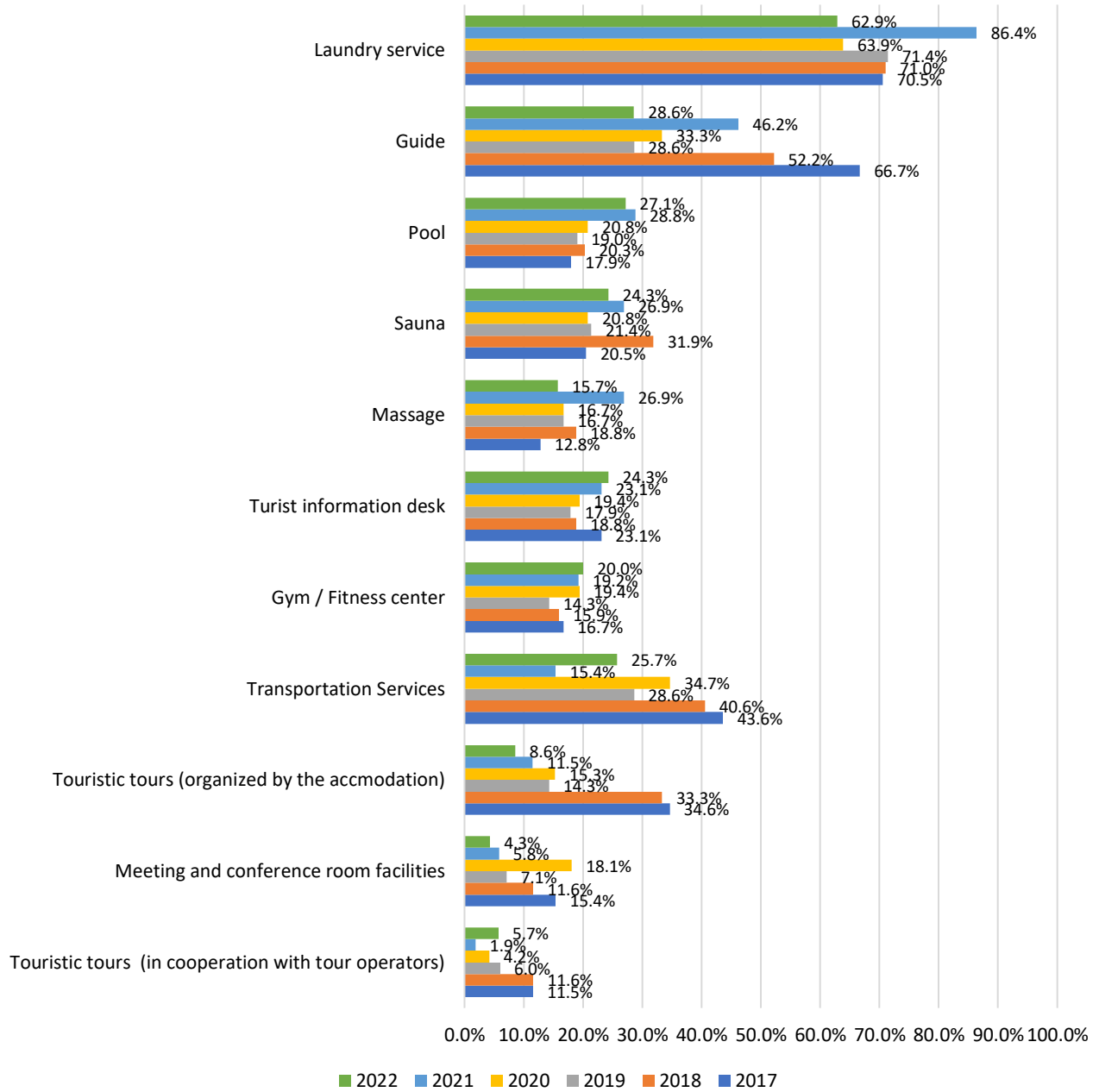
In 2022, 27.9 percent of the surveyed accommodations with restaurants declared to have made some investment, compared to 42.0 percent in 2021. In 2022, their investments were mostly financed through own savings (56.3 percent) and banks (21.9 percent). To see other investment sources and compare them with other years, refer to Figure 10.



**Services Offered**

When asked about the services offered in 2022, the most frequent answers turned out to be: laundry services (62.9 percent of cases), guide (28.6 percent), and pool (27.1 percent). For the other services offered by accommodations with restaurants in 2022 and those offered in the previous years, see Figure 11.

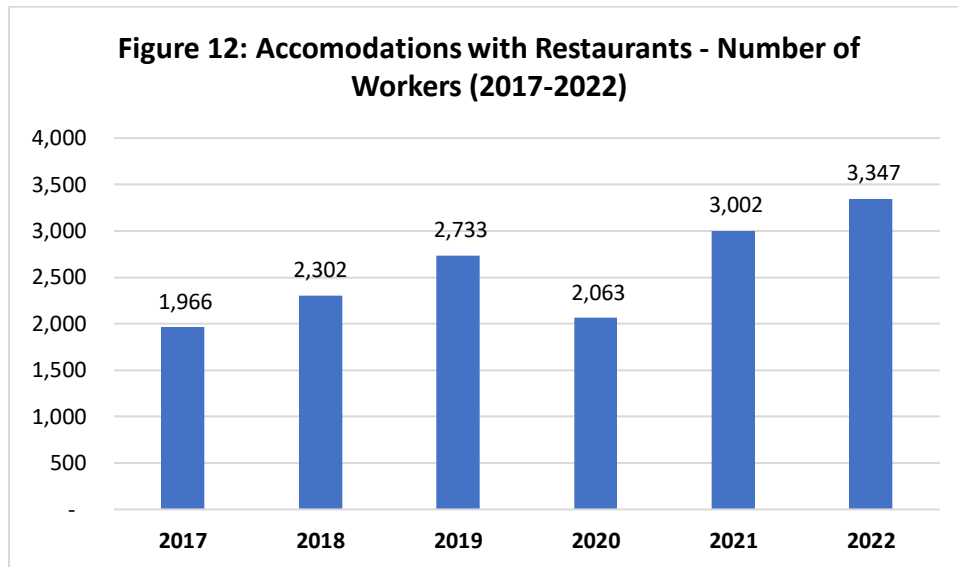
**Figure 11: Accomodations with Restaurants - Services Offered, 2017-2022 (in % of Cases)**



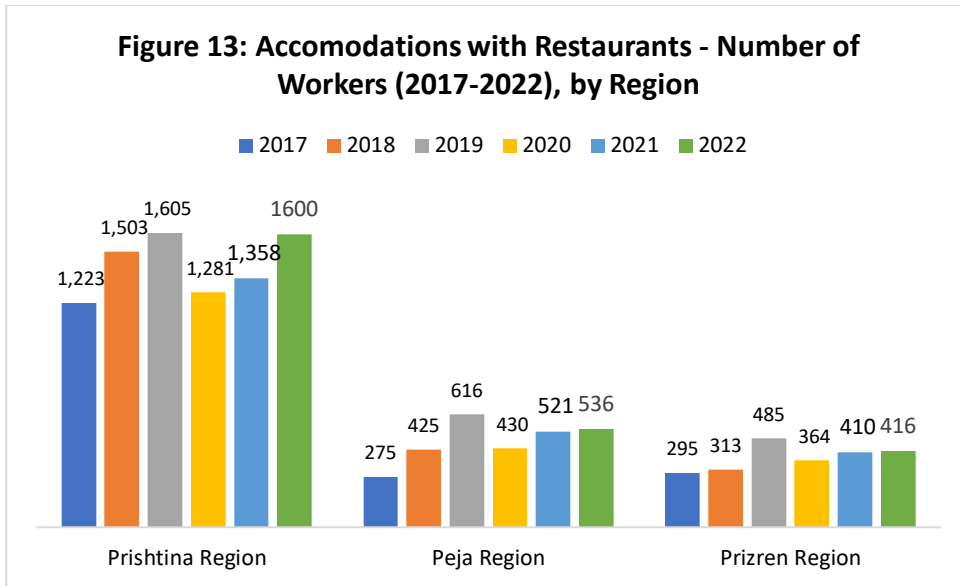
## **Employment**

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 fifth 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 six 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.



A breakdown of the findings by the top three regions shows that in 2022, accommodations with restaurants in Prishtina Region employed the largest number of workers, 1,600 in total. The number of workers in Peja Region and Prizren Region was significantly smaller, 546 and 416, respectively. In all cases, there has been a notable increase compared to 2021 (see Figure 13).



The following are some demographic characteristics of the workers employed in accommodations with restaurants in 2022. Men dominated with 78.5 percent. Out of all employed, only 10.8 percent worked on a part-time basis. A disaggregation of data by ethnic background reveals that workers were predominantly Kosovo Albanians – 95.6 percent; the rest consisted of Bosnians, 2.2 percent; Turks, 1.8 percent; RAE, 0.2 percent; and others, 0.2 percent. In terms of the age group, those falling in the range of 25-44 constituted the majority with 66.4 percent. For more detailed information and to compare employment demographics with the other five years, refer to Table 4.

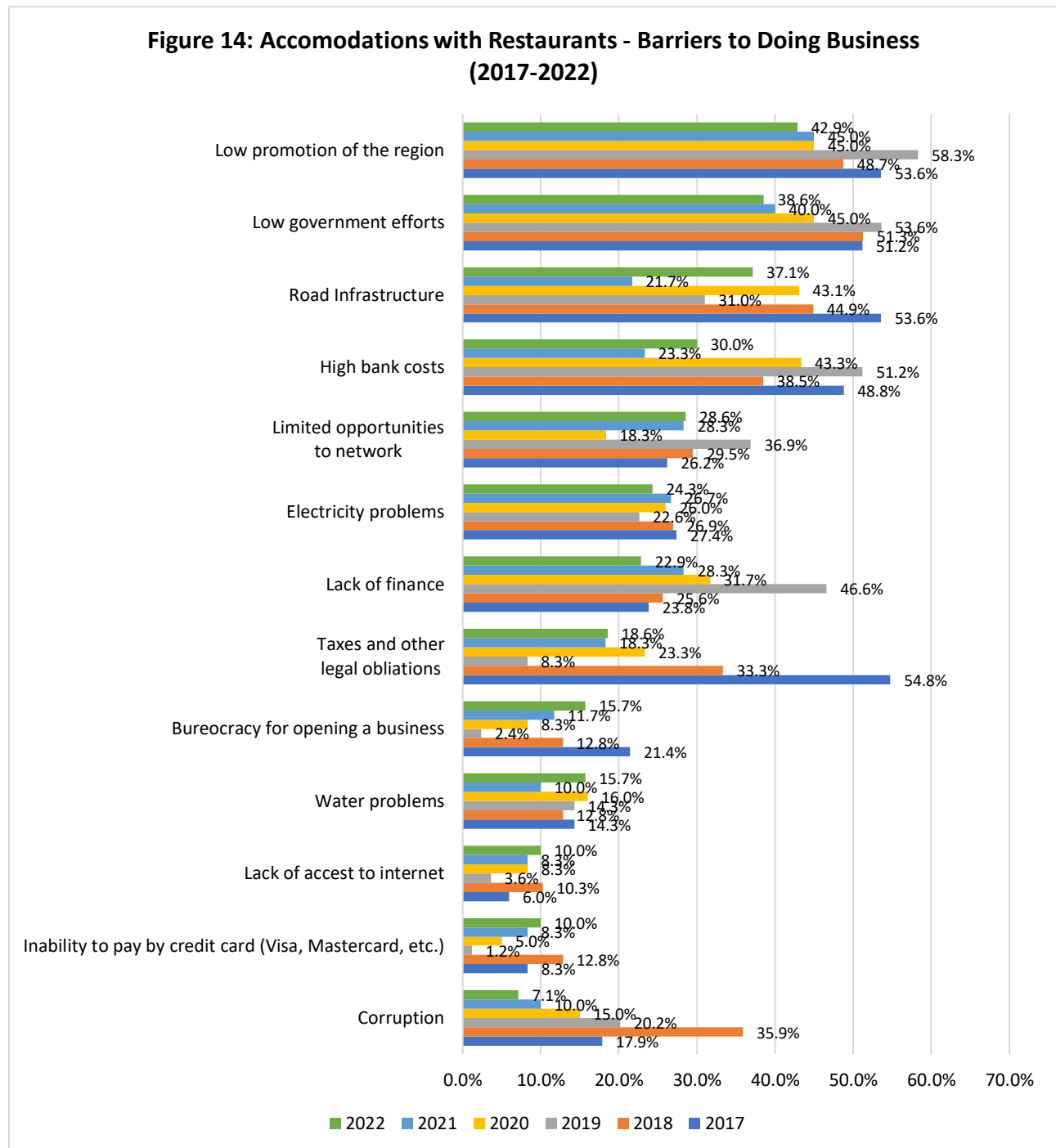
**Table 4: Employment Demographics**

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%



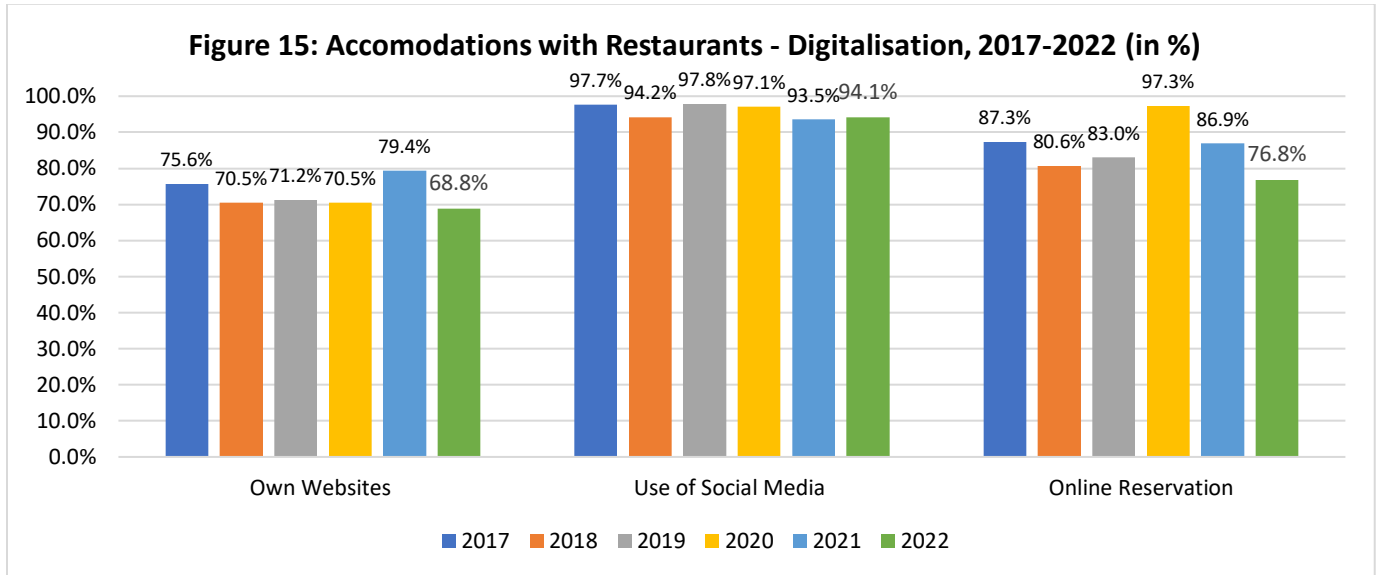
**Barriers**

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 42.9 percent and ‘low government efforts’ with 38.6 percent, followed by ‘road infrastructure’ with 37.1 percent were considered to be the most pressing barriers for 2022. For more detailed information and to make comparisons with the previous four years, see Figure 14.



## Digitalisation

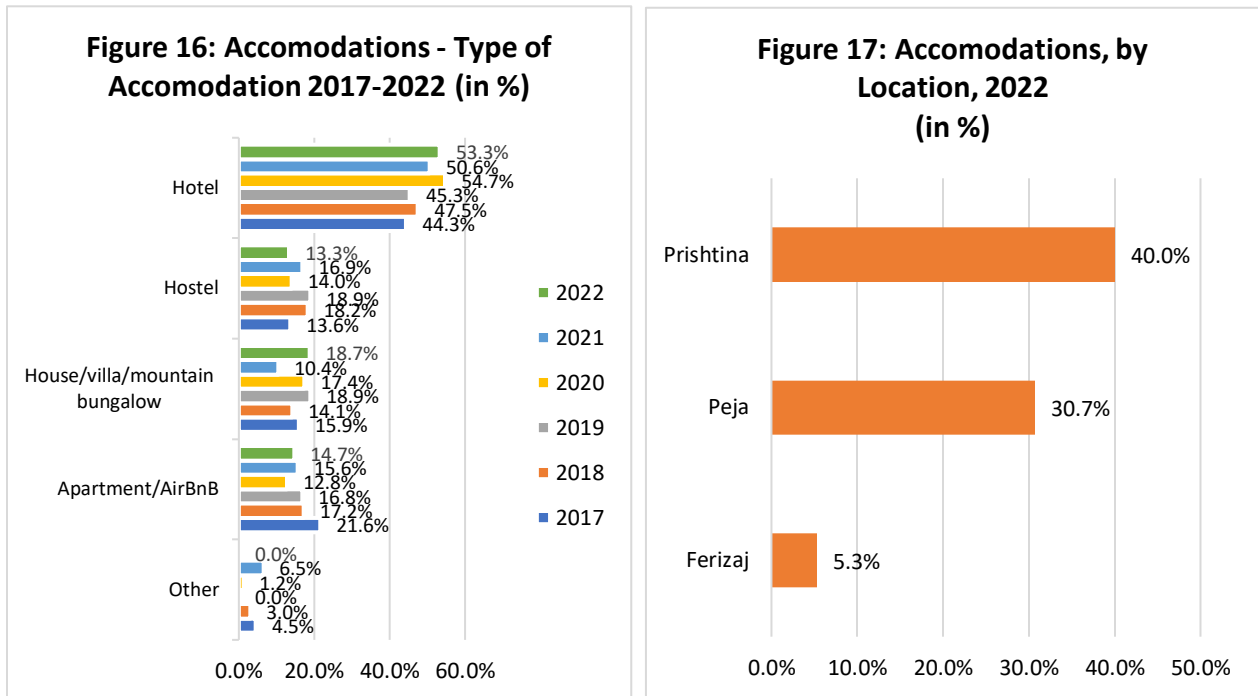
To understand whether accommodations with restaurants have been catching up with recent digitalization trends, the survey included a set of questions related to this subject. One finding shows that in 2022, 68.8 percent of accommodations with restaurants had their own websites. Moreover, the overwhelming majority, 94.1 percent, reported that they use social networks (mostly Facebook) as a means to promote their business. In the question regarding online reservations, 76.8 percent claimed to have this option. Reservations are made mostly through booking.com. To compare with the previous five years, refer to Figure 15.



### 3.2. Accommodations (without Restaurants)<sup>3</sup>

#### **General Structure**

In 2022, among all accommodations, hotels dominated with 53.3 percent, followed by hostels with 13.3 percent, houses/villas/bungalows with 18.7 percent, and Airbnb apartments with 14.7 percent. To compare with the other years, refer to Figure 16. Most of the accommodations were located in Prishtina (40.0 percent), Peja (30.7 percent), and Ferizaj (5.3 percent), see Figure 17.



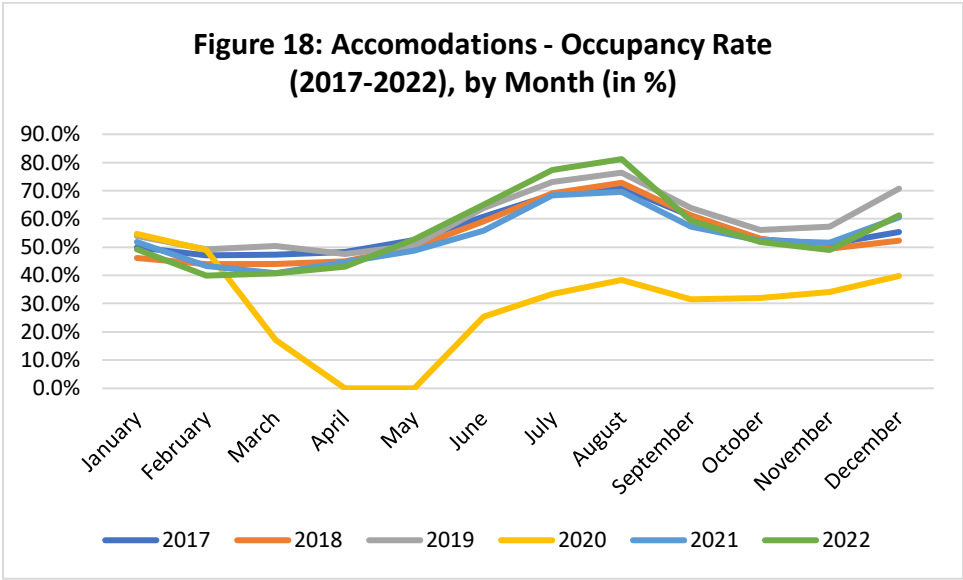
#### **Number of Rooms, Prices and Occupancy Rate**

The survey findings show that in 2022, accommodations had an average of 6.1 standard single rooms and 8.1 standard double rooms. In the same year, the total number of single and double standard rooms (adjusted to include the whole population) was 334 and 627, respectively. The average price for a single standard room stood at 33.9 EUR, while for a double one at 47.1 EUR. 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.

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

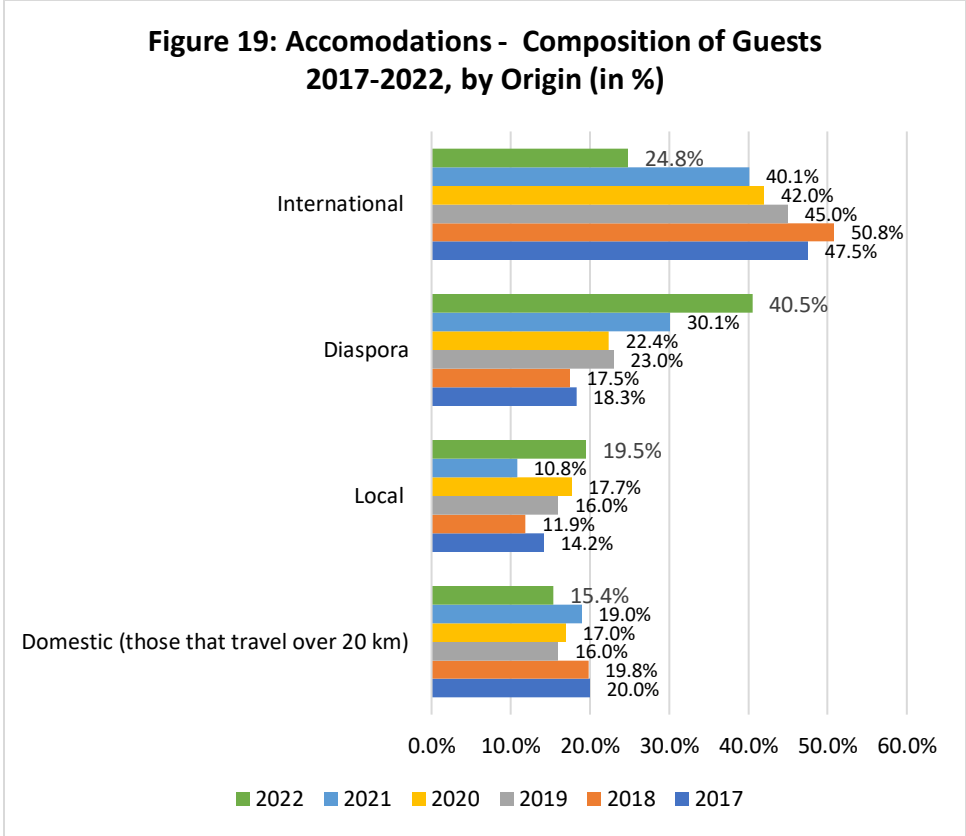
Table 5: Accommodations - Average Number and Price of Standard Rooms		2017	2018	2019	2020	2021	2022
Single Standard Rooms	Avg. # of Rooms	10.05	8.6	9.1	7.2	7.9	6.1
	Avg. Price (EUR)	27.3	25.0	24.6	24.6	36.3	33.9
	Total # of Rooms	582	680	678	541	481	334
Double Standard Rooms	Avg. # of Rooms	7.6	8.3	10.5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

In 2022, the occupancy rate in this category of accommodations averaged at 55.9 percent. The highest occupancy rate was in August (81.2%), while the lowest was in February (39.9%). For more detailed results and comparisons with the previous years, refer to Figure 18.



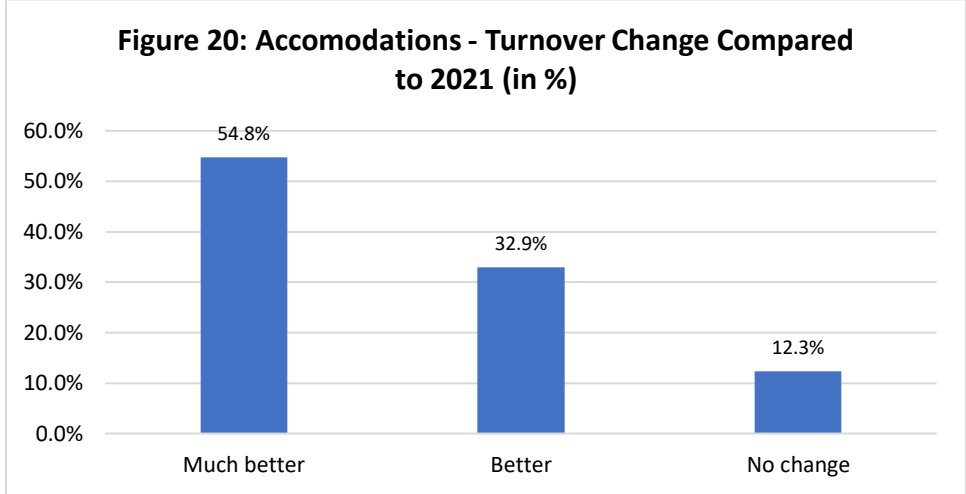
**Guests and their Behaviour**

The survey findings reveal that in 2022, the diaspora comprised 40.5 percent of all visitors in accommodations without restaurants; internationals, 24.8 percent; locals, 19.5 percent, and domestic visitors (with more than 20 km of travel), 15.4 percent. To compare data with previous years, refer to Figure 19. The number of nights spent averaged 5.6 in 2022, compared to 5.1 in 2021.



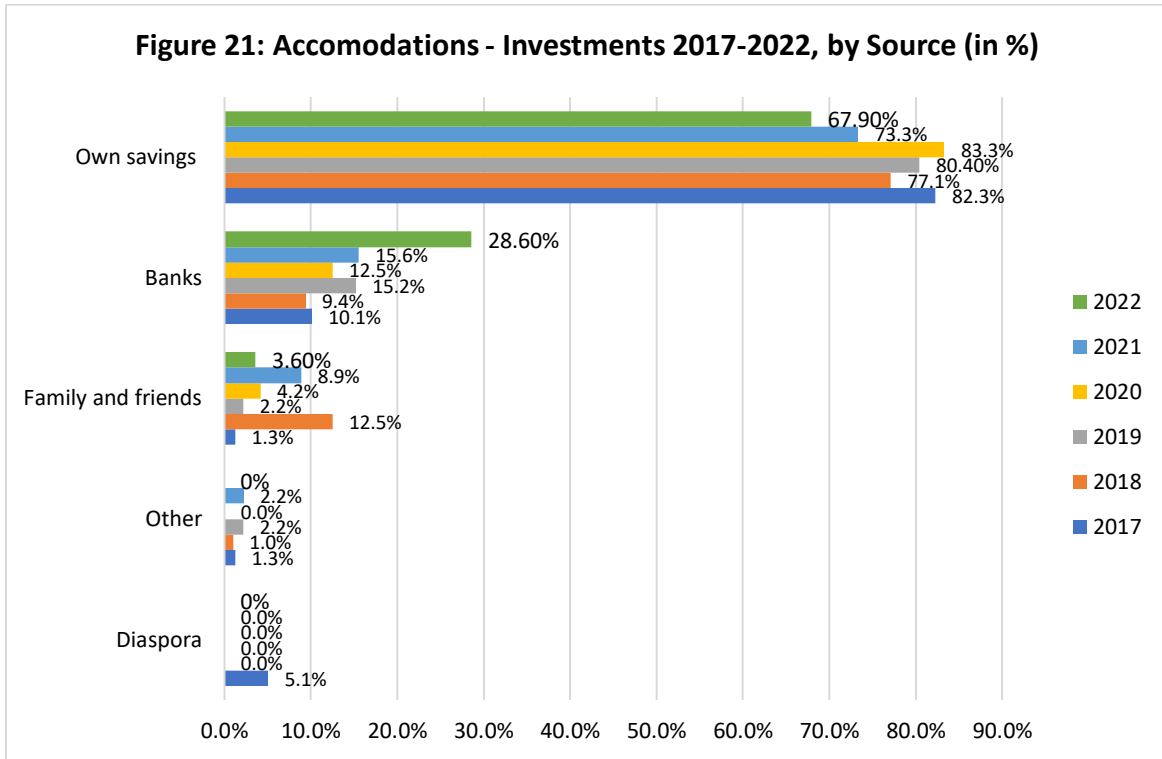
**Revenue and Investments**

The revenue findings reveal that in 2022, 54.8 percent of accommodations reported having "much better" turnover compared to 2021, 32.9 percent "better", while 12.3 percent said they did not experience any change (see Figure 20).



In response to the question about whether they have invested in their business in 2022, 55.6 percent of accommodations said 'yes'. Those who invested, financed their investment mostly from their own savings

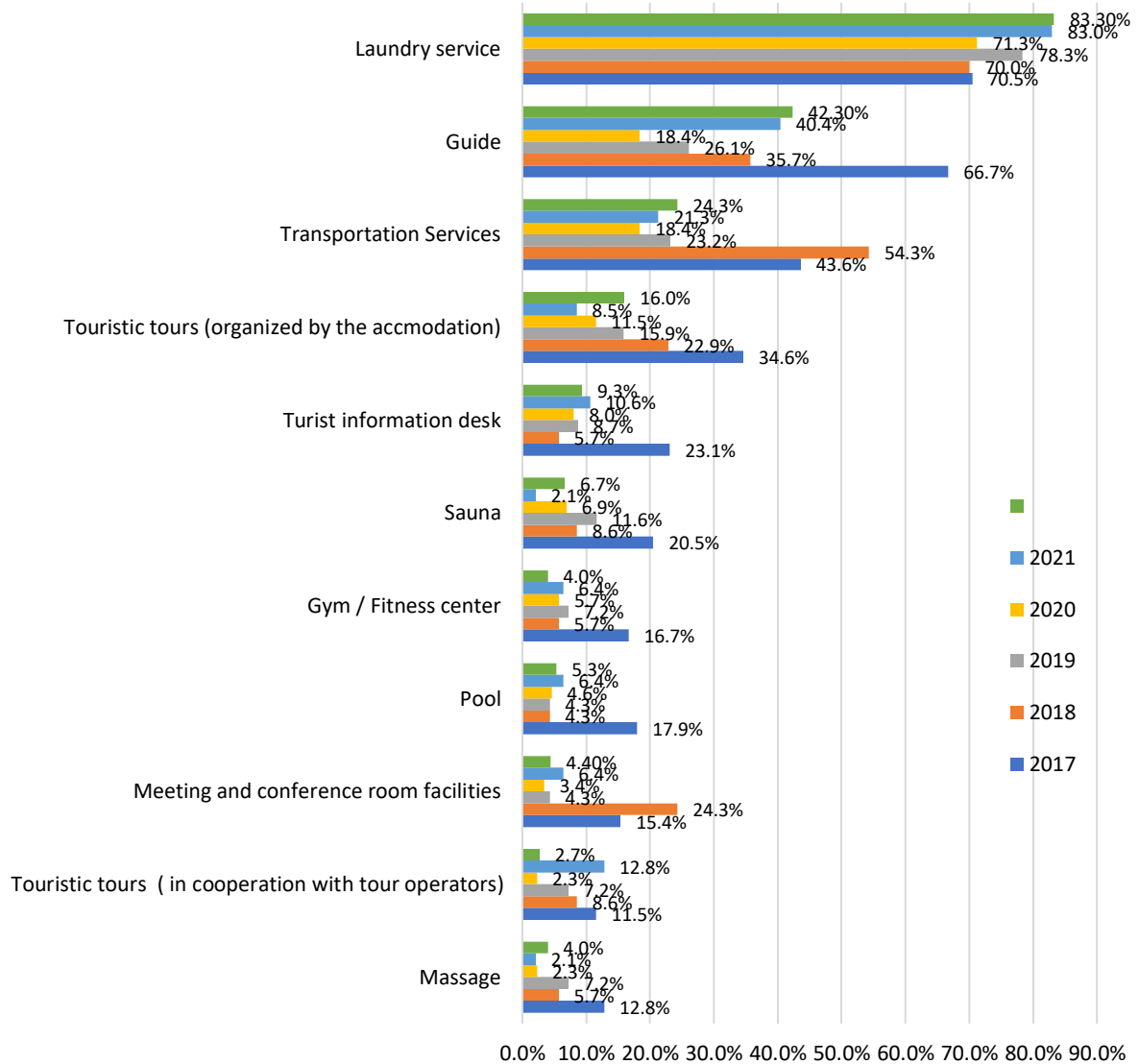
(67.9 percent). To see the other sources of finance and compare with the previous years, refer to Figure 21.



**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 (83.3 percent), guide (42.3 percent), and transportation services (24.3 percent), were the most common services offered by accommodations in 2022. To see other services provided in this year and to compare them with the previous years, refer to Figure 22.

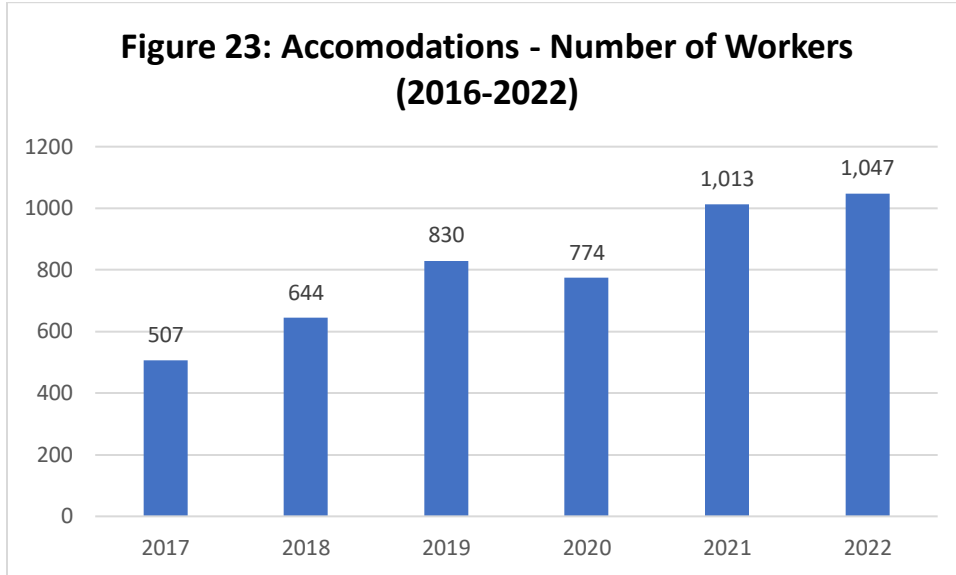
**Figure 22: Accommodations - Services Offered, 2017-2022 (in % of Cases)**



The findings further show that 18.7 percent of accommodations had special packages (i.e. for the weekend or vacation) in 2022, compared to 10.8 percent in 2021.

**Employment**

In 2021, the number of workers in accommodations stood at 1,047, more than double compared to 2017 (see Figure 23).<sup>4</sup> 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 2022. Men comprised the majority (74.4 percent) of workers. Of all workers, 25.6 percent worked on a part-time basis. A breakdown of data by ethnicity shows that almost all workers were Kosovo Albanians, 98.1 percent. As per age groups, those in the 25-44 age group constituted the majority with 59.7 percent. For more detailed information and comparisons with the previous years, refer to Table 6.

<sup>4</sup> Gross up factor for accommodations~1.423

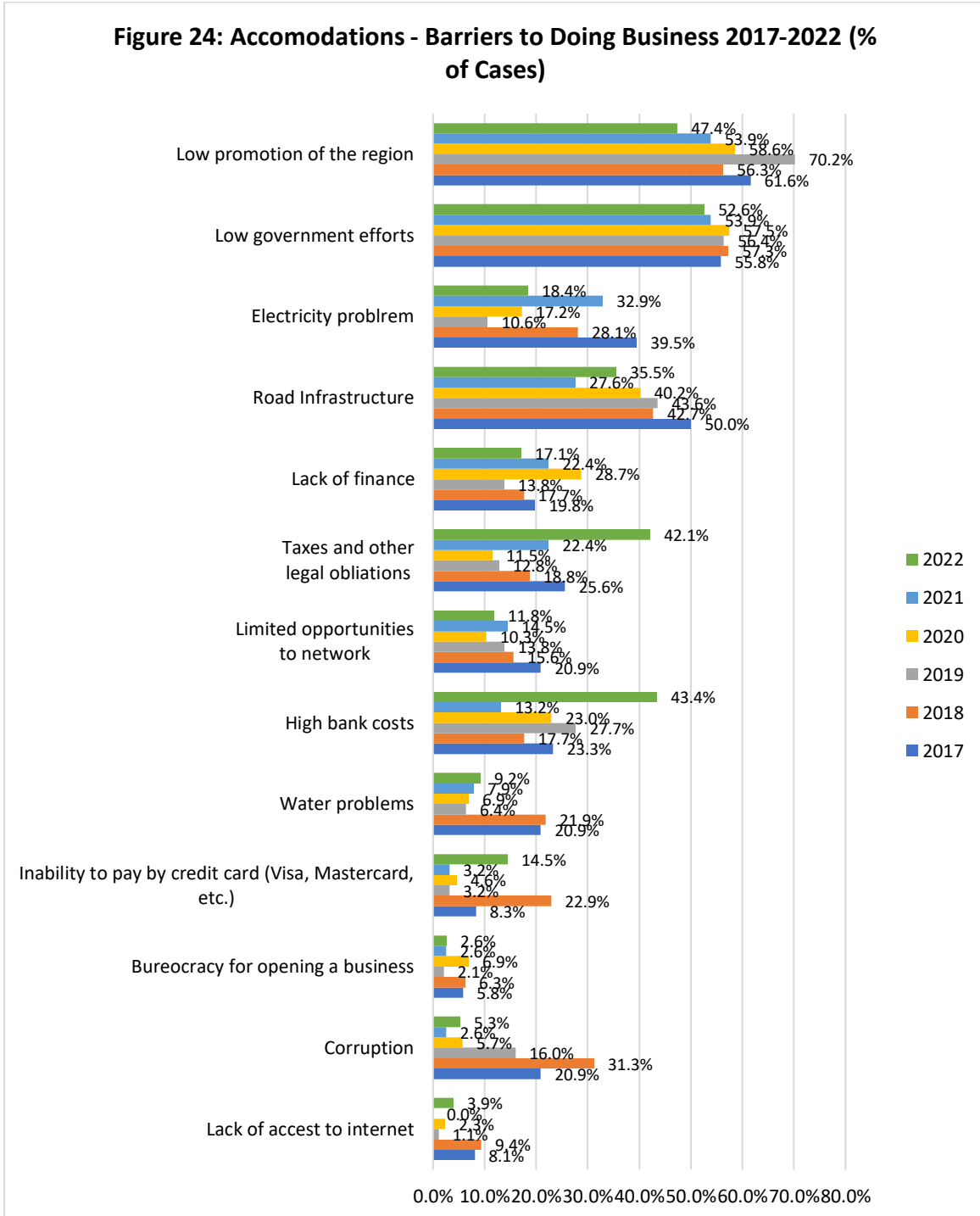


**Table 6: Employment Demographics (Accommodations)**

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%

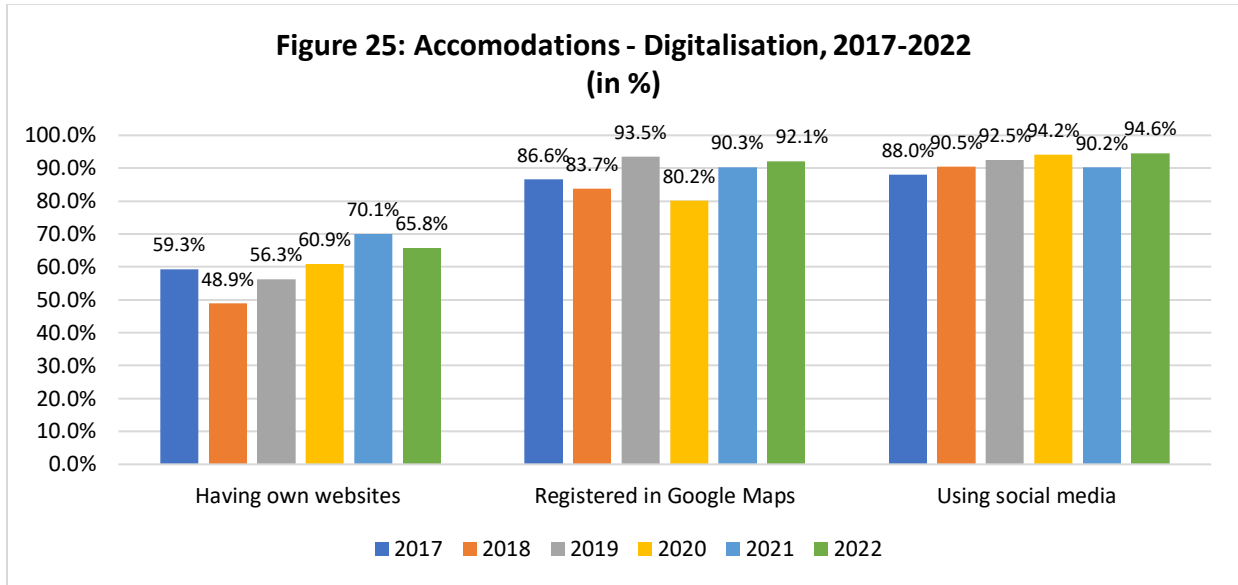
**Barriers to Doing Business**

Accommodations were also enquired to choose the most pressing barriers to doing business. ‘Low government efforts’ (52.6 percent of all cases), ‘low promotion of the region’ (47.4 percent), and ‘high bank costs’ (43.4 percent) were perceived to be the most pressing operating barriers by accommodations in 2022. To see the other barriers to doing business and to compare them with the previous years, refer to Figure 24.



**Digitalisation**

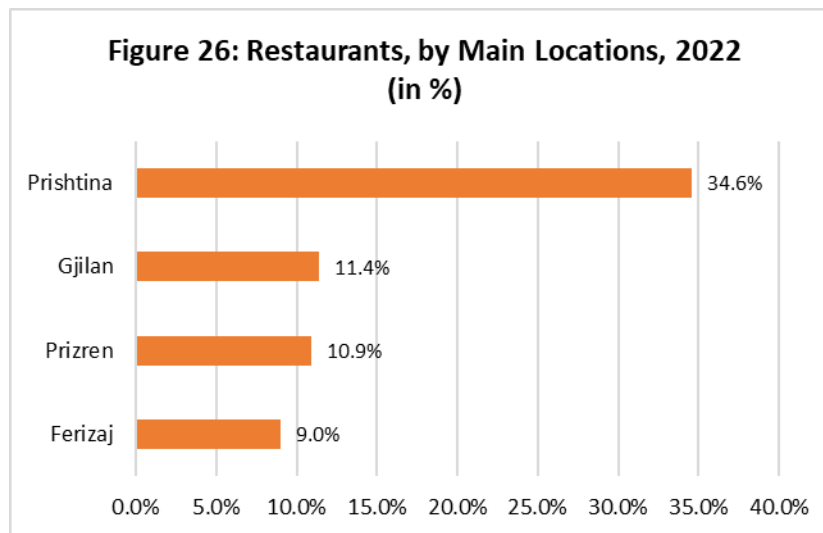
The survey findings reveal that 65.8 percent of accommodations had their own websites in 2022. The vast majority, 92.1 percent, were registered in Google Maps. A similar percentage, 94.6 percent, claimed to have used social media to promote their accommodations. To compare the data with the previous years, see Figure 25.



### 3.3. Restaurants

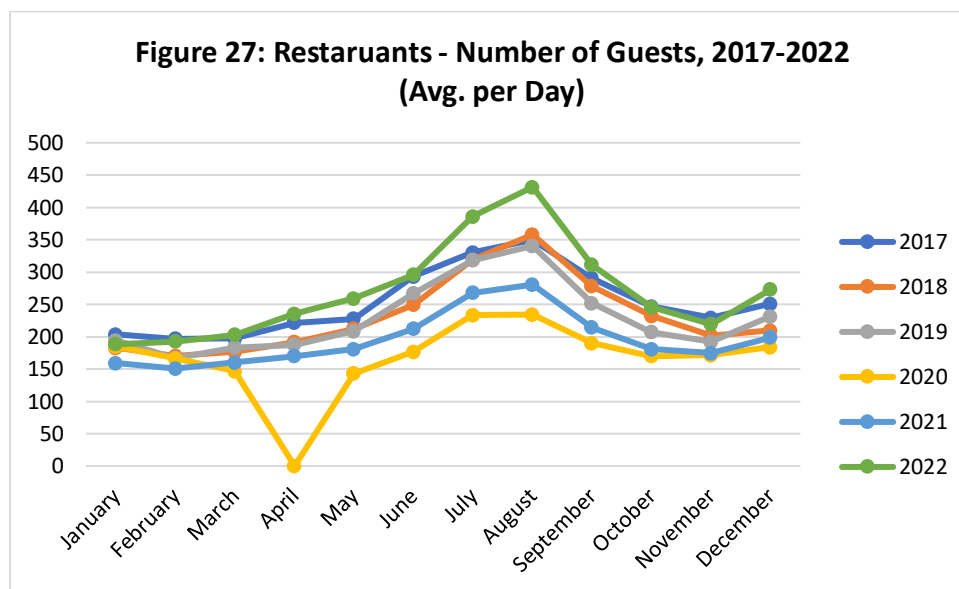
#### General Structure

In 2022, 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.



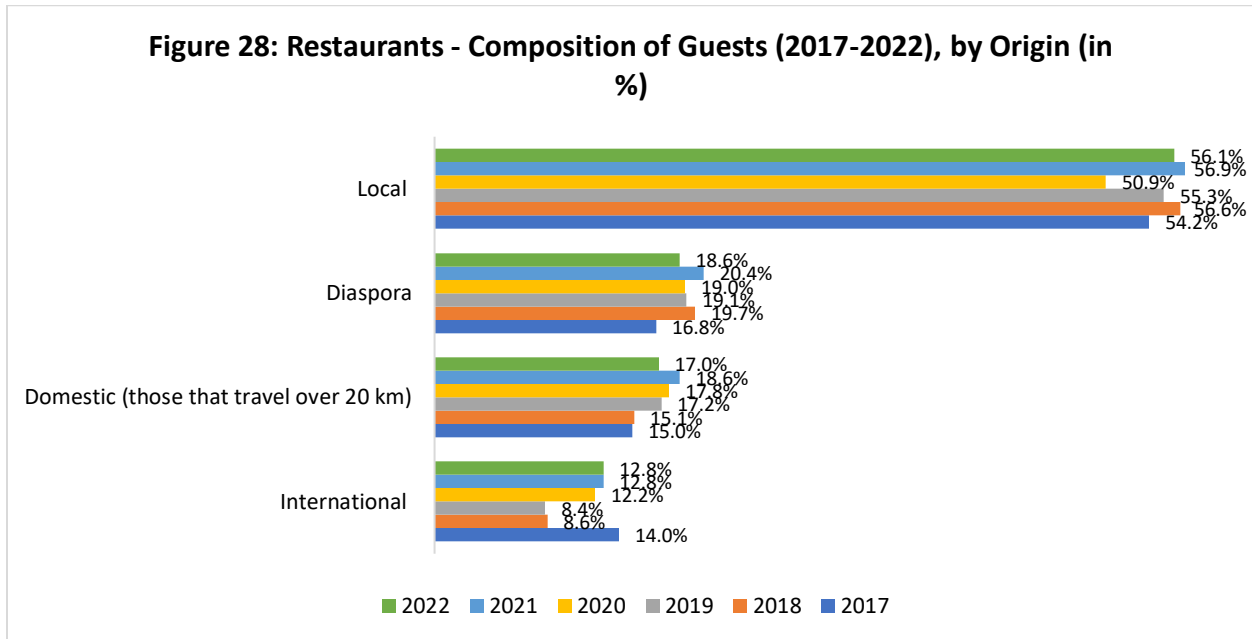
#### Guests and their Behaviour

The findings show that restaurants had an average of 270.1 guests per day in 2022, which is 38.0 percent more compared to 2021. During this year, the busiest month turned out to be August, with an average of 431.5 guests per day. For more detailed information and to compare averages with those of the previous years, refer to Figure 27.



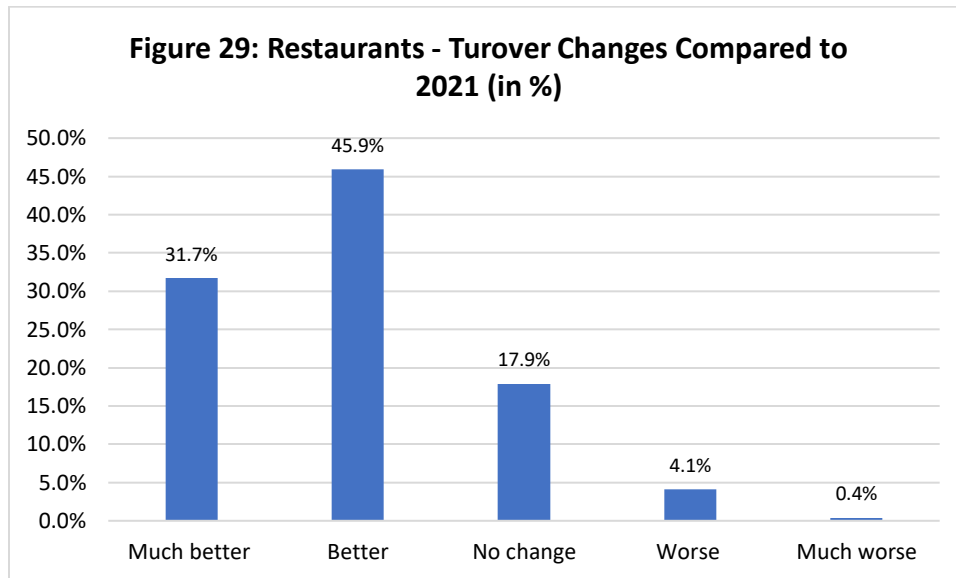
The findings reveal that in 2022, 56.1 percent of the clientele in restaurants consisted of locals; others included the diaspora (18.6 percent), domestic visitors (17.0 percent), and internationals (12.8 percent). To make comparisons with the previous years, see Figure 28. The data on restaurants show that in 2021,

59.8 percent (60.6 percent in 2021) 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 8.9 EUR (8.5 EUR in 2021), while the average of the latter was 3.9 EUR (3.6 EUR in 2021).



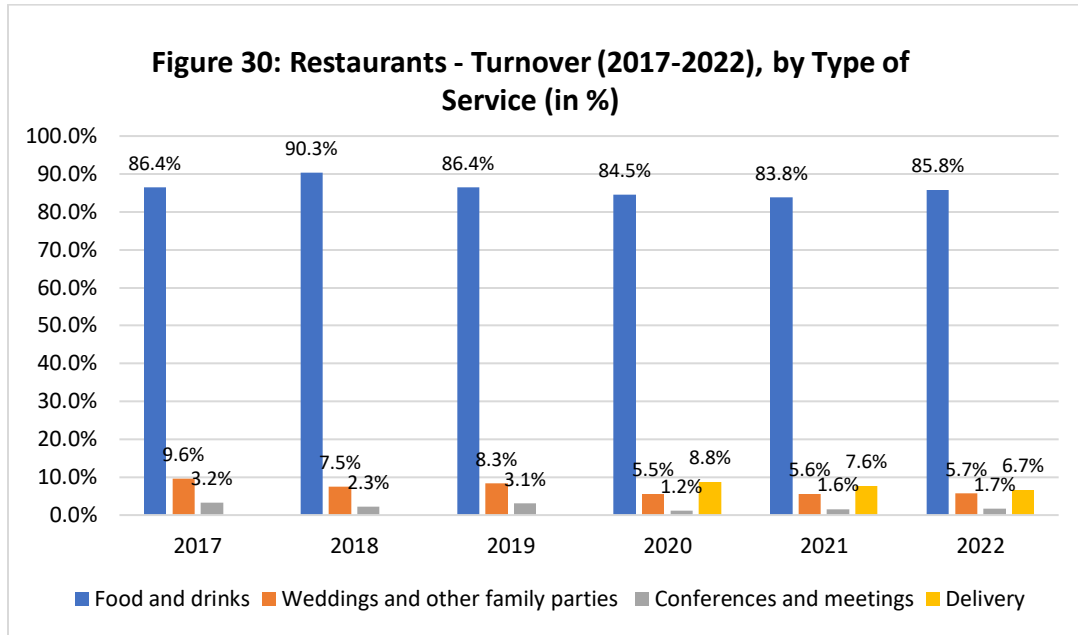
**Revenues and Investments**

When asked about the changes in turnover compared to 2021, 77.6 percent of the restaurants reported to have performed 'better' or 'much better'; on the other hand, 4.4 percent of them declared to have experienced the opposite; the rest said that they experienced no changes in turnover (see Figure 29).

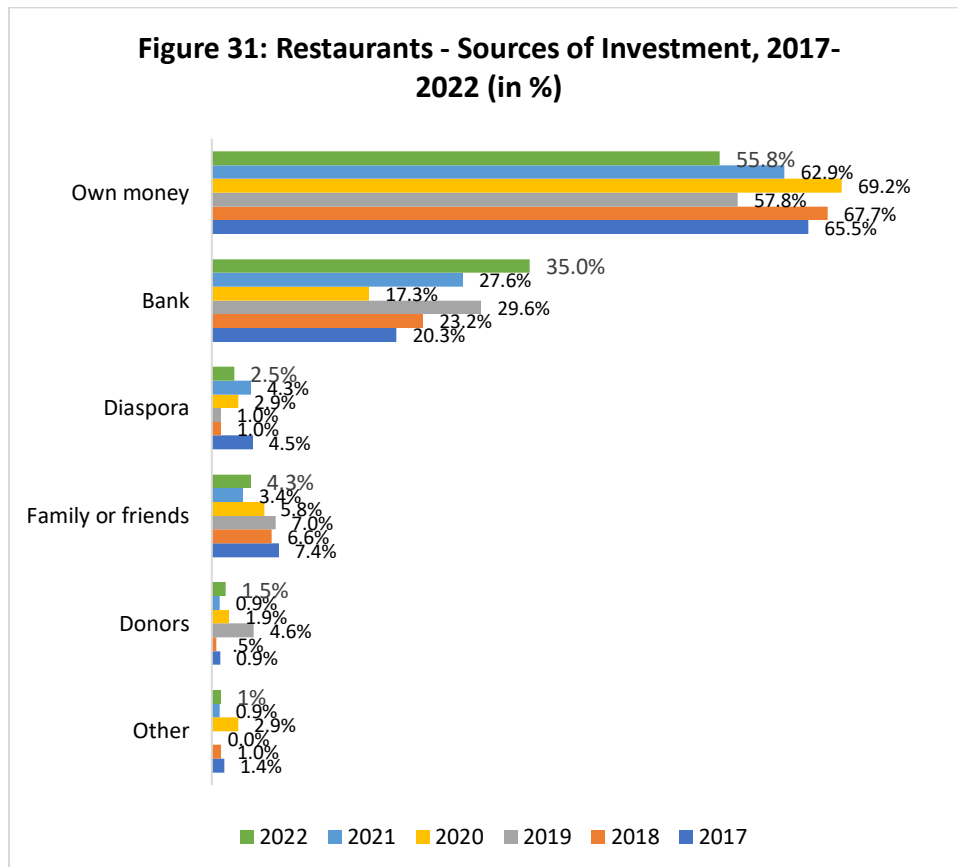


A further analysis on the composition of annual turnover shows that in 2022, food and drinks comprised the main source of revenue for restaurants with 85.8 percent, accompanied by delivery services with 6.7 percent, weddings and family services with 5.7 percent, and conferences with 1.7 percent. The option of

delivery services was added in the last three surveys; therefore, comparisons cannot be made with the years before 2020. For more details, see Figure 30.

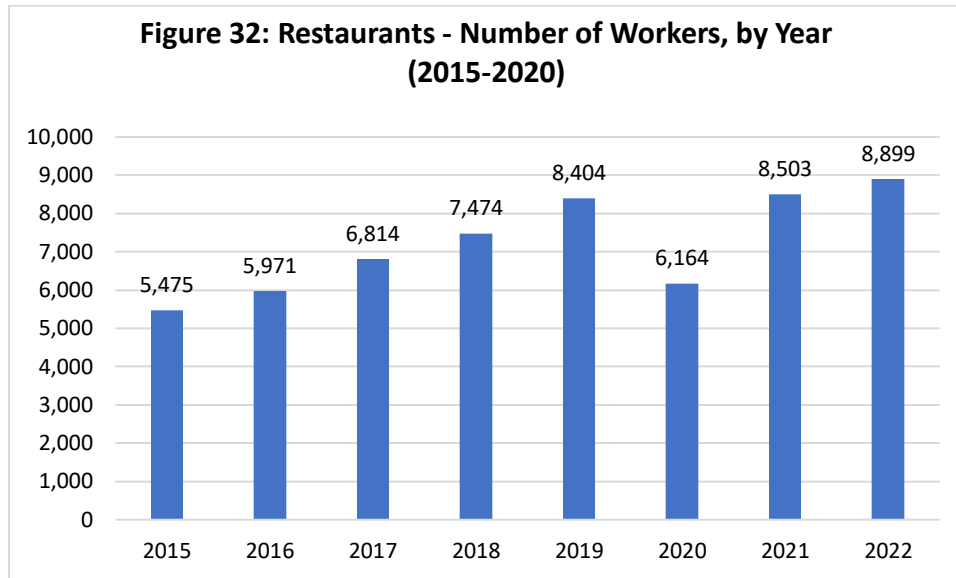


Those who invested in 2022, financed their investment mostly from their 'own money' (55.8 percent). To see other sources of finance and to compare with the previous years, see Figure 31.

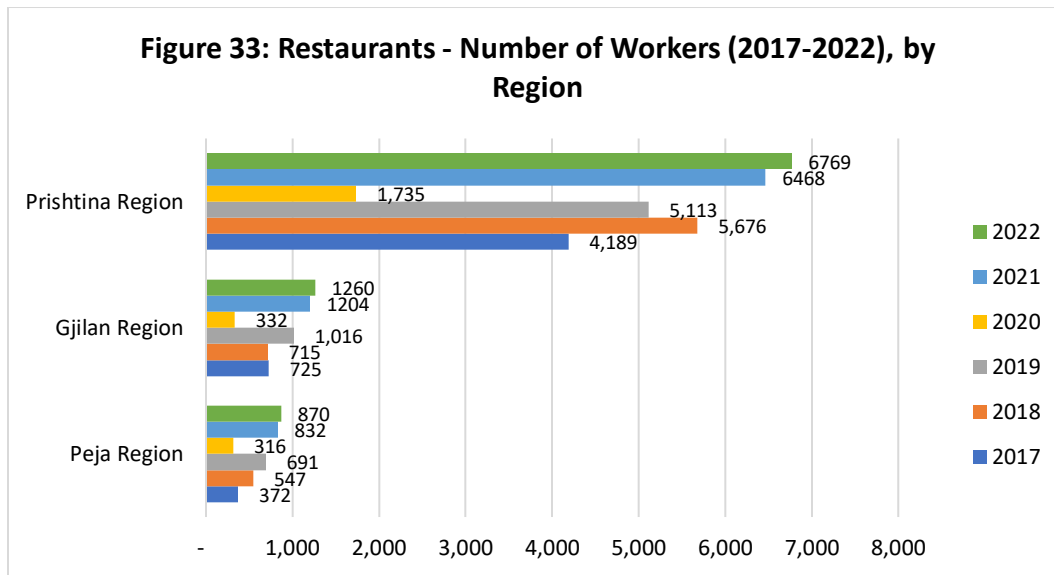


**Employment**

Employment in restaurants has been the highest in the past six years, amounting to 8,899, increasing by 62.5 percent compared to 2015 (see Figure 32).<sup>5</sup>



A disaggregation of the data by the main regions reveals that Prishtina Region with 6,769 constituted the largest number of workers employed in restaurants in 2022, followed by Gjilan (1,260), and Peja (870). In all cases, the number of workers is the highest in the last six years, refer to Figure 33.



The following are some employment demographics for restaurants. Of all employed in 2022, the majority were men – 75.7 percent. Most of the workers, 77.0 percent, worked on a full-time basis. A negligible percentage (2.6 percent) was comprised of non-Kosovo Albanians. In terms of age, those falling between

<sup>5</sup> Gross-up factor for restuarants~2.1644

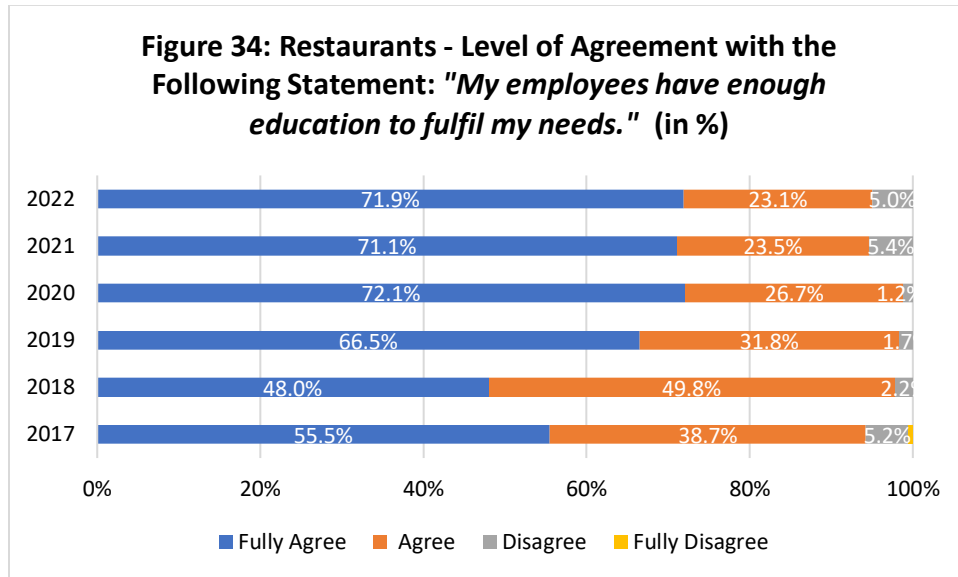
15-34 make up the most common group with 69.8 percent. For more information and to make comparisons with the previous years, refer to Table 7.



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

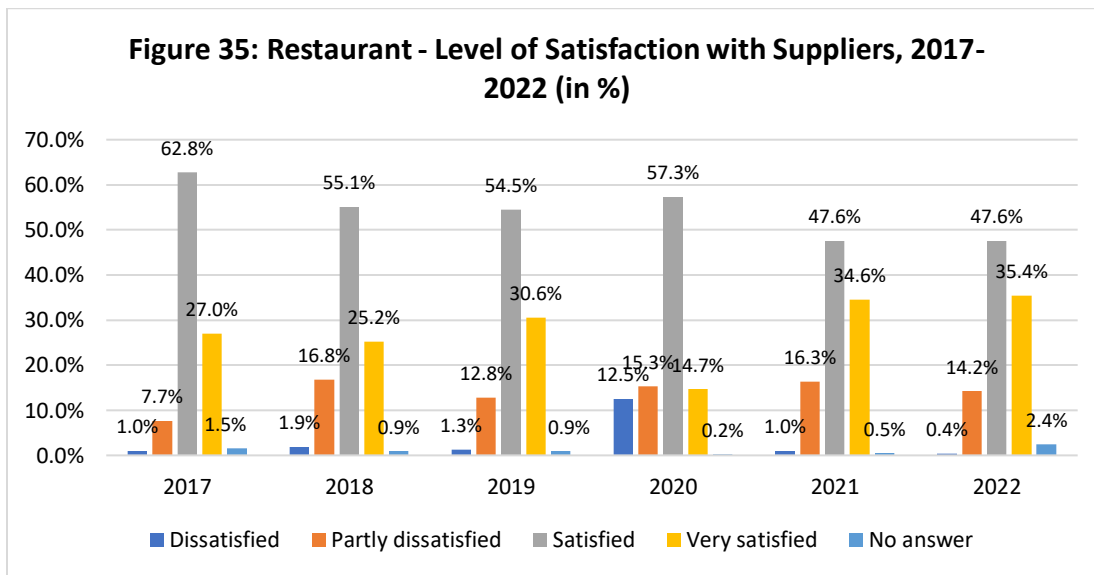
2017						
Gender	Men			Women		
	74.4%			25.6%		
Full vs Part Time	Full-Time (Men)		Part-Time (Men)	Full-Time (Women)		Part-Time (Women)
	63.2%		11.2%	21.3%		4.3%
Ethnicity	Kosovo Albanians	Kosovo Serbs	Turks	RAE	Bosnians	Others
	98.9%	0.1%	0.5%	0.2%	0.3%	0.1%
Age Group	15-24	25-34	35-44	45-54	55-64	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%

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 2022, 95.0 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.



**Supplies**

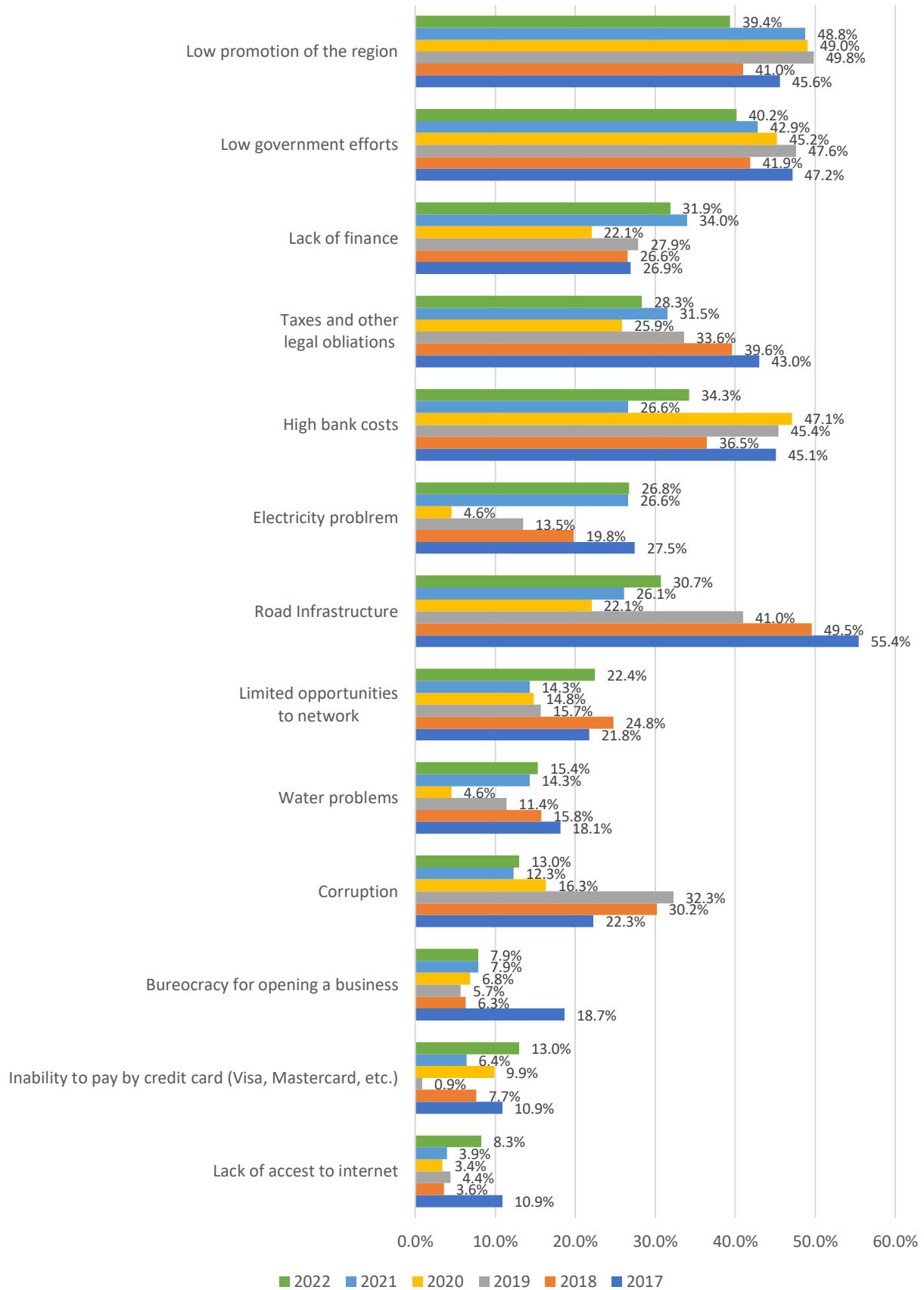
In response to the question about the origin of supplies used in 2022, 50.5 percent of restaurants believed that they were local, compared to 54.9 percent in 2021. Supplies for their restaurant in 2022 were mainly sourced from wholesalers and supermarkets. Another finding reveals that restaurants have generally been satisfied with suppliers; 82.9 percent of restaurants declared to have been 'satisfied' or 'very satisfied' with their suppliers in 2022. For more information on the level of satisfaction and to compare data with the previous years, refer to Figure 35.



### **Barriers to Doing Business**

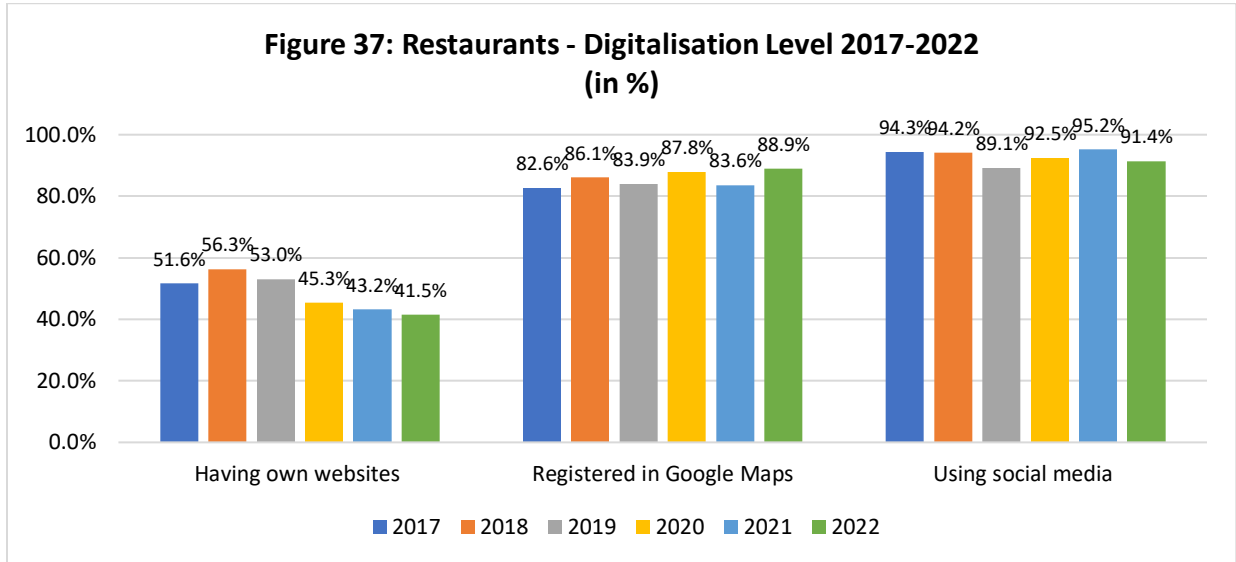
The potential barriers to doing business were also tested with restaurants. In 2021, it turned out that *'low government efforts'* with 40.2 percent, *'low promotion of the region'* with 39.4 percent, and *'high bank costs'* with 34.3 percent, were perceived to be the most severe operating barriers by respondents. For more detailed information and to make comparisons with the other years, see Figure 36.

**Figure 36: Restaurants - Barriers to Doing Business, 2017-2022**  
 (% of Cases)



**Digitalisation**

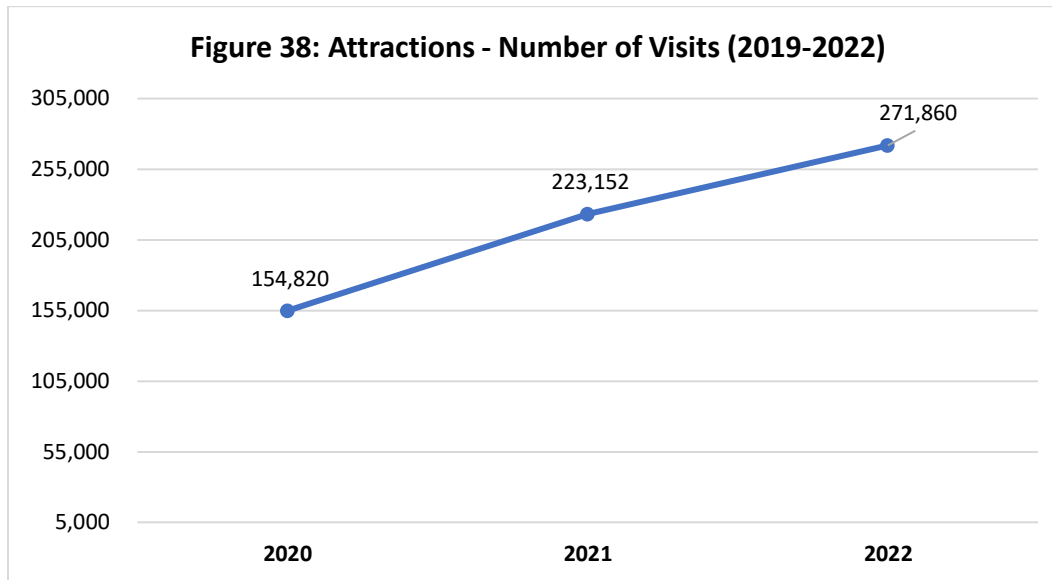
Of all restaurants surveyed, 41.5 percent had their own websites in 2022, and 88.9 percent were registered on Google Maps. A higher percentage (91.4 percent) used social media to promote their services. To compare the data with the previous years, refer to Figure 37.



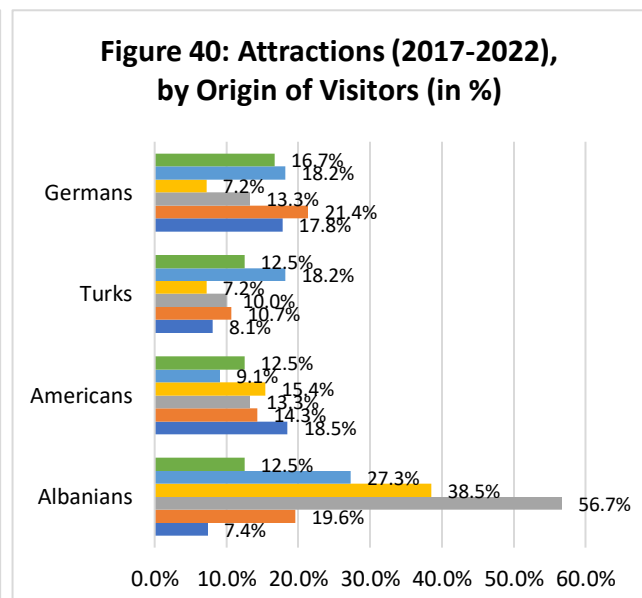
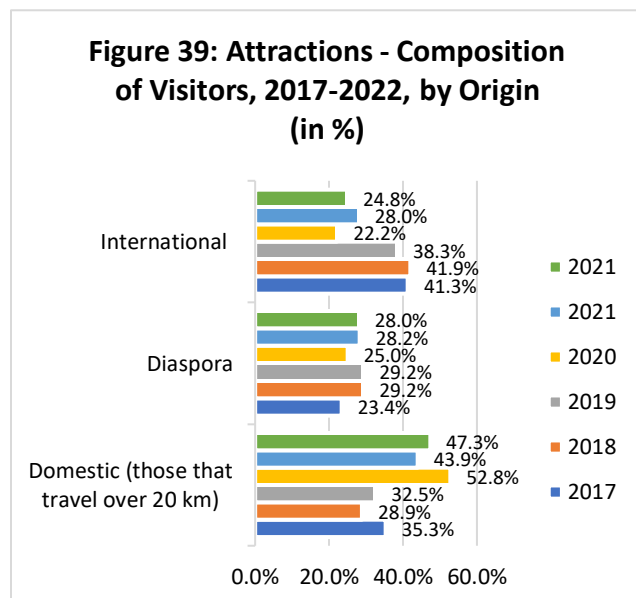
### 3.4. Attractions

#### Number of Visitors and their Characteristics

The total number of visitors to tourist attractions in 2022 stood at 271,860 – an increase of 76 percent compared to 2020 (see Figure 38). Note 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.

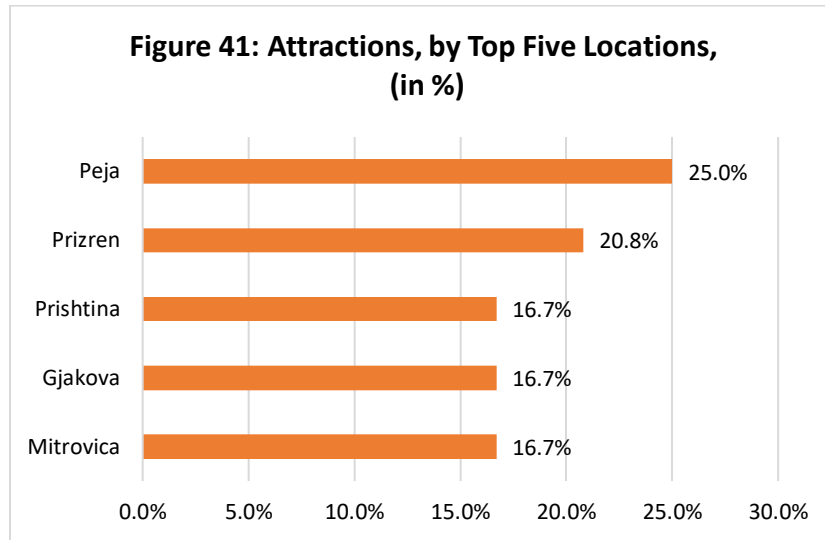


In 2022, the composition of visitors to attractions was predominantly comprised of domestic visitors (those traveling more than 20 km), accounting for 47.3 percent. They were followed by the diaspora at 28.0 percent and international visitors at 24.8 percent. For comparisons with previous years, refer to Figure 39. Germans, Albanians, Turks, Americans, and others constituted the majority of visitors, as depicted in Figure 40.



**Location**

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



**Employment**

In 2022, attractions were predominantly staffed by male workers, comprising 70.5 percent of the workforce. Of the total workers employed in attractions that year, 85.8 percent worked full-time. Non-majority communities constituted only 6.2 percent of all workers. In terms of age distribution, 58.2 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.

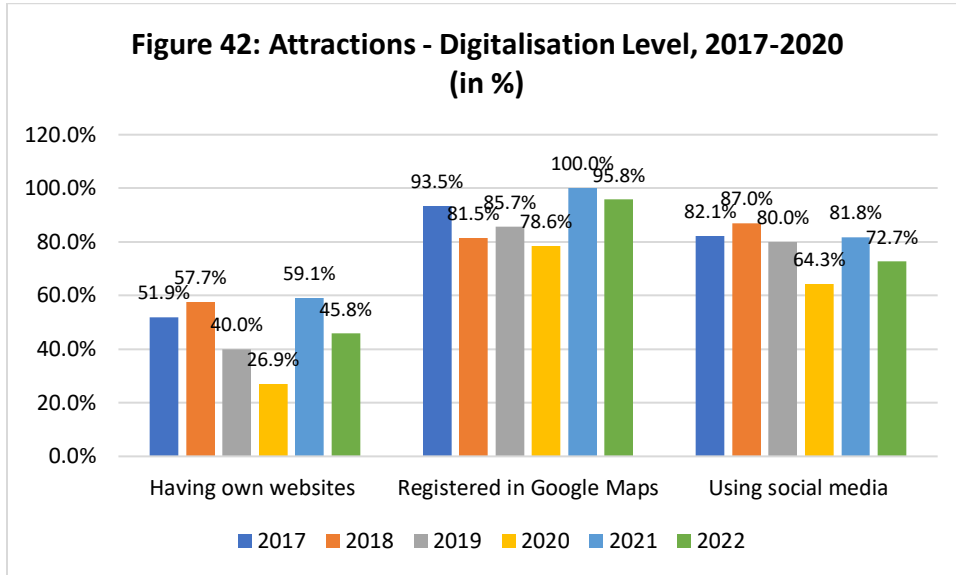
**Table 8: Employment Demographics (Attractions)**

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%



**Digitalisation**

The findings indicate that in 2022, 45.8 percent of attractions had their own websites, and 95.8 percent of all attractions were registered in Google Maps. Additionally, 72.7 percent claimed to have used social networks for promotional purposes. For comparisons with previous years, refer to Figure 42.



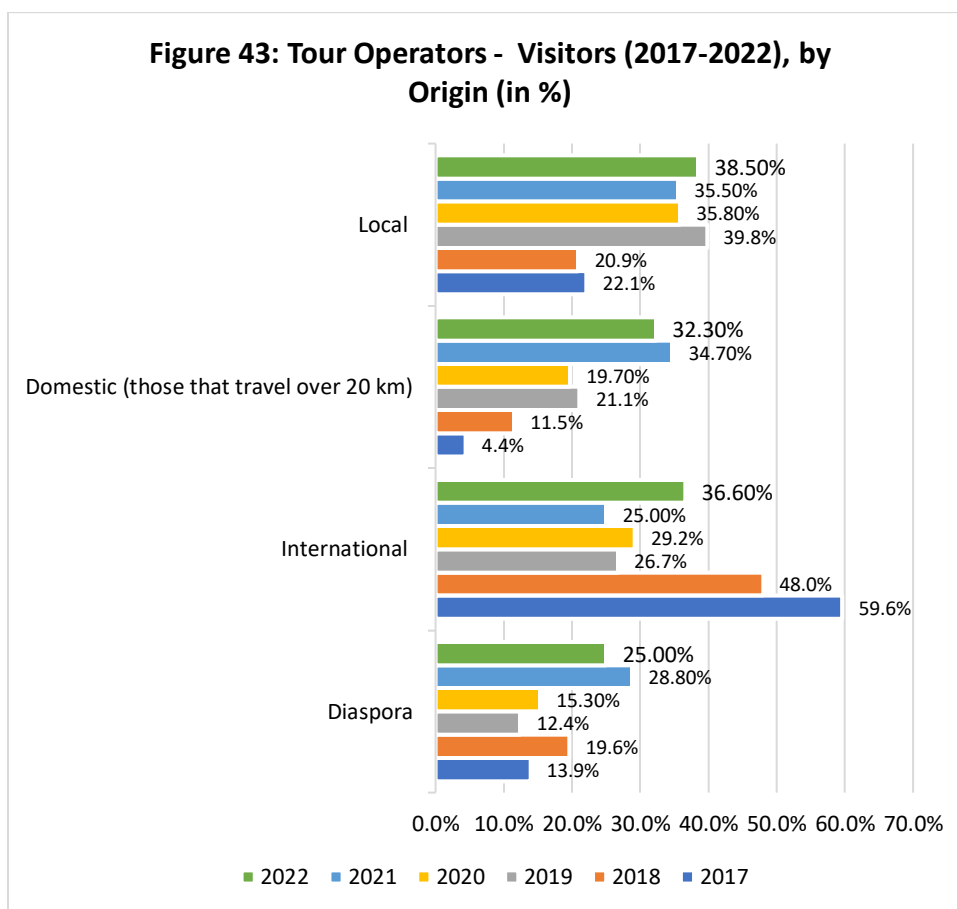
### 3.5. Tour Operators

#### Tours, Prices, and Turnover

In 2022, 64.4 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 2022 was 3,897, a notable increase from 2,172 in 2021.

#### Composition of Visitors

In 2021, the clientele of tour operators was primarily composed of locals, accounting for 38.5 percent, and international tourists, making up 36.6 percent. For more detailed information and comparisons with other years, please refer to Figure 43.



#### 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)**

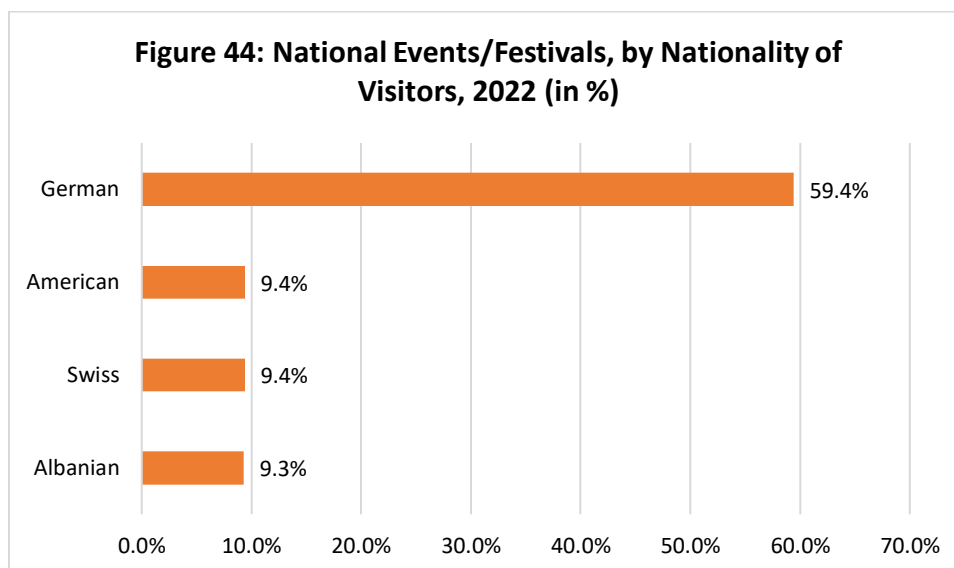
2017						
Gender	Men			Women		
	59.2%			40.8%		
Full vs Part Time	Full-Time (Men)		Part-Time (Men)	Full-Time (Women)	Part-Time (Women)	
	23.7%		35.5%	26.0%	14.8%	
Ethnicity	Kosovo Albanians	Kosovo Serbs	Turks	RAE	Bosnians	Others
	96.7%	0.0%	0.8%	0.8%	0.0%	1.7%
Age Group	15-24	25-34	35-44	45-54	55-64	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%

### 3.6. National Events/Festivals

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

In 2021, national events/festivals were dominated by locals with 43.4 percent, followed by diaspora with 24.8 percent, internationals with 21.8, and domestic visitors with 21.4 percent. To compare with the previous years, see Figure 44.

In 2022, the majority of national events/festivals were German (59.4 percent), American (9.4 percent), Swiss (9.4 percent), and Albanian (9.3%). For more information, refer to Figure 44.



#### **Prices**

The ticket price for a festival in 2022 averaged 6.7 EUR, up from 5.9 EUR in 2021. When queried about the average expenditures of foreign visitors per night in 2022, the representatives of events/festivals stated that it was 45.3 EUR.

#### **Employment**

In 2022, the majority (67.4 percent) of those employed in national events and festivals were men. Part-time workers accounted for 26.7 percent of the total employed, and non-Kosovo Albanians comprised 7.4 percent. Workers aged between 15 and 34 constituted 71.1 percent of the total workforce. For more information and comparisons with other years, please refer to Table 10.

Table 10: Employment Demographics (Events/Festivals)						
<b>2017</b>						
<b>Gender</b>	<b>Men</b>			<b>Women</b>		
	70.6%			29.4%		
<b>Full vs Part Time</b>	<b>Full-Time (Men)</b>		<b>Part-Time (Men)</b>	<b>Full-Time (Women)</b>	<b>Part-Time (Women)</b>	
	25.7%		44.9%	9.1%	20.3%	
<b>Ethnicity</b>	<b>Kosovo Albanians</b>	<b>Kosovo Serbs</b>	<b>Turks</b>	<b>RAE</b>	<b>Bosnians</b>	<b>Others</b>
	98.9%	0.5%	0.3%	0.1%	0.5%	0.1%
<b>Age Group</b>	<b>15-24</b>	<b>25-34</b>	<b>35-44</b>	<b>45-54</b>	<b>55-64</b>	<b>65&lt;</b>
	18.5%	59.6%	20.3%	1.5%	0.2%	0.0%
<b>2018</b>						
<b>Gender</b>	<b>Men</b>			<b>Women</b>		
	70.9%			29.1%		
<b>Full vs Part Time</b>	<b>Full-Time (Men)</b>		<b>Part-Time (Men)</b>	<b>Full-Time (Women)</b>	<b>Part-Time (Women)</b>	
	26.7%		44.2%	11.3%	17.8%	
<b>Ethnicity</b>	<b>Kosovo Albanians</b>	<b>Kosovo Serbs</b>	<b>Turks</b>	<b>RAE</b>	<b>Bosnians</b>	<b>Others</b>
	96.1%	0.5%	0.9%	1.7%	0.8%	0.0%
<b>Age Group</b>	<b>15-24</b>	<b>25-34</b>	<b>35-44</b>	<b>45-54</b>	<b>55-64</b>	<b>65&lt;</b>
	35.9%	58.4%	5.6%	0.0%	0.0%	0.0%
<b>2019</b>						
<b>Gender</b>	<b>Men</b>			<b>Women</b>		
	68.4%			31.6%		
<b>Full vs Part Time</b>	<b>Full-Time (Men)</b>		<b>Part-Time (Men)</b>	<b>Full-Time (Women)</b>	<b>Part-Time (Women)</b>	
	51.0%		17.5%	22.4%	9.2%	
<b>Ethnicity</b>	<b>Kosovo Albanians</b>	<b>Kosovo Serbs</b>	<b>Turks</b>	<b>RAE</b>	<b>Bosnians</b>	<b>Others</b>
	98.7%	0.3%	0.3%	0.5%	0.2%	0.0%
<b>Age Group</b>	<b>15-24</b>	<b>25-34</b>	<b>35-44</b>	<b>45-54</b>	<b>55-64</b>	<b>65&lt;</b>
	31.2%	55.2%	10.2%	3.0%	0.4%	0.0%
<b>2021</b>						
<b>Gender</b>	<b>Men</b>			<b>Women</b>		
	74.6%			25.4%		
<b>Full vs Part Time</b>	<b>Full-Time (Men)</b>		<b>Part-Time (Men)</b>	<b>Full-Time (Women)</b>	<b>Part-Time (Women)</b>	
	61.9%		12.7%	22.3%	3.1%	
<b>Ethnicity</b>	<b>Kosovo Albanians</b>	<b>Kosovo Serbs</b>	<b>Turks</b>	<b>RAE</b>	<b>Bosnians</b>	<b>Others</b>
	97.4%	0.0%	0.7%	1.2%	0.7%	0.0%
<b>Age Group</b>	<b>15-24</b>	<b>25-34</b>	<b>35-44</b>	<b>45-54</b>	<b>55-64</b>	<b>65&lt;</b>
	30.8%	35.3%	20.3%	11.3%	2.1%	0.3%
<b>2022</b>						
<b>Gender</b>	<b>Men</b>			<b>Women</b>		
	67.4%			32.6%		
<b>Full vs Part Time</b>	<b>Full-Time (Men)</b>		<b>Part-Time (Men)</b>	<b>Full-Time (Women)</b>	<b>Part-Time (Women)</b>	
	58.6%		8.8%	20.6%	12.0%	
<b>Ethnicity</b>	<b>Kosovo Albanians</b>	<b>Kosovo Serbs</b>	<b>Turks</b>	<b>RAE</b>	<b>Bosnians</b>	<b>Others</b>
	92.6%	0.0%	1.3%	3.6%	2.5%	0.0%
<b>Age Group</b>	<b>15-24</b>	<b>25-34</b>	<b>35-44</b>	<b>45-54</b>	<b>55-64</b>	<b>65&lt;</b>
	22.1%	52.8%	18.3%	6.3%	0.5%	0.0%

## 4. Economic Impact

This section examines the economic impact of accommodations, Airbnb apartments, and restaurants in 2022, comparing the overall results with previous years.<sup>6</sup> 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 2022 amounted to 85.4 million EUR. The same approach was used to calculate the revenue of Airbnb apartments, which reached an estimated 23.8 million EUR in 2022. For more information on the main steps of the approach, refer to Table 11 and Table 12.

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<sup>6</sup> 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.

<b>Table 11: Economic Impact – Accommodations (Excluding Airbnb Apartments)</b>					
<b>(a) Number of Available Room-Nights per Year*</b>					
Single Room	Double Room	Triple Room	Quad Room	Vila	Other
328,500	678,535	314,630	106,945	68,255	36,865
<b>(b) Average Occupancy Rate (%)</b>					
57.10%					
<b>(c) Number of Room-Nights Occupied per Year (a*b)</b>					
Single Room	Double Room	Triple Room	Quad Room	Vila	Other
187,574	387,443	179,654	61,066	38,974	21,050
<b>(d) Proportion of Room-Nights Occupied by Locals (%)</b>					
11.40%					
<b>(e) Number of Room-Nights Occupied per Year, Excluding Locals (c-d)</b>					
Single Room	Double Room	Triple Room	Quad Room	Vila	Other
182,961	378,715	98,652	31,979	25,584	50,586
<b>(f) Average Prices (€)**</b>					
12,258,411	28,233,167	8,247,293	4,039,008	2,389,506	4,863,816
Single Room	Double Room	Triple Room	Quad Room	Vila	Other
67.0	74.6	83.6	126.3	93.4	96.2
<b>(g) Estimated Accommodation Revenue from the Sample (€) <math>\Sigma</math> (e*f)</b>					
60,031,202					
<b>(h) Gross-Up Factor/Coefficient</b>					
1.423					
<b>(i) Estimated Accommodation Sector Revenue (€) (g*h)</b>					
<b>85,424,400</b>					
*It excludes Airbnb apartments					
**Adjusted by taking into account the prices of superior rooms					

<b>Table 12: Economic Impact – Airbnb Apartments</b>					
<b>(a) Number of Available Room-Nights per Year*</b>					
Single Room	Double Room	Triple Room	Quad Room	Vila	Other
8,395	5,840	5,475	1,825	14,600	365
<b>(b) Average Occupancy Rate (%)</b>					
61.50%					
<b>(c) Number of Room-Nights Occupied per Year (a*b)</b>					
Single Room	Double Room	Triple Room	Quad Room	Vila	Other

5,163	3,592	3,367	1,122	8,979	224
<b>(d) Proportion of Room-Nights Occupied by Locals (%)</b>					
11.10%					
<b>(e) Number of Room-Nights Occupied per Year, Excluding Locals (c-d)</b>					
<b>Single Room</b>	<b>Double Room</b>	<b>Triple Room</b>	<b>Quad Room</b>	<b>Vila</b>	<b>Other</b>
4,590	3,592	3,367	1,122	8,979	224
<b>(f) Average Prices (€)**</b>					
<b>172,119.0</b>	<b>214,418.5</b>	<b>185,191.9</b>	<b>78,566.3</b>	<b>448,950.0</b>	<b>17,958.0</b>
<b>Single Room</b>	<b>Double Room</b>	<b>Triple Room</b>	<b>Quad Room</b>	<b>Vila</b>	<b>Other</b>
37.5	59.7	55	70	50	80
<b>(g) Estimated Accommodation Sector Revenue from the Sample (€) <math>\Sigma</math> (e*f)</b>					
1,117,204					
<b>(h) Gross-Up Factor/Coefficient</b>					
21.3					
<b>(i) Estimated Accommodation Sector Revenue (€) (g*h)</b>					
<b>23,796,438</b>					

## 4.2. Restaurants

Similar to the approach for accommodations, the number of client visits in 2022 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 2022 was generated, amounting to 225.7 million EUR.

<b>Table 13: Economic Impact – Restaurants</b>	
<b>(a) Number of Client Visits per Year</b>	
28,924,571	
<b>(b) Proportion of Locals (%)</b>	
52.30%	
<b>(c) Number of Client Visits per Year, Excluding Locals (a-b)</b>	
13,797,020	
<b>(d) Food and Drinks Towards Total Revenue (%)</b>	
<b>Food and Drinks</b>	<b>Drinks Only</b>
59.9%	40.1%
<b>(e) Average Price (€)</b>	
<b>Food and Drinks</b>	<b>Drinks Only</b>
10.0	3.9
<b>(f) Total Estimated Revenue from the Sample (€) (c*d*e)</b>	
<b>Food and Drinks</b>	<b>Drinks Only</b>



82,478,864	21,798,464
<b>(g) Gross-Up Factor/Coefficient</b>	
<b>2.1644</b>	
<b>(h) Estimated Restaurants Sector Revenue (€) <math>\Sigma(f*g)</math></b>	
<b>225,697,849</b>	

### 4.3. Overall Estimated Revenue and Employment

The overall estimated revenue from accommodations, Airbnb apartments, and restaurants in 2022 increased by 38.6 percent compared to 2021. The most significant increase was observed in Airbnb revenue. For more detailed information, refer to Table 13.

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

The overall number of workers in 2022 in the three tourism categories stood at 13,757, higher by 26.7 percent when compared to 2015 (see Figure 49).

