ASSESSMENT OF NATURE-BASED TOURISM BUSINESS AND TOURIST DEMAND IN VLORA BAY AND KARABURUN-SAZAN NATIONAL MARINE PARK, ALBANIA
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ACRONYMS

B&B Bed and Breakfast
CEPF Critical Ecosystem Partnership Fund
DHS Directorate of Health Services
GIS Geographical Information System
IATA International Air Transport Association
INCA Institute for Nature Conservation in Albania
MPA Marine Protected Area
NBAs Nature Based Activities
SME Small and Medium Enterprises
SEA-Med Sustainable Economic Activities in Mediterranean Marine Protected Areas
TO Tourism Operators
WWF-MedPO WWF Mediterranean
1. INTRODUCTION

The main purpose of this study is to identify and evaluate nature-based sustainable tourism-related certification schemes available in, or appropriate for Albania. The study also evaluates tourist demand and tourist satisfaction in Vlora Bay, the level of information available on Karaburun-Sazan MPA and approaches to nature based initiatives.

The Karaburun–Sazan Marine National Park is a Marine Protected Area (MPA) established by Decision No 289, 28.04.2010, of the Council of Ministers. The overall surface of the MPA is 12,570.82 ha. This includes the marine area along the Karaburun Peninsula, which extends for 9,848.95 ha, and the marine area around Sazan Island, which covers an area of 2,721.87 ha. The MPA was created due to the high biodiversity value of the area both in terms of marine habitats (the different littoral habitats, sea caves, Posidonia meadows,) and species (monk seal, red corals, fish). The MPA extends over two municipalities: the Vlora and Orikum Municipalities.

About 11,000 people live in the municipality of Orikum and more than 145,000 people live in Vlora. Tourism is one of the highest priority sectors in the Vlora region, because of the natural and cultural resources that this area offers. The relationship between tourism and local natural and cultural heritage is of particular importance. Tourism can play a key role in generating awareness and support, directly or indirectly, for the preservation of these resources. Moreover, the quality of the natural and cultural heritage in many areas is essential for generating economic prosperity through tourism thus improving the quality of life of local communities.

Tourists have always enjoyed unique natural areas and outdoor-related activities for their vacations. Today, more people are seeking nature-related experiences. These activities cover a broad range including hiking, backpacking, camping, canoeing, fishing, hunting, nature photography, scuba diving, and nature tours. They are dependent upon many types of environments that are both public and privately owned1.

1 Nature-based tourism enterprises – Guidelines for success, Storm Thurmond Institute, 2000
But unlike many other sectors, nature-based activities (NBAs) are directly affected by the quality of the environment, which directly impacts tourist satisfaction and is a determining factor in the long term. Nature-based tourism refers to those tourism experiences that are directly or indirectly dependent on the natural environment and require a land or water base.

There are several characteristics of nature-based tourism:

- It accounts for a large proportion of the global tourism industry.
- This proportion is increasing as nature-based tourism continues to grow faster than the tourism sector overall.
- Nature-based tourism occurs in both public and private spaces, and hence, is managed by public agencies as well as private industry and non-governmental organizations.
- Nature-based tourism is an extremely diverse sector that encompasses potentially incompatible activities (such as wildlife viewing, boating, skiing, walking in alpine areas, hiking, hunting, fishing, surfing, snowmobiling, river tours, rafting).
- There is a complex array of potential economic, socio-cultural and environmental costs and benefits associated with nature-based tourism.

As with all forms of tourism, the planning and management of nature-based tourism is increasingly mediated by the paradigm of sustainability. Given the size, growth rate, ubiquity, diversity and variable impacts cited above, it can be argued that the goal of sustainability is especially imperative in the nature-based tourism sector. Indeed, the attempt to operate in a sustainable manner is universally acknowledged as one of the core criteria of tourism types which have nature based activities as inputs.

**Nature-based tourism businesses must meet the following criteria:**

1. Nature-based tourism businesses actively market products and services to tourists who are engaging in nature-based activities.
2. The primary source of revenue for nature-based tourism businesses is from clients, tourists or non-tourists, who are engaging in nature-based activities (ensuring this by an entry fee or a service fee).
3. The primary function of nature-based tourism businesses is not retail sales.
4. Nature-based tourism businesses must be able to estimate the percentage of revenue generated from tourists.
5. Nature-based tourism businesses provide products or services related to the activities included in nature-based activities.

Even though tourism provides the most promising opportunities for local development in the Vlora region, to date only standard, family-owned or low-end package tourism facilities are found in the Vlora region. The tourist area extends from the Orikum bay to the city of Vlora, including Radhima bay to the south of Vlora. About 75 registered facilities, with a total capacity of 1,360 rooms and 3,530 beds offer accommodation to visitors from Vlora to Llogara. Many unregistered private rooms add to these figures.

In this context, INCA, Institute for Nature Conservation in Albania initiated an assessment of tourism activities and businesses in the bay of Vlora under the SEA-Med Project (Sustainable Economic Activities in Mediterranean Marine Protected Areas) in Albania (Karaburun-Sazan Marine Protected Area) with the support of CEPF (Critical Ecosystem Partnership Fund) and in collaboration with WWF Mediterranean.

The assessment was carried out in two phases, the first based on interviewing stakeholders providing tourism services while the second phase targeted tourists directly. The main objective of the first phase...
was to make an inventory of all tourism- or recreation-related businesses operating in the bay of Vlora with a special focus on nature-based activities. The second phase of the assessment aimed at providing data on tourists’ perceptions regarding the quality of the tourism offer in the area.

The area of study begins from the point of Uji i Ftohte and includes Radhima and Orikum Bay.

A first research phase was undertaken to collect data to be used as a basis for the development of a sustainable management plan for the National Park of Karaburun and Sazan. This plan will be developed in collaboration with many stakeholders in the area, especially tourist operators.

Questions that require answers in the first part of the report are related to:

• Types of businesses, initiatives and Nature Based Activities (NBAs) in the area
• Types of services offered by different tourism businesses and initiatives
• The opportunities that lie behind the involvement of some operators in NBAs
• Problems related to the desirable quantity of NBAs to be offered in the area

In the second part of the report tourists’ answers are analysed in order to identify the services required by tourism demand, the perception of tourists concerning the local offer (either what is offered or how the information is conveyed) and finally the differences between national and international demand.
2. **PHASE I: ASSESSMENT OF NATURE-BASED TOURISM BUSINESSES OPERATING IN VLORA AND ORIKUM MUNICIPALITIES**

2.1 **METHODOLOGY**

2.1.1 Study area

The research targeted the region of Vlora Bay, including the MPA of Karaburun-Sazan. Three sub-areas were identified: Uji i Ftohte, Jonufer-Rradhime, and Orikum. These are the main tourist destinations of the Vlora region having a considerable role in tourism development. These areas also accommodate tourists that seemingly have generated the demand for NBAs.

Tourism operators (TO) survey

A comprehensive market survey was performed in 2014, analysing tourist operators with a special focus on nature-based activities and operators that consider these kinds of activities as complementary.

In 2014, secondary data on operators located in the area was collected through the analysis of existing studies of different non-government and government organizations present in the area of Vlora bay.

A questionnaire model was then developed after panel discussions (Annex 1). Primary data were gathered in 2014 through an interview-based survey of tourism operators in the study area. The number of interviews was defined according to the geographical distribution of the tourism businesses known as the most important for tourism development.

Semi-structured qualitative interviews targeted managers and/or owners of TOs, and aimed at:

- Understanding Nature Based Activities (NBAs) in the area and their impact
- Identifying other NBAs in the area, or services including NBAs in the main TO business.
Assessment of nature-based tourism business and tourist demand

Figure 1. Map of Vlora Bay and Karaburun-Sazan MPA (source: Institute for Nature Conservation in Albania)
A total of 73 interviews were carried out, 11 with tourism operators focusing on diving, hiking, fishing, aeronautics, and 61 commercial tourism operators, which collaborate with the former in offering a full package to tourists.

<table>
<thead>
<tr>
<th>Geographic area</th>
<th>Leisure activity operators</th>
<th>Tourism operators</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Uji i Ftohte</td>
<td>4</td>
<td>14</td>
</tr>
<tr>
<td>2. Jonufer – Rradhime</td>
<td>2</td>
<td>16</td>
</tr>
<tr>
<td>3. Radhime – Orikum</td>
<td>6</td>
<td>31</td>
</tr>
</tbody>
</table>

Table 1. Sample composition

Before each interview, detailed information on the study was provided to the interviewees.

Most of the contacted operators responded and accepted to be interviewed and were open to sharing requested information. The main difficulties concerned interviewing times, especially with NBA operators. In some cases these activities are carried-out by individuals who are not registered as companies, such as guides or boat tour operators.

The activities identified through the survey were mapped in GIS, as an important requirement for Sustainable Tourism Planning.

### 2.2 OVERVIEW OF NATURE-BASED TOURISM ACTIVITIES IN VLORA BAY

#### 2.2.1 Type of businesses and location

Most of the operators interviewed were for-profit local operators, but there were some non-profit organizations, such as:

- the management of fishing organizations,
- the centre for sports and tourism “Eagles”,
- the Non-Profit Organisation “Pisha Flamur”
- the diving centre “Ekspedita BLU”.

The main activity of for-profit local operators is providing accommodation, but there are also a number of NBA operators which base their activity only on sport and leisure.

Only one of the TOs is a foreign initiative, the Marina Port of Yachts, which was the first to offer some NBAs such as boat trips and is further developing these services.

The distribution of tourism operators in Orikum Bay is shown in Fig. 2. The main TOs providing accommodation and restoration (bars and restaurants) are concentrated in the western part of the bay, outside the MPA. The impact of these businesses on the MPA is not direct. Only two food sector related businesses are located in the MPA, operating only in the two peak months of the season.

The indirect impact of these businesses in the MPA is related mainly to problems in the sewerage system and pollution from uncontrolled waste disposal.
2.2.2 Main nature-based activities

There are two types of operators in the area offering tourist services: operators that offer accommodation and those who offer other nature based related tourist activities like diving, hiking, parachuting, fishing, boating. Operators offering NBAs represent about 46% of the sample, of which 15% offer tourist services based on nature. The following nature-based services and activities were identified:

- **Diving**: 3 operators were identified that offered this activity. They offer training for amateur divers, or other services for professional divers, as well as guided diving in different areas of the coast. These services are offered especially to international tourists and sometimes for national tourists because in Albania not many people go diving.

- **Hiking**: is offered by some of the accommodation businesses, with local unlicensed or unregistered guides. About 11% of those interviewed were accommodation services offering this service on a per demand basis.

- **Parachuting or skydiving**: was offered by two operators. Their main activity was parachute jumping, but they sometimes also offered trekking and climbing.

- **Fishing**: was offered by 5 operators as a tourist sport, along with other activities such as diving and guided boating tours.

- **Tour boating**: was offered by 35.6% of the tourism operators interviewed, which was the most common activity, offered to all tourists independently of their origin.

- **Sporting activities** offered as one resort complex for various disciplines. This is the accommodation unit that provided the greatest number of services intended for tourists, 20% of which used these activities. The rest of the users were not clients of the hotel. It serves as a diving centre, offering amongst others: snorkelling, diving, canoe, kayak, jet boating, fishing, a wide range of water sports, including surfing, wind surfing, kite surfing, skateboard sailing, parasailing.
Graph 1 shows the trend for the types of NBAs currently on offer by TOs in the area. The spread of the NBAs in the MPA is shown in Fig. 2 and Fig. 3. Fig. 2 shows the diving sites in the MPA. Fig. 3 shows mainly the boating activities, which are also offered by some of the accommodation tourism operators. Tour guide activities are also represented.

Graph 1. Types of NBAs offered by TOs

<table>
<thead>
<tr>
<th>Other sporting activities</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports fishing</td>
<td>8%</td>
</tr>
<tr>
<td>Boating</td>
<td>35.60%</td>
</tr>
<tr>
<td>Parachuting</td>
<td>3.00%</td>
</tr>
<tr>
<td>Hiking</td>
<td>11.00%</td>
</tr>
<tr>
<td>Diving</td>
<td>4.00%</td>
</tr>
</tbody>
</table>

Figure 4. NB activities in the Karaburun-Sazan area (Operators’ data, March 2014)
2.2.3 Activities related to Karaburun-Sazan Marine Protected Area

26% of the tourism operators whose basic activity is accommodation (bar, restaurant, hotel) also offered nature-based activities related to the MPA, and this trend is going to increase, since 54% of those who do not offer these activities were planning to develop them for the future, especially in the Karaburun-Sazan area.

32% of operators interviewed develop nature based activities in the area of Karaburun-Sazan Park, and see these kinds of activities as very important for the future development of this area, especially for sustainable tourism development.

They consider NBAs very important for several reasons; namely, economic, tourist satisfaction, attracting international tourists, competitive advantage, sustainable tourism development, and educative and intercultural exchange.

2.2.4 Interest and potential of future NBAs

All interviewees expressed their interest in NBAs in different ways. When asked if they are interested in offering more of these activities in the Karaburun-Sazan Area, 65% responded yes, while 35% said no (Fig. 5).

Some of the interviewees not offering NBAs at the moment of the interview, were interested in or planning to offer them in the future.

Out of 27 tourism businesses and initiatives (37%) not currently offering NBAs, 8 of them (29%) were planning to offer NBAs in the Karaburun-Sazan MPA in the near future, while about 6 (21%) businesses were just interested in offering these activities in the future, but still not planning to do so. The rest, about 13 businesses were neither planning nor interested (Graph 2).

Graph 2. Interest among operators not offering NBAs

If we consider why 35% of the interviewees are not interested in offering NBAs, we find their main concerns are mostly lack of capacity, lack of financial resources, lack of experience and lack of human resources management capacities.

These are also the main reasons for the difference between planning these activities and current interest of operators. In fact, all the operators that do not plan to offer NBAs say that the most important reasons are:

• financial aspects of the business
• requirements for professionals in the field, such as divers, guides
• lack of capacities or experience in the management of these activities.

Taking a deeper look in the individual interviewees that highlighted these problems, we can see first of all that they are mostly tourism operators offering basic services, such as accommodation and restaurant services. Secondly, their approach to offering NBAs is that of including them in the list of their services. This means they have answered the question if they want to offer more NBAs, while they do not base their service on NBAs. They may not be contrary to more NBAs being included in the total tourist offer, not necessarily offered by them, but by other operators specialized in NBAs. More information about the existence of these operators, their services, as well as cooperation between different kinds of operators in the market, should be promoted in these cases.
There are also perceptions about a lack of demand for NBAs (4 interviewees) and lack of professional figures that must be part of the NBA offer. In some cases, NBAs are not seen as an opportunity for growth. Finally, 3 interviewees stated that tourists organise these activities by themselves.

For those interviewees who accepted to offer more NBAs, the most desirable or appropriate activities are shown in Graph 5. In most cases, two or more alternatives are mentioned as responses. The most desirable ones were: diving, snorkelling, guided wildlife tours and cave exploration, because of the varied natural beauty the Karaburun area offers. Some new activities were also identified, such as parachute jumping, free fall, water sports, rafting and canoe tours.

![Graph 3. Types of most desirable/appropriate NBAs](image)

But how do the operators think that adding these activities to their existing business would impact its value? Some alternatives were explained to TOs, such as an increase in tourist numbers, higher revenues, greater market knowledge and merely expanding their business. TOs mentioned the increase in number of tourists and the higher revenue as the main positive aspects.

**2.2.5 Support for environmental protection in the area**

The environment is important in attracting tourism flows with their attendant economic effects. Conservation of valued environmental features can help to maintain tourism levels and its contribution to the economy. Furthermore, preservation and management of natural resources is a key challenge for a sustainable development strategy.

The support that local operators give in terms of management and protection of the environment is seen as an important aspect. However, when asked if their activity supports the protection or management of the environment (Question 11), TO’s positive answer is due mainly to keeping the area around the structure clean. The maintenance of the beach, which in fact is offered as a for-profit service, is also considered as support for the environment. In 45 cases, we received responses such as: “we protect the environment by cleaning, keeping clean, individually, our area or territory, around our structure”. In five cases TOs expressed sensitivity to sewage systems, to the prohibition of their waste in the sea, and to the handling of inert materials. In two cases the collaboration with the Directorate of Health and Disinfections (DSHSH) was mentioned. 6-7 cases mentioned their contribution through tree planting and decorating the environment with flowers and plants. The use of wood in the structures as a more environmental friendly material is mentioned in 2-3 cases. Percentages are shown in Graph 6.
Some TOs contribute to environment protection through site watching and providing information to the local authorities about problems such as fires or unclean areas. More active in this regard are the non-profit actors, but also some for-profit tourism operators, such as the diving centres or the tourist sports-complex, mentioned their attention to underwater flora and fauna and to the area’s biodiversity.

At the conceptual level, revenue enhancement should not be seen as contradictory to the objective of conservation. Instead it should be seen as an effective tool for conservation. The majority of the operators involved in the study consider the cost needed to ensure conservation or environmental quality as an additional and unnecessary expenditure.

2.2.6 Cooperation between operators and stakeholders

In 46% of the cases (33 cases) there was no cooperation between the operator and other institutions or operators. This relatively high percentage shows a lack of institutional collaboration, but also a lack of cooperation between operators.

17% of TOs interviewed (22 cases) claimed they collaborate with the municipality of Vlora and Orïkum. 12% of TOs collaborate with other operators, either nearby or in other tourist areas (in 9 cases with the same level of the value chain). Collaboration with Tourism Agencies was mentioned in 14% of the cases (10). Data are shown in Graph 7.
Collaboration with other actors in the value chain, such as collaboration between hotels and guides or hotels–restaurants and NBAs such as boat and diving operators is also present, but only on an individual basis and through personal acquaintances and the first empirical steps individuals offering NBAs take in marketing their services. In fact when asked more specifically, local guides or diving professionals receiving requests from foreign tourists say that they pass on their contacts to different operators, because they have no offices or private companies, or because of restrictions such as permissions or certificates or costs. On the other hand, operators that offer accommodation services collaborate with NBA operators to suggest their services to the clients.

Other types of collaboration with biologists associations, or the association of Albanian Animators, IATA, are mentioned in 5 cases.

The collaboration with the state or public sector organisations would be helpful in meeting conservation objectives. Organisations that carry out the task of preserving environmental quality with minimum cost to society and firms that maximise revenue from tourists in an environmentally friendly manner should be functioning in a broad state – private partnership structure, given the public value, of conserving natural assets such as the Karaburun-Sazan marine protected area.

Within this framework it is important to consider the potential impact of tour guides. It is generally recognized that tour operators and guides can play an important role and have an impact on information delivery, interpretation and as conduits for natural resource management agencies and organizations.

Another problem verified by TOs was a lack of a certified tourist guides. They are a necessary resource for visitors who want to explore the city. This relates primarily to the low level of incoming flows compared to the outgoing ones.

2.2.7 Main tourist attractions in Vlora from the operators’ point of view

Natural and cultural values of particular importance for tourism are:

- The quality and variety of natural landscapes
- Cultural landscapes created by people
- Historical places and cultural heritage
- Biodiversity – flora and fauna, marine and land
- The distinctive features of local living: culture, arts, crafts, cuisine, language, events and festivals.

The area of Karaburun-Sazan is well-known for its natural and cultural resources. All the materials, guides and studies in the tourism field mention the variety of resources, from ancient ruins and ancient Illyrian settlements, to biodiversity and beautiful beaches and natural resources. Lists of these attractions include:

1. The ancient city of Orik,
2. The ancient settlements of Radhima, Dukat and Tragjas,
3. The Pashaliman port,
4. Archaeological park of Orik,
5. Ethnographic museum,
6. Museum of Independence,
7. Dervish Aliu Castle,
8. Marmiroi church,
9. Sophe’s castle,
10. Gjon Bocari’s castle,
11. Cave of Haxhi Ali,
12. Cave of DukGjoni,
13. Izvor planes,
14. Man plane of Tragjas,
15. Orikum Laguna,
16. Shen Vasili beach,
17. Shen Jani beach,
18. Grama Bay,
19. Zhapoveli Bay,
20. Brisani Bay,
The answers to question 13, however, show that tourist operators have a general knowledge about the resources in the area, but there is lack of knowledge about specific natural and cultural monuments. Five interviewees mentioned Karaburun-Sazan MPA as an important resource, 18 cases mentioned the sea and the marine tourism connected to it as a resource, while in 11 cases mountain tourism is mentioned. These answers denote inadequate knowledge about specific attractions in the area, thus these operators are not able to adequately direct and advise tourists.

16 operators mentioned specific places as resources, including Radhima, Llogara, Orrikum, Kanina as the main tourist attractions in the area.

The most mentioned attractions are:

1. Cave of Haxhi Ali,
2. Marmiroi church,
3. Pashaliman,
4. Beaches of Karaburun,
5. Archaeological Park of Orrik,
6. Museums,
7. Laguna,

These are less than 50% of the available attractions, and were mentioned by less than 50% of the interviewees, figures that also show that there is little knowledge about the specific resources that the area offers.

As a conclusion, regarding TOs, their services and NBAs in the Karaburun-Sazan area, it seems clear that there is a growing tendency to offer more NBAs, from TOs in the accommodation businesses, but also from new TOs, focused mainly on providing NBAs. Problems are related to the knowledge and perceptions of TOs about NBAs and the problems and opportunities linked to them, together with aspects of the development of NBAs for the purpose of sustainable tourism. Cooperation, nature conservation, protection and the relationship with natural and cultural resources are fields to be focused on when discussing future NBA development.

### 2.3 STRUCTURAL AND ECONOMIC ANALYSIS OF NBAs IN VLORA BAY

#### 2.3.1 Tourist Demand

Preliminary data gathered from the study show that the interest of tourists for NBAs in Karaburun-Sazan marine protected area is not very high. The majority of tourists use the hotel offer, consisting essentially of marine infrastructure. But what should be positively evaluated is the increasing interest by hotels cooperating with NBA operators to enhance and fulfill tourist demand.

Over time, an increasing number of tourism operators, especially accommodation structures have opened up and invested in nature-based activities, increasing the possibility of meeting the demand by a single enterprise. Moreover, the large capacity of the structures, the year round activity of the hotels and the loyal clientele dictate the need for complementary activities. It is clear there is a growing interest in nature-based activities.

The tourist demand of 2013 ranged from 150-30,000 arrivals\(^6\).

There are several influencing factors:

- The size of the companies
- The number of services provided
- Seasonality
- Locality
- Prices.

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\(^6\) The minimum and the maximum number of tourists registered by each tourism operator in 2013.
Data regarding demand trends over the last three years are controversial: the number of tourist operators who claim to have experienced a reduction in demand approximates the number of operators that claim to have had an increase in demand. A considerable number of those interviewed believe that tourism will grow in the future.

Despite the current number of NBA users, a growing interest for nature-based activities is clearly evidenced. The institutional level of managing resources (motorboat moratorium law) had a significant influence on the NBA market, especially in boating for tourist purposes. With the abolition of this law, the interest and the possibilities of tourism operators will be greater and the majority of them are planning to offer these services in the future.

On the other hand, the current marketing practices of business owners and the main form of marketing used by commercial operators, associations and organizations has led to limited information about nature-based activities, especially for the regional and international market.

Figure 5. List of tourist attractions in Vlora Bay (INCA, March 2016)
2.3.2 Prices and costs

The expenditure associated with tourism flows makes tourism in Vlora region a key driver for socioeconomic progress. Market prices serve as signals or incentives to guide resources and products into their most highly valued uses. In the case of nature based activities, the data show that tourist payments for these services represent a significant part of average tourist expenditures. This is mainly due to the fact that their costs are high and there is not strong competition in the sector. The services provided are more or less the same, there is not much choice for visitors. In the case of activities offered by hotels, tourists find it more convenient to buy them from the same operator, not separately.

The service providers interviewed, made a distinction between foreign and domestic tourists based on the willingness to pay. Foreign tourists (including tourists from Kosovo, Montenegro and Macedonia) are less influenced by the prices of nature based activities.

The average expenditure of tourists varies according to:

- The type of accommodation structure
- The package plan (B&B, HB, FB)
- Service quality
- Distance from the sea
- The period of the year.

2.3.3 Seasonality

Tourist arrivals in Vlora mostly respect a seasonal pattern. According to the data collected from the questionnaires, it can be seen that 62% of tourist businesses operate during the four peak months, beginning June and including July, August and up to September. Only 38% of the operators interviewed declare that their activity extended throughout the year. This is due to the predominance of sea tourism, which is generally active only in the summer season.

Regardless of the concentrated activity in peak season, the majority of the accommodation structures are opened throughout the year. But, during the other months of the year, hospitality is not their main activity, the number of tourists and occupancy rates for hotels are very low during the off season; they offer restaurant and bar services used mostly by residents.

Analysing the category of tourism businesses operating all through the year, we can clearly conclude that there are several factors influencing their activity:

- Diversification of tourism supply: a large number of services provided by operators and a diverse range of these services create a greater possibility for demand to have a longer duration
- The type of main activity: a distinction was made between hospitality enterprises and all other kinds of enterprises. All associations and organizations providing NBAs as their main activity operate all over the year. While enterprises having hospitality as their main activity, are divided into two categories: those who have seasonal activities and those who operate all through the year
- Geographical distribution of operators: those that have their activity in Jonufer-Rradhime and Orikut areas have low seasonality in relation to those that operate in Uji i Ftohte, which is away from the tourist area of the Vlora coast.

Seasonality is an important factor in determining the viability of investments in hotels and nature based activities, given that the duration of use is limited to short periods. This is why tourism operators offering complementary activities mentioned above have greater financial opportunities to invest and increase occupancy rates.

2.3.4 Employment

Human resources in the tourism sector in the Vlora region reflect two main characteristics of the industry: seasonality and the size of the operators (all of them are SMEs). The primary data collected show a low number of employees during the year, doubling or tripling in the peak season. Their number varies depending on the size of the business, the number of services provided, the period of activity,
classification. In any case, the minimum number of employees is between 0 and 1, while the maximum is from 30 to 45, respectively in the low and high seasons. The average number varies from 10 to 13 in the low and high seasons.

Business and investment growth have resulted in increased market share and an increasing demand, creating a need for increased staffing, which is unable to be filled by family members. This has reduced the number of family businesses and has changed the structure of the labor market.

NBA operators are supported in their activity by a small number, which are generally members of an association or organization and, depending on the commercial venture they should meet specific professional requirements related to the type of activity (sport, adventure, boating,) provided.

2.3.5 Revenues through nature-based tourism

The analysis of current revenues from tourism, as a whole, indicates that there is reluctance in providing information regarding revenues. One third of those interviewed didn’t respond to this question. Only four of the respondents are non-profit organizations. For the rest revenues vary in a range from 420,000 ALL (3,000 €) to 40,000,000 ALL (280,000 €).

The operators with high levels of revenues set aside a part to invest in expanding the activity and in this context they represent the wider category of tourism operators interested in offering nature based activities for their clients.

Hotels providing NBAs consider them an additional source of revenue, which is added to the revenues of the main activity and the other services offered. If we take each of the NBAs as an independent activity, then the current revenue from them (which is based on different prices for different subsets of visitors: lower when the visitors are customers of hotels and higher when they are users of just one activity) seems to be higher compared to single charge-based revenue.

Since this number of NBA users is still limited, the revenues of this type of operator are not as stable as other forms of tourism activities.

2.4 CONCLUSIONS

After a thorough examination of Tourism Operators in the area of Vlora Bay with a special focus on the activities and services that these operators offer in relation to the Karaburun-Sazan MPA, the research team comes to the following conclusions in three related areas, examined in depth in this study. First, the activities of TOs in general and then especially NBAs are described. Secondly, the types of tourists and problems related to the market of these services are identified. Third, the need for planning and sustainable tourism activities in the MPA is addressed.

Activities

Tourism activities, which are focused on the natural environment, exert a number of pressures on the resources on which they rely. They create risks for ecosystems and the services provided. At the same time, the on-going protection of the MPA Karaburun-Sazan and its natural resources depend on the well-being of the tourism industry. Nature Based Tourism is one of the most rapidly advancing segments of the tourism industry and the growth of marine tourism is particularly reflected in an increased demand for activities such as sport fishing, boating, scuba diving, sailing and motor cruising, and guided walking.

Vlora is a beautiful destination. Soaring over the Adriatic and Ionian seas, vast forests, alpine ranges and much more, it offers the perfect environment for nature-based activities able to satisfy both locals and visitors alike. However, nature-based activities and entertainment for all age groups – aquariums, sightseeing tours, farm activities, natural wildlife experiences, theme parks, leisure parks, seeing endangered species in their natural habitats7 – are lacking. In the area, there is also lack of other support activities, such as festivals, fairs. Developing NBAs is seen by some operators as the only viable alternative

7 These are mentioned as Built Attractions and Facilities which allow visitors to experience the culture and resources of the area.
Perceptions of TOs as to why NBAs are not developed in the area, include lack of demand, and various obstacles, ranging from financial difficulties and lack of human resources, to a lack of managerial skills and experience.

The NBA market

There is a lack of satisfactory information about tourists that visit the area. The private sector and public offices in both municipalities have not carried out any studies. However, through qualitative interviews with open questions included in the questionnaire, some important information was gathered about the types of clients that require NBAs according to TOs in Vlora Bay.

Some operators state that the area has great potential for attracting foreign tourists, which may well be the market for NBAs. Some foreigners are adventurous tourists, or families coming with their own facilities, campers, camping tents, parachutes. Indeed, the majority of tourists that require information about types of NBAs are foreign tourists, especially interested in hiking and guided tours, whereas Albanian tourists require information about sporting activities.

There is insufficient marketing activity on the part of operators that provide NBAs. The only way they offer their services, especially those offering local diving guides and boating tours is on the basis of informal word of mouth communication.

Further studies are needed about the kind of services required by the market, differences between national and international demand, what these kinds of tourists need to attract more tourists to the area.

In relation to planning

Since there is an on-going process for the development of both plans, the awareness of the population, TOs and all the interested actors in this process should be emphasized. Information and collaboration between stakeholders is key in this regard.

The majority of TOs tend not to cooperate with other local stakeholders although there have been efforts to increase the level of cooperation with travel agencies, tour operators and other intermediate enterprises for commercial purposes, especially entering new markets.

The tourism industry is expected to take more responsibility for sustainable development. This often involves assuming a degree of financial responsibility for the long-term maintenance of the resources they profit from. Involvement may also mean accepting practices that limit the negative impacts of tourism. Tour guides should indeed be seen as one opportunity to reduce negative impacts on the natural marine environment, having the potential to contribute to the protection of the natural areas in which they operate by educating their customers through interpretation and modelling environmentally appropriate behaviours related to marine conservation.

Human resources management as part of the sustainable tourism plan for NBAs should be considered. There is a lack of training centres for sporting activities, for example for diving, as well as for local guides; so, a focused effort on guide training certification is required.

The lack of control of the beaches and the problems with energy, water, sewage and other needed infrastructure must be solved in the near future.

The military area in Karaburun-Sazan should be considered from both viewpoints in the planning process. There is a negative impact, with tourists experiencing problems with access to Karaburun by land, because legal permits are very difficult to get. But there has also been a positive effect on nature conservation, which would have been compromised given of lack of control over the territory by other authorities. The military base must be part of the planning process.

There is a need for higher conservation taxes/financial contribution by TOs in order to maintain the environmental quality. They should not focus only on the area in which they operate with their activity, but should consider it as an integral part of their business area.
3. PHASE II: VISITOR SURVEY IN VLORA BAY AND KARABURUN-SAZAN MPA

3.1 METHODOLOGY
The visitors survey was carried out in 2015, in the same area targeted by the tourism operator survey. Tourists were interviewed through questionnaires (Annex 2) during the first 15 days of August, the high peak of tourism in the area.

Samples were selected randomly by a team of 8 individuals, divided into 4 smaller groups of 2 people each. Each group was assigned to one sub-area.

A total number of 601 interviews were carried out, 451 of which with local Albanian tourists and emigrants, while 150 were with foreign tourists.

3.2 GENERAL SOCIO-DEMOGRAPHIC DATA OF VLORA BAY
Vlora Bay is an important tourist destination for Albanians and foreigners. According to INSTAT, in 2011 the population in the Vlora region was 175,640 inhabitants in an area of 2,706 km², and 68% of the area is urbanised.

In recent years there has been a migration of population from rural areas to urban ones. The same is also true for Vlora. In this area there is also a significant problem with external emigration, which is indicated by the reduced young labour force, although Albania is quite well known for its young population compared to other European countries. In Vlora the population over 65 years old is about 30%.
3.3 SOCIO-DEMOGRAPHIC DATA EXTRACTED FROM QUESTIONNAIRES

This chapter will examine issues related to the country and origin of visitors participating in the questionnaire, the number of participants from Albania and from abroad. In this chapter we investigate issues related to the age and sex of respondents that visit Vlora and the most preferred tourist sites for each category. We will also analyse data such as level of education, employment, marital status and tourist incomes.

3.3.1 Where are tourists from?

The data from the questionnaires completed in the Bay of Vlora indicate that from 601 respondents in total, 304 (50.6%) live in Albania and 297 (49.4%) live elsewhere.

![Graph 6. Percentage of interviewed tourists according to their place of residence](image)

Only 23.8% of respondents were from Tirana city, which indicates that Vlora Bay is a highly preferred destination for this population. Tirana is home to almost 1/3 of the population of Albania. The number of arrivals from other districts of Albania represent only 26.8% of the total number of respondents from Albania.

Table 2 shows the nationality of foreign tourists; part of the foreigners category includes Albanian emigrants living abroad, who provide a good potential for tourism. From 297 respondents that live abroad, 150 are foreigners (international tourists) and 147 are emigrants who return to their country for holidays. The percentage of tourists from Kosovo, who visit this area, is also quite high (9.2%).

<table>
<thead>
<tr>
<th>Number interviewed</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other City of Albania</td>
<td>161</td>
</tr>
<tr>
<td>Tirana-Albania</td>
<td>143</td>
</tr>
<tr>
<td>Italy</td>
<td>70</td>
</tr>
<tr>
<td>England</td>
<td>36</td>
</tr>
<tr>
<td>Germany</td>
<td>9</td>
</tr>
<tr>
<td>Kosove</td>
<td>55</td>
</tr>
<tr>
<td>Macedonia</td>
<td>19</td>
</tr>
<tr>
<td>USA</td>
<td>14</td>
</tr>
<tr>
<td>Greece</td>
<td>18</td>
</tr>
<tr>
<td>Polanad</td>
<td>21</td>
</tr>
<tr>
<td>Ukraine</td>
<td>12</td>
</tr>
<tr>
<td>Other</td>
<td>43</td>
</tr>
<tr>
<td>Total</td>
<td>601</td>
</tr>
</tbody>
</table>

Table 2. Tourists according to their place of residence
### 3.3.2 Age of respondents

Graph 9 shows that young people, aged 18-28, representing 40.9% of respondents were the biggest group of visitors to Vlora Bay, followed by 29-39 year olds, which made up 27.3% of respondents. The age group 40-50 represented 19.3% of respondents. If we sum the three, the age group 18-50 represents 87.5% of respondents, with the 60 and over group making up only 12.5% of respondents. This shows that the development of tourism in Vlora Bay is preferred mostly by younger age groups, which are generally also active and working and have more economic potential.

![Age group in %](image)

Graph 9 shows that young people, aged 18-28, made up the highest number of daily visitors to Radhima, with 88 interviewees, followed by Uji i Ftohte with 75 and, Jonufer with 59. The smallest number of tourists in this age group visited Orikum.

Radhima also had the highest number of respondents in both the 29-39 and 40-50 age groups. The 51-60 age group had the highest number of respondents in Jonufër with 16. While Radhima accounted for the highest number of respondents in the 60 and over group with 9 people. Jonufer had the lowest number with 1 respondent.

<table>
<thead>
<tr>
<th>Age group</th>
<th>Uji i Ftohte</th>
<th>Jonufer</th>
<th>Radhima</th>
<th>Orikum</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-28</td>
<td>75</td>
<td>59</td>
<td>88</td>
<td>24</td>
<td>246</td>
</tr>
<tr>
<td>29-39</td>
<td>48</td>
<td>17</td>
<td>65</td>
<td>34</td>
<td>164</td>
</tr>
<tr>
<td>40-50</td>
<td>28</td>
<td>29</td>
<td>38</td>
<td>21</td>
<td>116</td>
</tr>
<tr>
<td>51-60</td>
<td>12</td>
<td>16</td>
<td>13</td>
<td>14</td>
<td>55</td>
</tr>
<tr>
<td>over 60</td>
<td>3</td>
<td>1</td>
<td>9</td>
<td>7</td>
<td>20</td>
</tr>
<tr>
<td>Total</td>
<td>166</td>
<td>122</td>
<td>213</td>
<td>100</td>
<td>601</td>
</tr>
</tbody>
</table>

Table 3 indicates that the favourite destinations of young people were “Radhima”, “Jonufër” and “Uji i Ftohte”, with “Radhima” ranked in first place. Orikumi was a destination preferred more by older age groups.
3.3.3 Gender of respondents

The report shows that the number of women and men involved in the study is roughly the same, there are 295 women and 306 men respectively 49 and 51% of the total number of respondents.

Graph 10. shows that of the women and men aged 18-28 that represent the highest number of respondents, 114 respondents are women and 132 men.

3.3.4 Education

Graph 12, shows that the majority of respondents are either studying for or have obtained a university degree. They represent 66.6% of respondents or 402 people. People with a high school diploma account for 27.1% of the total or 163 people, while respondents who have only completed elementary school account for 2%. Finally, 4% of respondents (24 of them) refused to answer this question.
### 3.3.5  Marital status and choice of destination

Table 4 shows that of 601 interviewees, 342 were married, 235 single and 18 divorced, while only 6 of them refused to answer this question. The site which had the highest number of respondents with “married” status was “Radhima” with 115 people, while the place having the lowest attendance to this category is “Jonufer” with 68 people.

The place preferred by single women was “Uji i Ftohte”, where 81 tourists were interviewed and the place with the lowest number of single women was “Orikumi” “with 23 people. The number of divorced people interviewed in “Radhima” was higher than other places with 14 people, a significant difference from other destinations that had 1 to 2 divorced people.

<table>
<thead>
<tr>
<th>Civil status</th>
<th>Place</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Uje i Ftohte</td>
<td></td>
</tr>
<tr>
<td>Married</td>
<td>84</td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>81</td>
<td></td>
</tr>
<tr>
<td>Divorced/ widow</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Refuse</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>166</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Jonufer</td>
<td></td>
</tr>
<tr>
<td>Married</td>
<td>68</td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>52</td>
<td></td>
</tr>
<tr>
<td>Divorced/ widow</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Refuse</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>122</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Radhime</td>
<td></td>
</tr>
<tr>
<td>Married</td>
<td>115</td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>79</td>
<td></td>
</tr>
<tr>
<td>Divorced/ widow</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>Refuse</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>213</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Orikum</td>
<td></td>
</tr>
<tr>
<td>Married</td>
<td>75</td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>Divorced/ widow</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Refuse</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>601</td>
</tr>
</tbody>
</table>

Table 4. Marital status and choice of destination

### 3.3.6  Employment

Most of the tourists that participated in the survey carried out in Vlora Bay were employed (72% of tourists in total, 433 participants). This shows that both Albanian and foreign tourists are generally a potential economic resource for the area.

Travel and tourism generated 50,500 jobs in 2014 (5.3% of total employment) and this is expected to remain the same in 2015 at 50,500 (5.1% of total employment). This includes employment in hotel services, travel agents, airlines and other passenger transportation services. It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists.

Finally, 16% of respondent were unemployed (93 tourists), 5% retired (32 tourists) and 7% students (43 tourists). Graph 13 gives a clear picture of the employment status of the interviewees.

* Travel and Tourism economic impact 2015, WTTC World Travel & Tourism Council.
### 3.3.7 Incomes

Table 5 gives important information on respondents’ incomes, allowing us to make a comparison between the economic level of tourists from Albania and those coming from different countries of the world. Albanian tourists (60.5% of respondents) had monthly incomes around 1,000 €. Albanians without incomes were 19.1% and 20.4% refused to answer this question. Data from the table shows that there were no Albanian tourists with incomes of more than 1,000 €.

In contrast with Albanian tourists, foreigners and Albanian emigrants had higher incomes. Therefore, 34.6% of respondents had incomes up to 1,000 € per individual. Respondents who receiving from 1,001 to 2,000 € monthly incomes, amounted to 6.4%, while, 15.7% earned from 2,001-3,000 € per month, 13.5% received from 3,001-4,000 € per month, 1.1% received from 4001 to 5000 € per month with only 4.4% receiving over 5,000 Euros per month.

Money spent by foreign visitors in a country (or visitor exports) is a key component of the direct contribution of Travel & Tourism. In 2014, Albania generated ALL191.5bn in visitor exports. In 2015, this is expected to fall by 2.8%, and the country is expected to attract 3,526,000 international tourist arrivals. By 2025, international tourist arrivals are expected to be 5,217,000, generating expenditures of up to ALL273.1bn, which is an increase of 3.9% pa.\(^9\)

<table>
<thead>
<tr>
<th>Monthly income</th>
<th>Resident in Albania (%)</th>
<th>Resident abroad (%)</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without income</td>
<td>19.10</td>
<td>12.5</td>
<td>15.8</td>
</tr>
<tr>
<td>to 100€</td>
<td>2</td>
<td>0.7</td>
<td>1.3</td>
</tr>
<tr>
<td>101–1000€</td>
<td>58.50</td>
<td>34.6</td>
<td>46.8</td>
</tr>
<tr>
<td>1001–2000€</td>
<td>0</td>
<td>6.4</td>
<td>3.2</td>
</tr>
<tr>
<td>2001–3000€</td>
<td>0</td>
<td>15.7</td>
<td>7.8</td>
</tr>
<tr>
<td>3001–4000€</td>
<td>0</td>
<td>13.5</td>
<td>6.6</td>
</tr>
<tr>
<td>4001–5000€</td>
<td>0</td>
<td>1.1</td>
<td>0.5</td>
</tr>
<tr>
<td>More than 5000€</td>
<td>0</td>
<td>4.4</td>
<td>2.2</td>
</tr>
<tr>
<td>Refuse</td>
<td>20.40</td>
<td>11.1</td>
<td>15.8</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Table 5. Monthly income per individual in %

\(^9\)Travel and Tourism economic impact 2015, WTTC World Travel & Tourism Council.
3.4 ACCOMODATION

3.4.1 Length of stay in Vlora Bay

In answering the question “How long are you planning to stay on vacation in Vlora”, most of the respondents replied that they would stay for a few days (98.3%) and a very small number answered that they would stay only overnight (1.7%).

This is a very good indicator for the area. It shows that people are staying longer and consequently will spend more money, not only for accommodation in hotels, houses, rooms, but also for other expenses like restaurants, markets, bars, which means more income for the local businesses and the local community.

<table>
<thead>
<tr>
<th>Time of stay</th>
<th>Number of interviewed</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overnight Visitors</td>
<td>591</td>
<td>98.3</td>
</tr>
<tr>
<td>Daily Visitors</td>
<td>10</td>
<td>1.7</td>
</tr>
<tr>
<td>Total</td>
<td>601</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Table 6. Length of stay in hours and days

The following table specifies the number of tourists that planned to stay overnight or for half a day in Vlora Bay. From their answers it shows that about half of them, the largest number of respondents, about 305 individuals intended to stay 4-7 nights in Vlora Bay. Those who intended to stay 8-14 nights amounted to 123 individuals, while in third place were those intending to stay 1-3 nights with a number of 94 people.

An important piece of data that emerges from the interviews evidences a category of tourists staying on holiday in the Bay of Vlora for a period of more than 30 days. They made up 6.5% of respondents, or 39 people. Meanwhile, the number of individuals, spending only some hours in the Bay of Vlora was very small, with an average of 5 hours approximately, time they used for sunbathing or going to restaurants.

Graph 12. Length of stay in number of nights
3.4.2 Forms of Accommodation

An important sector of the tourism industry is accommodation. Capacities of hotels that operate officially in the market are approximately 300 beds in total with restaurant seating of around 13,351\(^{10}\). This is not an exact figure, because the number of rooms and houses for rent in coastal areas is much higher and it is unregistered, therefore, it is very difficult to control the products and the quality of service offered by these businesses. Most of the local population offer rooms for rent, flats or other family based accommodation facilities and most of them are not registered as such.

This is a widespread phenomenon in Vlora Bay. 31.9% of respondents were staying in a hotel, while 28.1% were in bedsits/private accommodation and 26% were accommodated in apartments or houses.

In total, the number of those accommodation sites like bedsits/private accommodation and apartments/houses accounted for 54.1% of our respondents. This shows that informal accommodation is still at high levels and incomes that tourists pay for accommodation are undeclared so the local government has no benefit, unlike the local community families. Table 7 also shows that only 4.3% of respondents used camping as a form of accommodation. That is explained by the fact that there is no present proper infrastructure for setting up these equipments. The majority of tourists using this kind of accommodation were foreign tourists.

<table>
<thead>
<tr>
<th>Type of accommodation</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>192</td>
<td>31.9</td>
</tr>
<tr>
<td>Studio/private accommodation</td>
<td>169</td>
<td>28.1</td>
</tr>
<tr>
<td>Camping</td>
<td>26</td>
<td>4.3</td>
</tr>
<tr>
<td>Yacht</td>
<td>4</td>
<td>0.7</td>
</tr>
<tr>
<td>Apartment/houses</td>
<td>156</td>
<td>26.0</td>
</tr>
<tr>
<td>Relative/friends</td>
<td>50</td>
<td>8.3</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>0.7</td>
</tr>
<tr>
<td>Total</td>
<td>601</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Table 7. Type of accommodation

3.4.2 Accommodation location

Table 8 shows that the majority of respondents had accommodation in the area of Radhime-Jonufër with 39.1% in total number. It is followed by Uji I Ftohte which had 28.3% of the number of respondents and then the Orikumi area with 26.1% of respondents. The table shows that a very small number of tourists, about 6.5%, found accommodation elsewhere.

To the question “how many times have you been to this place before” 10% of respondents answered never before, while 27% had been there only once, 17% twice and 46% of them had been to the area for holidays more than twice. So, 90% of tourists participating in the questionnaire had visited Vlora Bay before at least once.

<table>
<thead>
<tr>
<th>Location of accommodation</th>
<th>Number of interviewed</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orikum</td>
<td>157</td>
<td>26.1</td>
</tr>
<tr>
<td>Radhime-Jonufër</td>
<td>235</td>
<td>39.1</td>
</tr>
<tr>
<td>Uje i Ftohte</td>
<td>170</td>
<td>28.3</td>
</tr>
<tr>
<td>Other</td>
<td>39</td>
<td>6.5</td>
</tr>
<tr>
<td>Total</td>
<td>601</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Table 8. Accommodation location

---

\(^{10}\) INSTAT Hotels and their capacity, 1995-2010.
3.4.4 The most popular place for foreigners

Graph 15 shows the percentage of respondents staying in accommodation in areas where the questionnaire was carried out. The area of Radhime-Jonufër is more visited by foreigners and more than half of them (51%) found accommodation there. The second choice of tourists was the Orikumi area (27%), while 21% of respondents stayed in Uji i Ftohte. Only 1% of them chose another destination for accommodation.

Graph 13. Places preferred by tourists

When foreign tourists were asked: “How many times have you been” they responded as follows: 11% of them had never been there before, 47% only once, 28% of them twice while 14% had been in the area more than twice.

The number of visitors coming to the area for the first time is very small, while the number of visitors who have already been there before is about 89% of the total number of foreigners participating in the survey.

From one point of view, this is positive because it shows that visitors are returning to this place to spend their holidays, but on the other hand it shows that we have a lot of work to do, especially in marketing, in order to attract as many foreign tourists as possible to the area.

Graph 14. Number of times tourists have been in Vlora or Orikum for holidays
### 3.5 TRAVELLING COMPANIONS AND TRANSPORT

Table 9 gives information about who tourists travelled with. Important information obtained from this data is that more than half of the respondents had come to spend their holidays with their family, 50.6% of respondents. This makes the Bay of Vlora a preferred area for family holidays.

The table shows that travelling couples represented 17.1% which is close to the number of those who were travelling in groups, around 18.1% of respondents. Those travelling alone made up 13.8% of the total. This can also be considered a positive indicator because they contribute to raising incomes in the region and to creating more jobs for not only the local population but also for people coming from different cities of Albania for seasonal work.

<table>
<thead>
<tr>
<th>Way of travel</th>
<th>Number of interviewed</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alone</td>
<td>83</td>
<td>13.8</td>
</tr>
<tr>
<td>Couple</td>
<td>103</td>
<td>17.1</td>
</tr>
<tr>
<td>Family</td>
<td>304</td>
<td>50.6</td>
</tr>
<tr>
<td>Agency</td>
<td>109</td>
<td>18.1</td>
</tr>
<tr>
<td>Friends</td>
<td>2</td>
<td>0.3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>601</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

Table 9. Types of tourist groups

The survey reveals that the car was the most frequently used means of transport to reach the destination. About 87% of tourists used it, while public transport, in this case the bus, was used only by 11% of respondents.

Only 0.2%, mostly foreign respondents, used the bicycle.

These data show that the number of people using ecological means of travel like bicycles, must increase. Most of all in areas like Vlora Bay, which is overcrowded in summer.
3.6 INFORMATION ABOUT VLORA BAY

3.6.1 Level of information about the destination and tourist activities

Graph 18 provides data regarding the source of tourists’ information about Vlora Bay and other nearby tourist attractions. Most of them, about 41.3% said that it was recommended by friends. The second source of information was from the Internet, accounting for 16.8% of respondents. Other popular sources of information were tourist guides, representing 13%, and brochures, posters and advertising which amounted to 7.8%.

Newspapers and magazines, radio, TV, video, film, recommendations from travel agencies had a very low percentage of responses, which means that more work should be done regarding these resources. A marketing strategy is suggested in order to convey the information through these resources, especially tourist agencies, which need to engage more and develop their activity, because after all, tourism is an important economic sector for the area.

A significant element that emerges in this picture is the answer “other” (12% of respondents). This fact indicated that a significant number of respondents received information from other sources, such as work, random travel, personal exploration of the area, schools.

When tourists were asked what activities they were planning to do in Vlora Bay respondents answered as follows: 29.4% of respondents planned to go swimming, 16.5% were planning a boat trip and 15.5% diving. Hiking was one of the activities planned by 8.7% of respondents, and then came shopping, planned by 7.2% of respondents. Graph 18 shows that activities such as fishing, underwater fishing, mountain climbing, camping, received a very low percentage of responses. This shows that these kinds of activities are yet to be developed at an appropriate level in the area, to be accessible to tourists.
Graph 19, shows the most prevalent sources of information regarding possible activities in Vlora Bay. Most tourists received recommendations from friends, which was almost twice as high (38.5%) as the next source of information.

Information through the Internet was the next most common source with 17.5% of respondents, followed by brochures, posters, ads with 15.5%, and then tourist guides with 12%. Other sources of information made up a very low percentage.

These numbers suggest that more marketing should be carried out accessing different marketing channels in order to promote the potential of a diversified tourism offer, not only during the summer season, but throughout the year.

This requires that interest groups and local government collaborate to create a positive and functional marketing strategy for the area, so that tourists receive appropriate information on all the activities that the area offers, such as nature based activities, cultural heritage, traditional food and so on.
3.6.2 Reasons for selecting this destination

Graph 21 shows that the majority of respondents (about 30.7%), selected Vlora Bay for “beach and fun” while 26.1% responded “Vacation and Relax” followed by for “nature” with 18.4%.

The picture below shows that other options such as: recreation, food and culture accounted for a very small percentage, which was almost negligible compared to the “beach and relax” option. These data highlight the seasonality of tourism in the Bay of Vlora, because the sea-sand-sun activity can only be developed during summer season, which lasts 2 or 3 months, after that the area is empty, with only local people living there.

Other forms of tourism like cultural tourism, recreational activities can be developed throughout the year.

3.7 KARABURUN-SAZAN MARINE PROTECTED AREA (MPA)

3.7.1 Level of information about Karaburun-Sazan MPA

Graph 22 shows that the majority of respondents were informed that Karaburun-Sazan is an MPA. This category represented 72% of respondents, while 28% did not have this information. This result is very positive because it shows that tourist information about this fact has been very effective, since the marine park also constitutes one of the best tourist attractions with a great potential for tourism development in the region.
In terms of the level of information that Albanian and foreign tourists had regarding Karaburun-Sazan MPA, Albanian tourists were more informed about the MPA than foreign tourists. This shows that more work must be done to share this information on an international level, because foreign tourists are potentially a good resource for the economy of Vlora Bay and tourism development.

Graph 21. Level of information of Albanian and foreign tourists regarding the Karaburun-Sazan MPA

Graph 24 shows that the majority of foreign tourists were informed by tourist guides that Karaburun-Sazan is a Protected Area, indeed, 39% of them. Their second source of information was the Internet, with about 19% of respondents.

The main source of information about the MPA for Albanian tourists was from “the radio, TV, videos, movies”, accounting for 25% of them, followed by recommendations from friends”, with 23.5%.

This shows that the majority of Albanians receive their information from television, while the same is not true for foreign tourists; who are more connected to technology and use tourist guides more. Both of these elements are less frequently chosen by Albanian tourists.

Graph 22. Sources of information regarding the MPA
3.7.2 Nature based tourism in Karaburun-Sazan MPA

Graph 25 shows that 64% of respondents had never visited Karaburun-Sazan Marine Park before, 23% said they had only visited this area once, 7% had been twice, and only 6% more than twice.

Graph 23. Number of times tourists had visited Karaburun-Sazan

For a more detailed analysis Graph 26, makes a comparison between Albanian and foreign tourists in order to see how many times they visited the marine protected area of Karaburun-Sazan. Interestingly, from the data we learn that the percentage of foreigners having visited Karaburun-Sazan MPA once, twice, and more than twice as well was higher than that of Albanian tourists.

Most of the Albanian tourists interviewed, had never been to the Marine Park Karaburun-Sazan (67%), while the number foreign tourists interviewed that had not been there was 55%. About half of them had been at least once to visit the park, while only 1/3 of Albanians had done so.

Graph 24. Percentage of Albanian and foreign tourists that had visited Karaburun-Sazan

When tourists were asked about the nature based activities that they wanted to do in Karaburun-Sazan Marine Protected Areas, the following answers were given: 31% wanted to explore caves, 28% to travel by boat, 22% wished to go diving, and 12% wanted to swim. Only 5% percent of tourists wanted to do mountain climbing.
3.8 QUALITY OF TOURIST SERVICES

3.8.1 Tourist satisfaction levels

All tourists participating in the survey were asked, whether they were satisfied or not with their choice of vacation destination for the year. 42.8% of Albanian tourists were satisfied with their choice while 41% of foreign tourists also expressed their satisfaction.

The “Somewhat satisfied” category received a relatively high response from participants, with a significant difference between Albanian tourists (45%) and foreign tourists (29%).

The figure shows that a relatively low number of tourists responded “a little dissatisfied”, namely, 8% of Albanians and 17% of foreigners. However, if we add the “somewhat satisfied”, the “a little satisfied” and the “completely dissatisfied” we have more than 50% unsatisfied tourists and this is not a good thing for tourism development in Vlora Bay.
In Graph 30 the percentage of Albanian tourists sure of returning is larger than the percentage of foreign tourists. However, a higher percentage of foreign tourists responded “somewhat agree” when asked the question.

Foreign tourists were more unsure than Albanian tourists. It seems relatively clear that the probability of foreign tourists not returning is very high. If we add the 43% of “somewhat” to the 28% of “probably not, we can see that 71% of foreign tourists gave a negative answer to the question.

### 3.8.2 What tourists want to improve in Vlora Bay

This was a question to better understand tourists’ opinions and preferences about the products and services offered in Vlora Bay. The figures below show that the major problem for tourists was related to infrastructure development, which is weak and in some places crucially missing. This was the first on the list with 30.6% of total answers. Then came the problem of cleanliness with 25.4%, followed by problems related to services with 14.9%. There were also 11.5% who wanted to have more nature-based activities, 9.4% wanting more cultural activities, while 7.9% desired to have more information on the area.

This shows that tourists are not satisfied with the services offered in the area and the lack of infrastructure prevents them from knowing the place better and doing more nature-based activities. Finally, they also said that cleanliness was a big problem for the area, especially for the marine protected area, because there is a lot of waste and the local government should do something to clean the place.
The above graphs demonstrate the difference between Albanian and foreign tourists regarding what they thought needed improving in the location they spent their holidays. The data show that both foreign and Albanian tourists had more or less the same requests. They want, in order of importance, infrastructure improvements, cleanliness and better and improved services.

Other important points mentioned were more information and more nature-based and cultural activities in the area, both of which play an important role in tourist satisfaction.
3.9 CONCLUSIONS

In general, Vlora Bay is visited by both Albanian and foreign tourists. Albanian tourists come from diverse cities of Albania, mostly from Tirana. The highest number of foreign tourists are Italians with 11.6% of respondents followed by tourists arriving from Kosovo.

Most of the tourists interviewed are in the 18-39 age group, accounting for 68.2% of the total number of respondents. This indicates that, in general, Vlora Bay is visited by mainly young people. The number of women and men, who participated in the study, was almost equal. Since the study was conducted in a random manner this indicates that a considerable number of women are coming on holiday either with family or friends.

Most of the respondents in Vlora Bay (about 70%) had a university degree. The majority of them (about 72%) were employed. For 98.3% of respondents, the length of stay in Vlora Bay was generally a few days (4-7 days). Data from the questionnaire indicate that there are also tourists who stayed for more than 30 days, the majority of them were family groups.

The length of stay of tourists is a good indicator for local tourism incomes (local employment and local tourism businesses). Around 32% of respondents preferred accommodation in hotels, but most stayed in houses/apartments or rented rooms. This kind of accommodation, differently from hotels, is not registered and controlled by the local authorities. Consequently, the quality of their services cannot be checked and controlled.

The most preferred tourist destination was Radhime-Jonufër, followed by “Uji i Ftohtë” and finally Orikum. The majority of respondents (Albanians and foreigners) had been in the location before, but a very small percentage of them were there for the first time (10% of Albanian tourists and 11% of foreigners).

About 80.7% of respondents used their personal car to reach the location and generally they didn’t travel alone. The percentage of tourists travelling with their families was 50.6%. This shows that in Vlora Bay, family tourism is more developed.

The most prevalent form of obtaining information was a recommendation from friends. About 41.3% of respondents had received information about the area in this way, while the Internet was mainly used by foreigners. This shows that the majority of tourists are influenced more by the experiences of their friends, so it is very important to work towards providing higher tourism standards.

Among nature-based activities tourists were planning to do in Vlora Bay; swimming was the most popular, followed by boat trips and then, scuba diving. Other activities received a lower response because the area does not develop and organize these activities.

The majority of respondents (about 72% of them) were informed that Karaburun-Sazan is a Marine Protected Area. The source of this information for Albanian tourists was mostly through television, while the majority of foreigners were informed through tourist guidebooks, but also a good number of them used the Internet. The Marine Protected Area of Karaburun-Sazan is mostly visited by foreign tourists. 45% of foreign tourists had visited the area at least once; while Karaburun-Sazan Marine Protected Area was visited by 33% of Albanian respondents.

Tourists, both foreign and Albanian, in MPA Karaburun-Sazan liked cave exploration, followed by “boat trips”, with “swimming” in third place.

Regarding the quality of services, a high percentage of both Albanian and foreign tourists responded “somewhat satisfied”. This shows that people may be hesitant to return, because of the things that need to be improved in Vlora Bay. The most important thing to be improved according to Albanian and foreign tourists is “infrastructure”, followed by “cleanliness”, and then “service”. Tourists wanted to experience more nature-based activities or cultural activities and would like to have more information about the area.
4. CONCLUSIONS AND LESSONS LEARNT

4.1 OVERALL CONCLUSIONS

This assessment integrates two studies undertaken during the project “Sustainable Economic Activities in Marine Protected Areas of the Mediterranean, Karaburun-Sazan MPA Albania”. The results and findings of both studies give insight into the development of nature based tourism activities in the Vlora region with special focus on Karaburun-Sazan MPA.

- The findings of the studies are based on opinions and interviews of stakeholders, tourism operators and tourists. The studies were carried out in different time frames during the life of the project and targeted two groups of actors (stakeholders and tourists), but their content and results are compatible regarding nature based activities and the current tourism offer.

- Both stakeholders and tourists agree that Vlora Region and Karaburun-Sazan MPA offer a great potential for the development of nature based tourist activities, as they still preserve pristine places and undiscovered historical attractions.

- According to tourist operators, applying nature based activities is a great opportunity to reduce seasonality and extend the tourism season in Vlora Bay, as it is presently too short and poorly organised.

- Currently nature based activities are provided only by a limited number of operators. Tourists can mostly practice swimming, sunbathing, tour boating and artisanal fishing, while diving, hiking, paragliding and bird watching are less common in Vlora Bay and Karaburun-Sazan MPA.

- Albanian and international tourists are very much willing to experience different nature activities like cave exploration, diving, tour boating etc in Karaburun-Sazan MPA and Vlora Bay. According to the study, mostly younger people (18-39) prefer to go to Vlora, so if properly promoted and supported these activities can be easily introduced and developed.

- Presently, tourist operators offer their services through word of mouth, mostly because of limited financial and human resources and a lack of managerial skills and experience.
• Authorities should take responsibility for improving infrastructure and controlling the quality of services. When tourists are asked about the quality of services most of them indicated that there are still gaps in infrastructure, quality of service and cleanliness.

• Local government should collaborate to create a positive and functional marketing strategy for the area, so that tourists receive appropriate information on all available activities such as nature based activities, cultural heritage, traditional food that the area offers.

4.2 LESSONS LEARNT

• Nature based tourism activities should be seen as a great opportunity to introduce sustainable tourism development, reduce negative impact on natural resources and promote among the wider public sensitivity to, education and awareness of nature and biodiversity conservation

• More marketing options should be introduced for tourism operators of Vlora Bay and Karaburun-Sazan MPA, in order to offer them the opportunity to access different marketing channels and promote the potential for a diversified touristic offer not only during summer season but also throughout the year.

• Many tourism operators have understood the importance of high quality tourist services. However, there are only individual efforts and attempts of tourism operators that want to cooperate with travel agencies to organise joint touristic packages. There is still a need to set up legal organisational entities among tourism operators, “Associations”.

• Tourists wanted to experience more nature based activities or cultural activities and would like to have more information on the area. In this situation more interest groups and local government should collaborate to create a positive and functional marketing strategy for the area, so that tourists can receive appropriate information on available nature based activities, cultural heritage, traditional food that the area can offer.

• The tourism industry should take more responsibility for overall sustainable tourism development starting from legal frameworks, financial incentives, technical support and supportive infrastructure.

• There is still a lack of awareness among tourism operators and low levels of professional tourism capacities and services.

• In Vlora Bay and Karaburun-Sazan MPA information for visitors and tourists is not readily available (especially in PA information centres).
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ANNEX1: Questionnaire for tourist operators (2014)

Questionnaire “Assessment of nature-based tourism businesses and initiatives in the Vlora region (Albania)”

This assessment is done under the SEA-Med project (Sustainable Economic Activities in Mediterranean Marine Protected Areas / Albania) supported by the CEPF (Critical Ecosystem Partnership Fund) in collaboration with the Institute of Nature Protection in Albania and WWF MedPO (Mediterranean Programme Office).

The main objective of this assignment is to make an inventory of all tourism-related businesses and initiatives in the bay of Vlora with focus on the identification of current and potential nature-based activities. The information on tourism-related businesses and activities in the Vlora region will be used as basis data to develop a sustainable tourism-management plan for the Karaburun-Sazan Marine National Park by 2017 in cooperation with multiple stakeholders.

We therefore would appreciate to get the following information on your business or initiative for this important project.

1. Name of the business or initiative: ______________________________________

2. Contact and address: ______________________________________

3. Type of business or initiative:

4. Are you a for-profit/non-profit business or initiative?

5. Are you a local or foreign business or initiative?

6. What are your main activities? Please, underline the main activity, if possible.

6.1 Why do you consider part of the above services important to be involved in your business/initiative? (If in 6 are identified some type of NBAs by the interviewer) How do you see the importance of such activities by your business perspective?

7. In which parts of Vlora bay do your activities take place? Please, describe as precisely as possible.

8. Do you have or plan to have any activities carried out within the Karaburun-Sazan Marine Protected Area? What kind of? Where?

8.1 If yes, show some of these activities

8.2 If no, what are the reasons?

9. Would you be interested to offer (more) nature-based tourism activities in the Vlora region or in the Karaburun-Sazan Marine National Park

   yes ☐ No ☐

9/a. If no why

9/b. If YES, what activities would you think as more appropriate/possible/desirable

a) diving,
b) snorkelling,
c) exploring wrecks and caves,
d) guided wildlife tours,
e) hiking,
f) cycling,
g) Other ___________________
10. Do you think that adding these activities to your business/initiative (or explanation if you already have them) will be adding value to your activity and how (by expanding the activity, increase of number of tourists, more revenues, improving image and knowledge in the market)?

__________________________________________________________________________________________
__________________________________________________________________________________________

11. Does your business or initiative already support the protection, conservation or management of local biodiversity and landscapes?

__________________________________________________________________________________________
__________________________________________________________________________________________

12. Do you have any cooperation with other local stakeholders from the tourism business, the nature conservation or cultural side? If yes, what kind of cooperation is it and with whom?

__________________________________________________________________________________________
__________________________________________________________________________________________

13. From your point of view, which are the main tourist attractions in the Vlora region?

__________________________________________________________________________________________
__________________________________________________________________________________________

14. How many tourists or clients do you serve (per year): The trend in the last three years

__________________________________________________________________________________________
__________________________________________________________________________________________

15. What is the average amount of money, one tourist spends on using/booking your services? What about the part in the NBAs

__________________________________________________________________________________________
__________________________________________________________________________________________

16. Would you describe your main business activities as seasonal? When is your main season?

__________________________________________________________________________________________
__________________________________________________________________________________________

17. How many employees do you have? During the year? In the high season

__________________________________________________________________________________________
__________________________________________________________________________________________

18. What is the annual income of your business or initiative through tourism? (approx.)

__________________________________________________________________________________________
__________________________________________________________________________________________

19. And finally, is there anything else you would like to add?

__________________________________________________________________________________________

Thank you!
Date and name of interviewer: _______________________________________


### Section A: GENERAL INFORMATION

**A1 AGE**  
[Int] Don’t continue if less than 18 years old

**A2 Resident country**

**A3 GENDER**  
[Int] Don’t ask, mark
1. Female
2. Male

**A4 Location of the questionnaire**

**A5 How long are you planning to stay on vacation here?**
1. Several days How many nights are you planning to stay? ____________
   2. Several hours How many hours are you planning to stay here? ____________
   3. Refuses

**A6 Where is your accommodation in Vlora Bay?**
1. Orikum
2. Radhime-Jonafer
3. Uje I ftohte
4. Other ____________

**A7 What is your accommodation?**
1. Hotel
2. Studio/private accommodation
3. Camping
4. Yacht
5. Your own flat/weekend house
6. Relatives/friends
7. Home/rooms rent
8. Other ____________

### Section B: TRAVEL INFORMATION

**B1 Are you traveling alone or in company?**
1. Alone
2. Couple
3. With my family
4. With friends
5. Other ____________

**B2 What means of transportation did you use to come in Albania?**  
[Int] ask only if he/she is a foreign guest or Albanian that live abroad
1. By car
2. By bus
3. By plane
4. By yacht/sail boat
5. By bicycle
6. By motorcycle
7. Other ____________

**B3 What means of transportation did you use to come here in your location now?**
1. By car
2. By bus
3. By plane
4. By yacht/sail boat
5. By bicycle
6. By motorcycle
7. Other ____________

**B4 How many times have you been in…….?**
1. Albania (ask only foreign guests)  
   a) Never  b) Once  c) Twice  d) More than twice
2. At this location (specify)  
   a) Never  b) Once  c) Twice  d) More than twice

**B5 Why did you choose this site for vacations?**
1. Sunbathing and swimming
B6 How did you get informed about Vlora Bay attractions?

- Brochures, ads, posters
- Travel guides
- Newspaper
- Radio, TV, Film etc.
- Recommendations from friends/relatives
- Recommendations from travel agencies
- Internet
- Other

B7 How did you get informed about the touristic activities in this area?

- Brochures, ads, posters
- Travel guides
- Newspaper
- Radio, TV, Film etc.
- Recommendations from friends/relatives
- Recommendations from travel agencies
- Internet
- Other

B8 What kind of activities are you planning to practice here?

- Swimming/sunbathing/bathing
- Diving
- Fishing
- Underwater fishing
- Hiking
- Trekking
- Camping
- Boating
- Shopping at stores/souvenir shops
- Visits to restaurants
- Other

B9 Do you like the nature here in Vlora Bay?

- Yes – What do you like?
- No – Why?

B10 Do you know that Karaburun-Sazan is Marine Protected Area?

- Yes
- No (go to B 15)

B11 Where did you get this information?

- Brochures, ads, posters
- Travel guides
- Newspaper
- Radio, TV, Film etc.
- Recommendations from friends/relatives
- Recommendations from travel agencies
- Internet
- Other

B12 Have you ever visited the Marine Park (Karaburun -Sazan)

- Never
- Once
- Twice
- More than Twice
- Refuse

B13 What kind of activities do you like to practice in the Karaburun-Sazan MPA

- Diving
- Boating
- Swimming
Assessment of nature-based tourism business and tourist demand

4. Cave explorations
5. Hiking
6. Other

B14 What is the overall satisfaction with your visit to this tourist destination?
1. Completely satisfied
2. Somehow satisfied
3. Little satisfied
4. Completely dissatisfied
5. Refuse

B15 Please indicate to what extent do you agree with the following statements
1. I will recommend this tourist destination to my friends and relatives
2. I will return to this tourist destination

<table>
<thead>
<tr>
<th>Completely disagree</th>
<th>Completely agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 2 3 4 5</td>
<td>1 2 3 4 5</td>
</tr>
</tbody>
</table>

B16 What do you want to improve in this touristic destination
[INT more than one answer]
1. services
2. cleanliness
3. infrastructure
4. More information about the area (for example: history, culture, gastronomy, place to be visited etc.)
5. More nature based activity (for example hiking, cycling, guide to see endangered species in their natural habitats etc.)
6. More culture activity (festival, fair etc.)
7. Other _______________

C. DEMOGRAPHIC INFORMATION

C1 LEVEL OF EDUCATION?
[only one answer]
1. Elementary school
2. High school
3. College
4. Faculty and higher
5. Refuse

C2 which is your civil status?
1. Married
2. Single
3. Divorce /widow
4. Refuse

C3 OCCUPATION
[only one answer]
1. Employed
2. Unemployed
3. Retired
4. Student

C4 Average monthly income in your household?
[only one answer]
1. NO income
2. Up to 100 €
3. 101 € -1000 €
4. 1001€ -2000€
5. 2001€ -3000€
6. 3001€-4000€
7. 4001-5000€
8. More than 5000 €

Interviewer (name, surname) ____________________________
Date ___________________
Thank you!
The SEA-Med Project

SEA-Med (2014–2016) is a joint effort of WWF and its partners to support 8 Marine Protected Areas in the southern and eastern Mediterranean region to improve management capacity, advance sustainable economic practices, and identify sustainable financing mechanisms.

INCA

The Institute of Nature Conservation in Albania – INCA is a non-governmental and not-for-profit organization (NGO), established in July 2000. INCA’s main goal is to facilitate and help professional capacity building through training and a participatory approach. It is engaged on environmental safeguarding, conservation of natural treasures and rural development in the country. INCA works on the protection of flora and fauna, biodiversity assessments, management of protected areas, river basin management, raising awareness of the public and policy and decision makers, and undertakes conservation measures when possible and appropriate to protect species and their habitats.

WWF Mediterranean

WWF Mediterranean’s mandate is to pursue WWF’s global priorities to conserve biodiversity and reduce the human footprint on nature. In the Mediterranean, WWF works through field projects advocating improvements in regional and national policy processes affecting nature conservation and resource management.

WWF Mediterranean Marine Initiative

The Mediterranean Marine Initiative was created in 2010 by five national WWF offices – France, Greece, Italy, Spain and Turkey – with WWF Mediterranean, the WWF European Policy Office and WWF International, to bring a transformative change in marine conservation to the Mediterranean region.