

BASELINE ASSESSMENT IN RURAL TOURISM SECTOR



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Executive Summary

The report aims to present an indicator-based baseline analysis specifically targeting the rural tourism sector in Kosovo, assessing its characteristics and identifying the key stakeholders involved in the sector. Desk research and questionnaires were used to deepen the understanding on the state of the rural tourism sector in the targeted municipalities. To further enrich the report, an overview of relevant information from available sources and identification of main actors was conducted. During the desk research process, data on the size of rural tourism destination, number of MSMEs, quality of products and services, attractions, inbound tour operators, satisfaction of visitors/tourists, employment, revenues generated by MSMEs, marketing channels and business environment were collected.

The sample selection process, included tourist accessible entities only. To compile a better list of the core supply side actors, various online platforms have been consulted. The sample size is made of 80 interviews, which were categorized based on the services they provided.

The categorization looks as following:

- 12 accommodation units,
- 5 accommodation & restaurant units,
- 37 restaurant units,
- 4 touristic attractions,
- 5 tour operators,
- 17 wineries

The findings are presented in the report in the forms of a descriptive analysis, and the findings are categorized based on the three targeted regions (Rahovec, Has and Ferizaj). In order to give a more comprehensive and detailed assessment of the significant attributions, difficulties, and potential future prospects each region faces, the regions were all subcategorized in the business/stakeholder categories as indicated above.

Rahovec

The municipality of Rahovec is the largest region in terms of interviewees and it presents a focal point in rural tourism development in Kosovo's southern region, due to its potential in viticultural and oenological business orientation and activities. Generally, *accommodation units and accommodation & restaurants* units are sparse in Rahovec and about non-existent in its surrounding villages. The few operating businesses mainly work during the summer season and have low accommodating capacities; and, because of the seasonal work, they do not employ many regular workers. Generally, the pandemic affected the businesses by halting their business

activities, thus, decreasing their revenue collection. Both units are mainly frequented by local tourists, who in average do not stay more than three nights. Due to the nature of the activities and visitors, only the accommodation & restaurants businesses plan to invest in the following years, but only to replace their inverter. None of the businesses offered any commercial tourism product. All businesses mainly use Facebook to promote their activities, but resolve to accept reservations through other types of channels.

Rahovec has the highest number of restaurant units compared to the two other municipalities, as it is also the largest one among the three. *Restaurants* in Rahovec have their peak season during the months of July and August, much like the accommodation units. The pandemic likewise hit the restaurants, which are part of the gastronomy sector, where they showcased the lowest productivity during 2020. Restaurants mainly offered their services to local tourists, even though they were visited by international tourists as well. None of the restaurants offer any commercial tourism product and their future investments did not include any such product either. Future investments are mainly impeded by the lack of finance. Regarding the currently offered products, restaurants mainly purchase the food from markets/supermarkets and wholesalers, whereas few of them cooperate with local farmers.

Wineries are one of the main business categories in Rahovec, as they are presented as the rural tourism forefront of Rahovec's region. Wineries have their peak season during summer, the grape harvesting time as well, and at the end of the year. Winery representatives agreed that they offer commercial tourism products like wine tasting and tour around the vineyards. They also plan to add new commercial tourism products, but that mainly depends on available financial means. Regarding the workforce, the winery representatives have difficulties recruiting sales agents and handyman, whereas oenologists are lacking the most in terms of skills and knowledge.

Touristic attractions have been identified only in the municipality of Rahovec, where two are cultural and religious heritage attractions, one is a museum house and one a cultural house. The attractions receive both international and local tourists, and none have entry fees for visitors. The tourists visit in person; thus, the representatives do not receive reservations.

The tour operators did not operate in the said municipalities but they organized tours upon request. The main tours they offer include cultural, historical and city-specific tours. Tour operators mainly offered tours to international tourists. Two tour operators highlighted that they want to offer specific rural guided tours and gastronomy guides in the future.

Jezerc

Jezerc is the second largest region, where the development of gastronomical activities – *accommodations and restaurants*, was the primary focus in the study. Accommodation units in Jezerc identify themselves as hostels and are, generally, family-owned businesses, with smaller accommodation capacities and have family members as staff workers. Nearly all units were opened in 2021, that makes them fairly new businesses, which were not struck by the pandemic. None of the accommodations offer commercial tourism products, and the ones who plan to invest in the next two years, plan to invest in additional guest houses.

Restaurant units are the second largest service providers in Jezerc. They are mainly small businesses with low capacities, but served to both local and foreign visitors. The businesses do not offer commercial tourism products, and do not plan to invest in such products in the following years. However, the majority tend to offer authentic dishes as part of their services. Restaurants in Jezerc purchase food products from local shops and local farmers, and are very satisfied with the product quality they get from local farmers.

Fewer accommodation & restaurant units were interviewed compared to accommodation and restaurant units, since they were fewer in numbers. The businesses have small accommodation capacities, but their restaurant capacities are larger. They do not offer authentic dishes nor commercial products, but one of the businesses highlighted that they want to invest in a camping sight.

Has is part of the municipality of Prizren, where interviewees came from the villages of Zym and Gjonaj. In total, five businesses were interviewed, where one was an accommodation unit, and four were restaurant units. *The accommodation* is located in Zym and identifies as a guesthouse. The guesthouse's visitors were mainly foreign visitors, and depending on the season, it increases the room/house price. Tourists averagely stay for two nights. The representative said they plan in building another guesthouse in the following years. *The restaurants* in the Has region generally have small capacities, and do not offer any commercial tourism products. Half of them plan to invest in the following years, but only in inverter replacement and renovation. Only one of the businesses purchases food from local farmers. The restaurants include authentic dishes to some extent in their offer and they are not interested to improve the offers to reflect authentic elements.

Methodology and Work Plan

- *Background and Context*

Rural tourism is defined as tourism in rural areas where households have a direct influence and can support the nation's economy expand sustainably.¹ This kind of tourism aims to give the traveler close encounters with the environment so they can have personal experiences and deeper engagement. Rural tourism plays a vital role in holding the optimal population in villages, thus, preserving the dynamism in appealing locations and stopping migration and brain-drain². The contributor of growth for the development of rural tourism in a given community or area is the presence of appealing tourist resources, such as scenic locales, cultural and historical sites, special folklore, folk traditions, crafts, and others.³

- *Purpose and Scope of the Evaluation*

¹ Lulcheva, Ivanka; 2018; "Opportunities for the development of rural tourism in small settlements"; http://managementjournal.usamv.ro/pdf/vol.18_2/Art37.pdf

² Cucovic, Anita; 2020; "Rural tourism as one of the strategies for sustainable economic development of Kosovo"; Source: <https://ikm.mk/ojs/index.php/kij/article/view/1069>

³ PPSE; 2020; "The Dimensions of Tourism Development in Kosovo"; Source: <https://ppse-kosovo.org/the-dimensions-of-tourism-development-in-kosovo/>

The project presents an indicator-based baseline analysis specifically targeting the rural tourism sector in Kosovo, assessing its characteristics and identifying the key stakeholders involved in the sector, that are significant to the project. Desk research, questionnaires and in-depth interviews have been used to deepen the understanding on the situation of the rural tourism sector in the targeted municipalities, and, in turn, open up to new interpretations and potential modifications regarding the project indicators.

- *Methods of Data Collection Stage*

The main tasks for the Methods of Data Collection included the overview of relevant information from available documentation and identification of main actors. During the desk research process, information on the size of rural tourism destination, number of MSMEs, quality of products and services, attractions, inbound tour operators, satisfaction of visitors/tourists, employment, revenues generated by MSMEs, marketing channels and business environment have been collected. After drafting of questionnaire, followed the coding stage in the survey instrument (Kobo Toolbox).

- *Field Work Stage*

The field work stage included 80 interviews, with key actors like cultural house representatives, restaurant and accommodation owners, tourism agencies and tour operators, artifacts workers and winery representatives. A variety of stakeholders from the private sector have been targeted in order to analyze the indicators from a multi-faceted point of view, which is beneficial to the integration of MSMEs in the tourism sector.

The list on the number of interviewees and sectors in each municipality is presented below.

Sample (Surveys) - FEGO							
<i>Municipality</i>	Accommodation & Restaurant	Restaurants	Accommodation	Tour Operators	Touristic Attraction	Winery	Total
Rahovec	2	24	2	4	4	17	
Jezerc - Ferizaj	3	9	9	1	0	0	
Zym & Has - Prizren	0	4	1	0	0	0	
Total	5	37	12	5	4	17	

Limitations

This section offers an overview of the limitations in the municipalities where this research study took place.

Limitations in Rahovec:

- Low willingness to participate in the study from a large number of respondents from the winery sector due to the grape harvest season.
- Outdated contact details of businesses in the Kosovo Business Registration Agency (KBRA) were not working.

- Restaurants were operational only during summer months and not when the study took place.
- Generally, low willingness to participate in the study due to lack of information related to the project and the benefits of participating in it.
- A great number of wedding halls registered in the KBRA as restaurants.
- Confusion related to municipality location of certain restaurants that were on the border line of Rahovec and Gjakove.
- Lack of accommodation in Rahovec and surrounding villages.
- Low usage of social media; hence difficulties reaching the businesses.

Obstacles in Has - municipality of Prizren:

- Lack of accommodation in the villages of Has (Zym, Gjonaj, Romaje, Krajk)
- There were more cafeterias than restaurants
- Generally, low willingness to participate in the study

Obstacles in Jezerc- municipality of Ferizaj:

- The owners of the villas are usually in the villas only during the weekend; hence it was a challenge to reach out to them

Municipality of Rahovec

Rahovec is a town and municipality in the south-west territory of Kosovo and it has a rich history, dating from the period of Roman Empire. Rahovec is known for its scenic vineyard sights, and its tradition and culture for winery. Based on the 2021 population assesment⁴, Rahovec has approximately 57,575 inhabitants, where the majority (40,300) live in rural areas and the rest (15,900) live in the urban area. Rahovec as a municipality has a total of 35 villages within its directorate and the town of Rahovec as an urban area.

Rahovec lays in the Dukagjini Plain and is characterized by three microregions, the valley region, the hilly region and the mountainous region, which offer a mix of climate, altitude, hydrological properties, pedological properties and biodiversity, making Rahovec a suitable municipality for the development of agriculture, specifically viticulture and horticulture. About 65% of the population is estimated to live from agricultural activities.⁵

The municipality showcases an intertwining of cultures throughout the centuries, where there can be found remnants of Roman, Illyrian, Slavic and Ottoman periods. Viticulture and oenology are tightly connected to Rahovec's identity, where oenological artifacts were founded in 1953, dating since the 5th century B.C. Of significance is the bronze elephant statue, which is the symbol of the

⁴ ASK, 2021, "Vlersimi i Popullesise 2021", link: <https://ask.rks-gov.net/media/6873/vlersimi-i-popullesise-ne-kosove-2021-final.pdf>

⁵ Municipality of Rahovec, n.d., "Geographical position", link: <https://kk.rks-gov.net/rahovec/qyteti/pozita-geografike/>

wine cellar ‘Bodrumi i Vjeter’. Grape cultivation and wine production followed through until the Ottoman Empire period, when production and selling of alcoholic beverages was prohibited. During the Former Yugoslavia period, the oldest winery cellar, ‘Bodrumi i Vjeter’ was rebuilt, and Kosovar wines reached even the German markets at the time. After the ’99 period, wine production shut down and it started again the last decade.⁶

Due to its many villages, Rahovec has a variety of archeological settlements and artifacts dating from prehistoric times, including churches, graveyards, thermal baths, fortresses, tekkes, mosques, towers, fountains, monastery, bridges and mills.⁷ In the municipality, there are two areas that have a special character of protection, the Monastery of Zoqishta and the village of Hoqë e Madhe.⁸ The region is also known for the canyon of White Drini river, a natural monument protected by law, on top of which is an ottoman bridge, Ura e Fshajt.

One of the most important cultural events organized in Rahovec is the Hardh Fest Festival, also translated as Harvest Festival, which ties together the viticultural, gastronomic, ethnical and cultural characteristics of Rahovec’s region. The festival has been organized since 2001 and it spans out in a three-day period, where wineries, farmers, locals and tourists gather to revel on the goods and abundance that Rahovec has to offer.

Some of the activities that are part of the festival are Hardh Talks, a marathon, music performances from renowned foreign and local artists, carnival, train tours, the ceremony for the best wine and winery, camping, grape harvesting and traditional pressing of grape, traditional wine production techniques, and wine tasting. Among others, Hardh Fest aims to promote the historical and religious attractions of Rahovec, where tours around the main attractions include the Tekkes of Halveti, Rifai and Melami, Clock Tower, Wine House, Towers of Toni & Mici and Apterushe, and Ura e Fshajt⁹. Altogether, Hardh Fest is considered as the main activity that promotes the region and increases tourism.¹⁰

Survey findings

This section reveals the main findings generated from the survey with core tourism actors, including accommodations with restaurants, accommodations, restaurants, attractions, tour operators, and vineyards.

The findings capture various aspects, such as: the general structure of core actors; composition of guests; turnover changes across years when applicable; employment-related matters; type of services offered; and online presence.

⁶ Komuna e Rahovecit, n.d., “Wine Tourism in South of Kosovo”

⁷ Ministry of Culture, Youth and Sports, 2021, “Lista e Trashegimise Kulturore te Perkohshme”, link: https://www.mkrs-ks.org/repository/docs/Vendimi_me_regjister_2021-2022.pdf

⁸ Ibid

⁹ Hardh Fest, 2022, “Programi”, link: <https://hardhfest.com/wp-content/uploads/2022/08/PROGRAMI-SHOIP-1-1.pdf>

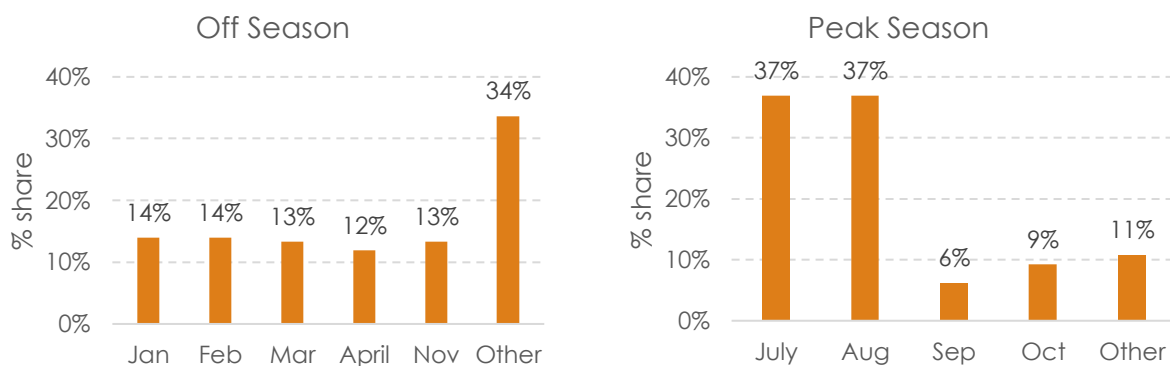
¹⁰ Insajder, 2019, “Ne konak te Rahovecit cdo gje gati per Hardh Fest”, link: <https://insajderi.com/ne-konak-te-rahovecit-cdo-gje-gati-per-hardh-fest/>

Restaurants

The municipality of Rahovec had the highest number of restaurants compared to two other municipalities surveyed in this research study. The position of interviews was mostly managerial where the vast majority (17 people) were owners of the restaurant and 7 of them were managers. All of them were male, and there was no female owner or manager among all 24 respondents of restaurants unit in Rahovec.

These 24 restaurants in Rahovec were located in different locations, however 7 of them were in the village of Xërxë and another 7 in the city of Rahovec, 3 in the village Fortesë, 3 in the village Krushe e Madhe and so on.

In terms of peak season, around 74 percent of the respondents reported that summer months July and August were their most active months, followed by October with 9.2% and September with 6.2%. Whereas, in terms of the off season, January and February were reported to be the most inactive months (14 percent per each), followed by March and November with 13.3 percent each, and October with 10.5 percent each.



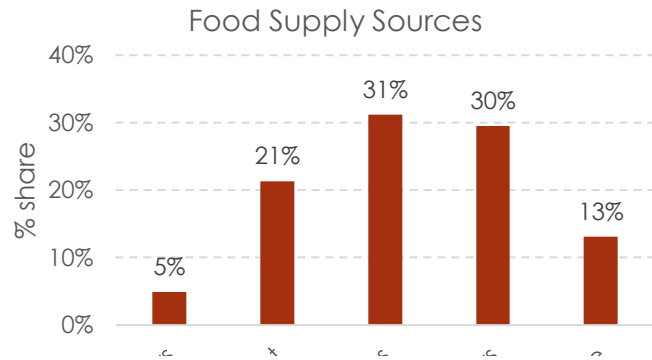
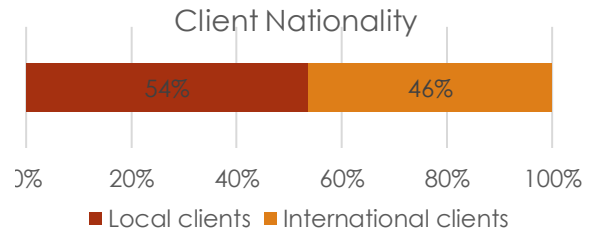
Restaurant capacities and clientele

The restaurants in the municipality of Rahovec have on average 101 seats available. In terms of average number of clients per year, there was a slight increase in year 2020 compared to 2019, and a significant annual increase of more than 200 percent in year 2021, which can be partly explained by the COVID-19 related containment measures which limited the economic activity of the hospitality sector.

Average number of seats available	101
Average number of clients in 2019	8,268
Average number of clients in 2020	8,579
Average number of clients in 2021	26,750

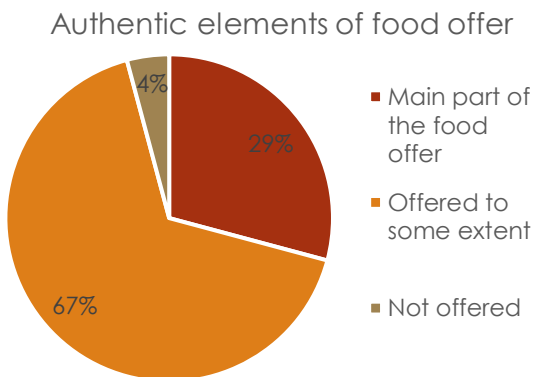
In terms of client composition, on average, the composition of clients based on nationality is slightly more skewed towards local clients.

It is worth noting that none of the restaurants offer other tourist attractions (such as cycling, horse riding, etc).



In terms of food supply sources, only 5 percent of the restaurants receive products from local producers/ farmers. The majority of them 31 percent are supplied from local stores/supermarkets, and another 30 percent

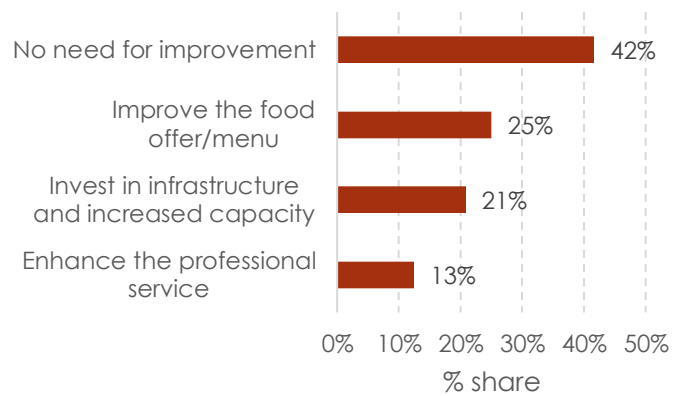
from wholesalers.



A restaurant's food choice is typically seen as a significant element that must represent the unique characteristics of the location in which it operates. 67 percent of the respondents stated that their food offer reflects to some extent the authentic elements of the destination in which they operate in, followed by 29 percent others who said that it is a main part of the offer and a 4 percent who said that they are not offered.

On another note, related to measures needed to improve the offer in order to more closely reflect the authentic elements of the destination they operate in, the majority (42 percent) stated that there is no need for improvement. The remaining proposed some strategies. For instance, 25 percent of the respondents stated that they need to improve the food offer/menu, 21 percent of them said that they need to invest in infrastructure and increase the capacities and 13 percent of them stated that they need to offer better professional service.

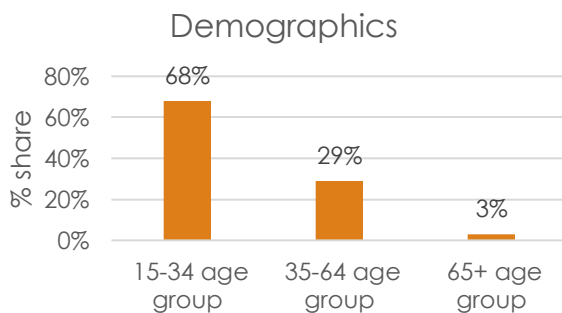
Elements to offer a more authentic experience



Employment

In terms of demographic characteristics of employees, male workers dominated with 89.2 percent of all workers. Likewise, the majority 78.3 percent worked full time.

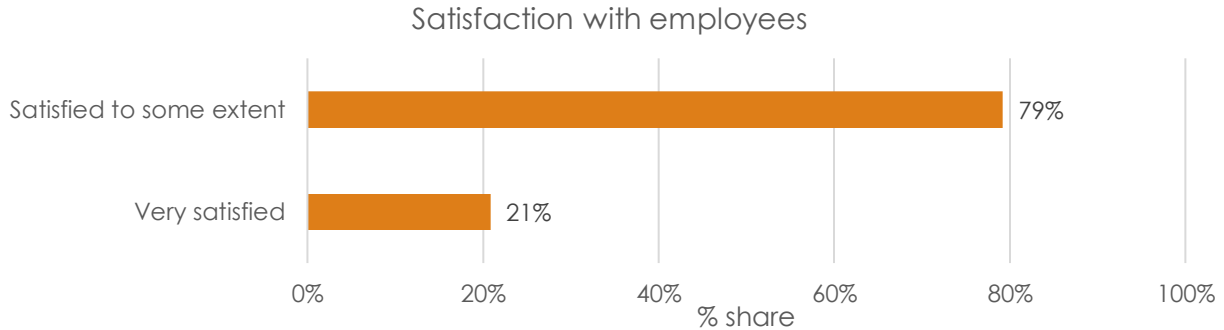
Total Number of Employees for sample	166
Average number of employees	6.9~7
<i>of which Female</i>	10.8%
<i>of which Male</i>	89.2%
Full time workers	78.3%
Part time workers	0.6%
Seasonal workers	21.1%
Average Salary	298 €



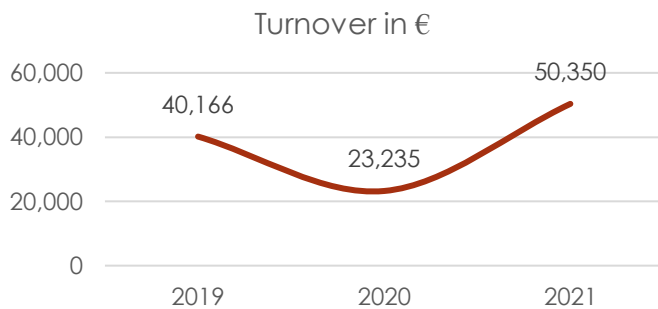
As per age group, those falling in the range 25-34 years of age constitute the majority with 68 percent, followed by 29 percent belonging in the 35-64 age group, and only 3 percent in the 65+ age group.

In terms of ethnic background all workers were Kosovo Albanians as no other ethnicities were reported.

Whereas, in terms of how satisfied businesses are with the employees, 79 percent of them are satisfied to some extent, while only 21% are very satisfied with them. The respondents believe there is a need for improvement of skills and knowledge, especially in the roles of the waiters and chefs.



Turnover and Investment



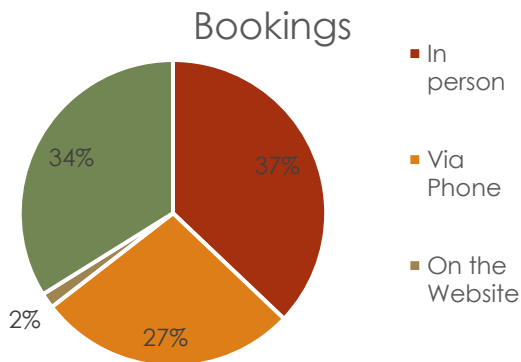
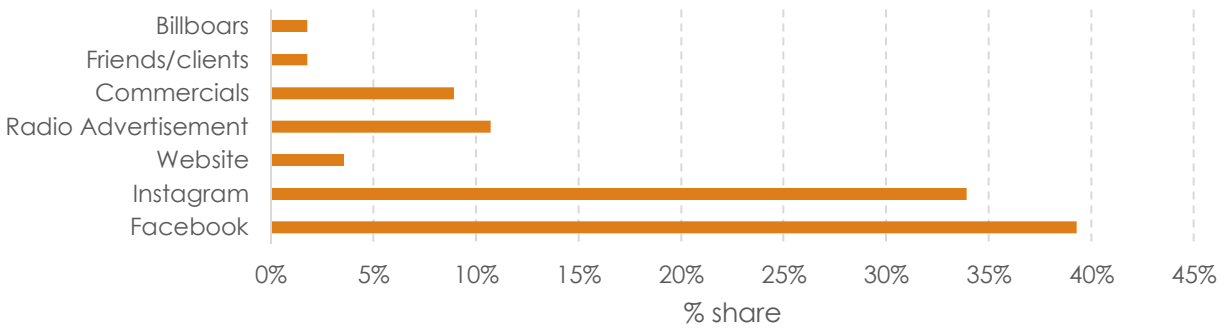
When asked about turnover, only a small number of respondents refused to answer. Turnover trends have been upward sloping, with the exception of year 2020. On average, turnover in year 2021 has been around 50 thousand euros, more than double of that reported in 2020.

Whereas, in terms of future investments, the majority 79 percent stated that they will not have investments in the near future mainly because of lack of finances, followed by the fact that some of them have already had investments in the past.

Promotional Activities

Businesses in the restaurant sector have listed Facebook and Instagram on top of the list when asked about the most effective channels that they have used to promote their businesses. Following Facebook and Instagram, radio advertisement and commercials are also seen as effective channels for promoting the restaurants.

Most effective channels for promotion



As per bookings, the most used means of booking is in person (37 percent), followed by bookings made through online platforms (34 percent), and those via phone (27 percent).

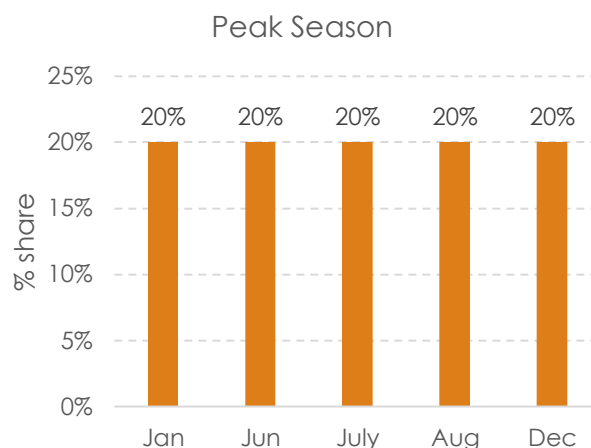
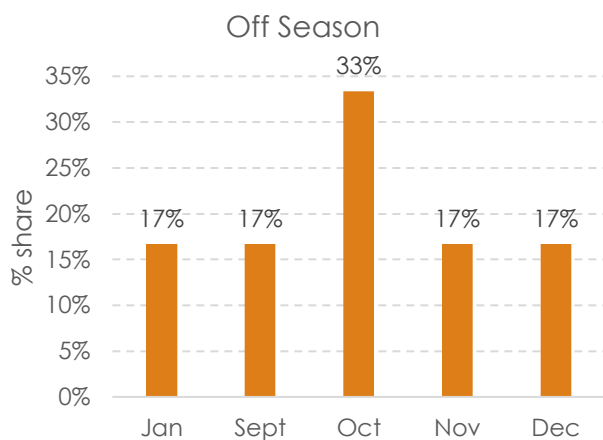
Whereas, in terms of common complaints from customers, the majority of the respondents stated that there are no complaints (around 46 percent) and that there are complaints related to delayed service (around 46 percent).

Accommodations with restaurants

Restaurant and accommodation unit was a sector in itself. In this sector, businesses that have both restaurant and accommodation were interviewed. In Rahovec, only two service providers of this kind were identified, where one was a hotel apartment/Airbnb and the other was a hotel.

In terms of peak season, there were five months reported, but none of them had a significant difference from the other. These months reported as part of the peak season were: January, June, July, August, and December.

Whereas, in terms of the off season, October was reported to be the most inactive month (33 percent), followed by January, September, November, and December with 17 percent each. While it is noted that January and December are reported as both part of the peak and off season, these data need to be taken with caution considering that the sample size was very small for this type of businesses.



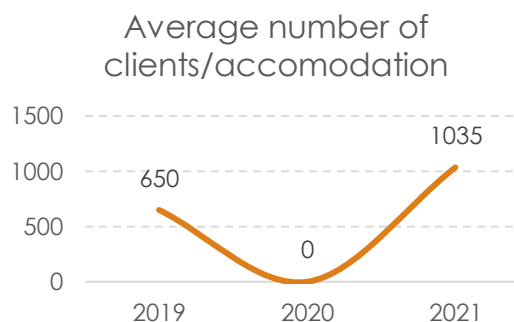
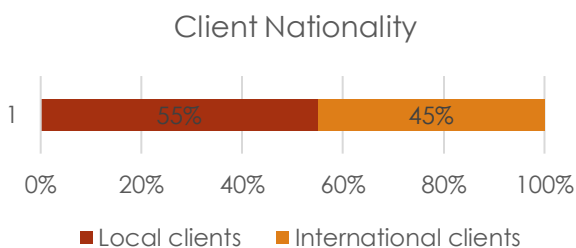
Accommodation capacities and clientele

The average number of rooms in accommodations with restaurants in Rahovec was 16, and the capacity per night was 38 on average.

The average price for a room was 20 € and the average occupancy rate was 60%. In comparison with the other municipalities for this category, the average number of nights per client is considerably higher in Rahovec (6 nights on average per client).

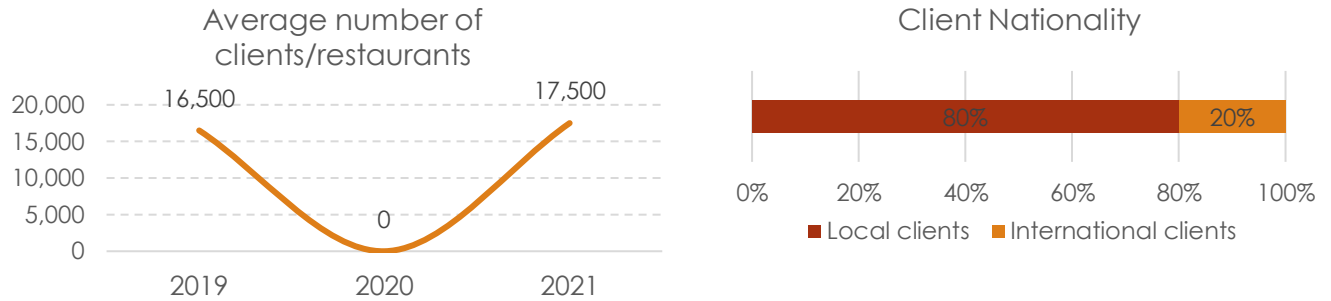
Average number of rooms	16
Average capacity per night	38
Average price per room in €	20
Average occupancy rate	60%

In terms of clients, year 2020 was considered an outlier since all respondents stated that they had no clients at all, in line with COVID-19 containment measures that limited economic activity for the hospitality sector. Whereas, in year 2021 there was an increase in the number of clients compared to year 2019.



Restaurant capacities and clientele

On average, the restaurants have a capacity of 175 seats. In terms of clients, year 2020 was considered an outlier since all respondents stated that they had no clients at all, in line with COVID-19 containment measures that limited economic activity for the hospitality sector. Whereas, in year 2021 there was only a slight increase in the number of clients compared to year 2019. In terms of client nationality, the majority of the clients in the restaurant site were local (80 percent).

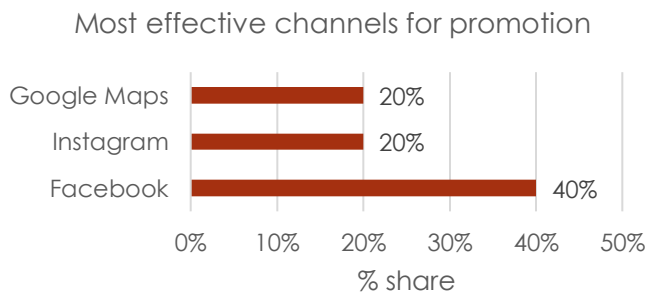


Employment

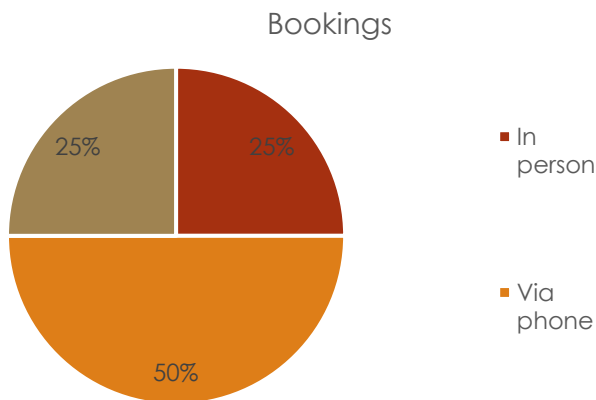
The majority of the employees were male (70 percent) and all of them worked full time. As per age group, those falling in the range 25-34 years of age constitute the majority with 63 percent, followed by 33.3 percent belonging in the 35-64 age group, and only 3.7 percent in the 65+ age group. In terms of ethnic background all workers were Kosovo Albanians as no other ethnicities were reported.

Total Number of Employees	27
Average number of employees	13.5 ~14
of which Female	30%
of which Male	70%
% of seasonal workers	59.3%
% of workers in the 15-34 age group	63.0%
% of workers in the 35-64 age group	33.3%
% of workers in the 65+ age group	3.7%

Promotional Activities



Businesses in the accommodation with restaurant sector have listed Facebook and Instagram on top of the list when asked about the most effective channels that they have used to promote their businesses. Following Facebook and Instagram, google maps is also seen as effective channel for promotion.



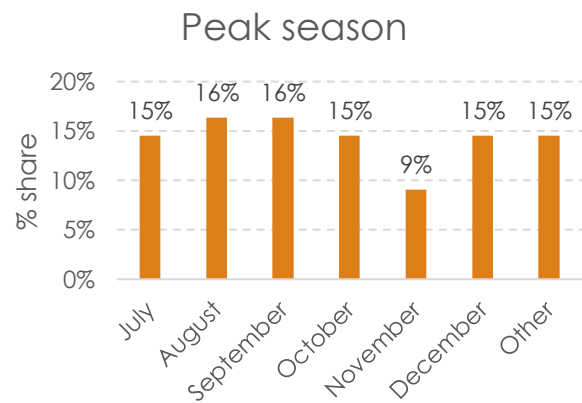
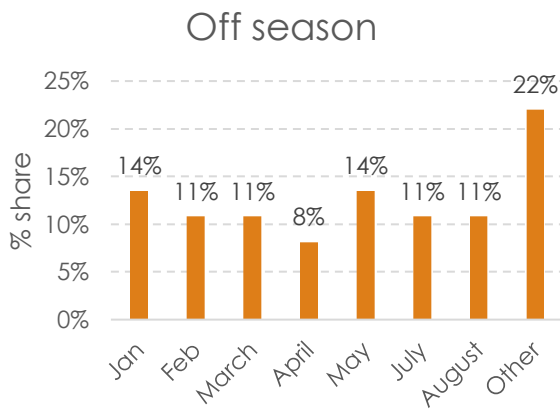
As per bookings, the most used means of booking is via phone (50 percent), followed by bookings made through online platforms (25percent), and those in person (25 percent).

Wineries

On total, 17 interviews were conducted with winery sector representatives in the Rahovec municipality. All interviews were held with people in managerial positions, where 5 were founders, another 5 were owners, 4 were managers, 2 were co-founders and one was a director and all of them were male. All wineries were located in Rahovec.

In terms of peak season, there were six months reported, August and September were the most active months, followed by July, October, and December.

Whereas, in terms of the off season, January and May were reported to be the most inactive months (14 percent per each), followed by February, March, July, and August with 11 percent each.

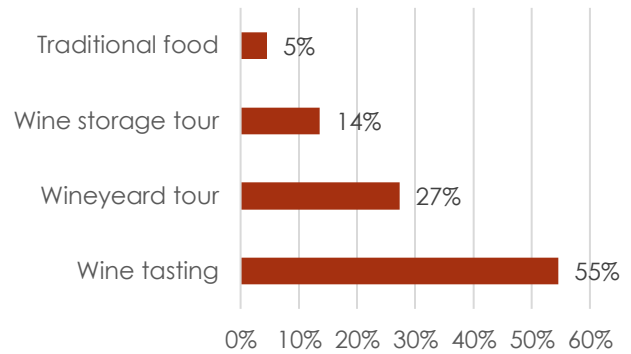


81 percent of the respondents stated that they do offer commercial tourist products besides selling wines. Out of these touristic products, wine tasting was the lead attraction, followed by tours around the vineyard.

The average price for these touristic products was reported to be 12.4€. However, the maximum price was 30€ and the minimum was 2€, whereas the majority were around 10-15€.

The average number of clients increased year-on-year during the period 2019-2021, however the numbers should be viewed with caution considering that the response rate for this question was very low for year 2019 and 2020, which mainly explains the lower number of clients reported. In terms of client nationality, the majority 65 percent were international clients.

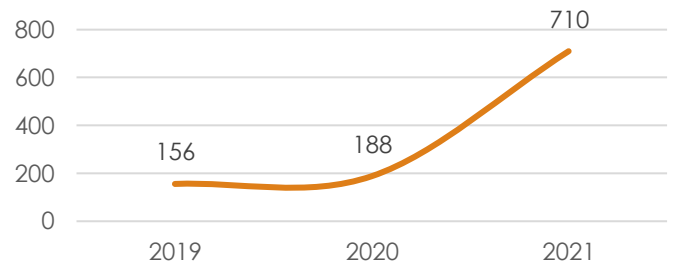
Touristic Products



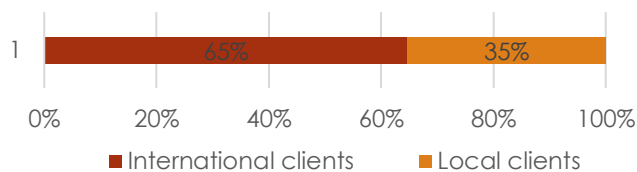
0% 10% 20% 30% 40% 50% 60%

the numbers should be viewed with caution

Average number of clients

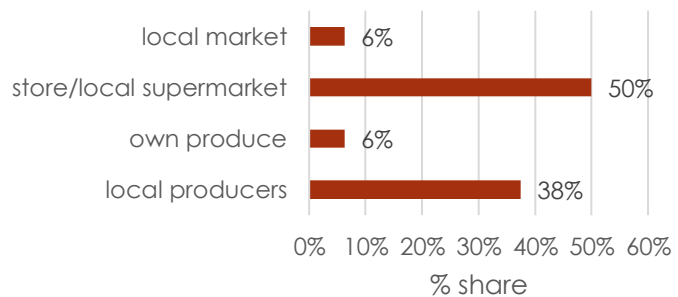


Client Nationality



In terms of food supply sources, the majority (50 percent) were supplied by the store/local supermarket, while a significant percentage (38 percent) were supplied by local producers/ farmers. The products supplied from these farmers were mainly dairy products and meat products. Out of those that are supplied from local farmers, 71 percent of them were very satisfied with the quality of products and 29 percent were satisfied with the products.

Food Supply Sources



0% 10% 20% 30% 40% 50% 60%
% share

Employment

The majority of the employees were male (74.4 percent) and the majority of all employees worked full time (92.5 percent) followed by seasonal employees and part-time employees.

As per age group, those falling in the range 35-64 years of age constitute the majority with 47.5 percent, followed by 46.1 percent belonging in the 15-34 age group, and only 6.4 percent in the 65+ age group.

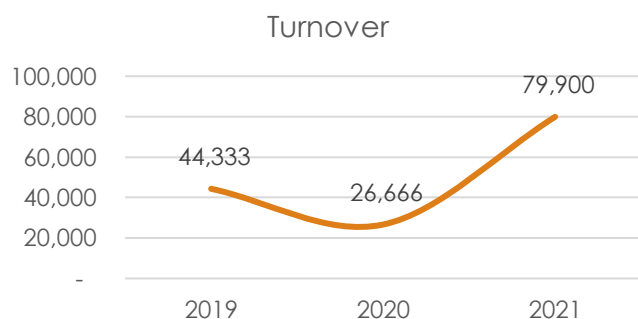
In terms of ethnic backgrounds, the majority of the employees are Kosovo Albanians, however two of the respondents stated that they have employees of the RAE community and one of the respondents stated that it has employees from the Serbian community.

Whereas, in terms of positions where an improvement of skills is needed: management skills, technological skills related to wineries; and sales. Whereas, related to positions that they have more difficulties in recruiting, simple workers-groundskeepers are more difficult to recruit, followed by sales agents.

Average salary reported by the respondents was 375€.

Total Number of Employees	360
Average number of employees	21
of which Female	25.6%
of which Male	74.4%
Full time employees	92.5%
Part time employees	2.2%
Seasonal employees	5.3%
% in 15-34 age group	46.1%
% in the 35-64 age group	47.5%
% in the 65+ age group	6.4%
Average Salary in €	375

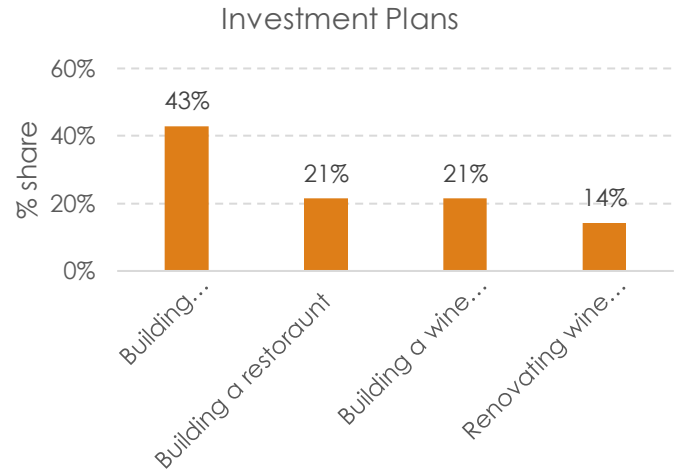
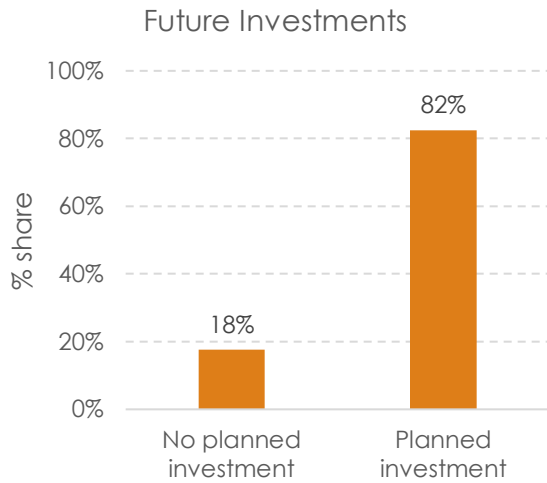
Turnover and Investment



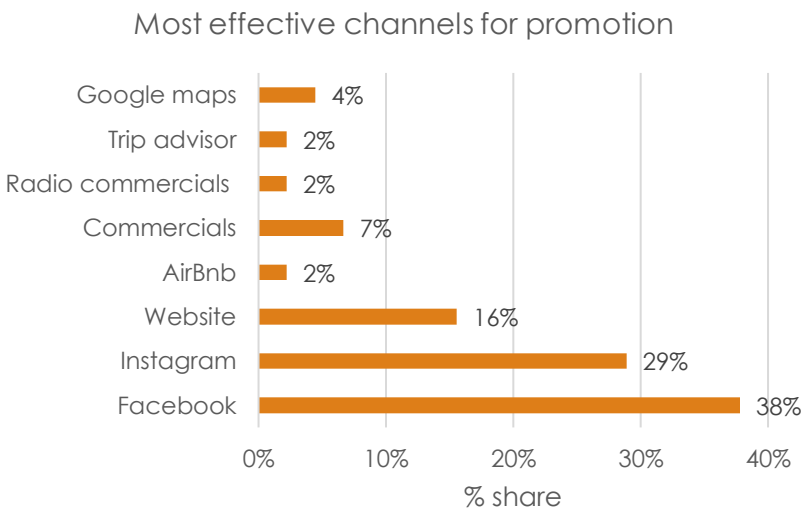
When asked about turnover, only a small number of respondents answered for year 2019 and year 2020, while for 2021, the response rate was higher. Thus, the data needs to be viewed with caution. Turnover trends, however, have been upward sloping, with the exception of year 2020. On average, turnover in year 2021 has been around 80 thousand €.

In terms of investments, the majority plan to invest (82 percent), and these investments are mainly planned in terms of building an accommodation site (43 percent), building a restaurant and a wine

cellar (21 percent, each), and renovating the wine tasting space (14 percent). Whereas, those who do not plan to invest, mainly name the lack of finances as the reason for not investing.

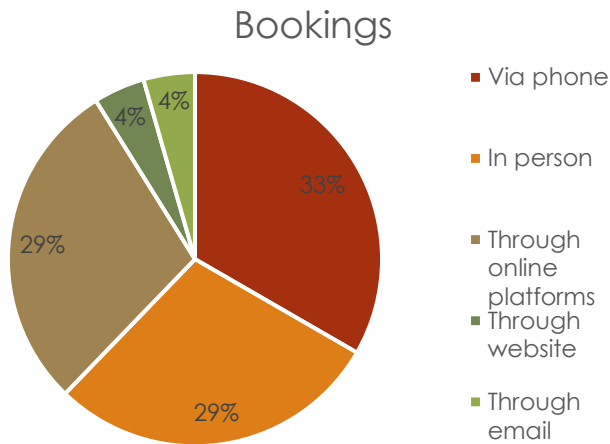


Promotional Activities



Businesses in the winery sector have listed Facebook and Instagram on top of the list when asked about the most effective channels to promote their businesses. Following Facebook and Instagram, google maps is also seen as effective channel for promotion. Websites and commercials follow Facebook and Instagram, while other platforms are not significantly rated as effective.

The majority of the respondents (76 percent) do take reservations in the aforementioned platforms. Whereas, in term of cooperating with other operators, the majority (88 percent) stated that they have no cooperation at all.



In terms of bookings and how are they received, bookings via phone are dominant with (33 percent), followed by in person bookings (29 percent) and through online platforms (29 percent). Websites and emails are used to a lesser extent.

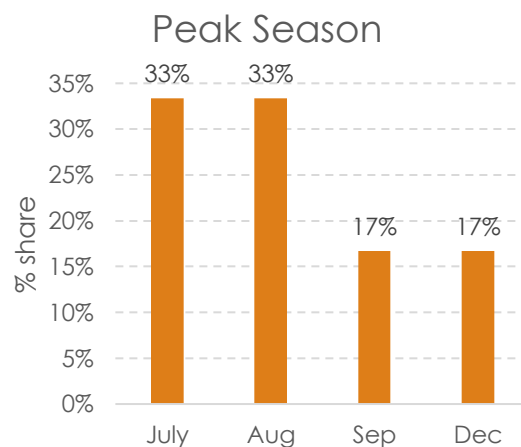
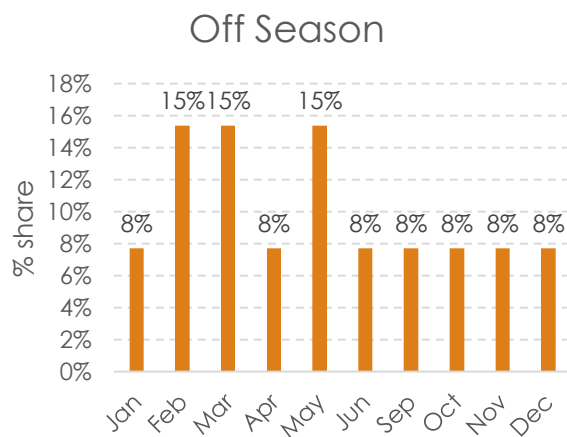
Whereas, related to customer complaints, the majority stated that they have no complaints (65 percent). While those that did have complaints, they were related to more innovative products/older wines.

Accommodation

Two representatives of accommodation sector were interviewed in Rahovec region. The people interviewed have managerial roles in their business where one was a founder and the other one was a manager. One of the respondents was male and another one was female. Both accommodations were located in Rahovec.

In terms of peak season, there were four months reported, July and August were the most active months, followed by September and December.

Whereas, in terms of the off season, February, March and May were reported to be the most inactive months (15 percent per each).



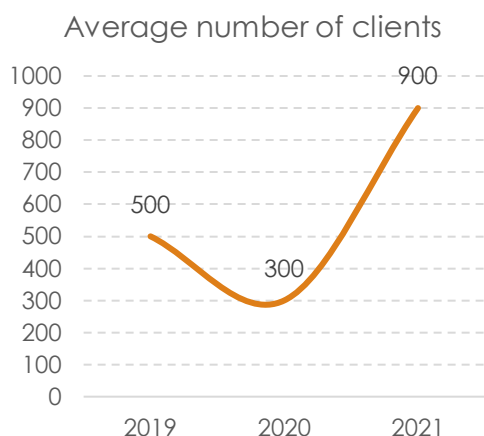
Accommodation capacities and clientele

Both of the accommodation units in Rahovec stated that they identify as hotels.

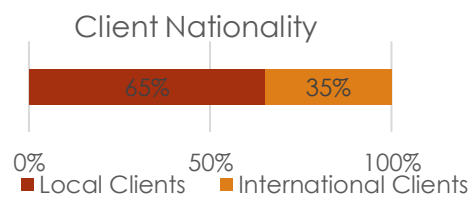
The average number of rooms in accommodations in Rahovec was 10, and the capacity per night was 33 on average.

The average price for a room was 28 € and the average occupancy rate in 2021 was 35 percent.

Average number of rooms	10
Average capacity per night	33
Average price per night	28
Occupancy rate 2021	35%
Average number of nights per client	2



The average number of clients increased year-on year during the period 2019-2021, with the exception of year 2020 during the pandemics related measures. In terms of nationality, local clients were more predominant with 65% of all clients.



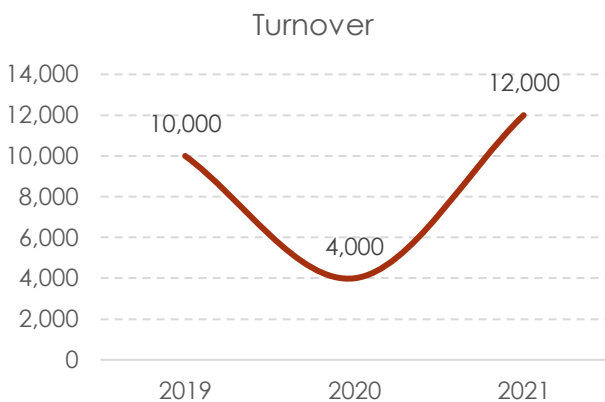
Employment

The majority of the employees were male (75 percent). While looking at a different distribution, the majority of all employees worked as seasonal workers (63 percent) followed by full time employees.

As per age group, those falling in the range 35-64 years of age constitute the majority with 81 percent, followed by 19 percent belonging in the 15-34 age group, and no workers in the 65+ age group. In terms of ethnic backgrounds, all the employees are Kosovo Albanians. Average salary reported by the respondents was 300€.

Total Number of Employees	16
Average number of employees	8
of which Male	75%
of which Female	25%
Full time employees	38%
Part time employees	0%
Seasonal employees	63%
Share of employees 15-34 age group	19%
Share of employees 35-64 age group	81%
Share of employees 65+ age group	0%
Average Salary	300 €

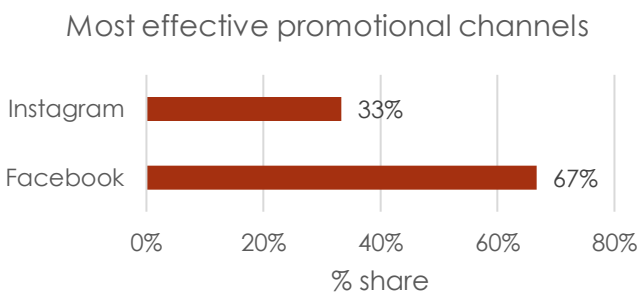
Turnover and Investment



When asked about turnover, only one of the respondents answered. Thus, the data needs to be viewed with caution. Turnover trends, however, have been upward sloping, with the exception of year 2020. On average, turnover in year 2021 has been around 12 thousand euros.

In terms of investments, the respondents did not plan any investments partly because there is no need to invest and partly because they lack finances.

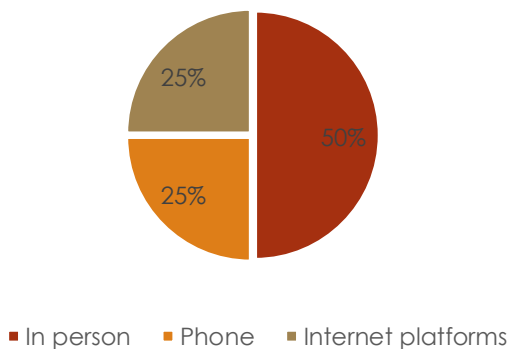
Promotional Activities



Businesses in the accommodation sector have listed Facebook and Instagram on top of the list when asked about the most effective channels to promote their businesses.

In terms of bookings and how are they received, bookings in person are dominant with 50 percent, followed by phone bookings (25 percent) and through online platforms (25 percent).

Bookings

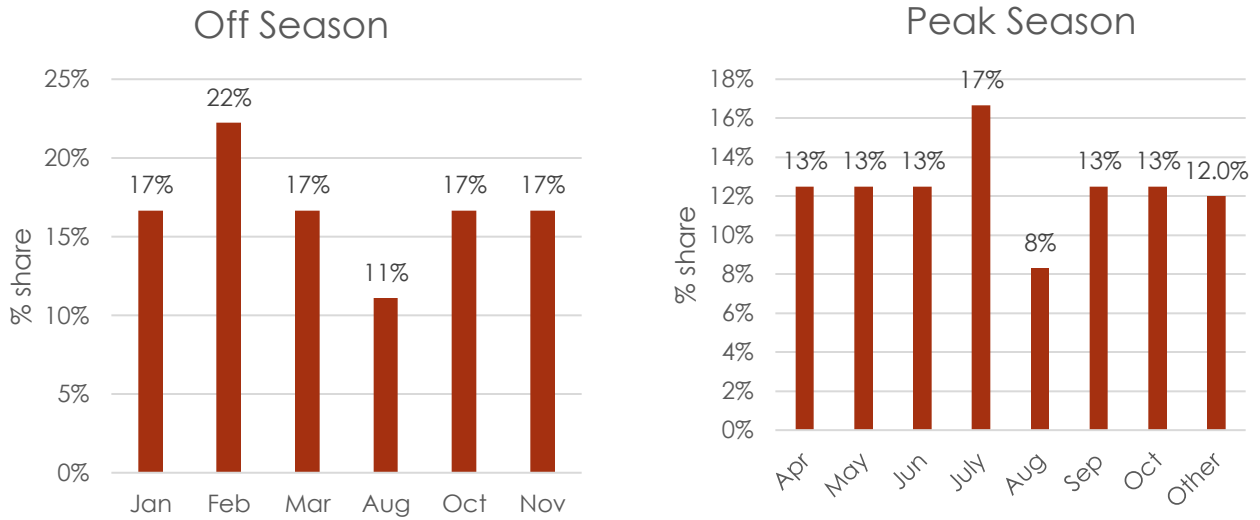


Whereas, related to customer complaints, one of the respondents stated that they have no complaints, while the other said that the complaints were related to the fact that they have no restaurant.

Tour operators

Tour operators were another target group of this study. Although the aim was to identify tour operators that operate in the given municipalities, there were no tour operators. However, the businesses interviewed organize tours in the given municipalities.

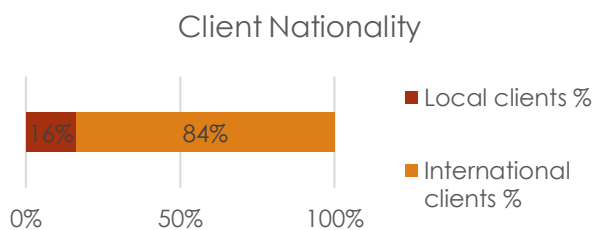
In terms of peak season, there were eight months reported, July, however, was the most active month with 17 percent, followed by other months with 13 percent each. Whereas, in terms of the off season, February was reported as the most inactive month with 22 percent.



All of the tour operators stated that they do offer tours, these included: cultural tours, historical tours, Rahovec vineyards, and trips around Kosovo cities.

Tours

The tour operators reported that on average, they had 15 tours in 2021 and the average price per tours was 50€.



In terms of client nationality, the majority of them were internationals (84 percent). The international clients were mainly American (25 percent), Swiss and English (17 percent each).

Employment

The majority of the employees were male (88 percent) and the majority of all employees worked as full time workers (94 percent) followed by part time employees.

As per age group, those falling in the range 35-64 years of age constitute the majority with 69 percent, followed by 31 percent belonging in the 15-34 age group, and no workers in the 65+ age group.

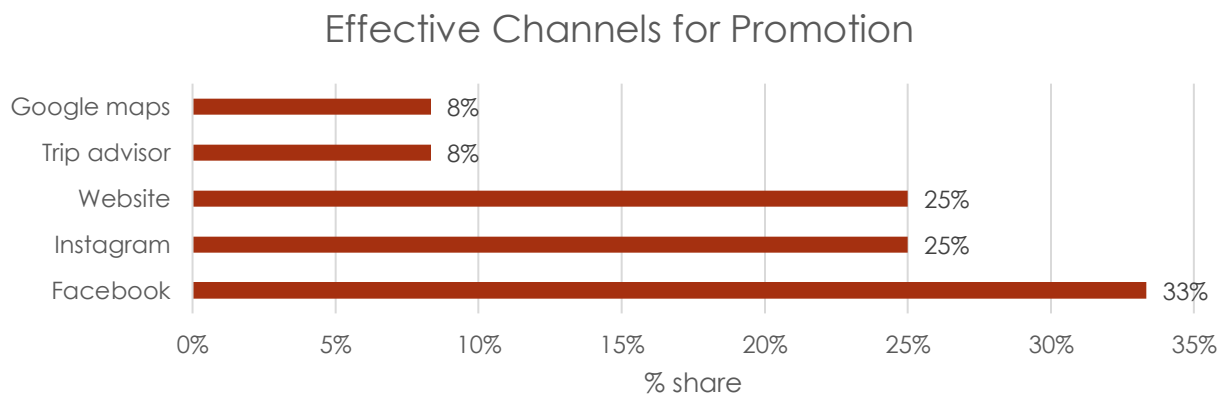
In terms of ethnic backgrounds, the majority of employees are Kosovo Albanians, but there is one Bosnian and one Turk employee in the workplace.

Average salary reported by the respondents was 425€, which was higher in comparison with other sectors.

Total Number of Employees	16
Average number of employees	4
of which Male	88%
of which Female	13%
Full time employees	94%
Part time employees	6%
Seasonal employees	0%
Share of employees 15-34 age group	31%
Share of employees 35-64 age group	69%
Share of employees 65+ age group	0%
Average Salary	425 €

Promotional Activities

Similar to other sectors, tour operators have listed Facebook and Instagram on top of the list when asked about the most effective channels to promote their businesses. Nonetheless, websites were also viewed as effective. Furthermore, the tour operators, unlike businesses in other sectors, did cooperate with other operators: international operators and travel agencies.



Tourist Attractions

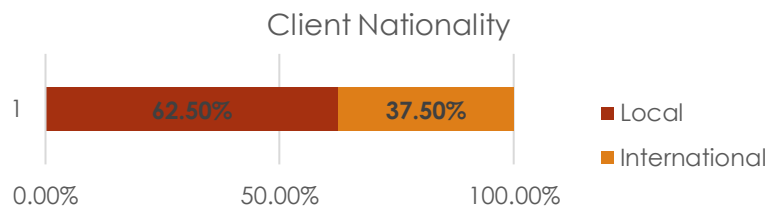
In Rahovec region, 4 touristic attractions were identified. The position of people interviewed in these touristic attractions were supervisors (3 of them) and one was a guide. All of them were male and the location of these touristic attractions was as follows; two of them were located in Rahovec, one of them was located in *Hoçë të Madhe* and another one was located in *Krushë të Madhe*.

In terms of having an off season, the majority (75 percent) stated that there was no off season in their sector and only one respondent (25 percent) named January as the most inactive month. Similarly, even in terms of peak season, (75 percent) declared that there is no peak season, while only one respondent (25 percent) listed summer months, July, August, and September as peak season.

Touristic Attraction

When asked about the type of attraction, 50 percent of the respondents stated that they offer cultural and religious heritage as an attraction, while the other 50 percent stated that they offer a cultural attraction.

In terms of pricing for viewing these attractions, the respondents stated that they do not have an entrance fee, i.e. free entrance.



Related to nationality of clients, the majority (62.5 percent) are local, and 37.5 percent are international. In terms of the most common internationals, German and American visitors dominate.

The number of visitors, year-on-year has had an increasing trend, with the exception of 2020 where respondents stated that they had no visitors at all. Nonetheless, data related visitors should be viewed with caution considering that there are more complete answers only for year 2021, however this should be viewed with caution since one answer in 2021 is an outlier (i.e. 200,000 visitors reported).

Average number of visitors			
Frequency	2019	2020	2021
1	I don't know/Refuse to answer	0	I don't know/Refuse to answer
1	I don't know/Refuse to answer	0	200,000
1	200	0	300
1	50	0	80
average	125	0	66,793

Employment

All of the employees were male (100 percent) and they all worked as full time workers (100 percent).

As per age group, those falling in the range 35-64 years of age constitute the majority with 63 percent, followed by 31 percent belonging in the 15-34 age group, and 6 percent in the 65+ age group.

In terms of ethnic backgrounds, the majority of employees are Kosovo Albanians (87.5 percent), while 6.3 percent of the employees are of Bosnian ethnicity and 6.3 percent of Turkish ethnicity.

Average salary reported by the respondents was 300€, which was higher in comparison with other sectors.

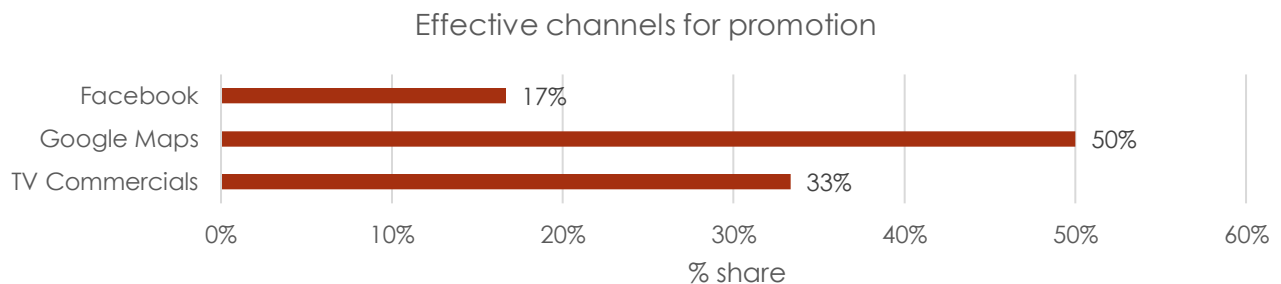
Total Number of Employees	16
Average number of employees	4
of which Male	100%
of which Female	0%
Full time employees	100%
% of workers in the 15-34 age group	31%
% of workers in the 35-64 age group	63%
% of workers in the 65+ age group	6%
Average Salary	300 €

Turnover and Investment

The respondents did not disclose their turnover data for any of the three years. Whereas, in terms of investments, 50 percent stated that they plan to invest for renovation purposes, while 50 percent stated that they do not plan to invest due to lack of finances.

Promotional Activities

Different to other sectors, tour operators have listed Google Maps on top of the list when asked about the most effective channels to promote their businesses. TV commercials followed as second with 33 percent, while Facebook was the last channel with 17 percent. In terms of bookings and how they are received, the majority 80 percent stated that the bookings are received in person or from clients who have previously been there, while 20 percent stated that the bookings are received through phones.



Municipality of Ferizaj

Village Jezerc

Jezerc is a village in the municipality of Ferizaj, situated in the eastern part of the municipality and is one of the most environmentally-preserved villages in Kosovo. Also, it is one of the biggest townships by area in the municipality of Ferizaj. Based on the latest official statistics, the village of Jezerc has approximately 454 inhabitants¹¹ as found in 2011 and there are no more updated data in population evaluation in terms of villages. This low population number is thought to have been mainly caused by urbanization.

Jezerc has a pastoral natural beauty consisted on mountains, meadows and springs, suitable climate as well as cultural heritage elements, that make it a suitable destination for the development of rural, recreational, summer and winter tourism¹². With the rise of tourism activities, the need for investments in road infrastructure increased, thus, making the village more accessible to tourists.

Although there has not been any structured research about its antiquity, unsystematic research and word-of-mouth traced some Illyrian-Roman remnants in the area¹³, e.g., the Old City of Jezerc¹⁴ and the archeological site “Gjyteti”.¹⁵ Additional locally promoted sights are the town fountain, built in 1954, and the waterfall in the entrance of the village.

Apart from its own touristic activities, Jezerc is surrounded by the Upper and Lower Nerodime villages, which have started to develop their touristic infrastructure and utilize the religious, cultural and historic sites. The ‘Bifurcation of Nerodime’ is a well-known phenomenon, one of its kind in Europe, that is considered a strict wildlife sanctuary according to IUCN.¹⁶

One of the recently created activities in Jezerc is the event “Dita Tradicionale Jezercase” (Traditional Jezerc Day), in the frame of the program “Ditëve të Mërgatës” (Diaspora Days) under the Department of Culture, Youth and Sports, and association “Jezerci”. The event has been organized for three years in the archeological site “Livadhet e Kishës”, where it fusions the cultural, artistic and recreational elements of the Albanian culture. Some of the activities include traditional, folkloric and modern music performances, traditional music instruments’ performances, and traditional dancing sequences and sports games.

¹¹ ASK, 2011, “Regjistrimi i Popullsisë Ekonomike Familjare dhe Banesave ne Kosove 2011”, link: <https://ask.rks-gov.net/media/1613/popullsia-sipas-gjinis%C3%AB-etnicitetit-dhe-vendbanimit.pdf>

¹² Komuna e Ferizajit, 2011, “Turizmi rural edhe ne Jezercin legjendar”, link: <https://web.archive.org/web/20140810092814/http://kk.rks-gov.net/ferizaj/News/Turizmi-Rural-edhe-ne-Jezercin-legjendar.aspx>

¹³ Revista Kosovarja, 2020, “6 foto te mahnitshme nga fshati piktoresk i Ferizajit”, link: <https://www.kosovarja-ks.com/6-foto-te-mahnitshme-nga-fshati-piktoresk-i-ferizajit/>

¹⁴ Halil Halili, 2015, “A Summary of the Tourist Potential of Ferizaj”, link: <https://www.mcser.org/journal/index.php/ajis/article/viewFile/7406/7090>

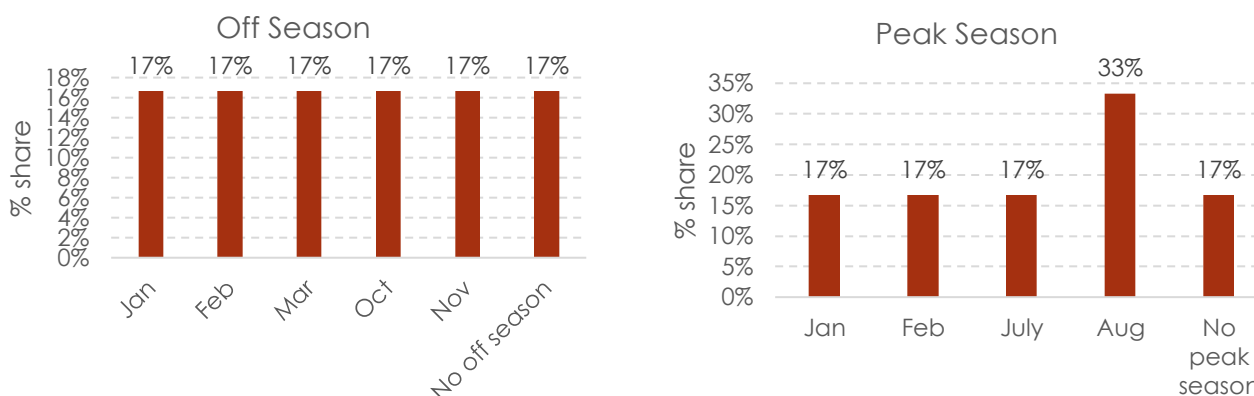
¹⁵ Ministry of Culture, Youth and Sports, 2021, “Lista e Trashëgimisë Kulturore të Perkohshme”, link: https://www.mkrs-ks.org/repository/docs/Vendimi_me_regjister_2021-2022.pdf

¹⁶ USAID, 2018, “Kosovo Biodiversity Analysis”, link: https://pdf.usaid.gov/pdf_docs/PA00WCZP.pdf

Accommodation with restaurant

On total, in Jezerc, there were only 3 respondents who said that they offer both accommodation and restaurants. One of the interviewees was the owner of the unit, another one was a co-owner and another one was a manager. Two of them were male and one was female. The three of the accommodation and restaurant units were located in Jezerc.

In terms of having an off season, winter and fall months were reported to be more inactive, but no particular month was emphasized over the other. Whereas, in terms of peak season, (33 percent) declared that August is the most active month, while January, February, and July, were also rated as being part of the peak season with 17 percent each.



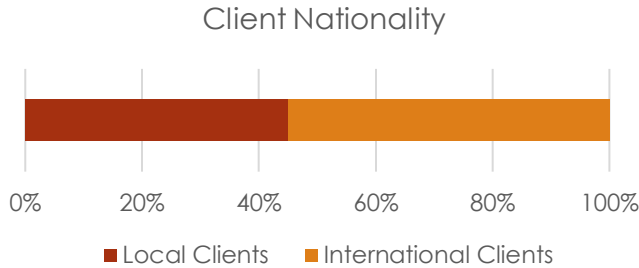
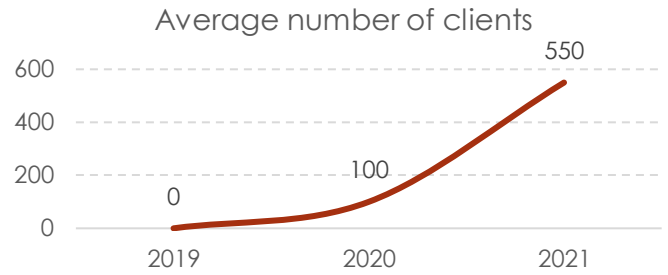
Accommodation capacities and clientele

There were only 3 respondents who said that they offer both accommodation and restaurants. One of them said that they have 1 room and two of them said that they have 6 rooms, hence the average number of rooms in accommodations with restaurants in Ferizaj was 4, and the capacity per night was 23 on average. It has to be noted that one of the guest houses which had only one room, had a more specific description as the room was an open concept room with a large area which was used by a greater number of people (max 30 people) and more for gathering purposes. If we were to not take this operator into account, the average number of rooms would have been 6, with a capacity of 20 people per night (in line with an average of 3.3 people per room).

The average price overall for a room was 63 € and the average occupancy rate for year 2021 was 75%.

Average number of rooms	4
Average capacity per night	23
Average price per room in €	63
Average occupancy rate	75%

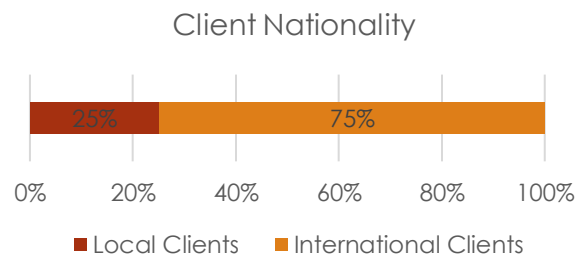
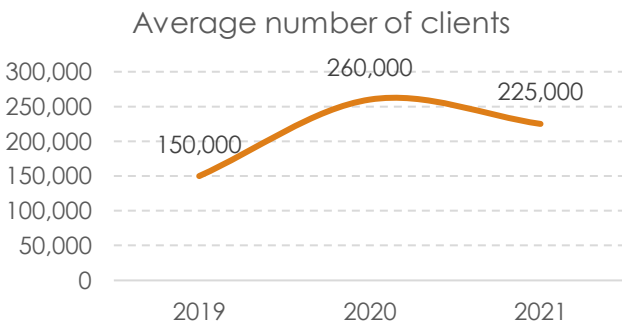
In terms of clients, year 2019 was considered an outlier since two of the respondents did not operate in that year and were established later, while one of them declared zero for 2019 so all respondents stated that they had no clients at all. Whereas, in year 2021 there was an increase in the number of clients compared to year 2020, and year 2021 can be considered as a more representative year.



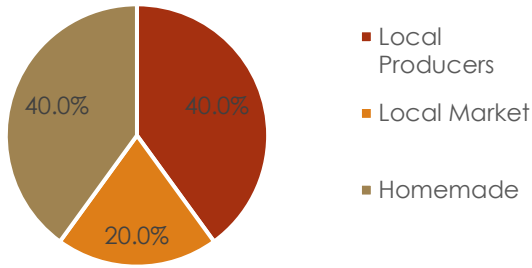
Related to nationality of clients, the majority (55 percent) are international, and 45 percent are local. In terms of the most common internationals, German and Swiss visitors dominate.

Restaurant capacities and clientele

On average, the restaurants have a capacity of 197 seats. In terms of clients, while there has been an increasing trend throughout the years, year 2020 had a considerably larger number of clients, despite the pandemic's containment measures. In terms of client nationality, the majority of the clients in the restaurant site were international (75 percent) and of them, the main ones were German and Swiss nationals.



Supply Sources



In terms of supply sources, the main sources are those from local producers/farmers and homemade products (40% each). Furthermore, the respondents stated that they are very satisfied with the products quality. These products were mainly dairy products, followed by meat products and vegetables.

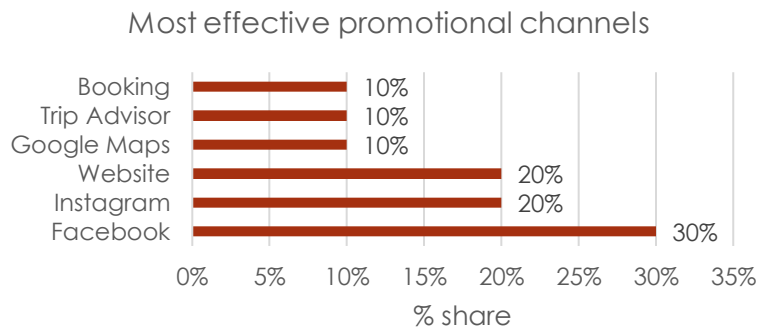
Employment

Unlike other sectors, the majority of the employees were female (52 percent) and all of the employees worked full time. As per age group, those falling in the range 25-34 years of age constitute the majority with 63 percent, followed by 33.3 percent belonging in the 35-64 age group, and only 3.7 percent in the 65+ age group.

In terms of ethnic background all workers were Kosovo Albanians as no other ethnicities were reported.

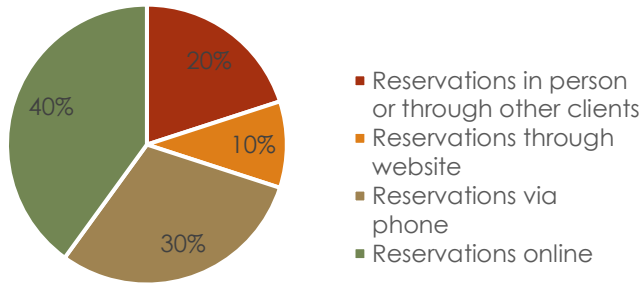
Total Number of Employees	44
Average number of employees	15
of which Female	52%
of which Male	48%
% of full time workers	100%
% of workers in the 15-34 age group	68%
% of workers in the 35-64 age group	32%
% of workers in the 65+ age group	0%

Promotional Activities



Businesses in the accommodation with restaurant sector have listed Facebook on top of the list when asked about the most effective channels that they have used to promote their businesses, followed by Instagram and Website. Following Facebook and Instagram, google maps is also seen as effective channel for promotion.

Bookings



As per bookings, the most used means of booking is via online platforms (40 percent), followed by bookings made via phone (30 percent), and those in person (20 percent).

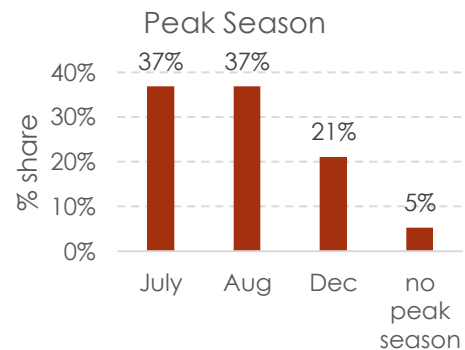
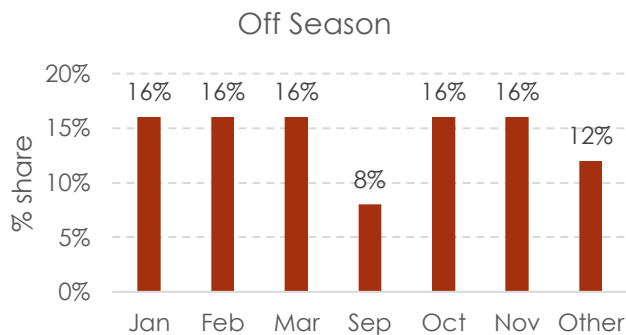
Whereas in terms of customer complaints, some of the issues/complaints from customers were food and drinks that are not part of the menu.

Restaurants

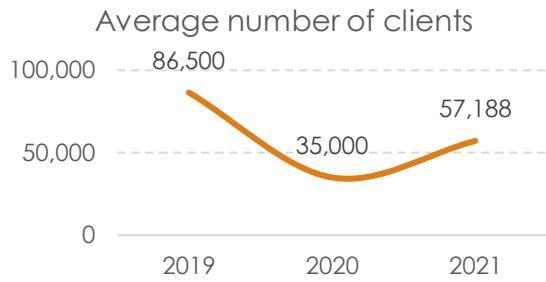
The restaurant industry in Jezerc was represented by nine restaurants. 5 interviews were held with owners of the restaurants while 4 others were held with managers of the restaurants. 8 of the them were male and one of them was female. Six of the restaurants were located in Jezerc, two in Balaj and one in Nerodime.

January, February, March, October, and November were generally the most frequently mentioned off season months, followed by September.

In terms of peak season, around 74 percent of the respondents reported that summer months July and August were their most active months, followed by December with 21%.



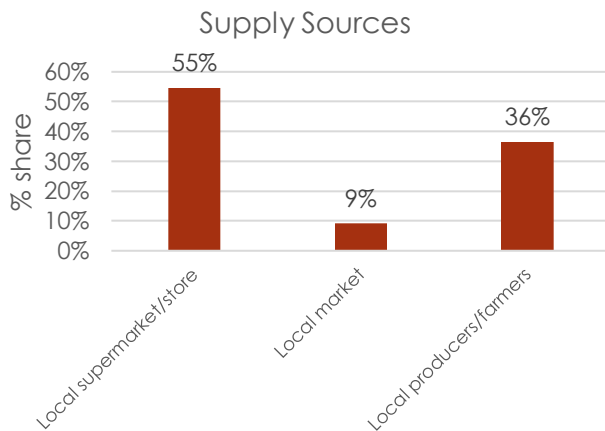
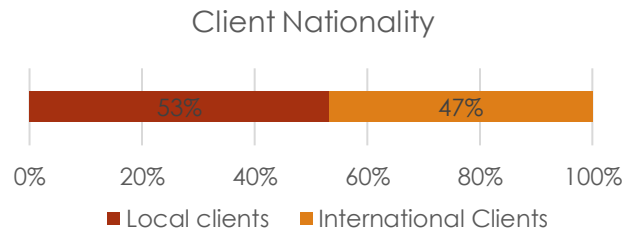
Restaurant capacities and clientele



The restaurants in the municipality of Ferizaj have on average 231 seats available. In terms of average number of clients per year, there was a declining trend, despite a rebound in 2021. However, considering that in year 2019 and 2020, there was a low response rate for this question, year 2021 should be viewed as more representative.

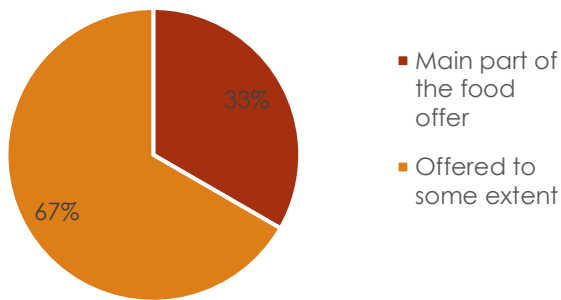
In terms of client composition, on average, the composition of clients based on nationality is slightly more skewed towards local clients.

It is worth noting that none of the restaurants offer other tourist attractions (such as cycling, horse riding, etc).



In terms of food supply sources, 36 percent of the restaurants receive products from local producers/ farmers. The majority of them 55 percent are supplied from local stores/supermarkets, and another 9 percent from the local market. The two products they are supplied with are dairy products and meat products. The respondents stated that they are very satisfied with the quality of these products.

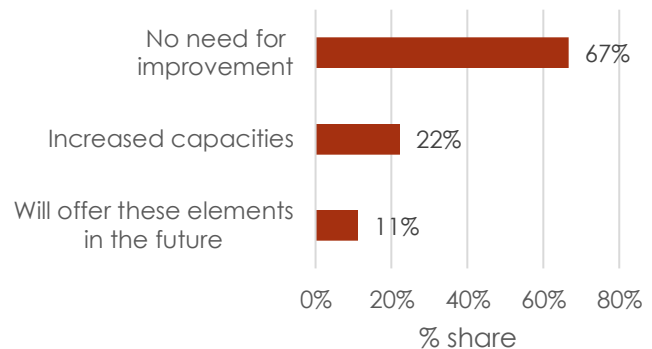
Authentic elements of food offer



A restaurant's food choice is typically seen as a significant element that must represent the unique characteristics of the location in which it operates. 67 percent of the respondents stated that their food offer reflects to some extent the authentic elements of the destination in which they operate in, followed by 33 percent others who said that it is a main part of the offer.

On another note, related to measures needed to improve the offer in order to more closely reflect the authentic elements of the destination they operate in, the majority (67 percent) stated that there is no need for improvement as they may already have these elements. The remaining proposed some strategies. For instance, 22 percent of the respondents stated that they need to increase the capacities and 11 percent of them stated that they will offer them in the future.

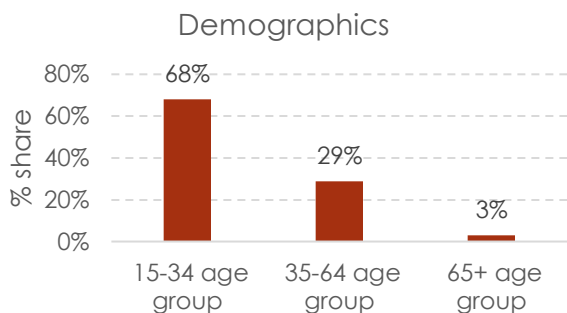
Elements to offer a more authentic experience



Employment

In terms of demographic characteristics of employees, male workers dominated with 54 percent of all workers. Likewise, the majority (74 percent) worked full time.

Total Number of Employees	185
Average number of employees	21
<i>of which Female</i>	46%
<i>of which Male</i>	54%
Full time workers	74%
Seasonal workers	26%
Average Salary	342 €

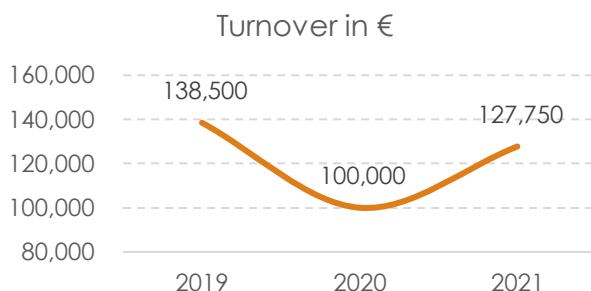


As per age group, those falling in the range 15-34 years of age constitute the majority with 69 percent, followed by 31 percent belonging in the 35-64 age group.

In terms of ethnic background all workers were Kosovo Albanians as no other ethnicities were reported.

Whereas, in terms of how satisfied businesses are with the employees, 78 percent of them are satisfied to some extent, while 22 % are very satisfied with them. The respondents believe there is a need for improvement of skills and knowledge, especially in the roles of roles of the waiters and chefs. While, they also have difficulties in recruiting chefs (44 percent) and waiters (44 percent).

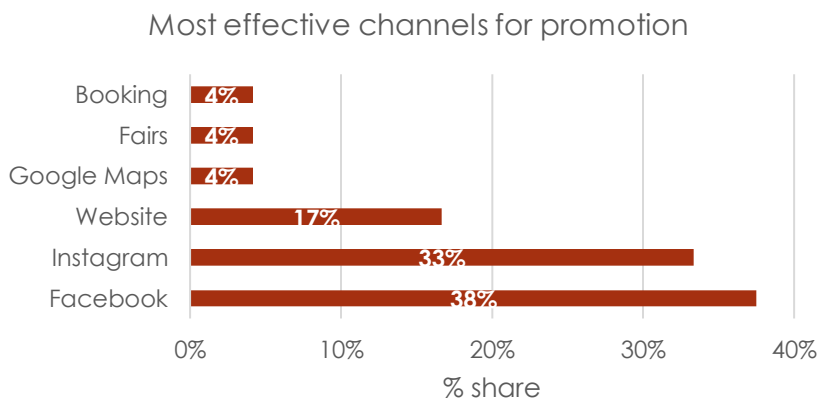
Turnover and Investment



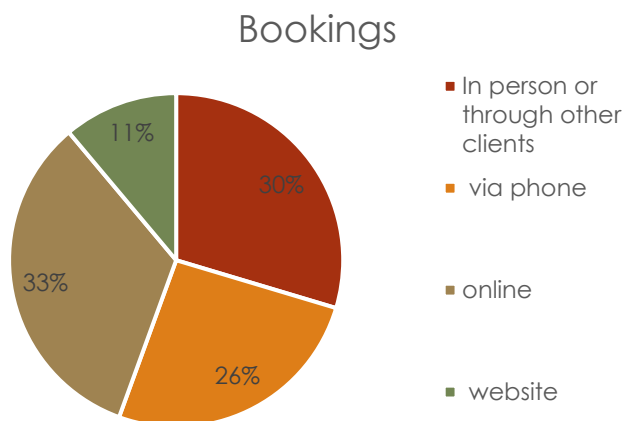
When asked about turnover, only a small number of respondents answered, less than 50% response rate. Turnover trends have been in line with the average number of clients. On average, turnover in year 2021 has been around 128 thousand euros, slightly lower than in year 2019 before the pandemics.

Whereas, in terms of future investments, the majority 67 percent stated that they will have investments in the near future mainly for renovations, followed by building an accommodation site.

Promotional Activities



Businesses in the restaurant sector have listed Facebook and Instagram on top of the list when asked about the most effective channels that they have used to promote their businesses. Following Facebook and Instagram, websites are also seen as effective channels for promoting the restaurants.



As per bookings, the most used means of booking is online (33 percent), followed by bookings in person (30 percent), bookings made via phone (26 percent), and those via website (11 percent).

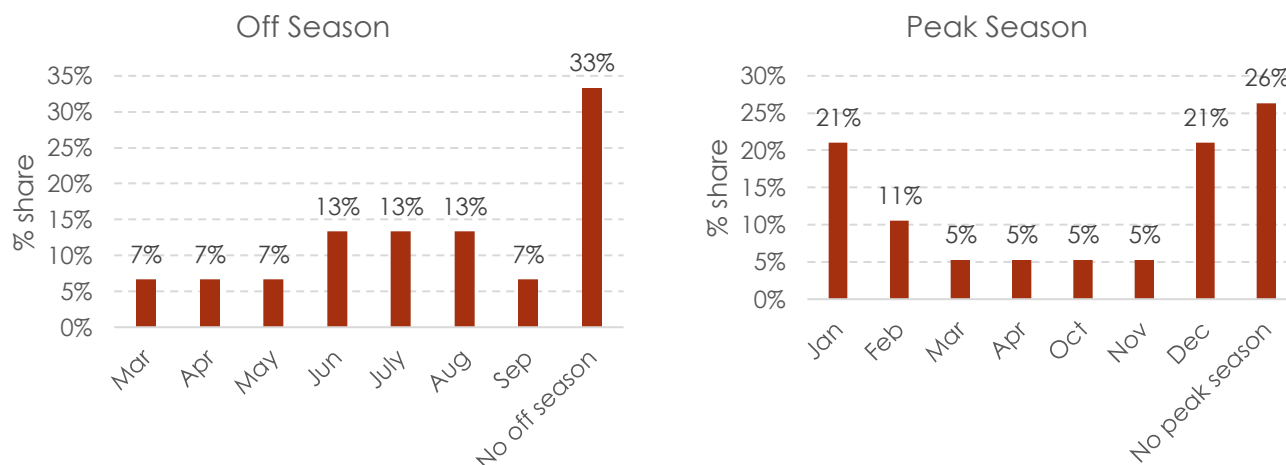
Whereas, in terms of common complaints from customers, 44 percent of the respondents stated that there are no complaints, 44 percent stated that there were complaints related mainly to food or drinks that they do not offer, but also due to lack of electricity (22 percent) and poor food quality (22 percent).

Accommodation

In Ferizaj, nine accommodation units were identified for this baseline assessments and all of them are guesthouses. Seven interviews were held with the owners of those hostels, one was held with an accountant, and one with a co-owner. Seven interviewees were male and two were female. All accommodation units were located in Jezerc.

In terms of peak season, the majority stated that there is no peak season, followed by January and December being very active.

Whereas, in terms of the off season, the majority stated that there is no off season, followed by summer months June, July and August, reported to be the most inactive months (13 percent per each).



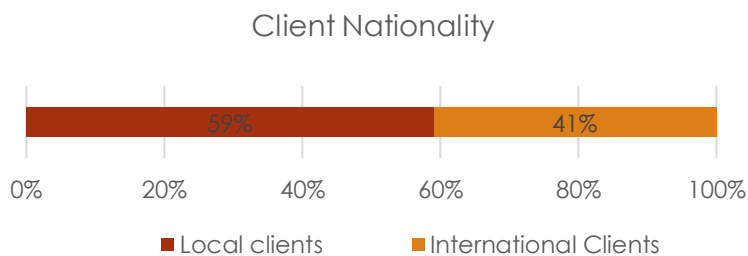
Whereas, the main attraction they offer is the fact that they are operating in a mountainous area.

Accommodation capacities and clientele

The average number of rooms in accommodations in Ferizaj was 10, and the capacity per night was 8 on average.

The average price for a room was 77 € and the average occupancy rate in 2021 was 61 percent. It has to be noted that some of the guesthouses were established in year 2022, so their answers related to occupancy rate are excluded.

Average number of rooms	3
Average capacity per night	8
Average price per night	77 €
Occupancy rate 2021	61%
Average number of nights per client	2.4



The average number of clients per each year was no disclosed and there is more data only for year 2021 where the average number of clients was reported to be around 200. The majority of the clients were local (59 percent).

Employment

The majority of the employees were male (55 percent) and the majority of all employees worked as full time workers (90 percent) followed by part time employees.

As per age group, those falling in the range 35-64 years of age constitute the majority with 59 percent, followed by 38 percent belonging in the 15-34 age group, and 3 percent in the 65+ age group. In terms of ethnic backgrounds, all the employees are Kosovo Albanians.

In terms of difficulties in recruiting, the majority of the respondents (67 percent) stated that they did not have such a difficulty since they are a family business where everyone is participating in the work. However, a few (33 percent) stated that they faced difficulties in recruiting housecleaners.

Average salary reported by the respondents was 310€.

Total Number of Employees	29
Average number of employees	3
<i>of which Male</i>	45%
<i>of which Female</i>	55%

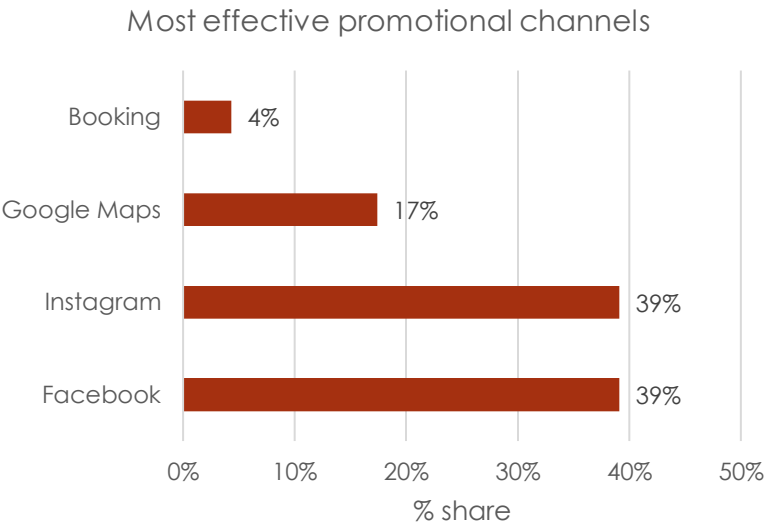
Full time employees	90%
Part time employees	7%
Seasonal employees	3%
Share of employees 15-34 age group	38%
Share of employees 35-64 age group	59%
Share of employees 65+ age group	3%
Average Salary	310 €

Turnover and Investment

When asked about turnover, the respondents refused to answer. Whereas, in terms of investment, 55 percent stated that they plan to invest and the investment is planned to be related to building a guesthouse.

The respondents who did not plan any investments stated that partly because there is no need to invest and partly because they lack finances.

Promotional Activities



Businesses in the accommodation sector have listed Facebook and Instagram on top of the list when asked about the most effective channels to promote their businesses.

In terms of bookings and how are they received, bookings by phone and those online constitute the majority (47 percent each).

Whereas, related to customer complaints, the majority (55 percent) stated that they have no complaints, while the others said that the complaints were related to lack of electricity, followed by the absence of a restaurant.

Municipality of Prizren

Has Region

Has is a region in north eastern Albania and south western Kosovo.

Hasi is an ethno-geographic area with well-defined borders, surrounded by river Black Drin to its West and south west in Albania and by the White Drin river on its south, east and north east in Kosovo. Gjonaj and Zym villages are part of the Has region.

Zym Village

Zym is a village in the northwest municipality of Prizren also known for its name ‘Zymi i Hasit/Zym of Has’. The village is protected under national law¹⁷, where the law specifically highlights the protection of cultural heritage and the promotion of its cultural values in a local and national level. Based on the latest official statistics, the village of Zym has approximately 1782 inhabitants¹⁸, which is a low rate mainly believed to be caused by urbanization and immigration.

Zym is characterized with a lush greenery, rich biodiversity and a lake deep within its forests. Being approximately 20km far from Prizren, it offers a beautiful view of the town from above.

Apart from its picturesque sights, Zym is known for having a rich cultural, architectural and historical heritage. The Amphitheater of Zym, Tower of Zaptijve and the House of Katarina Josipi are three cultural heritage sites protected by law, where the former one is utilized to organize events, e.g., the literary, cultural and scientific manifestation “Takimet e Gjeçovit” that has been held for five decades in Zym. The latter one is the newly founded house of the renowned Zymian actress, Katarina Josipi.

Moreover, one of the four oldest ethno-cultural ensembles is the ethno-cultural ensemble of Zym “Katarina Josipi”, which acts as an active promoter and cultivator of traditional Hasi rites of singing, traditional dancing, and Has wedding and religious traditions.

An important festival in the region of Has, including Zym and other villages, is ‘Hasi Jehon’. A folklore festival celebrating the return of spring through traditional music and dances, and promoting ethnographic elements (traditional costumes, food). Also, characteristic of the region is the tradition of wheat harvesting, which is done by women wearing traditional Has clothes and using a sickle¹⁹.

The surrounding villages of Zym include Romaja, Krajk, Lubizhdë, Lukinjë, Dedaj, Karashëngjergj and Kabash of Has. Some of the cultural heritage sites²⁰ in these villages include:

- Tumulary Necropolis in Romaja
- Tower of Ismail Hodaj Pogaj in Krajk
- Church of Saint Nicholas in Lubizhdë
- Tekke of Sheh Beqës in Lukinjë

¹⁷ Government of Kosovo, nd, “Law No.04/L-196 on the Village Zymi i Hasit”, link:

<http://old.kuvendikosoves.org/common/docs/ligjet/Ligji%20per%20Fshatin%20Zym%20i%20Hasit.pdf>

¹⁸ ASK, 2011, “Regjistrimi i Popullsise Ekonomive Familjare dhe Banesave ne Kosove 2011”, link: <https://ask.rks-gov.net/media/1613/popullsia-sipas-gjinis%C3%AB-etnicitetit-dhe-vendbanimit.pdf>

¹⁹ TV Prizreni, 2022, “Me veshje tradicionale, grate korrin grurin ne Has”, link: <https://tvprizreni.net/me-veshje-tradicionale-grate-korrin-grurin-ne-has/?fbclid=IwAR0AfIF-111dDogAKRbUtH20OPdYyTd2EMRkvHFHv-2zOzeGQ62y-Nz0KPI>

²⁰ ASK, 2011, “Regjistrimi i Popullsise Ekonomive Familjare dhe Banesave ne Kosove 2011”, link: <https://ask.rks-gov.net/media/1613/popullsia-sipas-gjinis%C3%AB-etnicitetit-dhe-vendbanimit.pdf>

- Tekke of Sheh Rexhës in Lukinjë
- Chapel of Father Shtjefën Gjeqovi in Karashëngjergj
- Ruins of Monastery and the Church of Saint Peter and Paul in Kabash of Has
- Mill of Rexhep Shatri in Dedaj

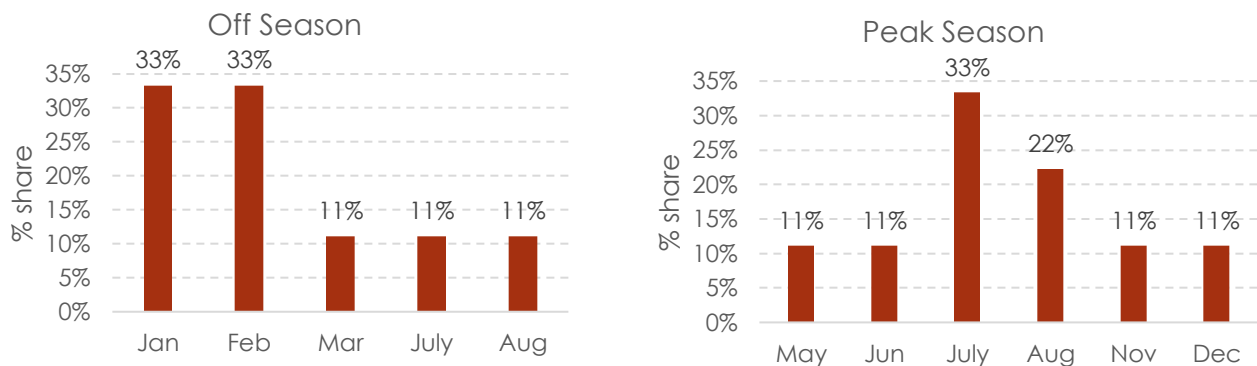
Gjonaj Village

Gjonaj is a village in Prizren municipality, Kosovo with a population of 4818 as per 2011 census. A church in Gjonaj is possibly one of the oldest Roman Catholic churches in Kosovo²¹

Restaurants

In total, 4 restaurant representatives were interviewed from Prizren Municipality, where three of them were managers of those restaurants and one interviewee was the owner. Out of those four, only one was female, whereas the three others were male. As per location, two of them were located in Gjonaj, 1 was located in Has and another one January, February, March, October, and November were generally the most frequently mentioned off season months, followed by September.

In terms of peak season, around 33 percent of the respondents reported that July was the most active month, followed by August. Whereas in terms of the off season, January and February were reported as the most inactive months.



Restaurant capacities and clientele

The restaurants in the municipality of Prizren have on average 88 seats available. In terms of average number of clients per year, there was a declining trend, however this needs to be viewed

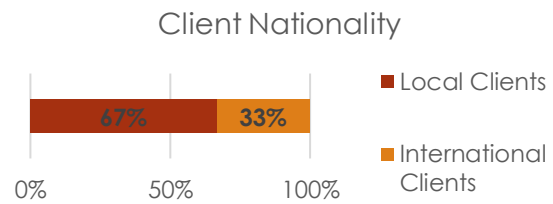
Average number of seats available	88
Average number of clients in 2019	120,000
Average number of clients in 2020	15,000
Average number of clients in 2021	30,333

²¹ Malcolm, Noel (1998). *Kosovo: A short history*. Macmillan. p. 54. [ISBN 9780810874831](https://doi.org/10.1007/978-0-230-48311-1). And Dusan's chrysobull of 1348 for the Monastery of the Holy Archangels in Prizren mentions a total of nine Albanian katuns.

with caution considering that in year 2019 and 2020, only one respondent gave an answer, so year 2021 can be viewed as more representative.

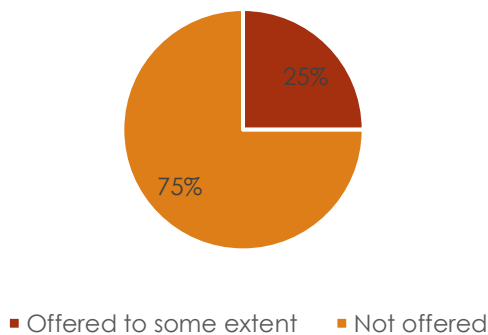
In terms of client composition, on average, the composition of clients based on nationality is more skewed towards local clients.

It is worth noting that none of the restaurants offer other tourist attractions (such as cycling, horse riding, etc).



In terms of food supply sources, 40 percent of the restaurants receive products from local market, followed by 20 percent each from the local producers, local supermarkets, and own produce.

Authentic elements of food offer



A restaurant's food choice is typically seen as a significant element that must represent the unique characteristics of the location in which it operates. However, the majority of the respondents, 75 percent stated that they do not offer traditional food.

Related to measures needed to improve the offer in order to more closely reflect the authentic elements of the destination they operate in, all of them stated that there is no need for improvement.

Employment

In terms of demographic characteristics of employees, male workers dominated with 54 percent of all workers. Likewise, the majority 74 percent worked full time.

Total Number of Employees	20
Average number of employees	5
<i>of which Female</i>	30%
<i>of which Male</i>	70%
Full time workers	100%
Average Salary	367 €
Age group 15-34	80%
Age group 35-64	20%

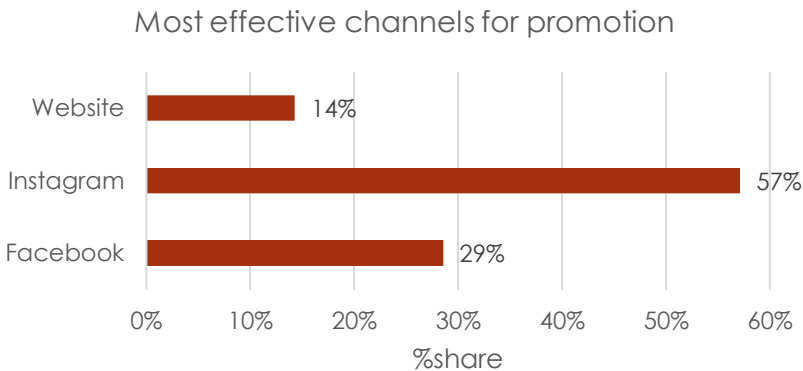
As per age group, those falling in the range 15-34 years of age constitute the majority with 80 percent, followed by 20 percent belonging in the 35-64 age group.

In terms of ethnic background all workers were Kosovo Albanians as no other ethnicities were reported.

Turnover and Investment

When asked about turnover, there were no responses.

Whereas, in terms of future investments, 50 percent stated that they will have investments in the near future mainly for renovations, whereas the other 50 percent stated that they will not invest partly because they have already done so and partly because of lack of finances.



Promotional Activities

Businesses in the restaurant sector have listed Instagram on top of the list when asked about the most effective channels that they have used to promote their businesses, followed by Facebook and websites.

Accommodation

In Prizren only one respondent from the accommodation unit was identified. The respondent interviewed for this study was the manager of the guesthouse which was located in Zym. For this accommodation, the high season is July and August, there is no average season and the low season is considered to be January, February, March, April and May.

Accommodation capacities and clientele

The total number of rooms in this guesthouse was 8, while the total accommodation capacity was 18. When asked about the average price for a night in this guesthouse, the respondent stated that their average price is around 40€.

Accommodation units usually tend to change their prices depending on the season. For instance, when in season they tend to increase them while out of season they tend to decrease them. In the case of this guesthouse in Prizren, the respondent stated that they have price changes during high season where they increase them by 25%.

Employment

The number of employees at this accommodation unit is 4, where 75 percent of them are male and 25 percent female. Likewise, 75 percent belong in the 15-34 age group, while 25 percent belong in the 35-64 age group. The average salary is 250€.

Promotional Activities

The three most effective channels that this accommodation unit has used to promote the business are a) Instagram b) Facebook and c) Booking.

Findings and Conclusions

Rural tourism plays a vital role in holding the optimal population in villages, thus, preserving the dynamism in appealing locations and stopping migration and brain-drain. The contributor of growth for the development of rural tourism in a given community or area is the presence of appealing tourist resources, such as scenic locales, cultural and historical sites, special folklore, folk traditions, crafts, and others. In Kosovo, the regions of Rahovec, Prizren (Hasi and Zym) and Ferizaj (Jezerc) offer these values and experiences to tourists and visitors. Although, there is still potential for further development of rural tourism in these regions. The baseline assessment asserted different points of view from supply-side stakeholders, starting from the accommodation and restaurant units, continuing to tour operators, touristic attractions, and wineries. The general findings are presented below, and are categorized in three municipalities and subcategorized on six sectors.

Trends:

Overall, there was an increasing trend in both number of clients and turnover across sectors and across municipalities. Year 2020 was generally hard for the majority of businesses and it resulted in lower (to no) clients. Year 2021 was a rebound and generally there were improvements in the number of clients and average turnover. Related to investment, there was a stronger investment climate among some sectors (such as wineries), but overall those that did not plan to invest in the near future, partly had investment before or lacked financial means to do so.

Employment:

The majority of employees in all sectors (except accommodation and accommodation/restaurants units in Ferizaj) were male. Likewise, the majority worked full time. In terms of ethnicity representation, throughout all sectors, there was little to no ethnic diversity in terms of employees as the majority were Kosovar-Albanians. In terms of positions they have difficulties in recruiting across all municipalities (restaurants and accommodations with restaurants had trouble recruiting chefs and waiters.

Aggregated Employment Data for Prizren	
Total Number of Employees	24
of which Male	71%
of which Female	29%
of which full time	92%
of which part time workers	4%
of which seasonal workers	4%
% of workers in the 15-34 age group	79%
% of workers in the 35-64 age group	21%
% share of workers from other ethnicities	0%
Average Salary	338 Eur

Aggregated Employment Data for Rahovec	
Total Number of Employees	601
of which Female	21%
of which Male	79%
of which full time	85%
of which part time workers	2%
of which seasonal workers	13%
% of workers in the 15-34 age group	13%
% of workers in the 35-64 age group	51%
% of workers in the 65+ age group	5%
% share of workers from other ethnicities	1%
Average Salary	339 Eur

Aggregated Employment Data for Ferizaj	
Total Number of Employees	273
of which Male	53%
of which Female	47%
of which full time	81%
of which part time workers	1%
of which seasonal workers	18%
% of workers in the 15-34 age group	64%
% of workers in the 35-64 age group	36%
% of workers in the 65+ age group	0%
% share of workers from other ethnicities	0%
Average Salary	350 Eur

Promotional Activities:

Generally, in all the municipalities, the most effective promotional channels are social media platforms (Facebook and Instagram), followed by advertisements in radio and other channels. Reservations are also done through these platforms, highlighting that the restaurants' sector receives more reservations in-person or from other clients.

Municipality of Rahovec Findings

Accommodation findings:

- Generally, the businesses have small accommodation capacities and have their peak season during the summer season;
- None of the businesses will invest in the two following years, either because there is no need or they lack financial means;
- The accommodation units did not work at all during year 2020, which negatively affected their financial stability.

- Low number of accommodation sites in Rahovec and surrounding villages.

Restaurant findings:

- The authentic characteristic of the restaurants was their location in a rural area;
- Only 5 percent of restaurants purchased food supplies (meat and dairy) from local farmers, and they were satisfied with the quality and availability. Additionally, most of the restaurants (67 percent) offer, to some extent, authentic dishes, and nearly half of them do not wish to furtherly enrich their offers with such products;
- The majority of the restaurants do not plan to invest in the following years either because they lack financial means or they have already invested;
- 27 percent of the restaurants cooperate with other operators, mainly travel agencies and domestic tour operators. Whereas 4 percent cooperate with international tour operators.
- A great number of wedding halls registered in the KBRA as restaurants.

Accommodation & Restaurant findings:

- The businesses have small capacities, both as accommodation and restaurant units;
- In comparison to other sectors, the tourists stayed for longer periods (6 nights on average) in accommodation & restaurant units in Rahovec;
- 50 percent of the businesses cooperate with local farmers, from whom they purchase vegetables, meat and dairy products. Moreover, they are very satisfied with the quality and availability of the products.

Wineries findings:

- Wineries have their peak season during summer, the grape harvesting time as well as at the end of the year;
- The majority of the wineries offer commercial tourist products and charge for their product/service; here listing the three most frequent ones: wine tasting, tours around the vineyard and tours in the wine cellar;
- In the wine tasting package, food tasting is also offered, where the primary food supply source for wineries are local supermarkets followed by local farmers. The products purchased from local farmers include dairy and meat products, and winery representative are satisfied with the quality and availability;
- The majority of the wineries plan to invest (82 percent) and add new commercial tourism products to their offers, mainly accommodation units, restaurants and showrooms for wine tasting;
- Around 24 percent of wineries do not offer commercial products because they are waiting for licensing;

- Wineries employ the largest number of non-Albanian employees in comparison to other sectors, around 13% of the employees belong to other ethnicities, namely Serbian and RAE;
- 53 percent of wineries are satisfied to some extent with their employees' skills.

Touristic attractions findings:

- The four touristic attractions are categorized in two cultural and religious heritage attractions, one museum house and one cultural house;
- None of the attraction have an entry fee;
- The only investments they foresee for the following two years are renovations of the buildings.

Tour operators' findings:

- Tour operators did not operate in the said municipalities but they organized such tours upon request namely in Rahovec and Jezerc;
- The main tours that the operators offer include cultural and historical tours, city-specific tours and tours in the nature. Vineyard tours are organized upon request or are included as part of the Peja tour;
- Tour operators generally sell their tours to international tourists;
- Two tour operators specified that they plan to include specific rural guides and gastronomy guides as part of their offers in the following years.

Jezerc, municipality of Ferizaj

Accommodation findings:

- All accommodation units in Jezerc identify themselves as guesthouses;
- In comparison to accommodation units in Rahovec, the prices per night in Jezerc are higher;
- Most of the units have low accommodation capacity of two to three rooms;
- The units were mainly established in 2021 and received little tourists, and only one unit received 1000 visitors during year 2021;
- Most of the visitors are international visitors, who stayed on average 2.4 nights;
- Services/products that customers require are restaurants and spas.

Restaurant findings:

- The majority of restaurants have small seating capacities, and only two have more than 400 seats;
- The main supply source of food products are supermarkets (55 percent) and local farmers (36 percent); where from the latter, restaurants mainly purchased dairy and meat products, and they are generally very satisfied with the quality and availability of the products;

- 67 percent of businesses offer only to some extent authentic dishes as part of their food offer, because mainly they are not interested; while only 33 percent have it as main part of the offer;
- 66 percent of businesses plan to invest in the following two years, in renovating and building new guest houses.

Accommodation & Restaurants findings:

- Generally, the businesses have small accommodation capacities, but bigger restaurant capacities;
- Businesses mainly produce their own food (homemade) and buy it from local farmers (40 percent, each); for the latter they purchase dairy and meat products, and they are very satisfied with the quality and availability;
- 63 percent plan to invest, and one of the business representatives highlighted that they want to invest in building a camping sight.
- Some of the issues/complaints from customers were: instability with electricity supply; poor road infrastructure in deeper areas of the mountain and hardships to navigate there; and weak or no phone/internet network

Has, municipality of Prizren

Accommodation findings:

- Only one accommodation unit was interviewed, which is located in the village of Zym and identifies as a guesthouse;
- Low number of accommodation units in Has villages (Zym, Gjonaj, Romaje, Krajk,etj)
- Depending on the season, the business increases its price by 25%;
- 80% of the visitors are international visitors, whereas 20% are local visitors, and on average, tourists stay for only two nights;

Restaurant findings:

- Local visitors are more frequent compared to foreign visitors;
- Businesses purchase food products mainly from local markets, and only 20 percent purchase food supplies from local farmers (meat products only);
- 75 percent of restaurants do not offer authentic dishes as part of their food offer and they are not interested in including such dishes in their offer or need financial support to do that.