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## Introduction

Beauties of nature, cleanness of the sea, history and culture, hospitality and human values make Himara one of the most attractive regions in the entire Albania. Thousands of tourists from inside and outside Albania visit Himara during the summer time looking for relaxation and enjoyments. For most of them Himara is one of the most favorite places for holidays and weekends. Himara welcomes the visitors and every year tries to improve the conditions and services offered to tourists.

Himara municipality has identified tourism as one of the principal sector for economic development. This is the reason the municipality pays a special attention to this sector by focusing on investments to improve infrastructure and public services, information and other services for businesses and citizens. In addition, the efforts made by the municipality can be considered as strong support for the business sector operating in the field of tourism, which is gradually expected to be one of the most profitable sectors for Himara region.

The material hereby presented is part of the work done in connection to the improvement of information and communication with tourists, businesses and citizens in Himara municipality. The Regional Development Agency of Fier and Himara Municipality prepared it in the framework of the assistance provided by the USAID-funded Local Government Program in Albania (LGPA).

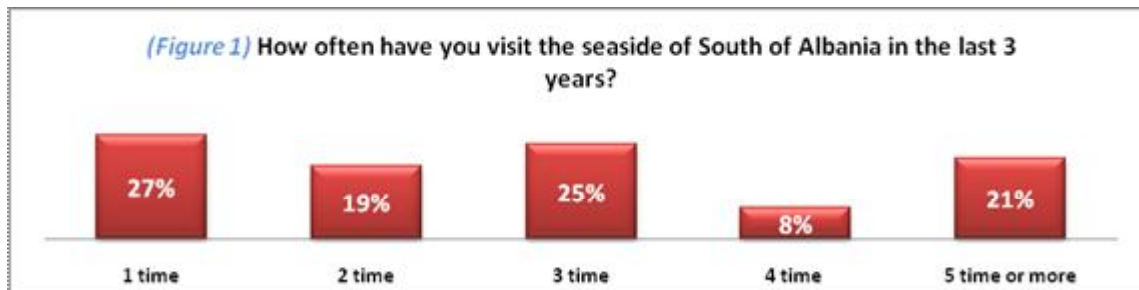
This material is the result of a survey completed with tourists visiting Himara region during the period of July – August 2009 and brings information from tourists that visited and stayed for vacation in Himara region including their evaluation on what they find in Himara in regard to services offered as well as their suggestions for improvements in the future.

Findings of survey will serve to Himara municipality to improve the work on planning and implementation of public services and services for citizens. In addition, we hope that this publication and activities undertaken to announce it, will also reach tourist businesses in order to affect the improvement of diversity, quality and conditions of hotels, restaurants and activities and possibilities for relaxation and enjoyments.

## Part I

This part gives a profile of the tourists that visit Himara.

27% of respondents (figure 1) have visited Himara for the first time. This means that at least 27% of the expected tourists for the next year will be based on the level of satisfaction from their first vacations in Himara. The results for “faithful” visitors are satisfactory since 21% of the respondents have visited Himara for fifth time in the last three years. In addition, 25% and 8% of respondents have respectively responded that



they have visited Himara 3 and 4 times in the last three years.

Figure 2 indicates that time duration of tourist staying fluctuated 10-15 days with 43% of the respondents, 5-10 days 24% of respondents, less than 5 days 21% of respondents. If the traditional vacations considered 10-15 days we see that tourists that prefer to stay less than 10 days have increased. This shows a new behavior of tourists influenced by the socio-economic changes. In addition, this can be explained with improvements in the road infrastructure, the preferences of the tourists to visit as much places as possible within a season and distribution of the vacation during all the year. In this situation, businesses have to modify the concept of services in order to have more tourists and to satisfy them.



Figure 3 clearly indicates that most of tourists come in Himara for holidays and entertainment. Summer time coincides with vacation and their duration dictates the duration of tourist season. In the future efforts should be made to increase the number of reasons to come to Himara.

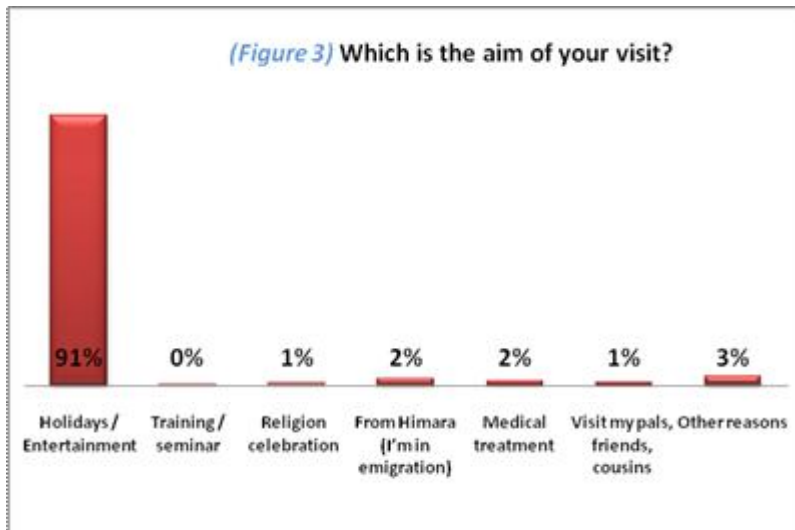


Figure 4 indicates that 64% of respondents have used their private cars for transport. This indicates the need for parking spaces and parking access by private beaches, hotels, restaurants etc. The other transport vehicles like taxi, shuttle bus, tourist bus etc that are used by 21% of respondents have to be seen as alternatives to facilitate traffic and avoid parking problems.

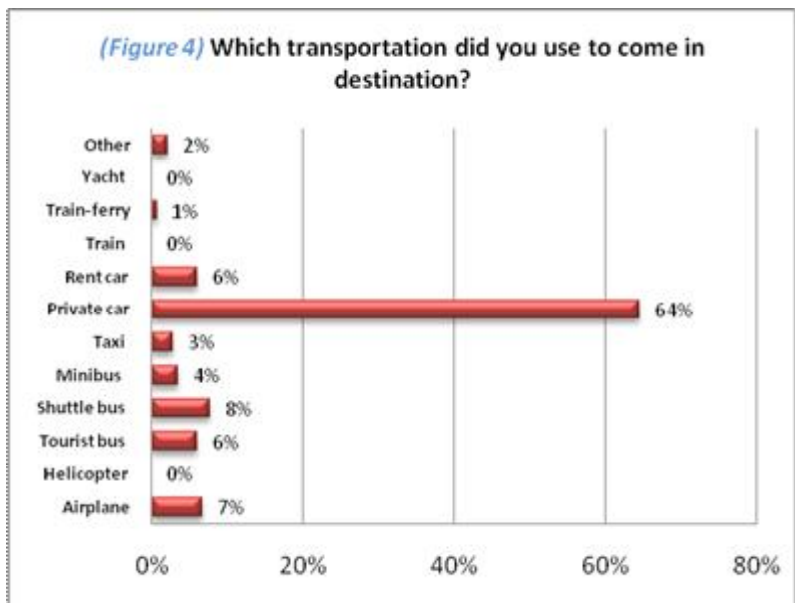


Figure 5 indicates that 42% of respondents rent houses, 25% use hotels for accommodation. 14% of respondents have used host houses, 4% and 5% have used respectively relatives house and their houses. The data in this figure coincides with accommodation capacities of Himara area. Family tourism has good possibilities for development in Himara, because it offers good conditions at affordable costs.

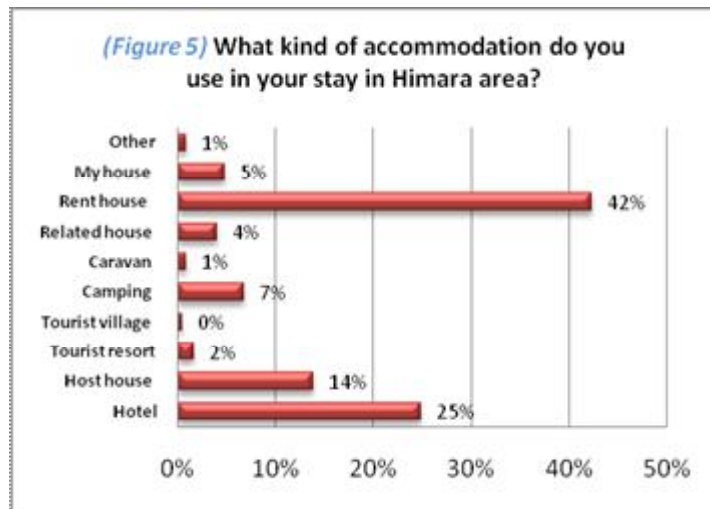


Figure 6 indicates that the most of tourists find information on Himara from either contacts or suggestions from friends. Other tools like internet, media, leaflets, exhibitions/tourist fairs result less efficient in this survey. We can say that tourist agencies have to find new ways to operate better and increase the credibility for advertisement / publicity versus real conditions of the places offered for accommodation. Furthermore, private businesses that operate in the tourism sector have to think for new ways and structures of communications in order to reduce the costs of contacts and reservations for their clients.

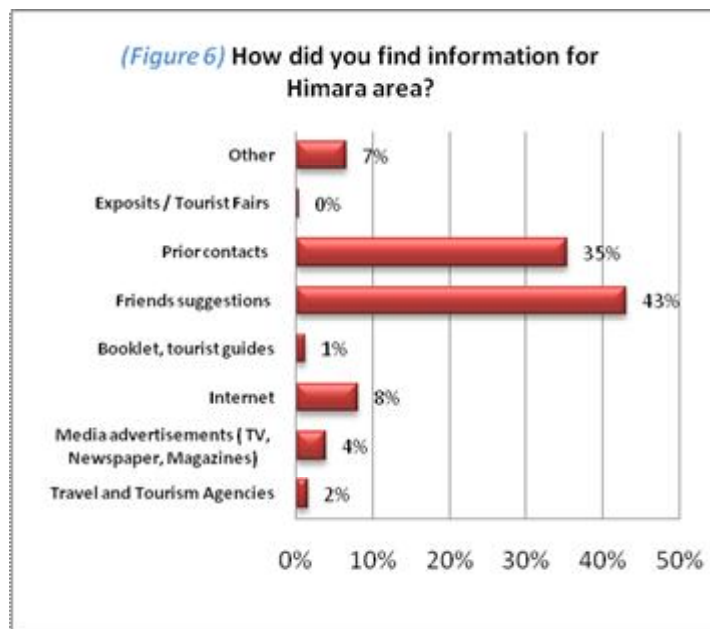
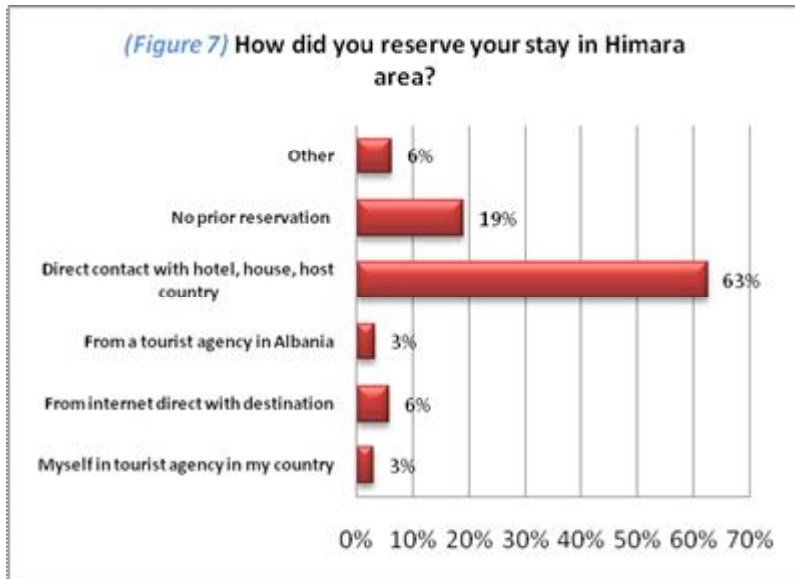
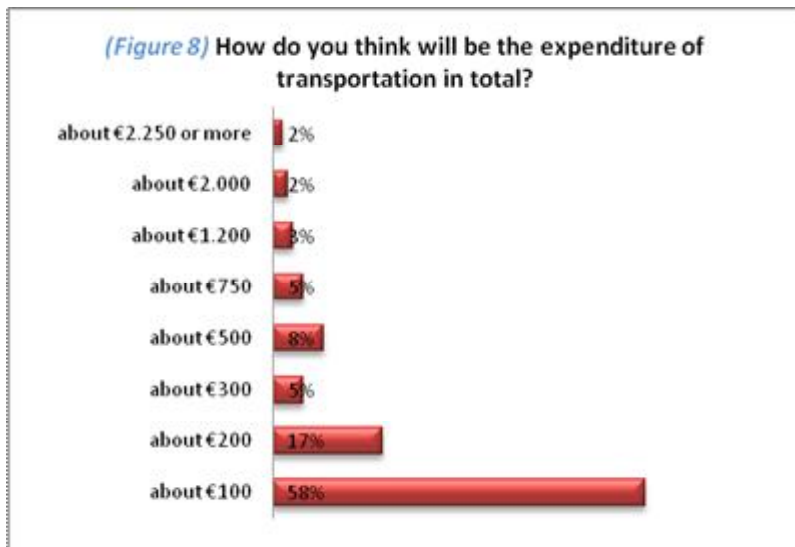


Figure 7 indicates that 63% of respondents have reserved by contacting directly the hotel or house in Himara, but 19% of respondents have not reserved the hotel or house in advance. This group of tourist has no preferences and represents an unstable group for hotels and houses. Any kind of dissatisfaction will make this group to move from one place to another.



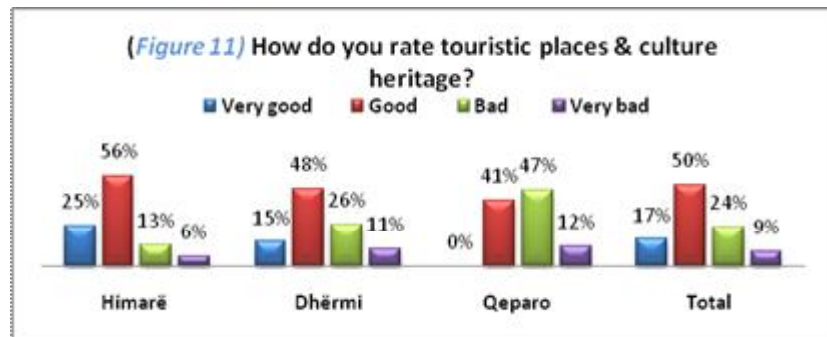
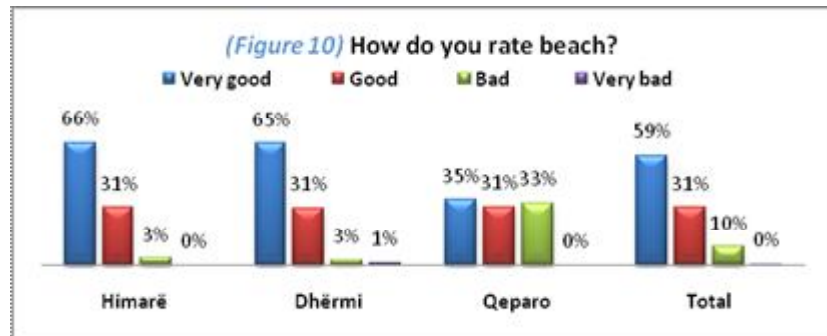
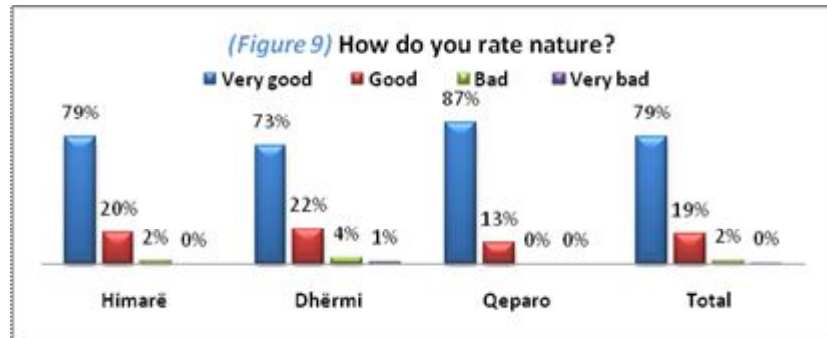
According to figure 8, 7% of respondents spend over 1000 Euros for transport, to reach the tourist destination and back. 35% of respondents spent 200-750 Euros and 58% of respondents spent about 100 Euro for transport. These costs can be considered high if we compare with daily consumption expenditures of a tourist. They can be half of these expenditures for a tourist that stays in vacation 5-10 days. In addition, this money is not spending in the vacation area.



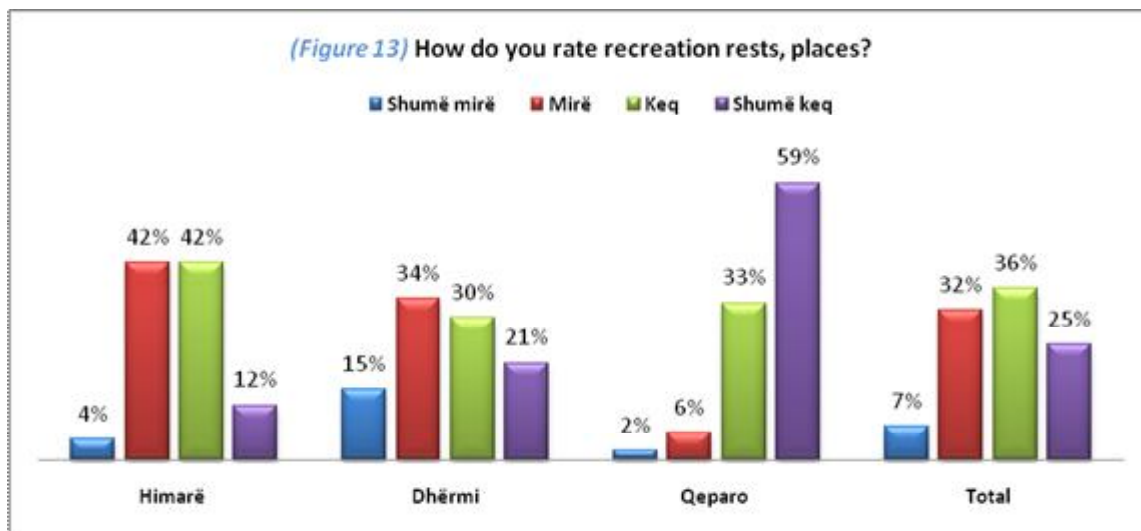
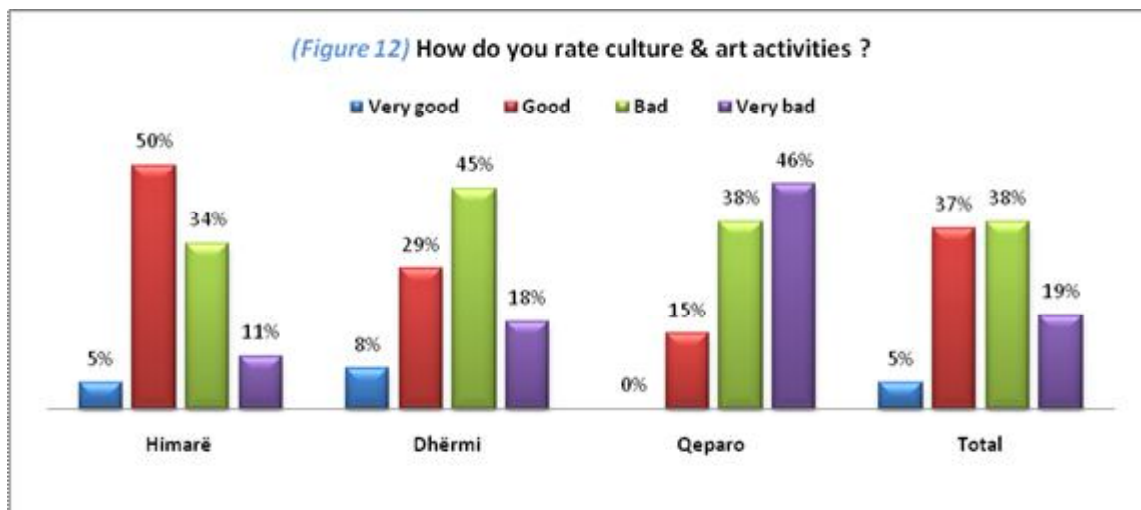
## Part II

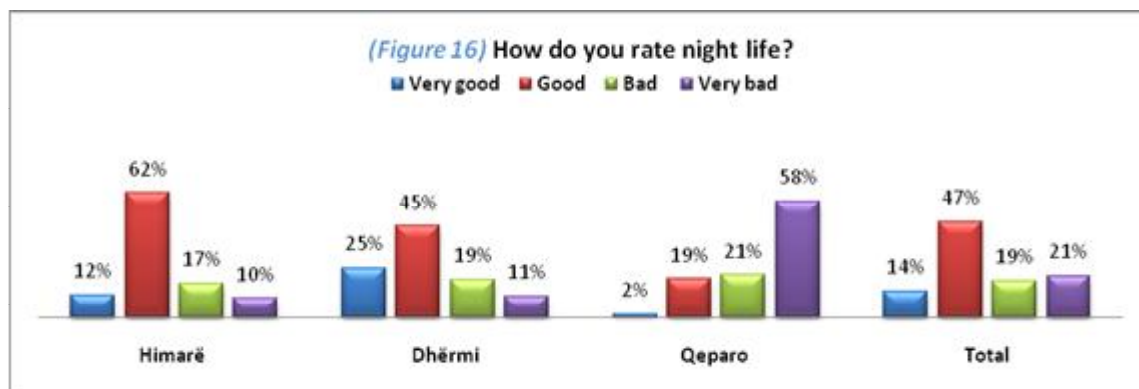
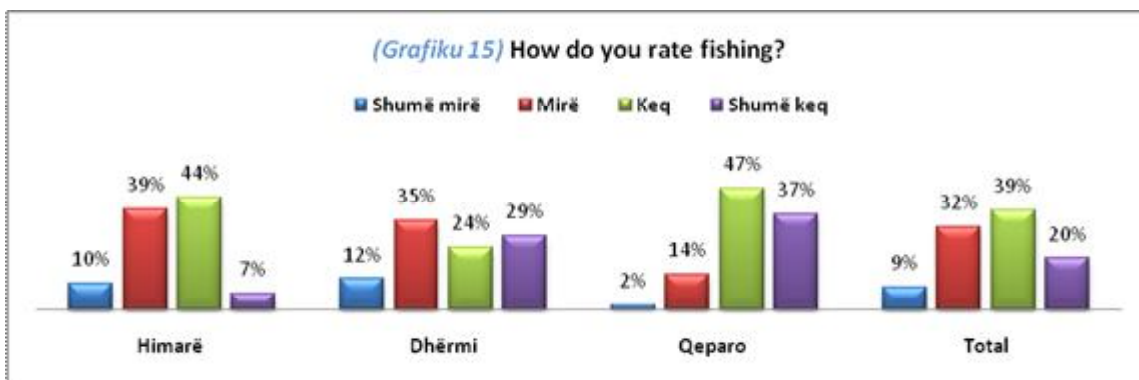
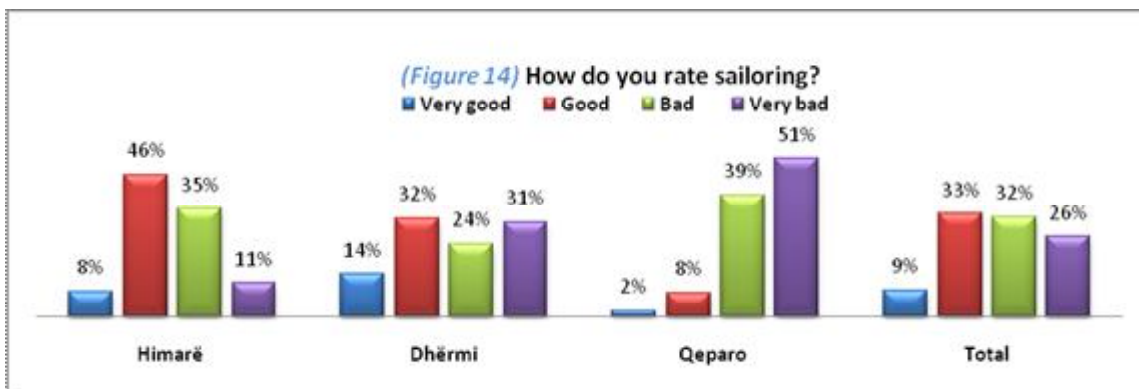
The figures below give a consideration on several components of nature, infrastructure and other elements offered to the tourists in Himara.

Figures 9, 10, 11 indicate ratings for nature, beaches and cultural heritage. In general, they are clearly evaluated very good and good from respondents. However, negative ratings indicate that tourists' requests are for better level in this direction like improvement of maintenance, explanatory materials as well as organization of visits in historical places. For Qeparo, the respondents suggest improvements in infrastructure and restorations. Improvements in historical and archeological places will also create the possibility for a bigger number of visitors not only during tourist season.

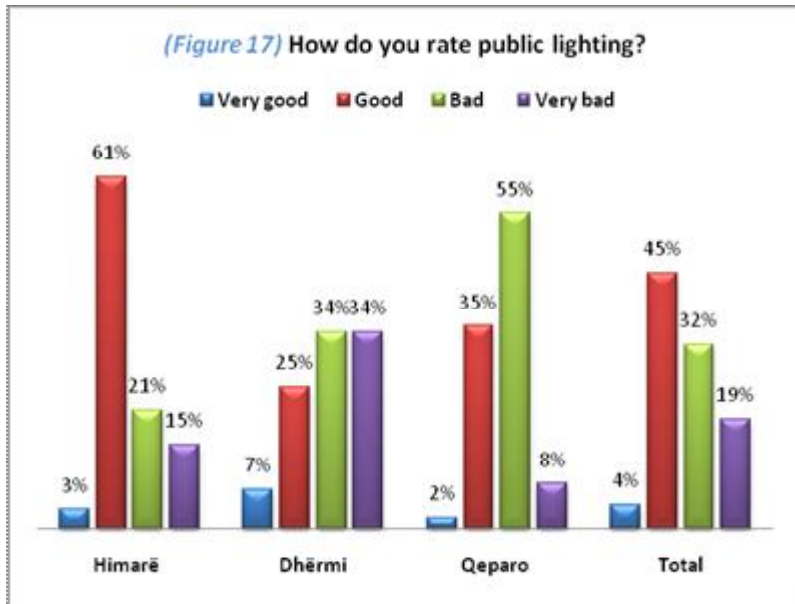


Figures 12, 13, 14, 15, 16 indicate the evaluation for entertainment, sport and recreation activities. Tourists in Himara and Dhërmi have positive feelings, while for Qeparo the evaluations are negative.

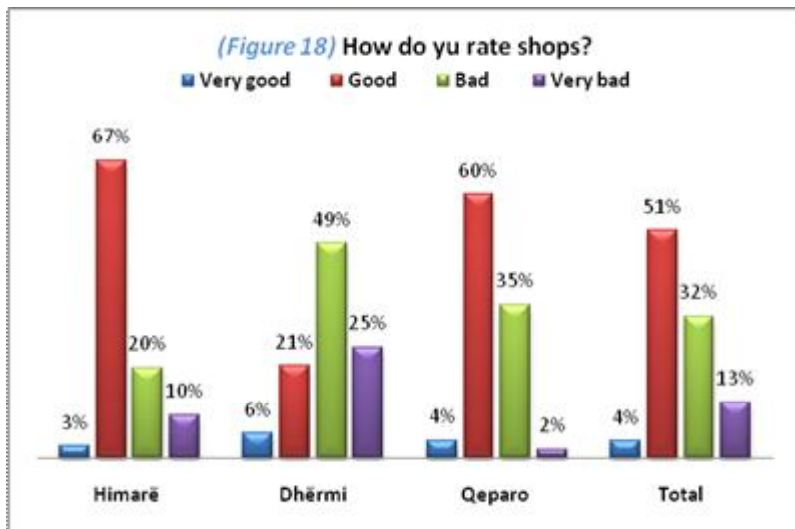




Public lighting is an important element for tourist cities and places. Lighting of the roads during nights creates feeling of safety and quietness; therefore, public lighting is an element evaluated in this survey. From figure 17, we can see that for Himara city the assessment is positive. For Dhërmi and Qeparo negative evaluation of respondents is higher than positive one.



Shops represent consumption. The positive evaluation for some of the areas means that tourists have found what they requested. For Himara the evaluation is respectively 70% positive and 30% negative. Dhërmi has the lower assessment for shops. 74% of respondents rated bad and very bad as indicated in figure 18.



The respondents evaluated hospitality and kindness, which are values that attract tourists positively. In total, this evaluation is 85% very good and good and 15% bad and very bad figure 19.

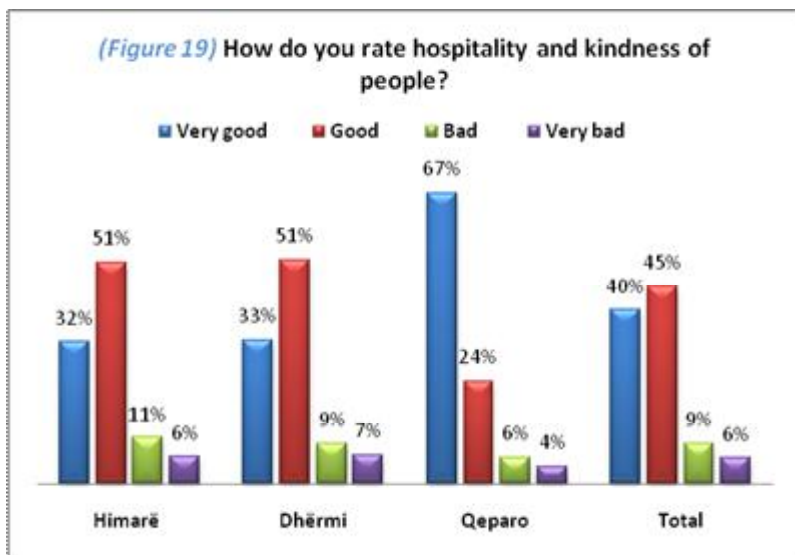
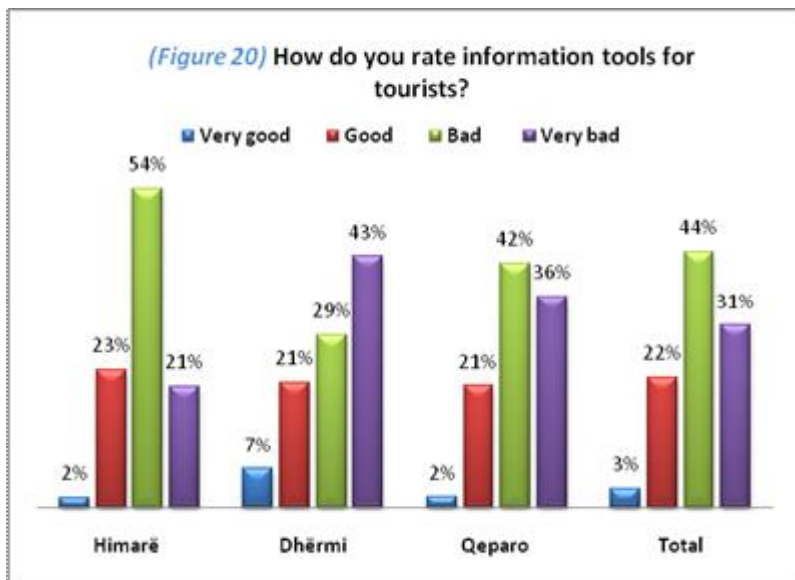


Figure 20 indicates the evaluation for information tools for tourists. This is a component for which tourists are not satisfied and ask for the attention for improvements.



Evaluations indicate that 82% of respondents rate safety as very good and good in total. If we refer the evaluations by beaches, Dhërmi has the higher level of dissatisfaction on safety with 25% of respondents that evaluated it bad and very bad figure 21.

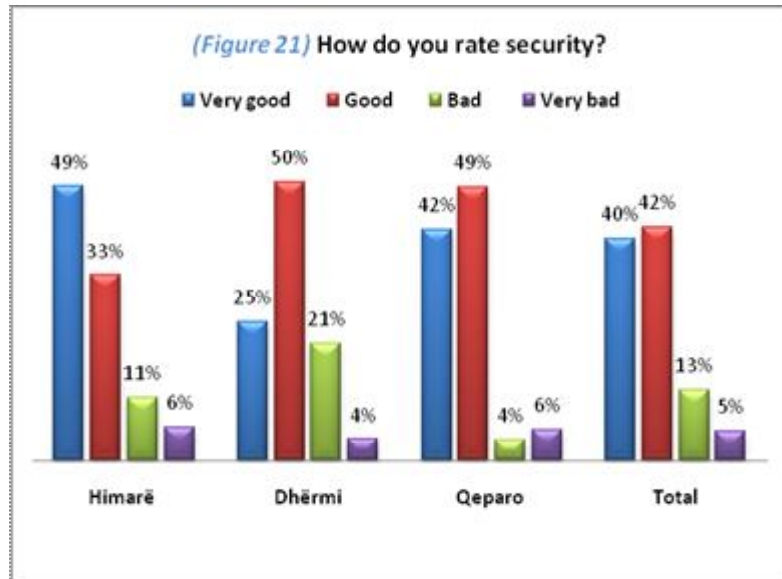


Figure 22 indicate the evaluation for health care, which has higher scores in Himara. This is explained with the fact that Himara is the administrative center and this service functions properly. The evaluation goes down in Dhërmi and is negative for Qeparo.

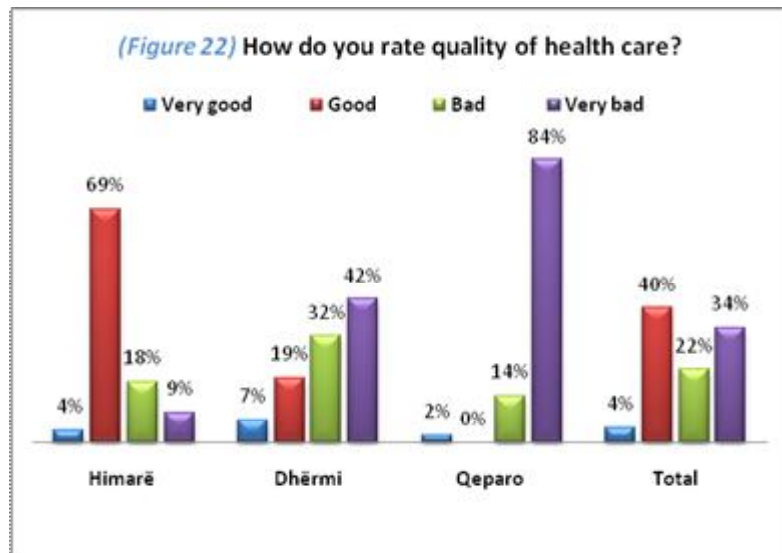
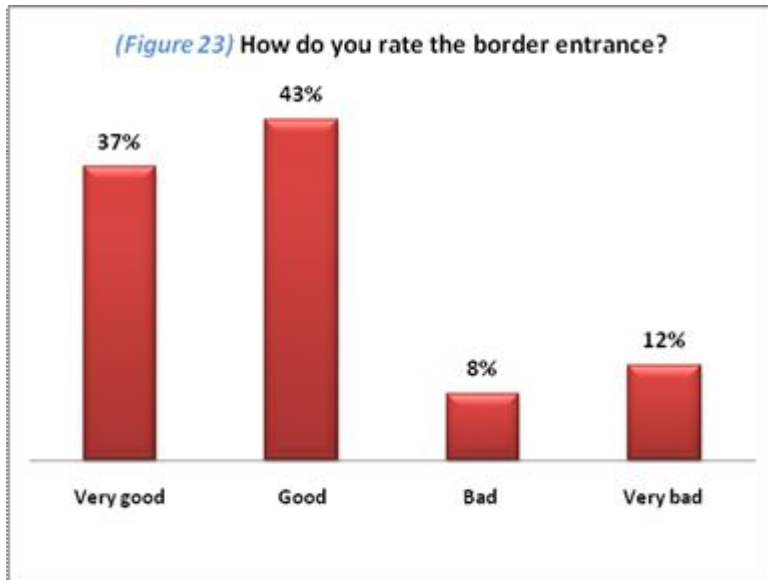
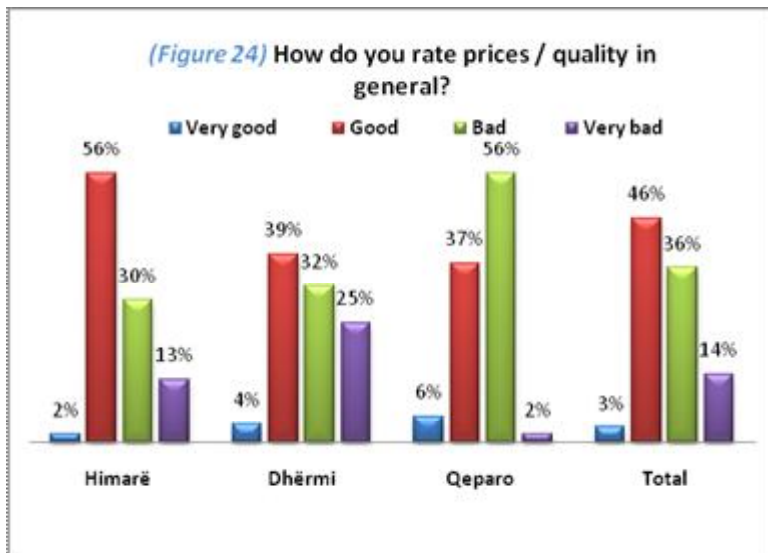


Figure 23 indicates the assessment for border crossings from Albanian citizens that lives abroad and for foreign citizens. This evaluation is respectively 80% of respondents very good and good and is linked with the improvements in infrastructure and policies undertaken from Albanian government in regard to border crossing procedures.



Tourists have a befitted evaluation for prices and quality. One part rates very good and good the other part rates bad and very bad. Based on beaches the positive evaluation is higher for Himara goes down for Dhërmi and is lower for Qeparo



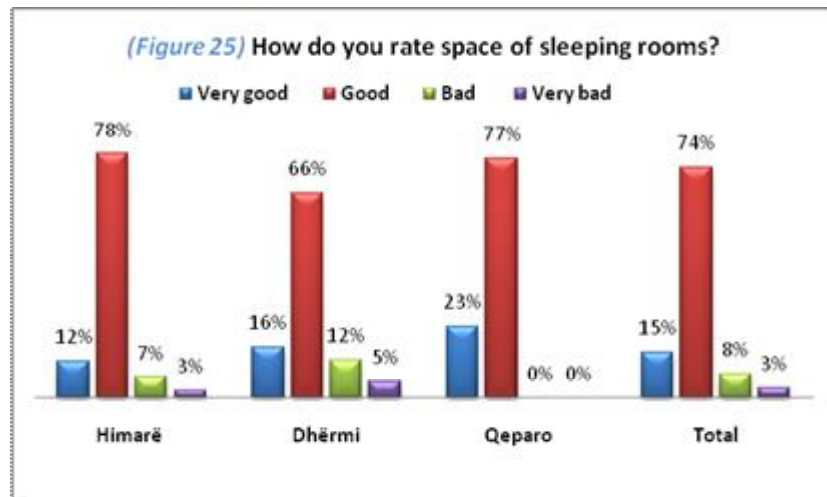
### Part III

In this part, tourists evaluate accommodation, food and beaches. These components are linked directly to the businesses that offer these services and are evaluations that highlight problems that have to be taken into consideration from businesses to improve their work. In a situation of growth of tourism sector, it is normal that competition is increasing and will increase. This competition becomes apparent between regions and inside region. The quality of services is the dimension of the future quality and competitiveness. The quality of services will determine the success. Beach, food and accommodation offered in all coastal areas, inside and outside Albania will affect tourists' choices depending from the capability to create credibility, verity, empathy, competence, courtesy and sympathy toward tourists.

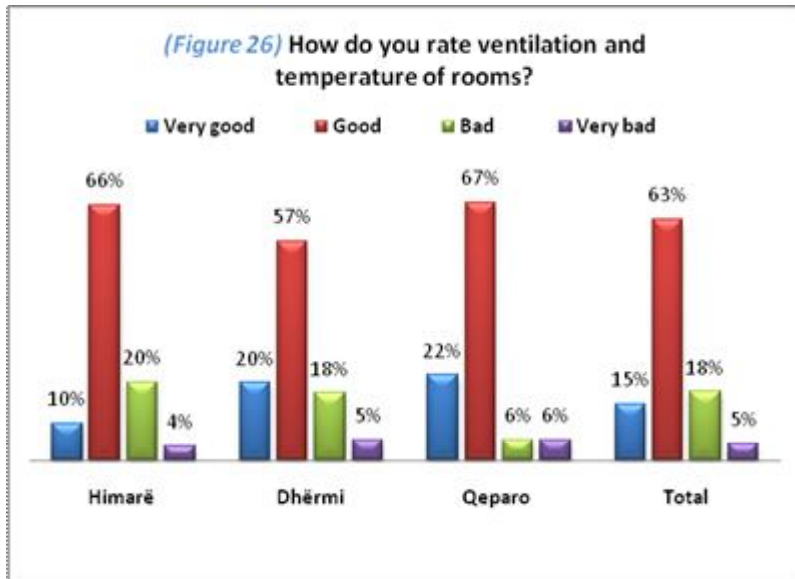
Characteristics of services are not really tangible, they are produced in the same time of consumption and the customers are involved in their production, are variable and are evaluated after consumed. For that reasons they really depended from people.

To insure the above-mentioned elements of quality it is important the strong collaboration of business sector and local and central government. Electrical power, roads and water are related with central government investments while maintenance of drinking water systems, sewage systems, cleaning service, public lighting, and public beaches are responsibility of local government.

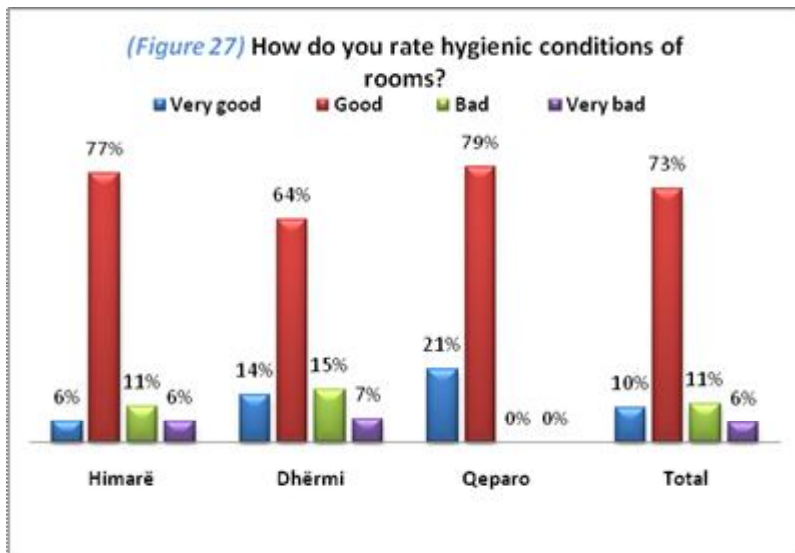
Figure 25 shows a positive evaluation for spaces of the sleeping rooms.



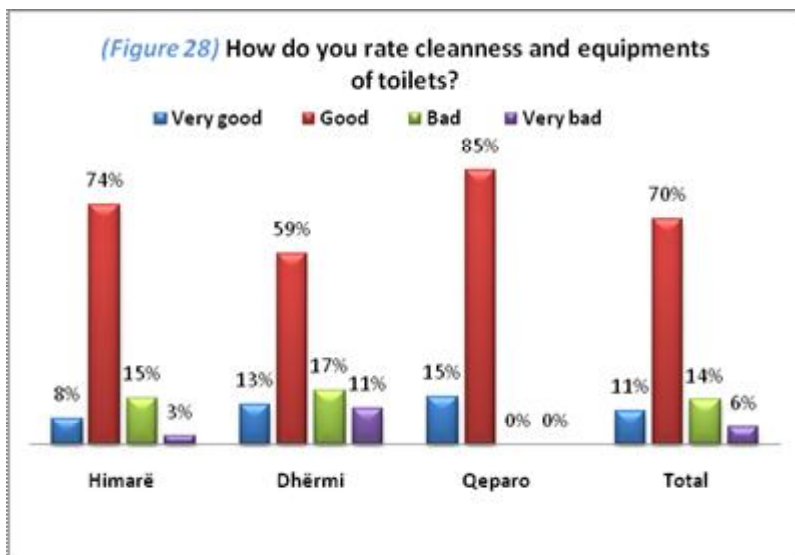
Tourists are asked for ventilation and temperature of rooms in order to have an evaluation on the conditions rather than the appliances that insure ventilation like air conditioners, ventilators, etc. This evaluation is rather problematic for Himara and Dhërmi respectively 24% and 23% of respondents' rate bad and very bad, figures 26. This figure is linked with the space of rooms that in these areas is more limited.



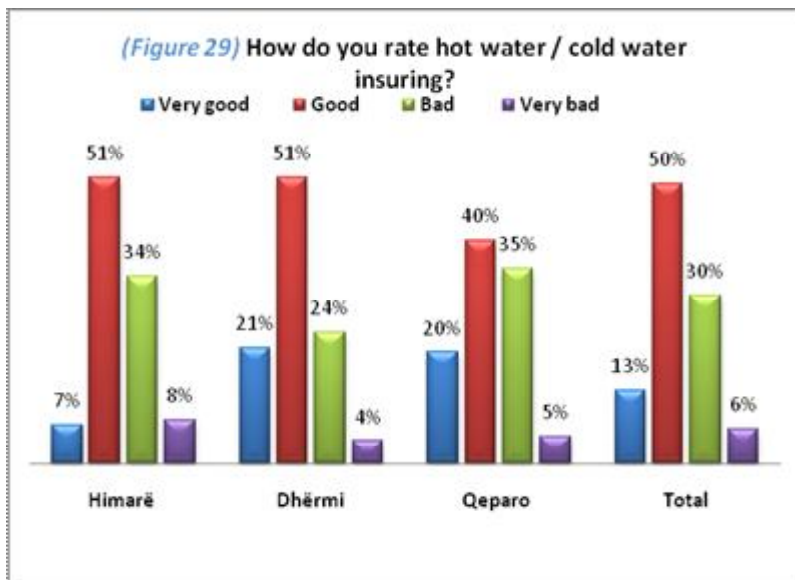
In general, tourists evaluate very good and good hygienic conditions of rooms, but there are also negative evaluations 17% of respondents in Himara and 22% for Dhërmi, figure 27.



Evaluation for toilets is in similar to the evaluation for rooms.



For hot / cold-water the evaluation are different and have to be linked with the areas in which investment to insure it are completed. This evaluation is lower for Himara and Qeparo. Respectively 42% and 40% of respondents rate bad and very bad, figure 29.



Voltage and function of electrical equipment seems to be problematic for the entire Himara area. According figure 30 the evaluation is lower for Himara and Qeparo respectively 67% and 55% of respondents have rated as bad and very bad. Better is Dhërmi where businesses have invested in generators to insure electrical power.

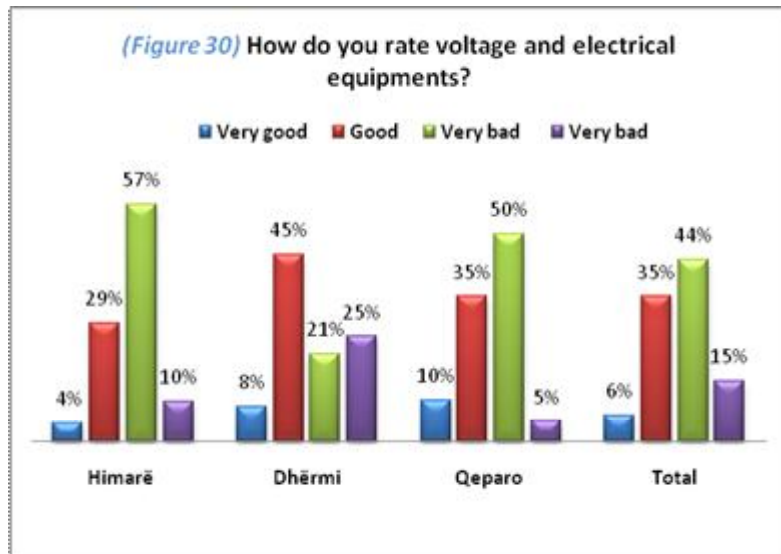
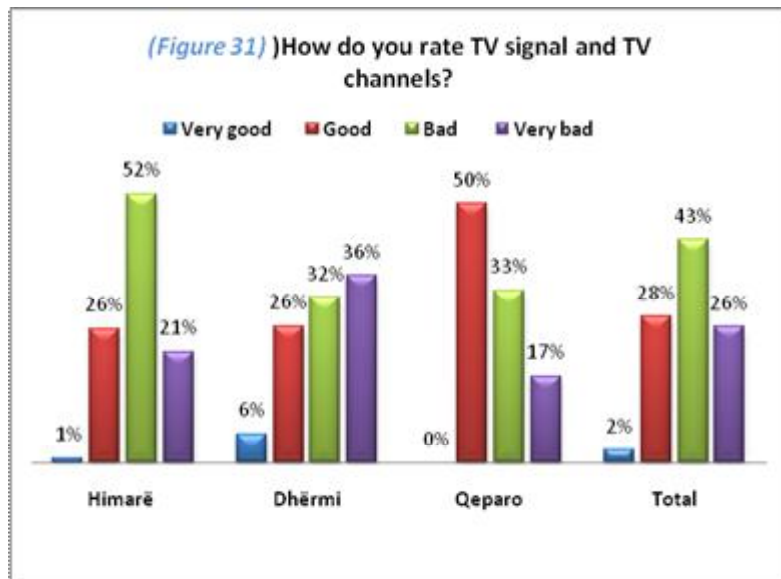
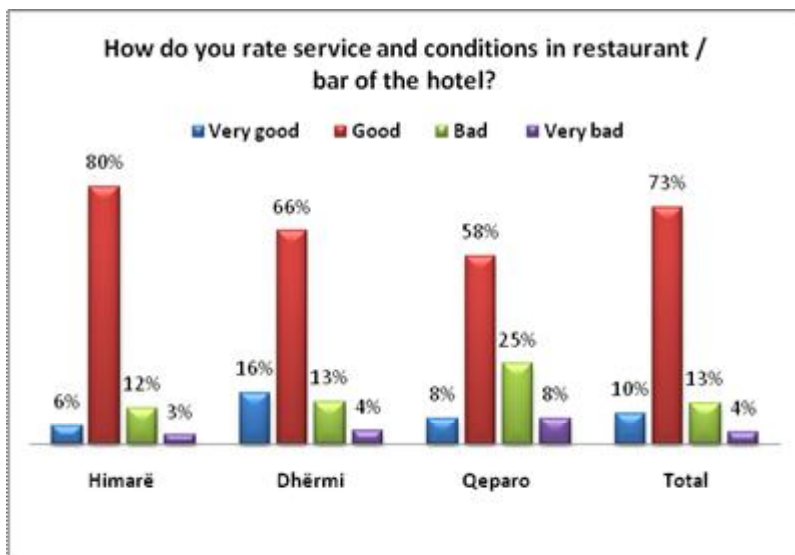
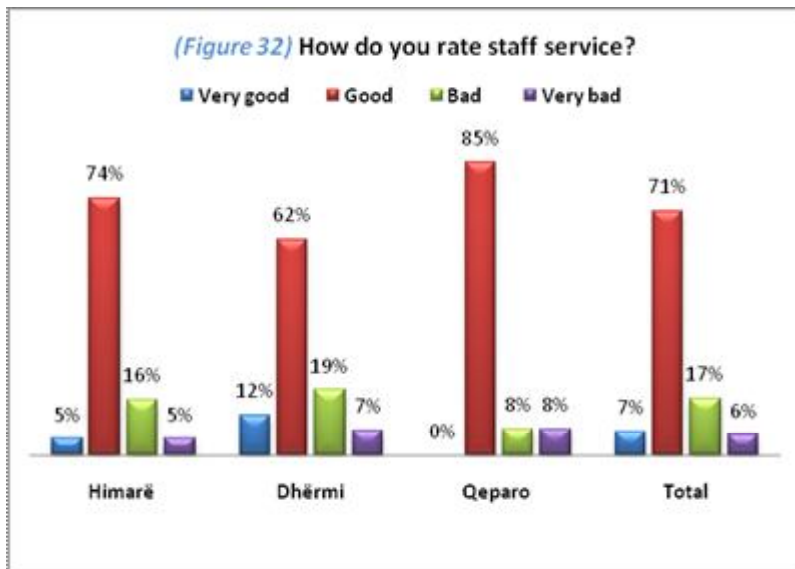


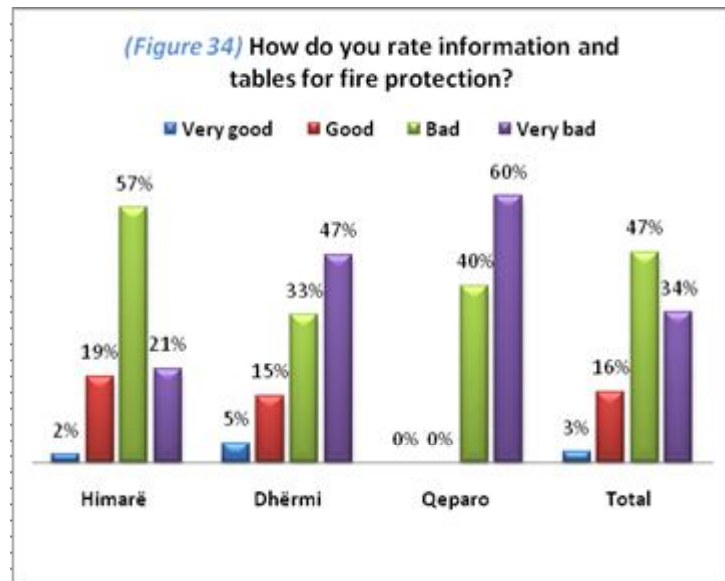
Figure 31 indicate the evaluation for TV signal and channels. Tourists have expressed that the area has problems that have to be improved in the future.



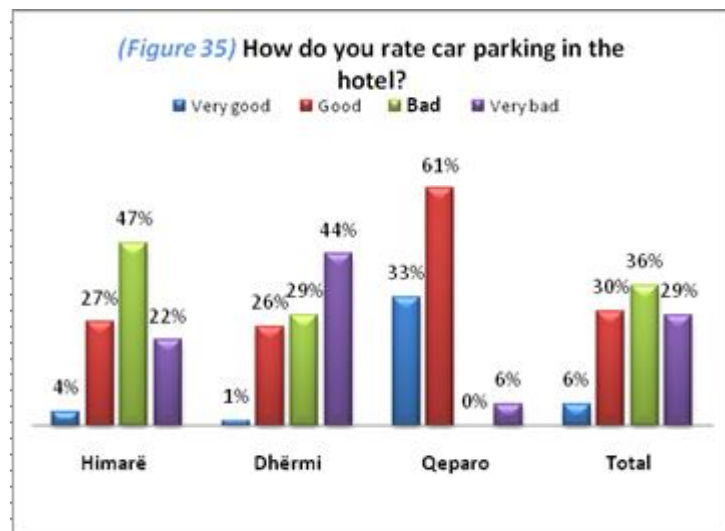
Service of the staff and conditions of the service have positive estimations from respondents. However, there are also negative evaluations, which have to be taken into consideration if we think that an unsatisfied client may express its negative comments to nine other clients. A satisfied client may express its positive comments to three other clients. 70% of the clients complain for their problems and 1 complain means 3 undeclared complains. One new client cost 5 times more than the old one. The lower estimation for services is indicated in Qeparo, figures 32,33.



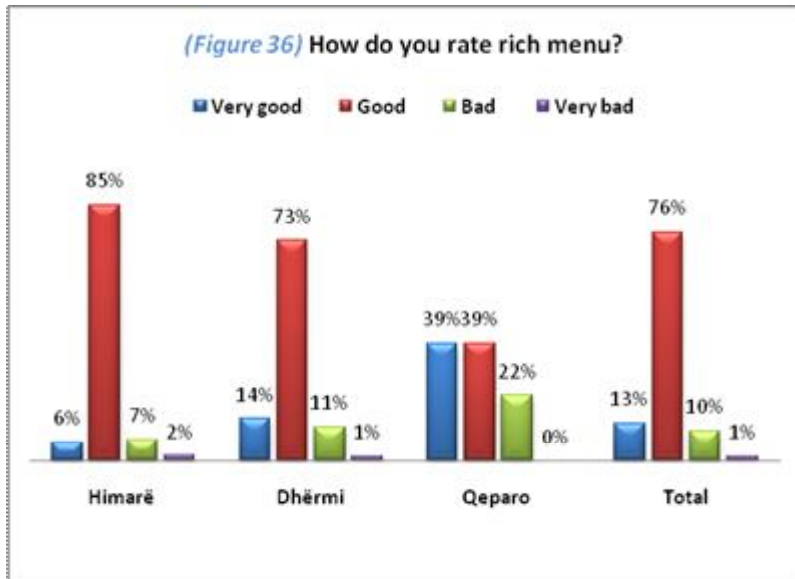
Overpopulated areas, collective spaces, hot season, forest closeness are considered to constitute in every moment risks of fire. Experiences of last years have indicated that fires are evident in Himara area. For that reason information about fire protection are object of this evaluation. For this element, the estimation is negative from respondents and is explained with lack of information and instructions in hotels or houses although they have the obligation to do it. In figure 34, 19% of respondents' rate fire protection very good and good and 81% of respondents' rate bad and very bad.



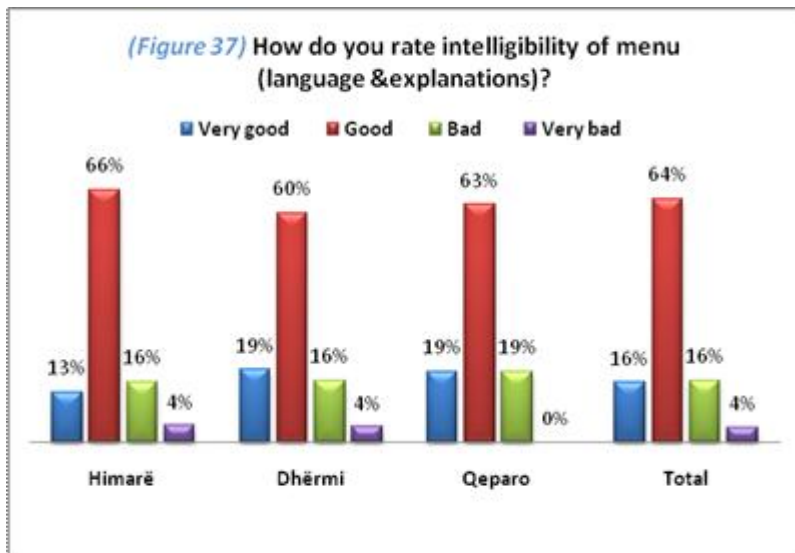
Parking is a problem for guests and clients of hotels and restaurants. Most problematic are Himara and Dhërmi that have the biggest number of hotels and restaurants, figure 35. Positive estimation is for Qeparo, explained with good position supported also by olive trees. In this area, houses are far from see, but they are linked with asphalted roads and there are parking possibilities.



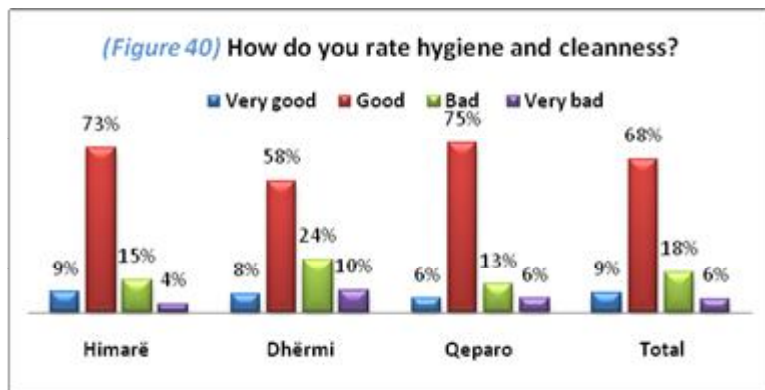
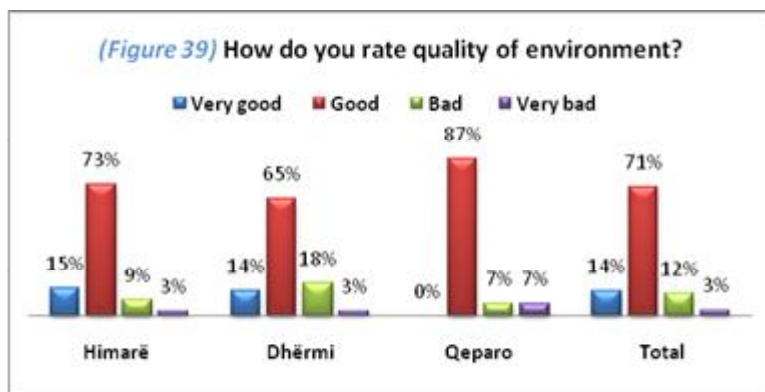
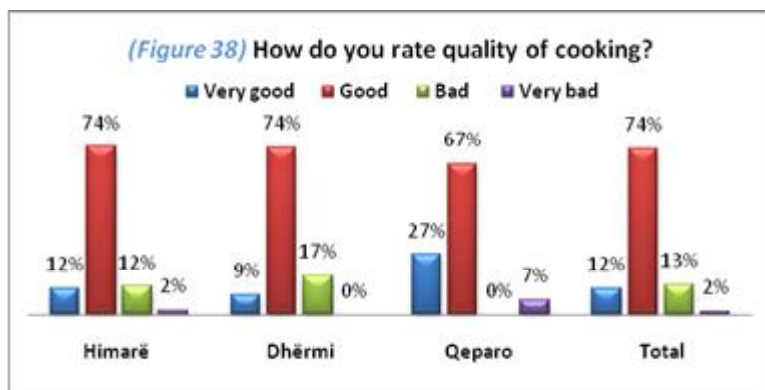
Rich menu received high scores in Himara and Dhërmi and lower scores in Qeparo. Figure 36 indicates that negative estimation for Himara is only 9%, for Dhërmi 12%, for Qeparo 22%.



Language and explanation confusion is rated by 20% of respondents, figure 37. This element can be easily improved in the future.



Quality of cooking has positive estimation, figure 38. Although in the positive estimation, “good” dominate versus “very good”. The same estimation was given for restaurant spaces, figure 39 and for hygiene and cleanness figure 40.



The following figures have information for beach components. These estimations identify problems that explain concerns related to dissatisfactions and lower number of tourists. Although the positive estimation dominates the negative estimations, even a single negative estimation may become an issue that can have consequences for tourists and businesses in this field.

Figure 41 indicates that parking in the beach is problematic. In the previous figures, we saw that most of tourists used personal cars; they move from one beach to the other, they use cars to go from the hotel / house to the beach. Therefore investments in roads and parking are necessary.

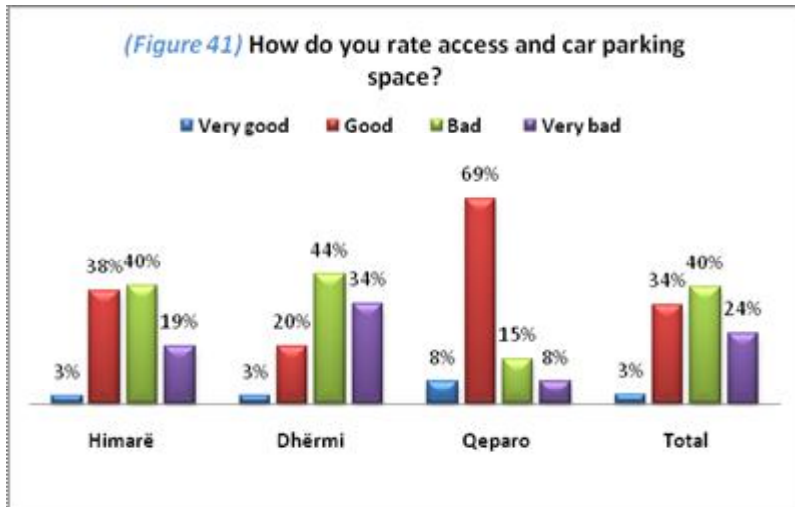
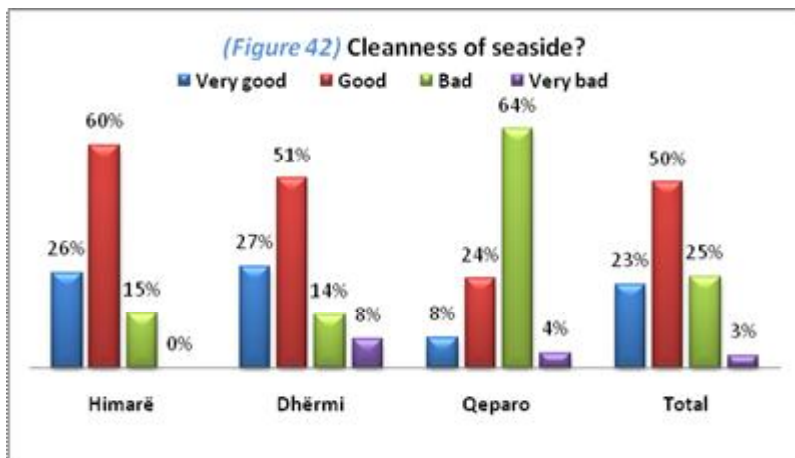
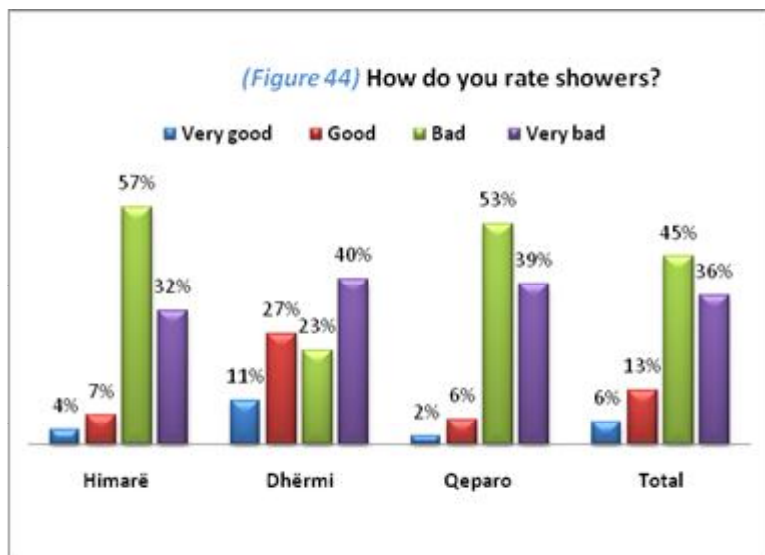
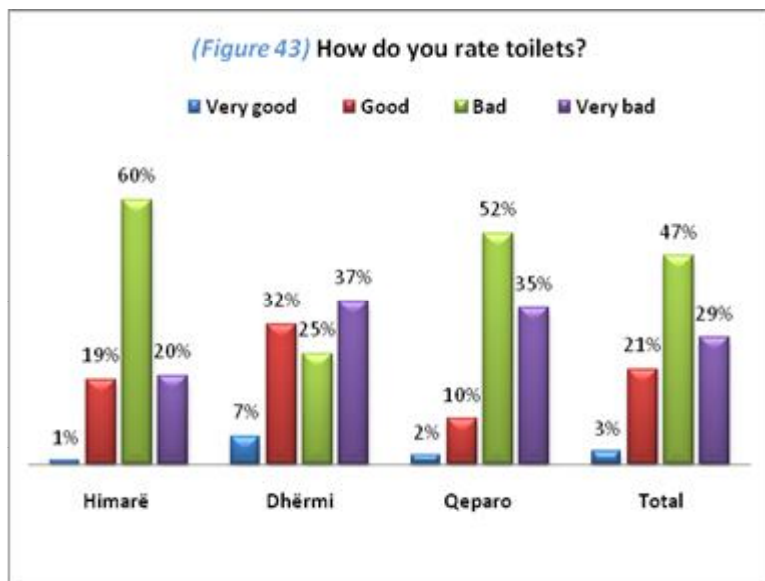


Figure 42 indicate that the lower estimation on cleanness in the beach is for Qeparo. 68% of respondents rate bad and very ad.



Toilets and showers in the beach have low estimation almost in all beaches of Himara area. Figures 43 and 44 indicate that 76% of respondents rate bad and very bad toilets and 81% of respondents rate bad and very bad showers.



The estimation for sunshades / sun beds / staying places evaluate the investments of the private sector, but tourists ask for bigger sunshades as indicated in figure 45.

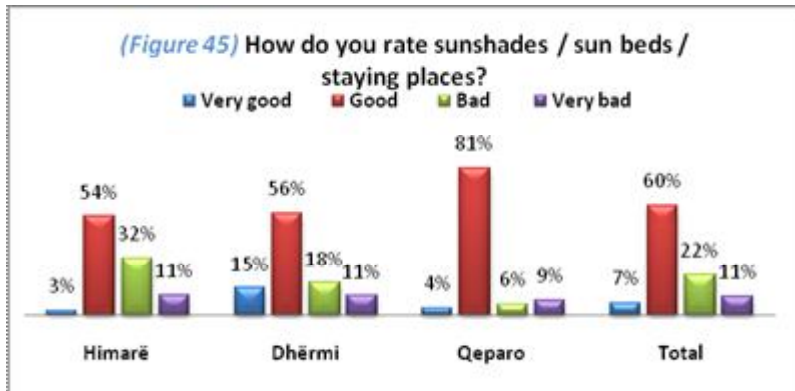
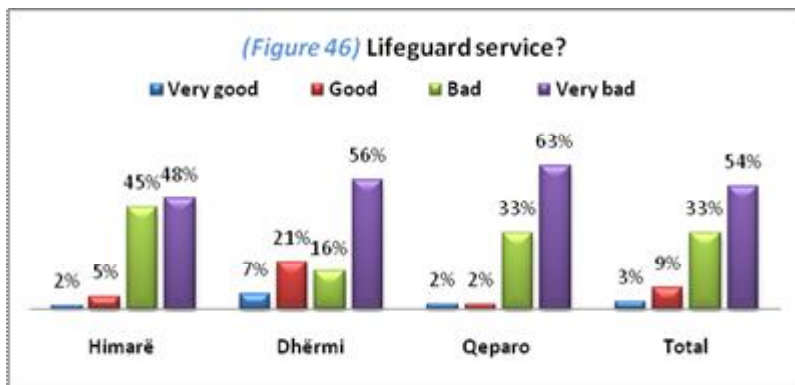
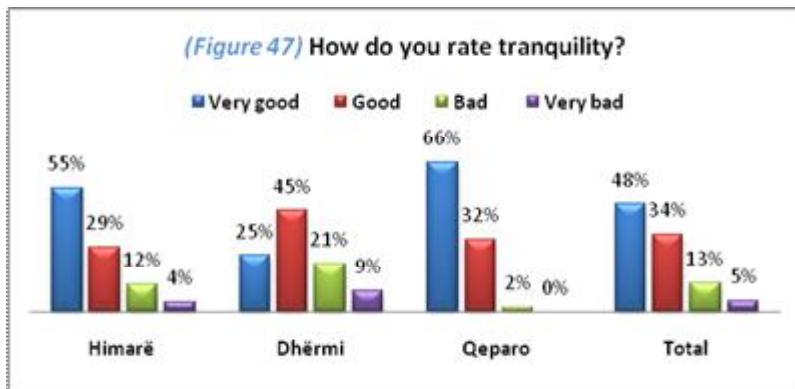


Figure 46 indicates the low estimation for lifeguards. This is explained with the lack of this service in the all area.



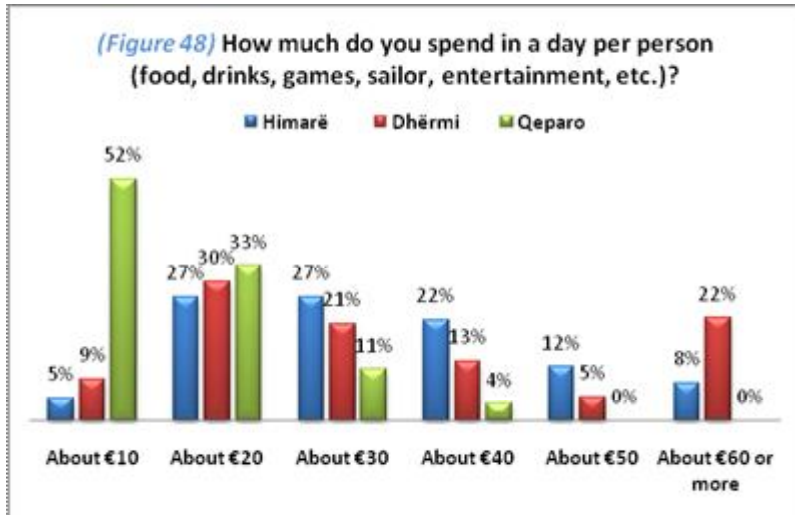
Tranquility is scored positively, in total 82% of respondents' rate very good and good, figure 47. However in some questionnaires respondents say that motorboats are big problem.



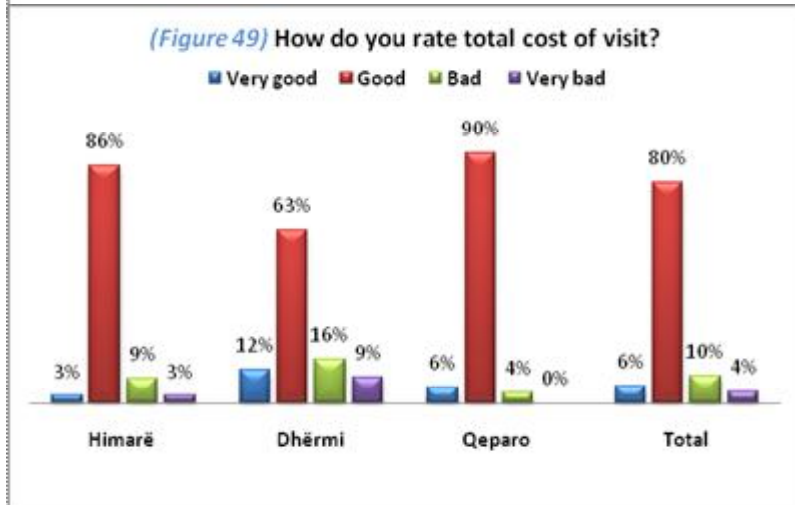
#### Part IV

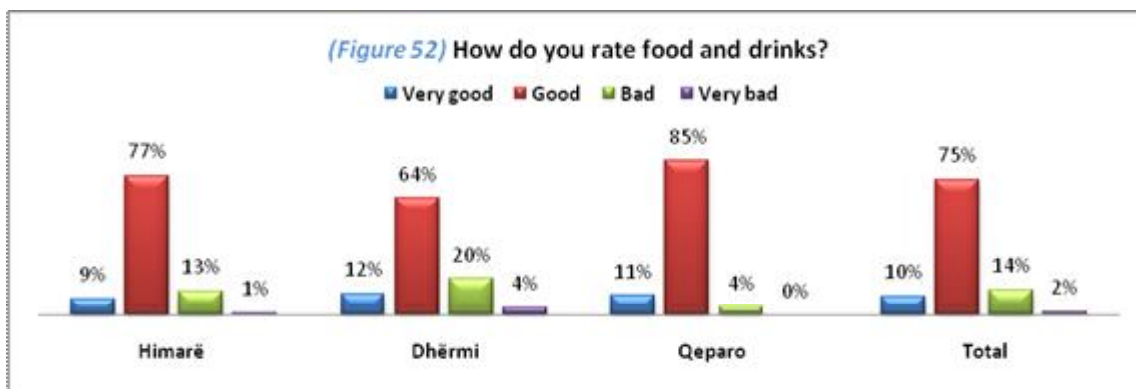
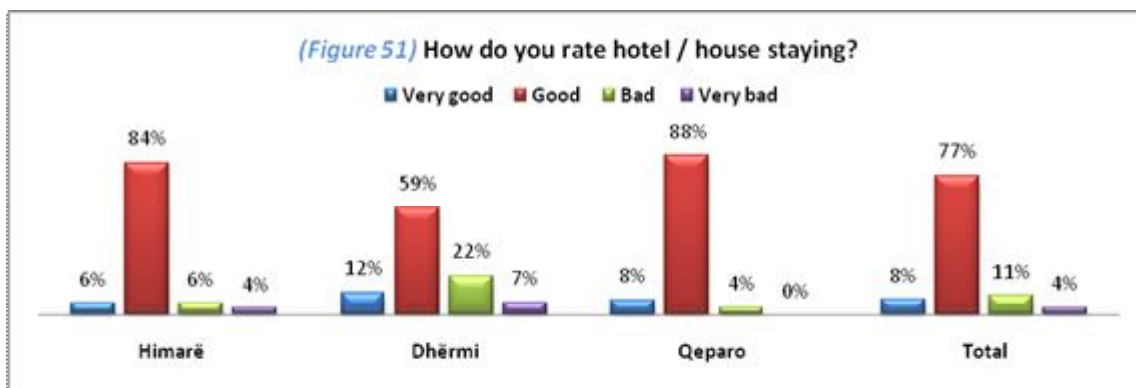
This part provides information on expenditures and tourists satisfaction on services and products.

Figure 48 indicate the expenditures of tourists per person during a day. It can be noticed that the major part of tourist that choose Himara spend 10-30 Euro per day per person. Dhërmi has the biggest part of tourists that spend more than 60 Euro per day per person, respectively 22% of respondents. Qeparo has the biggest part of the tourists that spend 10 Euro per day per person, respectively 52% of respondents.

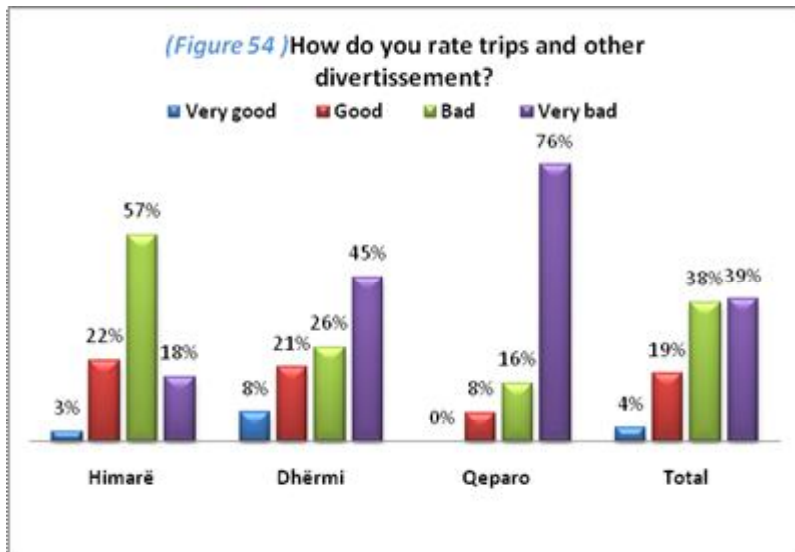
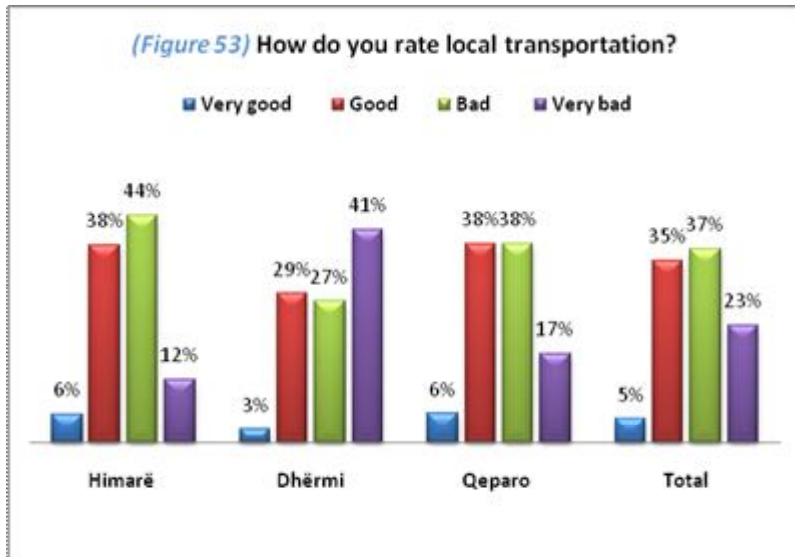


Figures 49, 50, 51 and 52 indicate the same estimations for satisfaction received against the money spent for total cost of holidays including accommodation, food, drinks and shopping. In general, the estimation is positive for all elements mention above. Anyhow, the positive estimation is dominated by "good" expression.

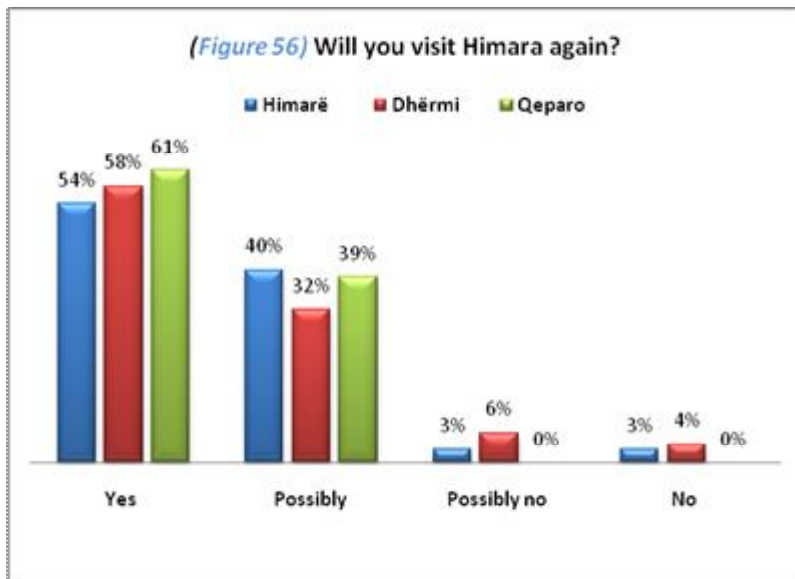
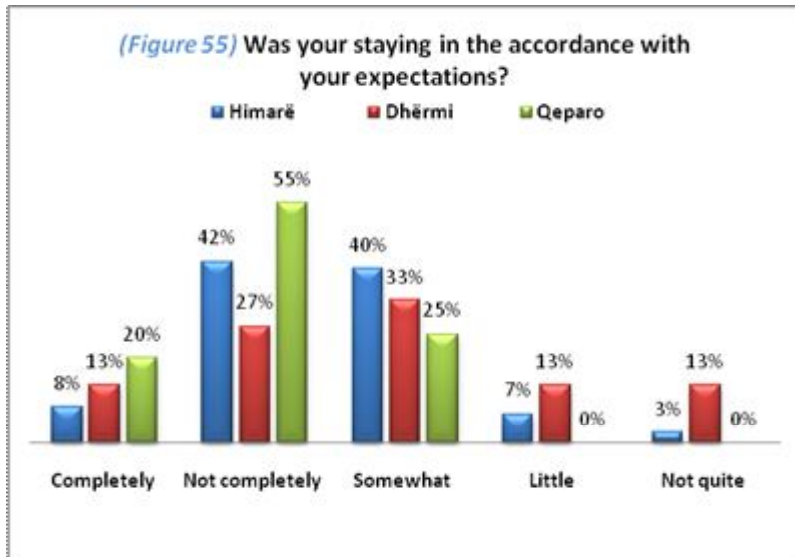




Low estimation is given to local transport, trips and especially entertainment constitute an issue, which asks for attention in order to achieve a higher satisfaction of tourists. Figures 53 and 54 indicate that estimation is respectively 40% of respondents very good and good for local transport versus 60% of respondents bad and very bad and 23% of respondents very good and good for trips and entertainment versus 77% of respondents bad and very bad.



Figures 55 and 56 indicate achievement of tourists' expectations for holidays passed in Himara. 50% of responders are satisfied, 47% of responders are partially satisfied, not satisfied. The unsatisfied group is in doubt for next holidays.



**Part V**

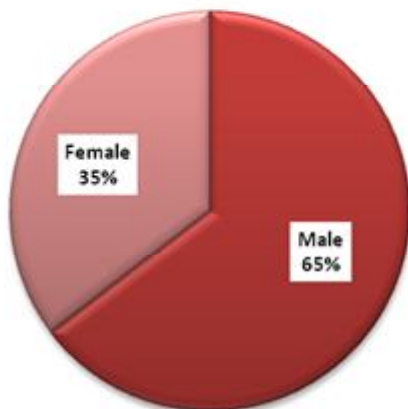
This part consist of open questions focusing on three main things that tourist have liked from Himara and three things that they did not like from Himara. In this part, responders have expressed their ideas, which are explained below based on number of responses.

Things that like from Himara area: clean air, seaside, clean see, clime, nature, panorama, beautiful beach, lunchrooms, tranquility, safety, new national road, speak very well Greek, good people, walking during nights, night life, hotels, shops, beautiful places, friendship, night activities, hospitality, possibility to travel from one beach to the other.

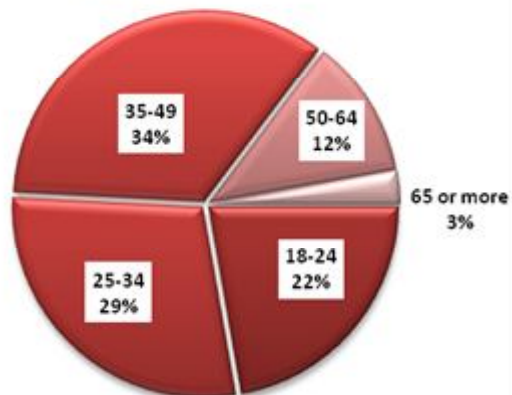
Things that don't like from Himara area: difficult parking, lack of parking, internal roads (to house / hotel), cleaning, low voltage of electric power, lack of health care, parks and creative spaces, high prices, public toilets, speaking with high voice, small port and lack of maintenance, trash bins, lack of activities for children, parking of scars in sidewalks, lack of diverse shops, center of the city is full of cars, lack of bins in the beach, motorboat near to the seaside, room accommodation, sun beds are near with each other, the tranquility is not full, service in the restaurants, lack of knowledge for foreign languages, lack of organization, lack of youth activities, lack of water, high volume of music during nights, lack of information office, lack of bank service and cash machine ATM.

Data for citizens that are asked to give their opinion on this survey

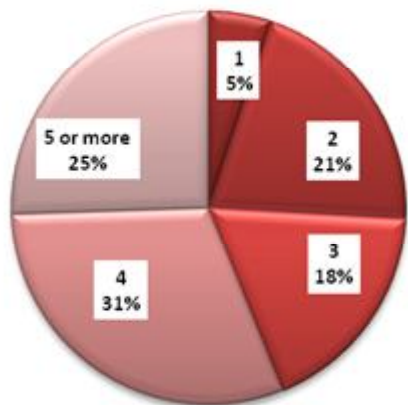
(Figure 57) Gender



(Figure 58) Age group



(Figure 59) How many persons were with you in this visit including your self?



On the figure 60, the term "foreign" is used for the Albanian citizens that live outside Albania and for foreign citizens.

(Figure 60) Albanians vs Foreigners

