

ASSOCIAZIONE JUVENILJA

“MAPPING REPORT”

“VITA VJOSA” PROJECT

OCTOBER 2023

This report is part of the commitment of Associazione Juvenilja, in the framework of “VITA VJOSA” project, implemented by CESVI and other Italian and Albanian partners and it is financed by AICS.

The project focuses on all the areas comprised in the Vjosa river, including its tributaries. Among other objectives, the overall project aims to develop sustainable and responsible tourism in the mentioned areas. The main cities taken into consideration in this mapping are Permet and Gjirokaster.

The following methodology and table of contents is included in the Report:

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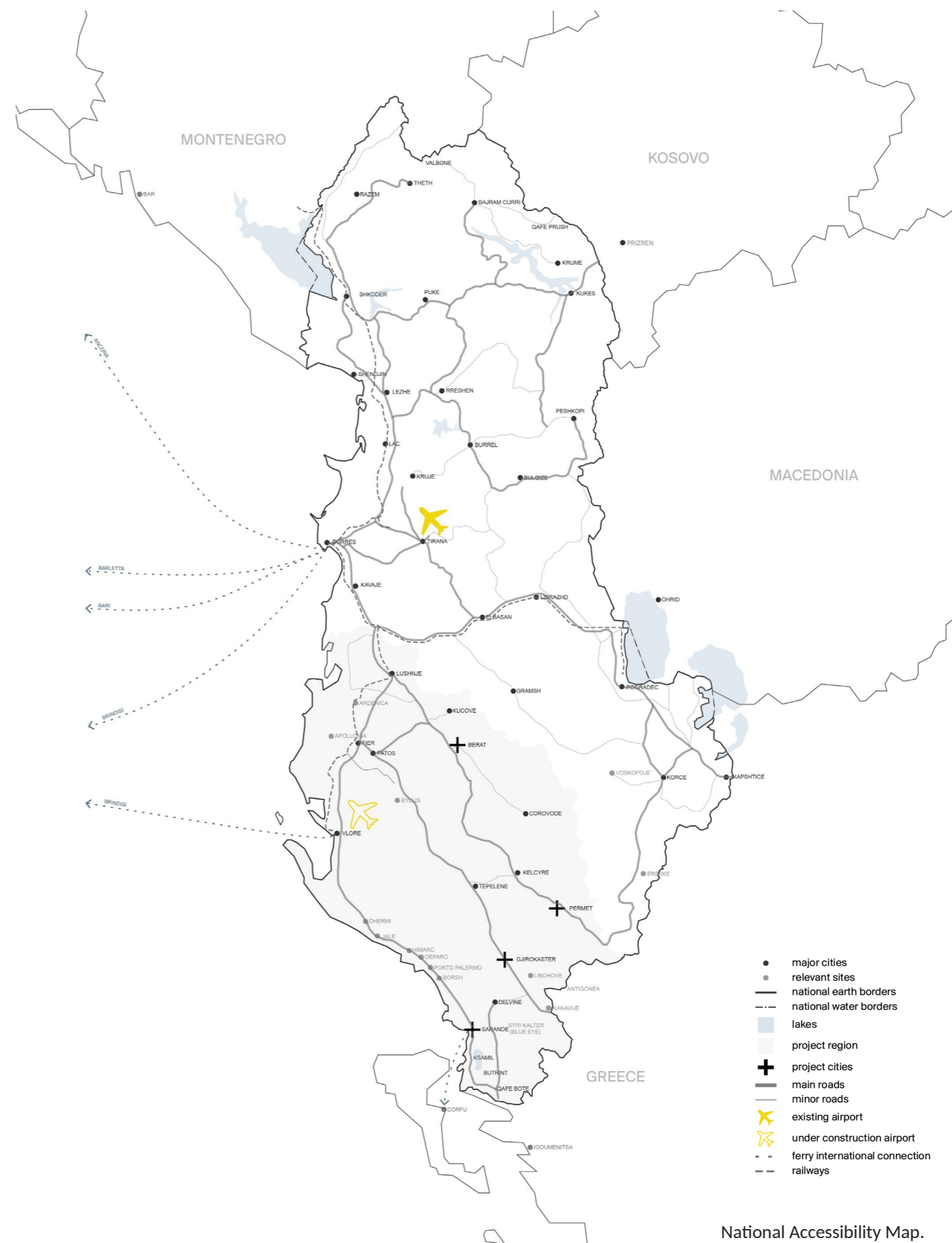
1. TOURISM BACKGROUND IN ALBANIA

Albania has made substantial investments in enhancing its infrastructure which encompasses not only the major but also the minor thoroughfares. The government of Albania has taken on this endeavour while receiving backing from global establishments as well as the European Union. Various projects are underway to improve the nation's road network. The country has a network of national roads (SH roads) which connect major cities and regions. The quality of these roads varies, with some having been upgraded to European standards.

Permet can be reached from Tirana by taking the SH4 national road southwards. Travellers can follow the SH4 route from Tirana, passing through Berat and continuing further south to reach Permet. The distance between Tirana and Permet is easily navigable via this route. Permet is located about 210 kilometres away.

Gjirokastrë is also linked to Tirana through the SH4 national road. The distance between Tirana and Gjirokastrë is roughly 230 kilometres, and the estimated duration of the trip by car is provided for. The journey from Tirana to Saranda takes approximately 4.5 to 5 hours, subject to traffic and road conditions.

Berat and Saranda are considered two other crucial cities influencing tourism in the Vjosa river basin.



National Accessibility Map.

General tourism analysis

In recent years, travel and tourism have directly contributed to around 8.5-8.7% of Albania's GDP. However, when we take into account the multiplier effects from indirect sources, the total contribution is almost three times higher, surpassing 20% of the GDP. Therefore, this sector is one of the primary drivers of growth for the country. In 2019, the travel and tourism industry served as a significant contributor to Albanian economy, generating employment opportunities for 244,000 individuals and accounting for 20% of the economic output (Source: WTTC).

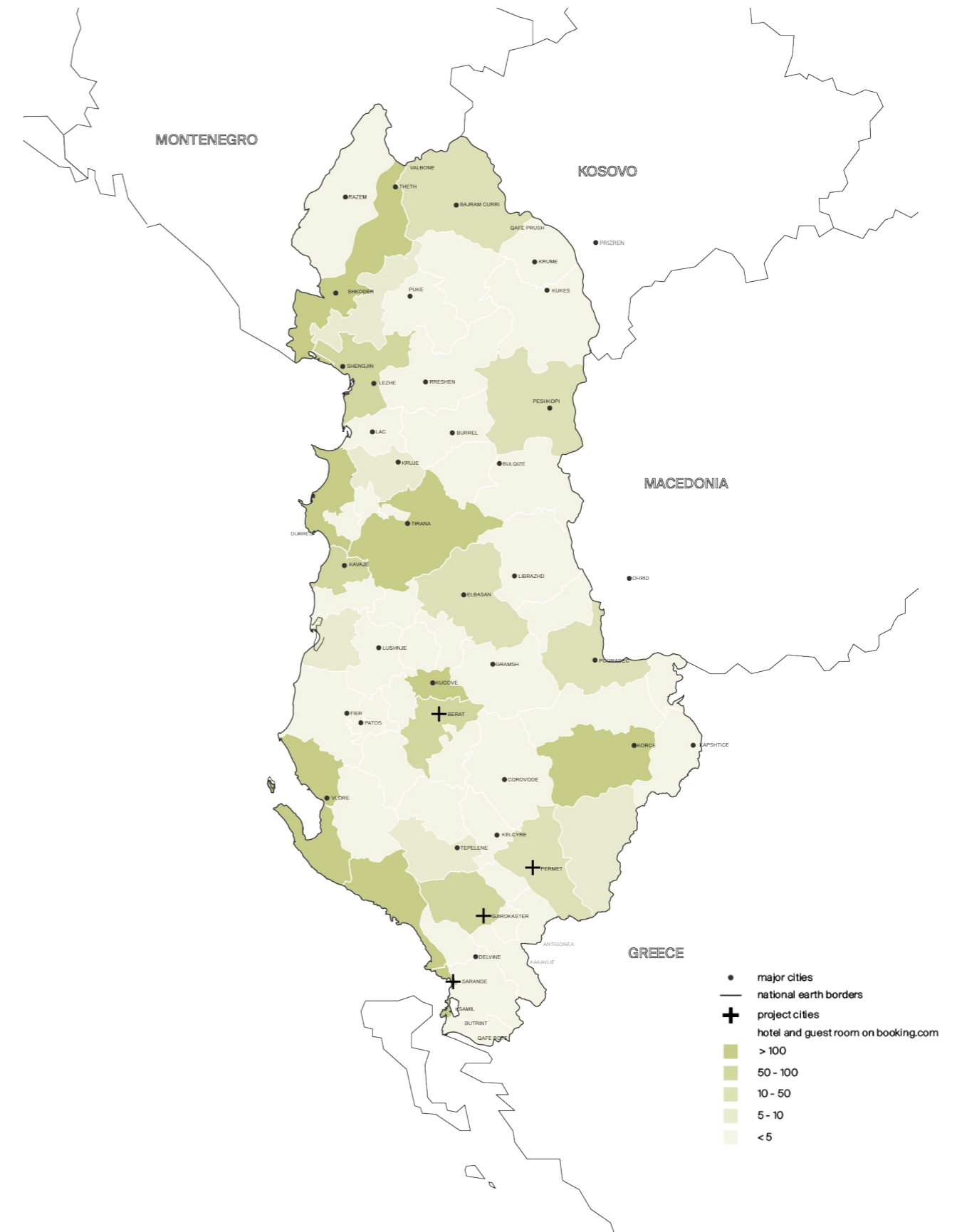
According to the World Tourism and Travel Council, one out of every five jobs in Albania is associated with tourism, travel, and allied sectors. The year 2023 is expected to be the most successful year for Albanian tourism. According to Government statistics, 7.5 million tourists visited the country in the period of January-August 2023, an increase of over 30% compared to the previous year, which was also a strong year for tourism.

The country's main tourist routes follow its geographical composition. In the North, the city of Shkoder, the Albanian Alps, and the beaches of Shengjin and Velipoje are the most popular areas. In Central Albania, Tirana, the capital, is the most frequented location, followed by the beaches of Durrës, as well as Kruja and Berat. In Southern Albania, the principal destinations include Saranda, Vlorë, Gjirokastra, Korça, and the Vjosa River valley - recently declared a National Protected Park.

The most recent figures from the Ministry of Tourism Bulletin indicate that in June 2023, Kosovo, North Macedonia, Greece, Italy, and the United Kingdom were the primary source countries for tourists. Other European Union nations subsequently followed suit, thereby corroborating the "proximity tourism" trend during the post-COVID-19 era.

According to official information from the Albanian Ministry of Tourism and Environment, the average daily expenditure per tourist is €109, which is an increase of €11 compared to 2021. They also indicate that tourists typically stay an average of 5.5 days in Albania.

- From the analysis of the above data, the following conclusions can be drawn at a national level: The number of incoming tourists is significantly on the rise in Albania.
- The number of incoming tourists is also increasing in the Project Region.
- The higher proportion of incoming tourism comes from neighbouring countries, known as tourism of proximity.
- The number of resident tourists from the Albanian Diaspora is substantial compared to the total number of incoming tourists. It is particularly pertinent during the off-peak tourism season.
- The duration of each per individual is 5.5 days (inclusive of arrival and departure day) and, though noteworthy, it fails to effectively contribute towards inclusive growth. The length of stay is proportionally linked to the range of tourism products.
- The mean spending per person is £550 (inclusive of travel and insurance expenses) and, while significant, there is still ample room for improvement.



Density of hotels & guesthouses listed on booking.com. Source: Tourism and Hospitality in Albania 2022

Existing tourism products in each area

Permet:

Permet has become an important tourism destination only in the past 10 years. The Vjosa valley, Lengarica canyons, the Benje thermal waters, the Bredhi I Hotoves natural park but also the old town, the typical villages and their Byzantine churches are some of the most known tourism destinations. Permet has developed very relevant culinary and agro-tourism products and has also developed and outdoor and natural tourism identity (rafting, hiking, trekking, off-roading, climbing).

- Combined tours with origin from Saranda and Gjirokaster. Daily stops or overnight stops. Main assets: rafting in Vjosa river and Benje thermal waters. Mainly international organized groups.

- Combined tours with origin from Korca and Greek border. Daily stops or overnight stops. Main assets: rafting in Vjosa river and Benje thermal waters. Mainly international organized groups

Permet should further develop tourism products linked to outdoor activities and consequently develop also family-friendly and students-friendly tourism products. It also could create historical tourism products linked to the II World War some unutilized and abandoned assets (i.e the Italian military Caserme).

Gjirokaster:

Gjirokaster is a UNESCO World Heritage site with a unique ottoman style architecture. Tourism products are traditionally linked to history, culture and folklore: the Castle, the historic museum, the arms museum, the old ottoman mosques, the Ethnographic museum, the House of the dictator Enver Hoxha, the house Ismail Kadare, the typical guesthouses and small hotel structures of Qafa e Pazarit, Dunavat and Kerculle neighborhoods. Culinary is very important with many typical restaurants and bars. Recently, tourism in Gjirokaster has developed also outside the city, mainly in the Cajup mountain, Antigonea archeological park and Drinos river.

The most typical tourism routes based on the mentioned tourism products are:

- Tour operators offering combined tours from Tirana (main destination) with daily or overnight tour to Gjirokaster. Mostly cultural tourism (combined to visits to other cultural destinations such as Kruja, Apollonia ecc). International tourists

- Tour operators offering combined tours from Saranda and Corfu (main destination) with daily or overnight tour to Gjirokaster. Mostly cultural tourism (combined to visits to other cultural destinations such as Butrint, ecc). International tourists

Further tourism products to be developed could aim at integrating tourism offer between the old and the new city and the city and the countryside. Integrated cultural and eco-tourism products could be offered. "Albergo diffuso" style accommodation could be offered in the old town. Given the presence of many monuments and buildings in "liberty" Italian style, coherent tourism products related to fashion, design and branding could be developed.

Based on the tourism subsectors identified in the National Strategy for Sustainable Tourism Development as Coastal, Natural and Thematic, we can distinguish two main types of tourism in the region's identified areas:

- Cultural and heritage tourism in Gjirokaster
- Nature-related tourism in Permet.

At this regional level tourism has also increased significantly. The more recent data from the Ministry of Tourism (June 2023 Bulletin) indicates a rising trend in two categories of tourism: cultural tourism and eco-tourism.

With regards to cultural tourism:

- i) Visits to museums and castles in Gjirokastra have increased by 85%.

Regarding eco-tourism:

- i) The number of visitors to the natural parks and thermal waters in Permet has risen by 38%.

To summarise, the average increase in cultural and natural park visits has been impressive. Eco-tourism in Gjirokastra, and Permet surpasses the average growth of total visitors, indicating a rising demand for cultural and eco-tourism offerings in these two cities.

Existing tourism infrastructure in project area

Alongside the previously mentioned transport considerations, it's important to examine the area's infrastructure, including lodgings, food and drink, utilities, safety and security, cultural and leisure facilities.

You can find accommodation available across the two cities. Permet and Gjirokaster offer quaint agrotourism ventures and smaller lodgings. However, at festivals and cultural events that draw many visitors, particularly in smaller cities such as Permet and Gjirokaster, there are not enough places to stay for guests.

Both cities have bustling food and drinks industries, with locally-owned small enterprises enhancing the cities' diverse culinary experiences. Nonetheless, the lack of year-round workers presents an ongoing challenge for both accommodation and food & beverage sectors. Many individuals only migrate and return during the peak tourism season.

Cultural and recreational amenities are distributed unevenly across the cities in the area, with Gjirokaster leading the sector with an abundance of small-scale museums.

Despite limited funds, the Permet local authority deserves recognition for striving to exhibit their archive in the cultural centre of the city. However, the centre requires significant refurbishment, engaging narratives and a well-organized plan to maximise its influence and ensure ease of use.

Another part of Albania's tourism infrastructure is the creation of Information Points or Centres, which have been recently located in major tourist cities throughout the country. These are mainly overseen by local government authorities.

An additional feature of Albania's tourism infrastructure is the setting up of Information Centres, which have been placed in strategic tourist locations all over the country and are mostly managed by local government authorities. The aim of these facilities is to help visitors by providing necessary resources, such as brochures, maps, and general information about local sites of interest, historical places, cultural happenings, and places to stay. However, a current problem is that the tourist information centres sometimes don't open during regular working hours. Moreover, the employees who work at these locations are often unskilled and may not have good English proficiency, which hinders their capacity to provide necessary help and information to visitors.

With respect to amenities, Permet and Gjirokaster promise uninterrupted supplies of water and electricity. However, handling waste continues to be a significant problem, especially when the number of tourists is at its highest.

The healthcare infrastructure has room for improvement. Regional hospital with minimal standards is present in Gjirokaster. Healthcare facilities are not sufficient in Permet, and they rely on a limited supply of tourism-oriented medical services, mainly located in urban areas.

Key Report findings

Preservation of Destinations is crucial for sustainable tourism development. As tourism continues to be a significant contributor to Albania's economy, it is essential to maintain a delicate balance between economic benefits and environmental conservation. Protecting destinations requires a multifaceted approach that includes safeguarding natural habitats, cultural heritage, and local communities. It is vital to implement eco-friendly measures, promote responsible tourism, and enforce stringent regulations.

Sustainable tourism practices protect the distinctive ecosystems and historical landmarks and also enhance the welfare of local communities by generating employment and promoting their cultural heritage. Responsible tourism encourages travelers to honour native customs and landscapes, fostering a spirit of gratitude and consciousness. In essence, preserving destinations in the context of developing tourism is not just a choice but a responsibility, guaranteeing that upcoming generations can relish in the marvels of Albania.

Enhancing Synergies

Developing tourism in any area requires enhancing regional synergies, which are deeply intertwined with various sectors such as hospitality, transportation, agriculture and local businesses. The importance of collaboration and cooperation cannot be overstated in this regard. Developing tourism in any area requires enhancing regional synergies, which are deeply intertwined with various sectors such as hospitality, transportation, agriculture and local businesses. By fostering synergies among these sectors, a region can unlock tremendous economic potential. Collaboration between local farmers and the hospitality industry, for example, can promote regional cuisines to offer tourists a unique culinary experience while supporting local agriculture. Similarly, partnerships between the tourism and transportation sectors could improve accessibility to attractions, thereby making it easier for visitors to explore the region. Incorporating local artisans and craftsmen into the tourism industry can safeguard traditional crafts and arts, offering visitors genuine keepsakes and enhancing their complete experience. By fostering these collaborations, a region can establish a strong and interdependent network that not only boost tourism income but also strengthens the economic and cultural vibrancy of the area, encouraging sustainable progress in the long term.

Slow and Sustainable versus Mass Tourism

The choice between slow and sustainable tourism versus mass tourism is a crucial factor in the global development of the tourism industry. Slow and sustainable tourism places greater importance on quality versus quantity, emphasising meaningful travel experiences that positively contribute to local cultures and environments. It advocates for socially responsible tourism by promoting sustainable travel, fostering community engagement, and safeguarding cultural and natural resources. This approach embraces authenticity, indigenous customs, and eco-preservation, seeking to mitigate tourism's adverse effects on destinations. Conversely, mass tourism frequently stresses the importance of tourist volume, exacerbating issues such as ecological decay, overcrowding, and cultural dilution. Tourism can impose a burden on local resources and disturb ecosystems, while also causing the displacement of communities. Slow and sustainable tourism, on the other hand, promotes a more amicable relationship between visitors and destinations. This approach guarantees fair and equal distribution of the economic gains of tourism. It also ensures the marvellous identity of each place is conserved for future generations to cherish and enjoy.

CUSTOMER JOURNEY:

The customer journey in tourism development refers to the stages that a traveller goes through when planning, booking, experiencing, and reflecting on a trip. By understanding and enhancing each stage of the customer journey, tourism development efforts can create positive, lasting impressions and encourage repeat visits and positive referrals. Analyzing diverse target groups, or personas, visiting the area further aids in customizing experiences and marketing strategies according to individual preferences and demographics.

Here are the typical stages in the customer journey for tourism development:

1. Dreaming:

Trigger: The traveller becomes inspired by various sources such as social media, friends' recommendations, or promotional materials.

Goal: To generate interest and curiosity about a destination or a specific travel experience.

2. Researching:

Trigger: The traveller actively starts researching potential destinations, accommodations, activities, and logistics.

Goal: To gather information, compare options, and plan the trip according to preferences and budget.

3. Booking:

Trigger: The traveller has chosen a destination and begins making specific plans, including booking flights, accommodations, tours, and activities.

Goal: To finalize the trip details and make necessary reservations.

4. Experiencing:

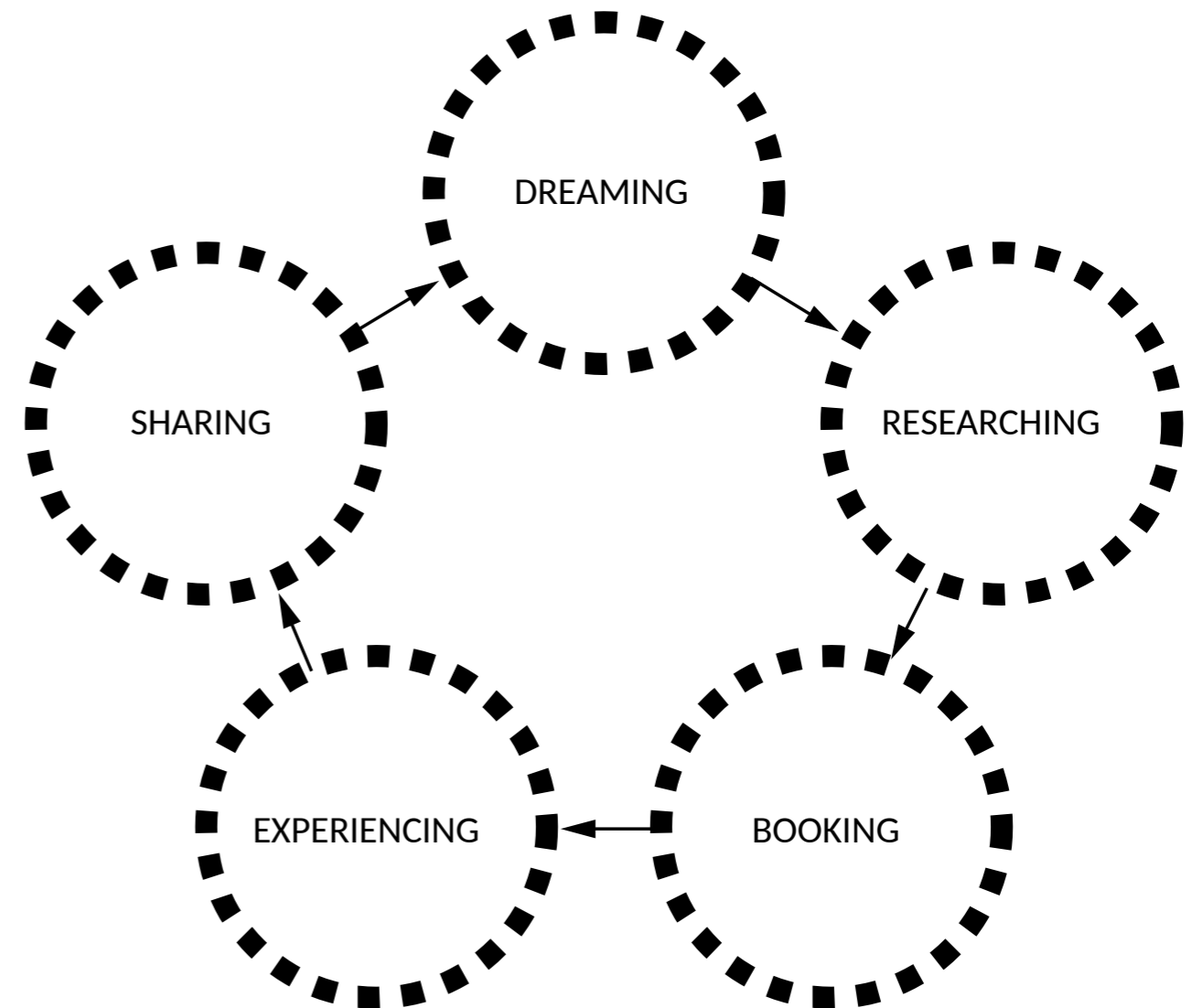
Trigger: The traveller embarks on the trip and engages in planned activities and experiences.

Goal: To provide seamless and enjoyable experiences, exceeding the traveler's expectations and creating memorable moments.

5. Sharing:

Trigger: The traveller reflects on the trip and shares their experiences with friends, family, and online communities.

Goal: To encourage positive word-of-mouth, attract new customers, and obtain insights for future improvements.



Circular economy tourism

STUDYING THE PERSONAS:

ADVENTURES:

DESCRIPTION:

- Solo travellers who love to go on physically demanding outdoor adventures.
- They are well prepared, have adequate equipment and get a kick from exploring new and unknown territories.

REGION'S TOURISM DEVELOPMENT PHASE:

- This group is willing to explore the region in the short term before it is fully developed.

EXAMPLE ACTIVITIES:

- mountain biking, multi-day hikes, etc.

GOALS

- Discover the country of Albania
- Feel that they are active in their life
- Feel that they are close to nature
- Feel like they've seen more of the world
- Find out if they would visit Albania again
- Wildlife photography



OUTDOOR FAMILIES:

DESCRIPTION:

- Adventurous parents who like to spend time outdoors with their children. They may spend multiple days in the country.

REGION'S TOURISM DEVELOPMENT PHASE:

- This group needs some family friendly amenities to balance out the adventurous portion of their trip.

EXAMPLE ACTIVITIES:

- camping, short hikes, zipline

GOALS

- Relax & unwind
- Transfer an active & outdoor related lifestyle to their children



STUDYING THE PERSONAS:

RELAXATION SEEKERS

DESCRIPTION:

- People looking to escape their busy day to day life and to relax in the peaceful natural environment. They may come for a single day from nearby cities or spend multiple days if there are adequate facilities where they can eay 'worry free'.

REGION'S TOURISM DEVELOPMENT PHASE:

- This group needs adequate infrastructure that allows them to relax with limited effort.

EXAMPLE ACTIVITIES:

- glamping, hotel, restaurant, thermal waters

GOALS:

- Relax & unwind
- Get inspired by the natural environment
- Experience the local culture and special park features (land art)
- land art installations.



LUXURY SEEKERS

DESCRIPTION:

- Wealthy people looking for an exclusive experience with a high level of quality.
- Interesting for business people attending events in Albania and wish to escape the city.

REGION'S TOURISM DEVELOPMENT PHASE:

- This group needs highly developed infrastructure or a chic experience and adequate entertainment options.

EXAMPLE ACTIVITIES:

- hotel, restaurant, cable car trip, land art installations.

GOALS

- Have an exclusive experience
- Get away from their daily work
- Enjoy high quality accommodations

SHARED GOALS:

- See and discover more of the country
- Tasting local products. Enjoy the local dishes
- Discover the history of Albania
- Going on an adventurous outing
- Take Instagram worthy photos



- Relax & unwind

Key recommendations

- Addressing the challenge of tourism seasonality in the region and advocating for a shift from mass to slow tourism is imperative.
- Gjirokaea and Permet, renowned tourism cities primarily focusing on cultural heritage tourism, have witnessed substantial investments in recent years.
- Permet is emerging as a destination for outdoor and active nature tourism, supported by a community enthusiastic about providing quality tourism experiences. However, there is a shortage of skilled workers and adequate accommodations. Increased investment in this sector is essential to enhance Permet's existing tourism offerings while preserving its unique charm.
- Collaborative efforts among these cities hold tremendous potential. By complementing each other's tourism offerings, they can provide travelers with a holistic Albanian experience, seamlessly transitioning from sea to mountain, all while nurturing the local communities and preserving the destinations' authenticity

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