



ASSESSMENT OF NATURE-BASED TOURISM BUSINESS OPERATIVE IN VLORA AND ORIKUM MUNICIPALITIES



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The study was undertaken in the context of the SEA-Med Project in Albania (Sustainable Economic Activities in Mediterranean Marine Protected Areas - Karaburun–Sazan Marine Protected Area) with the support of CEPF (Critical Ecosystem Partnership Fund) and in collaboration with WWF MedPO (Mediterranean Programme Office), and the main purpose of this study is to identify and evaluate nature based sustainable tourism-related certification schemes available in, or appropriate for Albania.

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LIST OF ABBREVIATIONS

- 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 Med PO- Mediterranean Programme Office



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I. INTRODUCTION

The Karaburun–Sazan Marine National Park is a Marine Protected Area (MPA) established by the Decision No 289, 28.04.2010, of the Council of Ministers. The overall surface of the protected marine area 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 the 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, *Posedonia* meadows, etc.) and species (monk seal, red corals, fish, etc). The MPA develops within two municipalities: the Vlora and Orikum Municipalities.

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

Throughout the ages, many tourists have seen unique natural areas and outdoor-related activities for their vacations. Today, an even larger portion of the world population is seeking nature-related experiences. Their 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.

But unlike many other sectors, NBAs are directly affected by the quality of the environment, which will directly impact the tourist satisfaction and will be 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 base².

There are several characteristics of Nature Based Tourism:

- It accounts for a large proportion of the global tourism industry³.
- 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 such potentially incompatible activities (such as wildlife viewing, boating, skiing, walking in alpine areas, hiking, hunting, fishing, surfing, snowmobiling, river tours, rafting, etc).

¹ Nature – based tourism enterprises – Guidelines for success, Storm Thurmond Institute, 2000

² Characteristics of the commercial Nature-Based Tourism Industry in British Columbia, Tourism British Columbia Research Services, Wilderness Tourism Association, 2005

³Eagles et al., 2002, Newsome et al., 2002, Buckley 2003



- There is a complex array of potential economic, socio-cultural and environmental costs and benefit 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 as inputs nature based activities.

“Tourism businesses must meet each of the following criteria to be considered a nature-based tourism business:

- 1. Businesses actively market products and services to tourists who are engaging in nature-based activities.*
- 2. Businesses’ primary source of revenue 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. Businesses’ primary function is not retail sales.*
- 4. Businesses must be able to estimate the percentage of revenue generated from tourists.*
- 5. Businesses provide products or services related to the activities included in Nature Based Activities”⁴*

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

In this context, INCA, Institute for Nature Conservation in Albania, has initiated an assessment of the tourism activities and businesses in the bay of Vlorë 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 MedPO (Mediterranean Programme Office).

The main objective of this assessment is to make an inventory of all tourism- or recreation-related businesses operative in the bay of Vlorë with a special focus on nature-based activities.

The area of study begins from the point of Uji i Ftohtë and includes Radhima and Orikum bay.

This report is based on the interviewing process of the stakeholders of Vlorë Bay, which base their activity on tourism services in this area.

⁴ Economic Value of the Commercial Nature-Based Tourism Industry in British Columbia, Tourism British Columbia Canada Research Services, 2004



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In this context, a first research phase is undertaken to collect data which will 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 a lot of stakeholders in the area, especially tourist operators.

Questions that try to get answers in this report are related with:

- Type of businesses, initiatives and Nature Based Activities (NBAs) in the area
- Types of services offered by different tourism businesses and initiatives
- The opportunities that lay behind the involvement of some operators in NBAs
- Problems related to the desired level of NBAs supply in the area



II. METHODOLOGY

The method for this survey and analysis is best described as a comprehensive market survey, analysing both tourist operators with a special focus on nature-based activities, and also those operators, which see this kind of activities as complementary.

The first phase of the research was based on a desk research, supported by other partners in this project. During this phase the group of local experts has gathered secondary data, based on other studies by different non-government and government organizations present in the area of Vlora bay, about the operators located in the area, with a special interest on those operators which base their activity on Nature Based Activities.

The next phase of the research is gathering the primary data through a survey of tourism operators in the area. Before going in the field, there has been a panel discussion regarding the exact definition of the tool used for gathering data. A questionnaire model was provided by INCA and reviewed attentively by the research team.

The last phase consists in mapping the activities, through GIS mapping, which is one of the most important requirements also from the point of view of MPA planning in the area, especially for Sustainable Tourism Planning.

2.1 Survey

Primary data gathering through survey research is the most important phase of this study. The survey is aimed at mainly making semi-structured qualitative interviews with the managers and/or owners of TO, to have a clear understanding of the state of the art of NBAs in the area and their impact. During interviewing process, more information was gathered about identifying other NBAs in the area, or services including NBAs in the main TO business.

The survey tool regards the most important points and alternatives available in tourism sector, about the Nature Based Tourism Activities. The questionnaire was also adapted with the data entry requirements, which was later used for data analyses and report.

Also, the number of interviews was defined according to the geographical distribution of subjects, NBA and not, which are known as the most important by the point of view of tourism development. The gathering data tool is the survey questionnaire and the method of administration is the face to face interview with the subjects.

2.2 Geographic coverage

This research targeted the region of Vlora Bay. The survey gathered data including TO not only in the MPA of Karaburun-Sazan, but also in all Vlora Bay, because of the impact that these tourism businesses has also in the MPA. To manage better the process of collecting data the group of local



experts divided the study area in three subareas: Uji i Ftohte, Jonufer-Rradhime, and Orikum. The main reason for selecting these regions is related with the considerable role of these areas in tourism development as the main tourist destinations of Vlora region, part of which is also Karaburun-Sazan National Marine Park, related to different forms of tourism development, with a special focus on the nature based activities forms of tourism. This is also the area that accommodates the tourists from which the demand for NBAs is supposed to be coming from.

The data collection was the most important phase regarding team efforts and time. During this phase, there were made a lot of efforts, especially with subjects who are not located geographically.

2.3 Sampling

Sampling method is judgement, non-probability sampling. The selection of operators is done according information that must lead to NBAs from these operators.

Sample size and composition for this research was defined by desk research and field research: In total there have been made 73 interviews from which, 11 were tourism operators which focus was: diving, hiking, fishing, aeronautics, etc, and 61 commercial tourism operators, which collaborate with the above mentioned for offering a full package to the tourists.

Geographic area	Leisure activity operators	Tourism operators
1. Uji i Ftohte	4	14
2. Jonufer – Rradhime	2	16
3. Radhime - Orikum	6	31

Table 1. Sample composition

Interviewing has been one of the most important processes of the study. Therefore, detailed information about the study and the interviews has been provided to the interviewees to ensure a low percentage of wrong answers.

Identification and selection of TO and NBA operators were a complex process, by using a mix of selection criteria and sources:

- Discussion table with INCA experts, and other partners of the project;
- Field research;
- Desk research;
- Personal contacts and professional networks.

Most of contacted operators responded and accepted to be interviewed and were open to share requested information. There were faced difficulties with the times of interviewing, especially with the NBA operators. There is also a particular characteristic about NBAs. In some cases they are activities realized by one person, and not registered as companies, such as guides or boat tours.



This is a special condition that also creates difficulties in the individualization of these activities in the field.

*Concluding: the **methodology** is appropriately designed with both **types of data, secondary and primary**. The **survey process, questionnaire and interviewing process** are the most important elements for obtaining qualitative and quantitative data.*



III. OVERVIEW OF NATURE BASED TOURISM ACTIVITIES IN THE BAY OF VLORA

3.1 Type of businesses and location

The greatest part of the operators interviewed, is composed by profit local operators, but still there are some non-profit organizations, which are:

- the management of fishing organization,
- the centre for sports and tourism “Eagles”,
- the NGO “Pisha Flamur” and
- the diving centre as an agency of the armed forces.

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

Only one of all the TOs is a foreign initiative, which is the Marina Port of Yachts, while all the others are local operators. In fact this foreign operator has based its activity mainly in the interest of tourists for the beautiful and untouched nature of the area, being the first to offer some NBAs as boat trips and then developing those services.

The spread of the operators in the Orikum – Bay is shown in the Map 1, *Accommodation and restoration tourism activities in the region (GPS data taken in the area, March 2014).*

As it can easily be seen, the main tourism activities of the accommodation and bar-restaurants are concentrated in the western part of the bay, not in the MPA. The impact of these businesses is not direct in the area, in which there are located only two businesses in the food sector, operating only in the two peak months of the season.

Even though, there is an indirect impact of these businesses in the MPA, mainly because of problems in the sewerage system and the pollution from uncontrolled waste disposal.

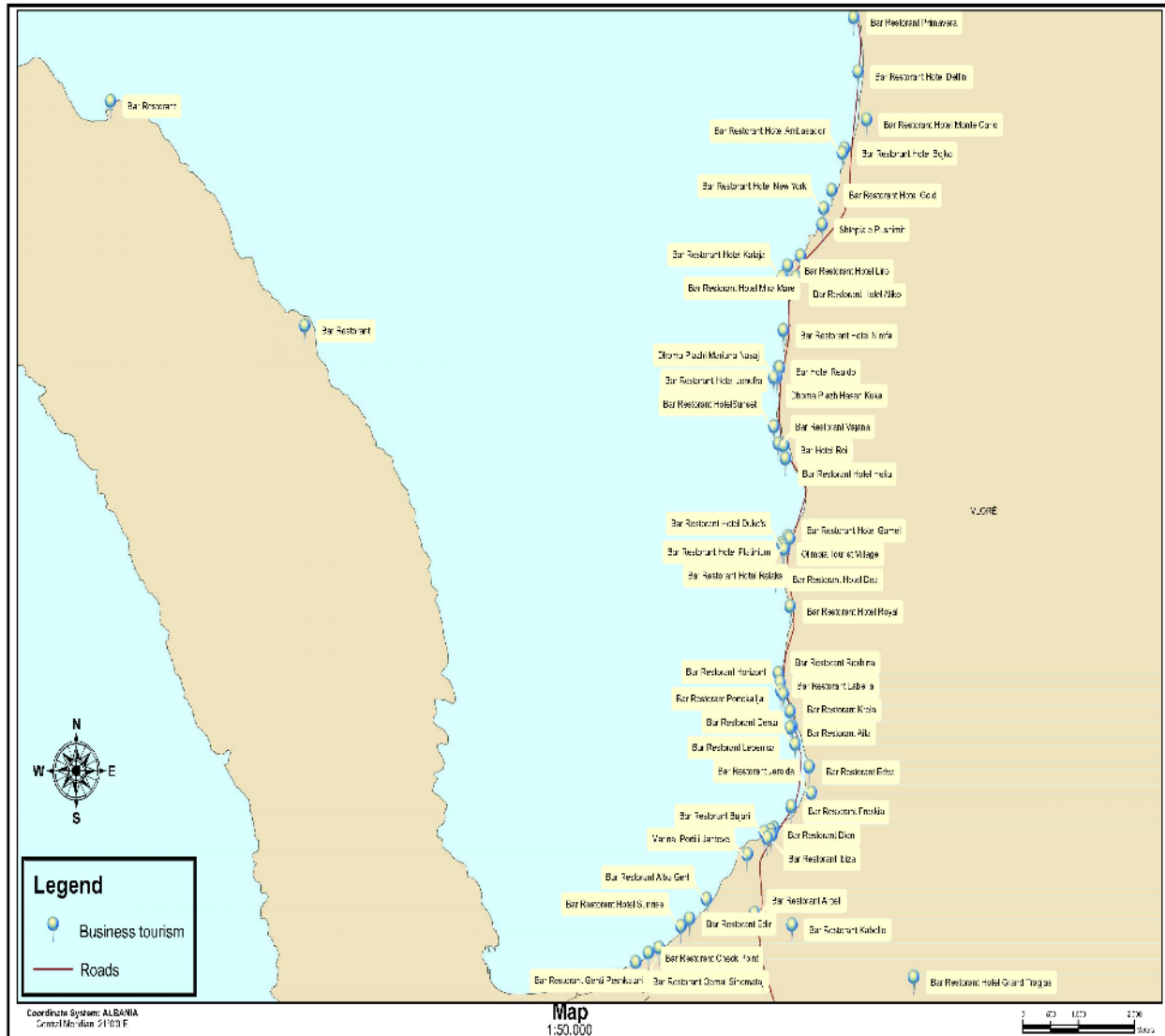


Fig1. Accommodation and restoration tourism activities in the region; (GPS data taken in the area, March 2014)

3.2 Main nature-based activities

Two types of operators in the area are actually offering NBAs, those which main business is related to accommodation and those which offer basically the services related to nature based tourism activities. Both types compose around 46% of the sample, while 15% of the operators are basing their service mainly in NBAs. The following services and activities in the nature -based category are identified:

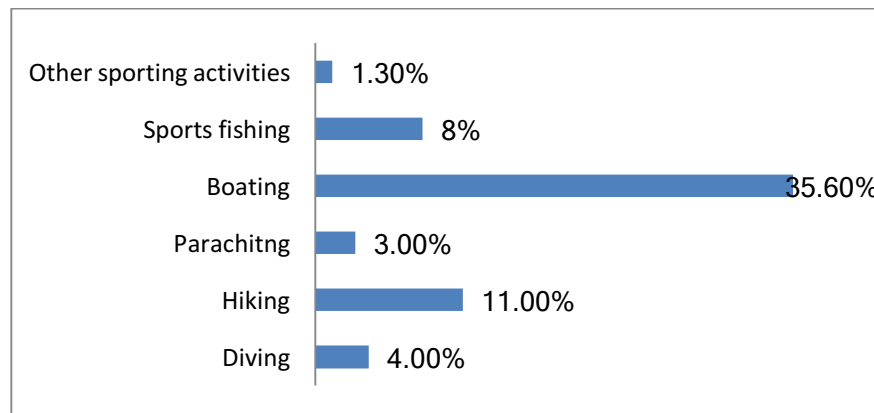
- Diving - 3 activities identified, offering services for tourists, such as training as amateur divers, or divers for different underwater services, as well as guided diving in different

areas of the coast. These services are offered especially to international tourists and a part of national tourists.

- Hiking – offered by some of the accommodation businesses, as well as a local guide, not licenced or registered. About 11% of interviewees offer this kind of service and most of them are accommodation businesses, which also offer this service on a requirement bases.
- Parachuting or skydiving – offered by two operators. Their main activity is parachute jump, but they offer also tracking and climbing.
- Fishing – offered by 5 operators, offering it as a sport for tourists, along with other activities such as diving and guided boating tours.
- Boating – offered by 35.6% of the tourism operators interviewed, the most realized activity, from NBAs, especially offered to all tourists independently from their place of origin.
- Sporting activities – offered as one resort complex for various disciplines. This is the accommodation unit that provides the greatest number of services intended for tourists, 20% of which use these activities. The rest of the users are 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, sailing skateboard, parasailing, etc.

The graph 1 is showing the trend for the types of NBAs being offered actually by TO in the area.

The spread of the NBAs in the MPA is shown in the map 2 and 3. In Map 2 there are shown the diving areas in the MPA. Map 3 shows mainly the boating activities, which are spread also from some of the accommodation tourism operators, as previously explained. It also shows the tour guides activities (mainly the area in which the tours are offered).



Graph 1: Types of NBAs offered by TO

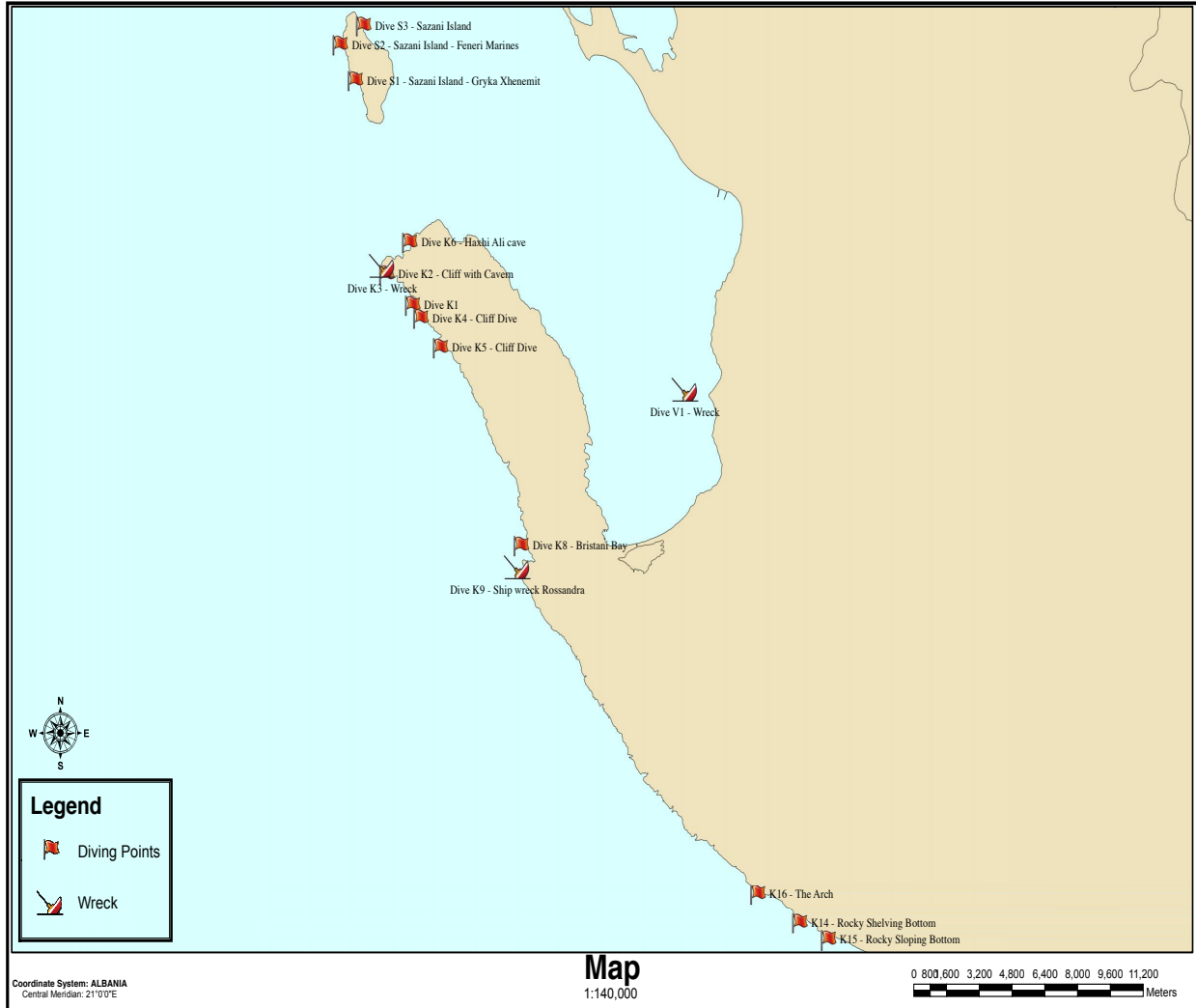


Fig 2 Diving areas spread in the MPA Karaburun-Sazan⁵

⁵INCA, 2012): The potential for ecotourism development in the Marine National Park Karaburun-Sazan.

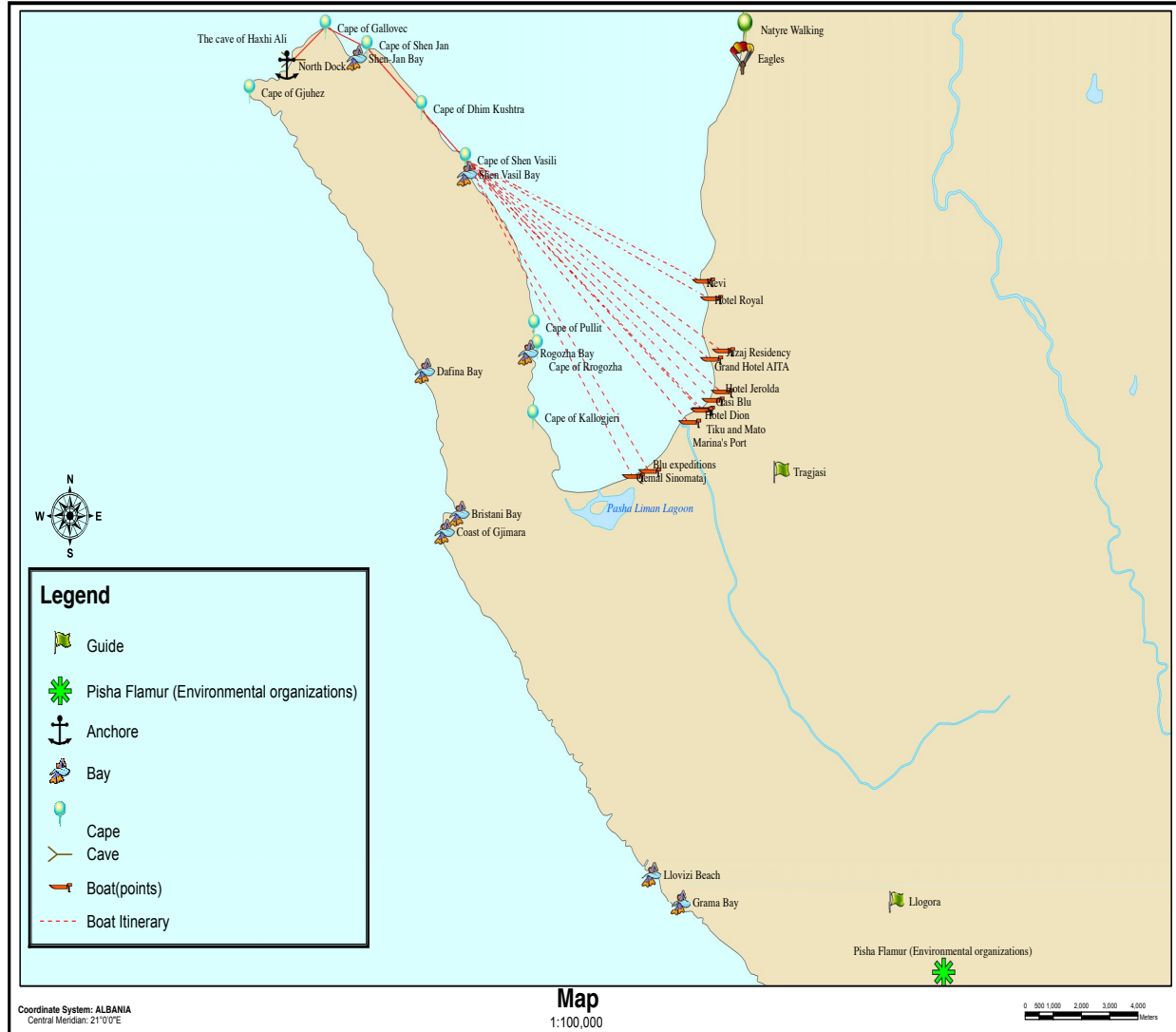


Fig 3. NB-activities spread in the Karaburun-Sazan area (Operators' data, March 2014)

3.3 Activities related to Karaburun-Sazan Marine Protected Area

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

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



They see NBA very important for the following reasons:

- economic;
- tourist satisfaction;
- international tourists attraction;
- competitive advantage;
- sustainable tourism development;
- educative and intercultural exchange.

The map in the fig 3 shows more information about the spread of the activities in the MPA.

3.4 Interest and potential of future NBAs

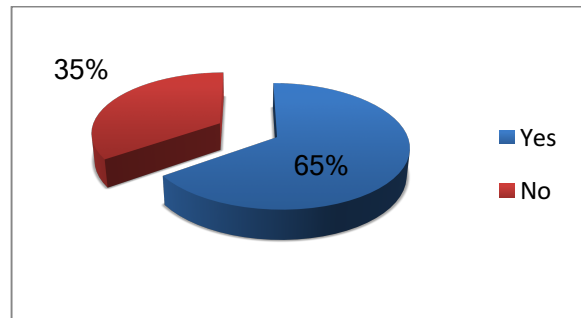
All the interviewees have expressed their interest about the NBAs in different manners. In fact when asked if they are interested to *offer more* of these activities in the Karaburun-Sazan Area, 65% want to offer more NBAs, while 35% are not willing to offer more of these activities. This is shown in table 2 and also in graph 2.

The tendency that some of the interviewees have for the future of these activities is also interesting. In fact, if we see, on one hand the actual status and, on the other hand their willingness to offer these activities, there is a positive trend. Although 27 tourism businesses and initiatives, or 37%, are not offering actually NBAs, 8 of them, or 11% of all the cases are planning to offer more nature based activities in the Karaburun-Sazan area in the near future. This is shown in graph 3.

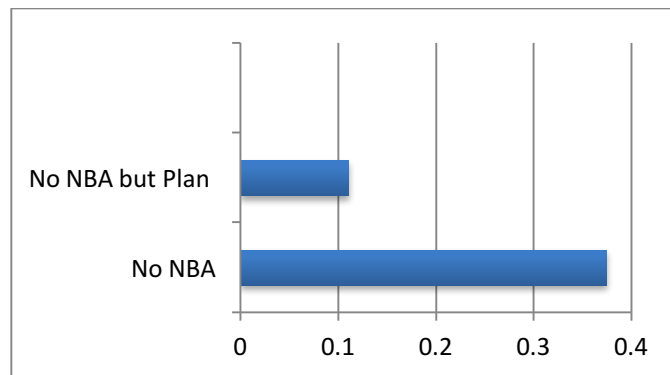
There is a difference also between their planning and their willingness of offering the NBAs. This is shown if analysing questions 8 and 9 in the same time, we can see that there are less than one third, or 21% of all cases in which businesses or initiatives are not planning to offer NBAs, for the reasons mentioned in the section above, but still they are interested to offer these activities.

Alternatives	Number	Percentage
Yes	48	65%
No	25	35%
Total	73	100%

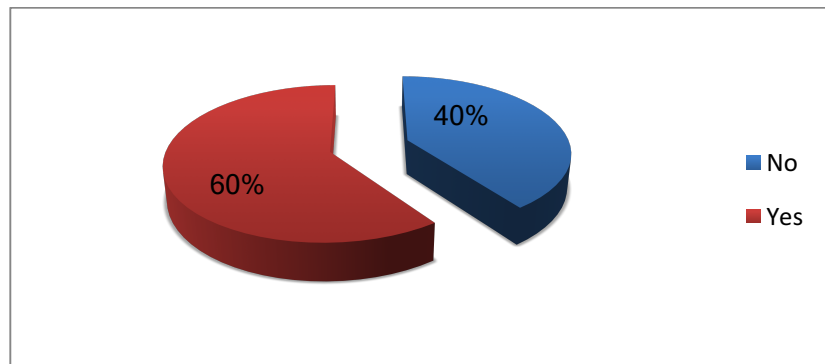
Table: 2 The interest for offering more NBAs in the area



Graph 2: Interest for offering more NBAs



Graph 3: Actual and Planned NBAs



Graph 4: Interest among operators non offering NBAs

Let us take a look on the reasons why 35% of interviewees are not interested in offering NBAs. They focus more on the lack of capabilities as well as the impossibilities from financial resources, lack of experience and human capacities for management of these kinds of activities.

This seems to be also the reasons why there is the difference that was previously mentioned about planning of these activities and actual interest of operators. In fact, all the operators that do not plan to offer NBAs say that the most important reasons ranked first, second and third are as follow:

- financial aspects of the business,



- requirements for professionals in the field, such as divers, guides etc., and third the problems with management of these activities.

Taking a deeper look in the individual interviewees that have expressed these problems, we can see first of all that these are mostly tourism operators offering basic services, such as accommodation and restaurant services. Secondly, it is understood that the perception of these operators about ways of offering NBAs is that of including them in the list of their services. So, basically they answer to the question if they want to offer more NBAs, while they do not base their service on the NBAs. While they may not be contrary of more NBAs included in the total tourist offer, not necessarily offered by them, but by other operators, which may be specialized in the NBAs. More information given about the existence of these operators, their services, as well as the cooperation between different kinds of operators in the market, should be incited in these cases.

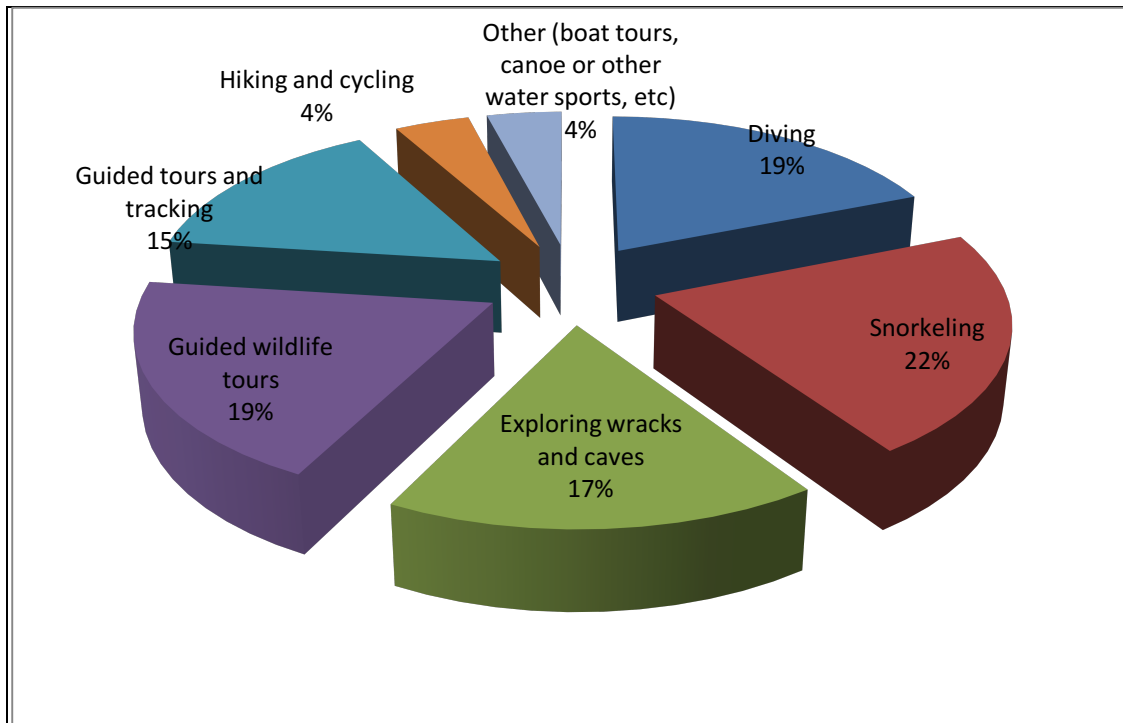
But there are also comments and *perceptions* that there is lack of demand for NBAs, lack of professionals that must be part of the offer for NBAs. In some cases they are not seen as an opportunity for growth.

Stating these reasons in a quantitative manner, we can say that only in 4 cases there is the perception for the *lack of demand*, in 3 cases they say that *tourists care about activities by themselves*, while all the other cases are dealing with *different kind of impossibilities, from financial and human resources, to managerial skills and experience*.

For those interviewees who have accepted the more offering of NBAs, the most desirable or appropriate activities are listed in the table 3 and shown in graph 5. The figures show in how many cases and what percentage the activities are mentioned as desirable/appropriate. It is to be said that in most of the cases, two or more of alternatives are mentioned as responses. The most desirable ones result to be: diving and cave exploration, because of many beauties that the nature of the Karaburun area offers for the tourists. But also guides for the wild life are one of the activities of interest to be included in the operators' activities. Guided tours and cycling are not so mentioned as expected, may be because of the spread that the walk already has.

Alternatives	Number	Percentage
Diving	20	28%
Snorkelling	23	32%
Exploring wracks and caves	18	25%
Guided wildlife tours	21	29%
Guided tours and tracking	16	22%
Hiking and cycling	4	6%
Other (boat tours, canoe or other water sports, etc.)	5	6%
Total	73	100%

Table: 3. Most appropriate/desirable NBAs



Graph 5: Type of most desirable/appropriate NBAs

There are also some new activities identified in the field study, such as parachute jumping, free fall, water sports, rafting, canoe tour.

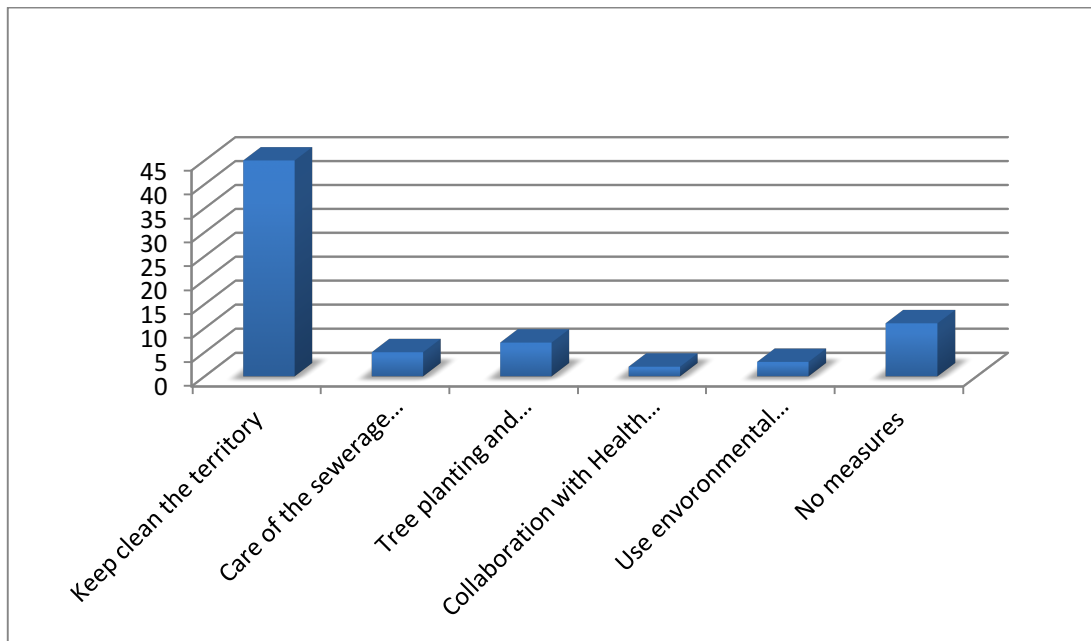
But how do the operators think that adding these activities to their existing business would impact in the value aspect? After explaining some alternatives such as the increase in number of tourists, or in more revenues, as well as getting more knowledge in the market and merely for expanding their business. All those aspects could possibly impact positively in the value of the business or initiative. The most mentioned positive aspects are the increase in number of tourists and the revenue increase of the businesses.

3.5 Support for environment 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 visitation and tourism's contribution to the economy. Also, preservation and management of natural resources is a key challenge for the sustainable development strategy.

The support that local operators give in regard of management and protection of the environment is seen as an important aspect. But their perception about this question is limited to mainly keeping clean the area around the structure. Also the maintenance of the beach, which in fact is offered as a service for profit, is considered as a support for the environment. In 45 cases, we face responses

such as: “we protect the environment by cleaning, keeping clean, individually, our area or territory, around our structure” These are the keywords of the interviewees for considering their support for the protection of the environment. Although in five cases we can identify their sensitivity to sewage system and the prohibition of their discharge in the sea, also the care for the inert materials. In two cases is mentioned the collaboration with DSHSH, directorate of health, for the disinfections. While in 6-7 cases it is mentioned the care through the initiatives for tree planting and decorating the environment with flowers and plants, along with the use of wood in their structures as a more environmental friendly material in 2-3 cases. The percentages are shown in the graph 6.



Graph 6: Ways of environment protection by operators

But there are also such responses and initiatives that contribute in environment protection through sight watching and giving information to the local authorities about the problems such as fires or unclean areas. More active in this regard are the non-profit actors that are interviewed, but also some profit tourism operators, such as the diving centres or tourist, sports- complex mention their care to the underwater flora and fauna and the biodiversity in the area.

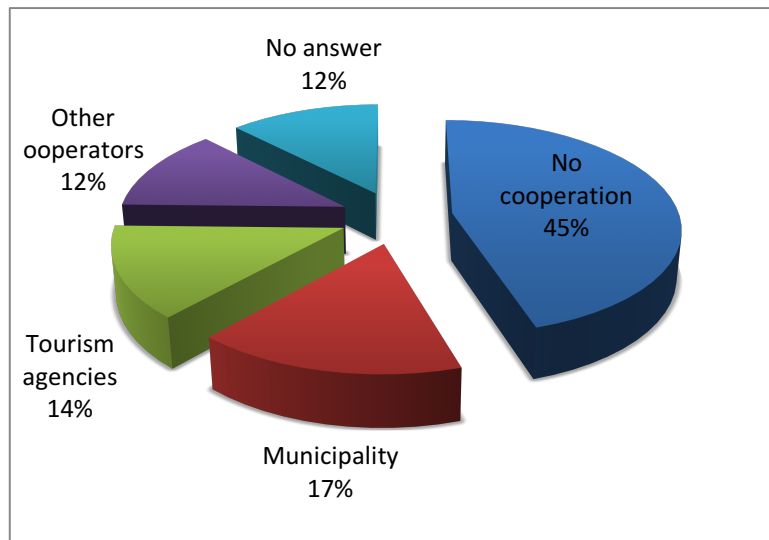
At the conceptual level, revenue enhancement should not be seen as contradictory to the objective of conservation. Instead it should be seen as an effective tool for conservation. The majority of the operators included in the study consider additional the cost on conservation or environmental quality.

The need for higher conservation cost to maintain the environmental quality.

3.6 Cooperation between operators and stakeholders

In 33 cases, or 46% of the cases, there is no cooperation between the operator and other institutions or operators. It is relatively high percentage that shows a lack of institutional collaboration, but also a lack of cooperation between operators, which in many cases is very important in the tourism sector, because of the nature of this sector.

Anyway, there are other cases which claim the collaboration with the municipality of Vlora and Orikum, specifically in 12 cases or 17% of the cases. There is also the collaboration with other operators, either nearby or in other touristic areas, in 9 cases with the same level of the value chain. While collaboration with Tourism agencies is mentioned in 10 cases. Data are shown in graph 7 below.



Graph 7: Cooperation of operators

Collaboration with other actors in the value chain, such as collaboration between hotels and guides or hotels–restaurants and NBAs such as boats and diving operators are present, but also in the individual bases and through individual knowledge and first empirical steps in marketing the NBAs from individuals that offer these services. In fact when asked more specifically local guides or diving professionals say that they give their contacts to different operators which have expressed some requests from foreign tourists for NBAs, while they have no offices or private companies, because of restrictions such as permissions or certificates and costs. On the other hand, operators that offer accommodation services collaborate with NBAs operators to suggest their services to the clients.

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

The collaboration with the state or public sector organisation will be helpful in meeting the objective of conservation. Organisations that carry out the task of preserving environmental quality



with minimum cost to the society and firms that maximises revenue from tourists in an environment friendly manner should be functioning in a broad state – private partnership structure, given the externality and public good nature, of conserving natural assets such as Karaburun – Sazan marine protected area.

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

Another problem verified by TO was lack of a certified tourist guide. It is a necessary role to visitors who want to explore the city. This relates primarily to the low level of incoming flows compared with outgoing.

3.7 Main tourist attractions in Vlora from operators' view

Natural and cultural values of particular importance for tourism are :

- The quality and variety of natural landscapes .
- cultural landscapes created by man .
- historical places and cultural heritage .
- Biodiversity - flora and fauna , marine and terrestrial .
- The distinctive features of local living culture-arts, crafts, cuisine, language–eventsand festivals .

The area of Karaburun–Sazan is well known for the natural and cultural resources. All the materials, guides and studies in the tourism field mention the variety of resources, from the ancient ruins and ancient Illyrian settlements, to the biodiversity and the 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. Sofe'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,
21. Flag Pine.

The answers of question 13 show if the tourist operators are aware of all the resources that this area contains. According to these answers we can say that the knowledge is mainly general about the resources, but there is lack of knowledge about specific monuments of nature and culture in the Area. Five interviewees mention Karaburun as an important resource. In 18 cases it is mentioned the sea or the marine tourism as a resource, while in 11 cases the mountain tourism is mentioned. These are in fact answers that denote inadequate knowledge of these operators about specific attractions in the area. So they are not able to orientate tourists to these attractions and the nature based activities.

On the other hand in 16 cases, the resources are mentioned as places and the answers include Radhima, Llogara, Orikum, Kanina as main tourist attractions in the area.

While we can analyse as the most mentioned attractions:

1. Cave of Haxhi Ali,
2. Marmiroi church,
3. Pashaliman,
4. Beaches of Karaburun,
5. Archaeological Park of Orik,
6. Museums,
7. Laguna,
8. Flora and Fauna.

We can see that less than 50% of the attractions are mentioned, and these mentioned by less than 50% of the interviewees, figures that also represents little knowledge about the specific resources that the area holds.

*As a conclusion, regarding **TO**, their **services** and the **NBAs** in the Karaburun Sazan area, it can be stated a **raising tendency** for more NBAs, from TOs in accommodation businesses, but also from new TO, focused mainly in the NBAs. Problems are related with the **knowledge and perceptions** of TOs about NBAs and their problems and opportunities, as well as with elements of the development of NBAs for the purpose of **sustainable tourism**. Cooperation, nature conservation, protection and relationship with natural and cultural resources are fields to be focused in the future in relation with NBAs development.*



IV. STRUCTURE AND ECONOMIC ANALYSES OF NBAs IN VLORA BAY

4.1 Demand from tourists

Certain indication from primary data gathered on the primary issue of the study shows 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 to cooperate with the NBA operators in order to fulfill the 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 at a single enterprise. Moreover, the large capacity of the structures, the all over year activity of the hotels and the loyal clientele dictate the need for complementary activities. Meanwhile is clearly evidenced a growing interest for nature-based activities.

Regarding the tourist demand of 2013, it ranges from 150 – 30,000 arrivals⁶.

There are several factors influencing:

- The size of the enterprise
- The number of services provided
- The seasonality
- Localization
- Prices

There are different data regarding the trend of demand during the last three years. The number of tourist operators who claim to have reduction in demand approximates the number of operators that claim to have increase in demand. A considerable number of the interviewed believe that the tourism demand is expected to grow into the future.

Despite the current number of NBA users, is clearly evidenced a growing interest for nature based activities. The institutional level of managing resources (motorboats moratorium law) had a significant influence in the nature based activities market, especially in boating for tourist purposes. With the abolition of this law, the interest and the possibility of the tourism operators are going to be higher and the majority of them are planning to offer these services in the future. On the other hand, the application of direct marketing as the main form of marketing used by commercial operators and associations and organizations has led to limited information of the nature-based activities, especially for the regional and international market.

4.2 Prices and costs

⁶ The minimum and the maximum number of tourists registered by each tourism operator during 2013



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 shows 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 a high 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 the hotel, the tourists find more appropriate buying them not separately, but by the same operator.

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

While, the average expenditure of the tourists varies according:

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

4.3 Seasonality

Tourist arrival in Vlora has mostly seasonal pattern. According to the data available collected from the questionnaires, it is seen that 62 per cent of the tourist businesses operate during the four peak-months, beginning June and including July, August and up to September. Only 38 per cent of the operators interviewed declare that their activity is extended throughout the year.

This is related to the domination of the sea tourism, whose inputs can be used only in the summer season.

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

Analyzing the category of tourism businesses operating all over the year, we can clearly conclude that there are several factors influencing:

- Diversification of tourism supply

A large number of services provided by the operators and a diverse range of these services, create greater possibility for the demand to have a longer extent of time.

- The type of main activity

A distinction was made between the hospitality enterprises and all other kind of enterprises. All associations and organizations providing NBA as their main activity operate all over the year.



While enterprises having hospitality as their main activity, they are divided in two categories: those who have seasonal activity and those who operate all over the year.

- Geographical distribution of subjects

The subjects that operate in Jonufer-Rradhime and Orikum 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 determination the viability of investment in hotels and nature based activities given that the duration of use is limited to short period. Is this why tourism operators offering complementary activities mentioned above have greater financial opportunities to invest and increase the rate of occupation.

4.4 Employment

Human resources in tourism sector in 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 shows a low number of employees during the year and a number of employees doubled or tripled in the peak season. Their number varies according to the size of the business, the number of services provided, period of activity, classification, etc. Anyway, the minimum number of employees is 0 and 1, while the maximum is 30 to 45, respectively in the low and high season. The average number varies from 10 to 13 in the low and high season.

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

NBA operators support their activity by a small number, which are generally member of the association or organization and in the case of the commercial subjects; they should meet specific professional requirements related to the type of the activity (sport, adventure, boating, etc.).

4.5 Revenues through nature based tourism

The analysis of the actual revenues from tourism, as a whole, indicates that there is reluctance in providing information regarding revenues. One third of the interviewed didn't fill this question of the questionnaire. Only four of the total numbers of the subjects are nonprofit organizations. For the other part the revenues vary in a range from 420,000 ALL (3,000 €) to 40,000,000 ALL (280,000 €).

The operators with the high level of revenues use a part of them to invest in expanding the activity and in this context they represent the most wider category of tourism operators interested in offering nature based activities for their tourists.



Hotels providing NBAs consider additional revenue from these activities, that is added to the revenues of the main activity and the other services offered.

If we take each of the NBA as an independent activity, then the current revenue (which is based on different prices for different subsets of visitors: lower when are customers of hotels and higher when are users of just one activity) seem to be the highest compared to single charge based revenue.

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



CONCLUSIONS

After a thorough examination of Tourism Operators in the area of Vlora Bay with a special focus on the activities and services that this operator's offer in relation with Karaburun-Sazan MPA, the research team comes with conclusions in three related areas. These areas represent also the main questions raised at the beginning of the study and the need for more quality information especially focussed on NBAs. First of all, the activities of TOs in general and then especially NBAs are described. Secondly, types of tourists and problems related to the market of these services are identified. The third area relates to need for planning and sustainable tourism activities in the MPA.

In relation to 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 MPA Karaburun-Sazan and its natural resources depend on the well-being of the tourism industry that also threatens it.
- 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, motor cruising and guided walking.
- Vlora is a beautiful destination. It offers the perfect environment for a selection of NBA able to satisfy both locals and visitors alike. Soar over Adriatic and Ionian seas, vast forests, alpine ranges and much more, create a great opportunity for all potential tourists to experience a scenic flight in Vlora region.
- The number of NBA provided in the geographic area covered is limited. There is a lack of activities and entertainment for all age groups, for example: aquariums, sightseeing tours, farm activities, natural wildlife experience, theme parks, leisure parks, see endangered species in their natural habitats⁷. In the area, there is also lack of other support activities, such as festivals, fairs, etc. But the development of the NBAs is seen from some operators as the only activities that bring people for other reasons other than the sea and sand tourism.
- Perceptions of TOs for the reasons why NBAs are not developed in the area, include lack of demand, and different kind of impossibilities, from financial and human resources, to managerial skills and experience. In fact these reasons must be addressed thoroughly to evaluate if they depend more on perceptions of TOs, or their characteristics and focus on the services.

In relation to market:

⁷These are mentioned as Built Attractions and Facilities to experience the culture and resources of the destination



- Actually there is not enough and satisfactory information about tourists that visit the area. The private sector and also public offices in both municipalities do not have appropriate studies. But, from tourism literature, it is widely accepted that the planning process need accurate data about the tourist market and market studies are needed in this process.
- This study does not aim to identify the market for NBAs, but some information is gathered because the interviewing process and the survey method let qualitative interviews with open questions take place. So, important information is about types of clients that require NBAs, in TOs in Vlora Bay. Some operators state that the area has great potential for attracting foreign tourists, which may be very well the market for NBAs. Some of them are adventurous tourists, or family ones coming with their own facilities, campers, camping tents, parachutes etc.
- The NBAs may very well be an opportunity to reduce seasonality and extend the tourist season, because foreign tourists are coming more in the period May-June and September, because the type of whether conditions needed for NBAs.
- The majority of tourists that require information about types of NBAs are foreign tourists, especially for hiking and guided tours. While national tourist require information for activities such as diving and sporting activities. But further studies are needed about the kind of services required by the market, differences between national and international demand, what these kinds of tourists are lacking etc., in order to attract more incoming tourists in the area.
- There is insufficient marketing activity by the part of operators that provide NBAs. The only way they offer their services, especially those offering local guides of diving and boating tours is on the bases of informal word of mouth communication. There is also lack of marketing practices between operators in the value chain of the tourism market.

In relation to planning

- Actually there is a lack of plan of MPA, and about the sustainable tourism plan, there is more information in the certification report (chapter on strategies). Since there is an on-going process for the development of both plans, the awareness of the population, TOs and all the interested actors about this process should be emphasized. Information and collaboration between stakeholders is a key in this regard.
- The majority of TO don't cooperate with other local stakeholders from the tourism business, nature conservation or cultural sites; meanwhile there have been efforts to increase the level of cooperation with travel agencies, tour operators and other intermediate enterprises for commercial purposes, especially entering in 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 be seen as one opportunity to reduce negative impacts on the natural marine environment, having the potential to contribute to the protection of 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 the NBAs should consider especially the training for different activities. There is 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 the Karaburun-Sazan should be considered from both viewpoints in the planning process. There is negative impact because tourists usually have problems with the access of the Karaburun from the land, because of the legal permeations are very difficult to get. But there is also the positive effect in the nature conservation, which otherwise would have been compromised in the conditions of lack of control over the territory by other authorities. Military base must be part of the planning process.
- The need for higher conservation cost by TO in order to maintain the environment quality. They should not focus only on the area in which they exert their activity, but should consider it as an integral part of their business area.



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ANNEX1: The questionnaire



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:** _____

GPS _____

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 Vlorë 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: _____