REPORT NO. 4
MARKET RESEARCH

IDENTIFICATION OF MARKET NEEDS IN THE DUKAGJINI PLAIN

4th RESEARCH

IDENTIFICATION OF NEEDS IN THE TOURISM INDUSTRY

INSTITUTE FOR SCIENCE AND ARTS

PEJA, 2025

“HAXHI ZEKA” UNIVERSITY

INSTITUTE FOR SCIENCE AND ARTS

INSTITUTI PËR
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HAXHI ZEKA

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Report compiled by the Institute for Science and Arts

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CONTENT

LIST OF FIGURES

LIST OF GRAPHS

LIST OF ABBREVIATIONS

GP - General Partnership

HZU - “Haxhi Zeka” University

IB - Individual Business

ISA - Institute for Science and Arts

JSC - Joint Stock Company

LLC - Limited Liability Company

1. INTRODUCTION

The Institute for Science and Arts (ISA) within the “Haxhi Zeka” University in Peja (HZU), in the continuation of its commitment to applied research and support for regional economic development, presents this fourth report in the cycle of market research. This report is specifically focused on identifying the needs of the tourism industry, a sector of strategic importance for the local economy and for the promotion of the natural and cultural resources offered by the Dukagjini Plain.

In a context where tourism is considered one of the most promising sources for generating income and promoting employment, this research aims to provide concrete data on the typology of enterprises, human capacities, managerial practices, marketing channels, institutional cooperation and challenges that limit the sustainable growth of this sector. The report is based on structured questionnaires, administered directly to tourism operators active in the municipalities of the Dukagjini Plain, including Peja, Deçan, Istog, Klina, Gjakova, Junik, Prizren, Suhareka, Malisheva and Rahovec.

The data collected provides a realistic picture of how tourism businesses operate, the resources they possess, but also gaps in training, technology, promotion and financial support. These findings enable the identification of priority areas where interventions by local policymakers, support from local institutions and cooperation with international actors can have a direct impact on strengthening the tourism offer.

This report aims to be a practical tool for businesses themselves, which can use the data to improve strategic plans and adopt more efficient management and marketing practices. At the same time, the recommendations issued provide a solid basis for municipalities and development organizations that aim to increase investments, improve infrastructure, support vocational training and create sustainable cooperation mechanisms with the industry.

Through this research, and not only, ISA once again confirms its role as a supporter of sustainable local economic development, by providing well-structured and interpreted data that can serve as a reference for decision-makers and key stakeholders of the tourism ecosystem in the Dukagjini Plain.

2. RESEARCH METHODOLOGY

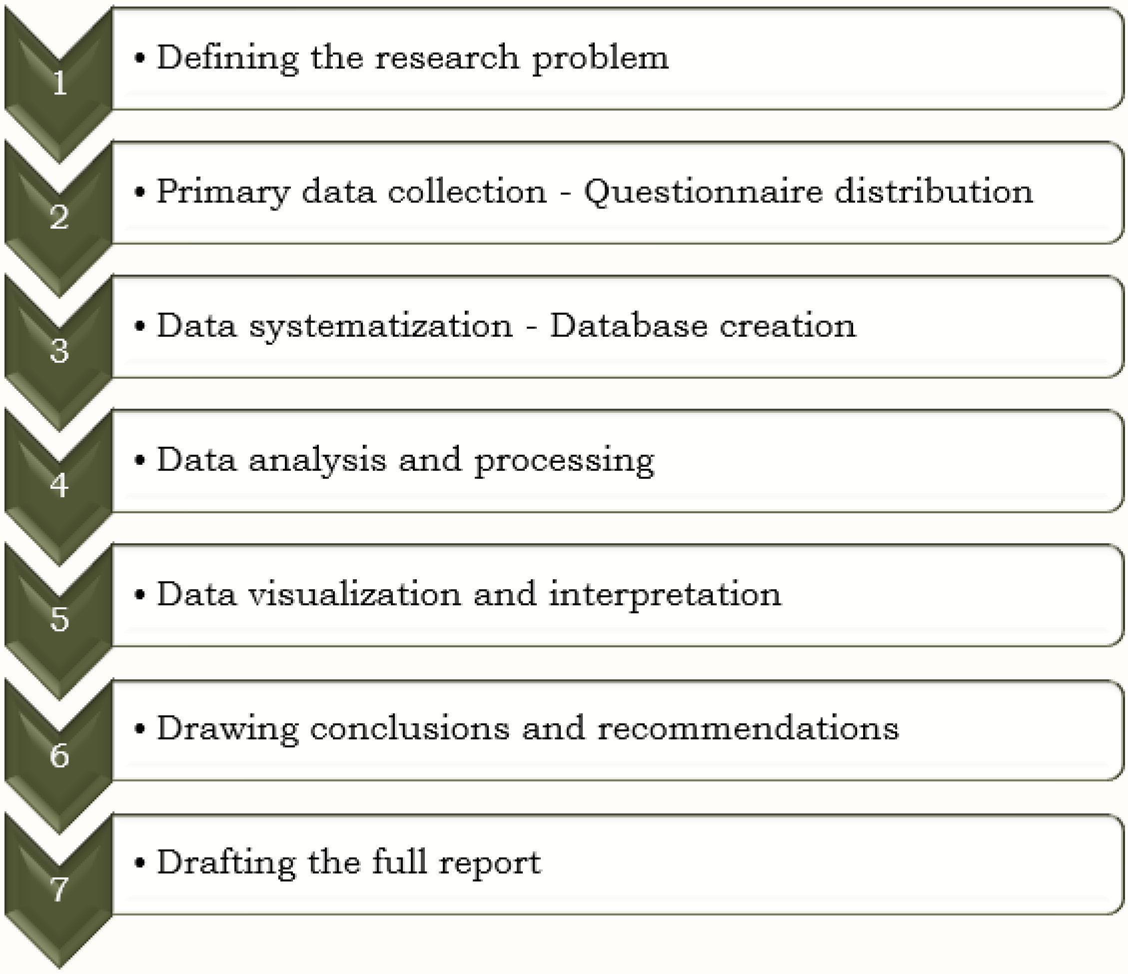
The compilation of this report is based on a structured process of primary data collection and analysis, with the aim of presenting a realistic and substantiated overview of the current situation, needs and challenges that characterize the tourism industry in the Dukagjini Plain. The main instrument for data collection was the *"Questionnaire for identifying the needs of the tourism industry"*, specifically compiled to cover various aspects of the functioning of enterprises that carry out their activity in this sector.

The questionnaire was designed to collect data on the main characteristics of tourism businesses, the types of services they offer, their size and capacities, marketing and reservation management practices, cooperation with local institutions, the most frequent operational challenges, as well as the needs for professional development and training. A significant portion of the questions were structured with closed alternatives, while some were also accompanied by open options, to enable the collection of qualitative data that complements the quantitative data.

The information collection process was carried out through the distribution of questionnaires to various businesses in the tourism sector, including accommodation operators, travel agencies, transport providers, tourist guides, restaurants and other entities that contribute to the tourism service chain in the region. The collected data was statistically analyzed, processing percentages and distribution according to key indicators, in order to identify industry trends, needs and priorities.

Through this methodological approach, it is guaranteed that the information presented in the report is based on concrete evidence and realistically reflects perceptions and the situation on the ground. This ensures that the interpretations and recommendations issued are based on verifiable data, thus becoming a valuable resource for tourism businesses, local municipalities and institutions, regional development organizations, as well as for all stakeholders who aim to contribute to strengthening the tourism industry in the Dukagjin Plain.

Figure 1. Research methodology



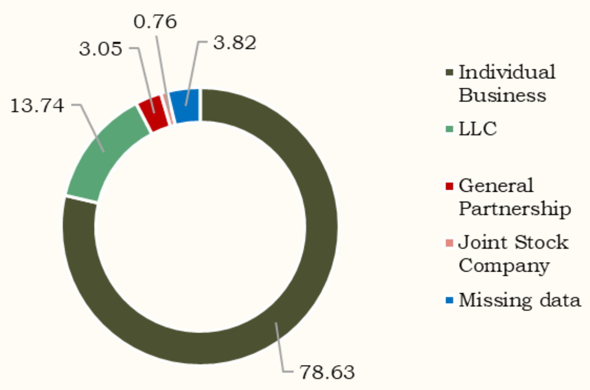
Source: ISA (2025)

To ensure a clear and systematic approach, the research process followed several well-defined steps: first, the research problem was defined, clarifying the objectives and scope of the analysis; then, the collection of primary data was organized through the distribution of questionnaires to tourism businesses. The collected data was systematized, analyzed and statistically processed to derive accurate indicators. The results were visualized and interpreted to ensure easier understanding, which enabled the drawing of concrete conclusions and recommendations. Finally, the entire process was concluded with the drafting of a full report, which summarizes the findings and practical suggestions for relevant stakeholders in the tourism industry.

3. DATA ANALYSIS AND INTERPRETATIONS

This chapter presents the most important findings derived from the analysis of the data collected through the questionnaire, in order to provide a clear framework for the current state of businesses in the tourism industry. Interpretation of the results helps to clarify the structure and main features of these enterprises, the service profiles they offer, the number of employees, as well as the ways in which they manage the reservation processes and communication with the target markets. At the same time, the most frequent challenges faced by tourism operators, the level of cooperation with local institutions, as well as the needs for continuous improvement of professional and technical capacities are highlighted. This section aims to help the reader better understand the reality on the ground, identify opportunities for progress and create a basis for taking concrete steps that will support the long-term and sustainable development of the tourism sector in the region.

Graph 1. Type of business/enterprise

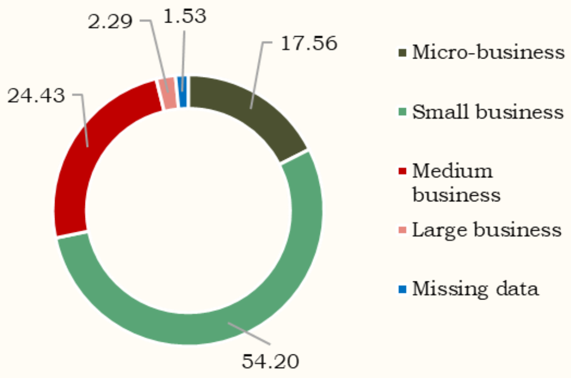


Source: ISA (2025)

Data on the distribution of businesses according to their legal form show that the majority of them are organized as individual businesses (IB), with a very high percentage of 78.63%. In second place are limited liability companies (LLC) with 13.74%. Together, these two legal forms constitute over 92% of all registered enterprises, which clearly demonstrates the strong market trend towards simpler and more flexible forms of organization. General partnerships (GP) represent a modest percentage of 3.05%, while Joint-Stock Companies (JSC) have a minimal representation of only 0.76%, indicating that enterprises with more complex structures and larger capital are rarer. The share of unspecified data accounts for 3.82%, which does not affect the overall picture.

Data on the distribution of businesses by size show that the majority of these surveyed businesses were small businesses, with a dominant percentage of 54.20%. In second place are medium-sized businesses with 24.43%, while micro-businesses represent 17.56% of the total. Large businesses occupy only 2.29%, demonstrating a lower presence of enterprises with high capacities or consolidated structures within the tourism sector. The share of unspecified data occupies 1.53%.

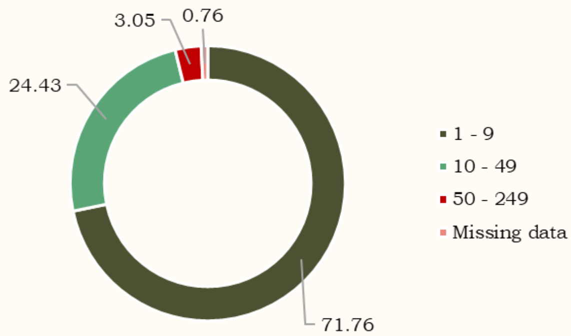
Graph 2. Size of business/enterprise



Source: ISA (2025)

This structure shows that tourism in this context relies mainly on small and medium-sized enterprises, which account for about 80% of the market, highlighting their role as the main pillar for the provision of services, local employment and income generation.

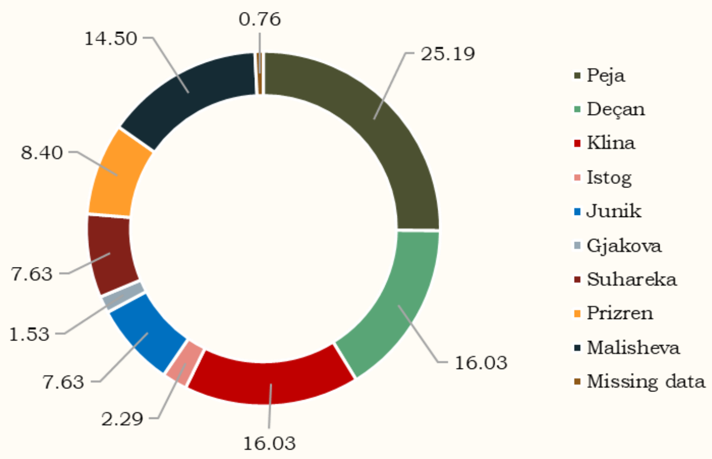
Graph 3. Number of employees



Source: ISA (2025)

Data on the number of employees show that the majority of surveyed businesses/enterprises have a very small number of employees, specifically from 1 to 9 employees, with a prevailing percentage of 71.76%. Businesses with 10 to 49 employees represent 24.43% of the total, while those with 50 to 249 employees account for only 3.05%. The share of unspecified data constitutes 0.76%. This structure shows that the sector is dominated by very small and small enterprises, reflecting the fragmented and flexible nature of their activity, where organizing with few employees allows them to adapt more easily to market demands and seasonal fluctuations. The minimal presence of businesses with a large number of employees suggests that the potential to generate large-scale employment is still limited, highlighting the need to support small and micro businesses to ensure sustainability and gradual growth of employment capacities.

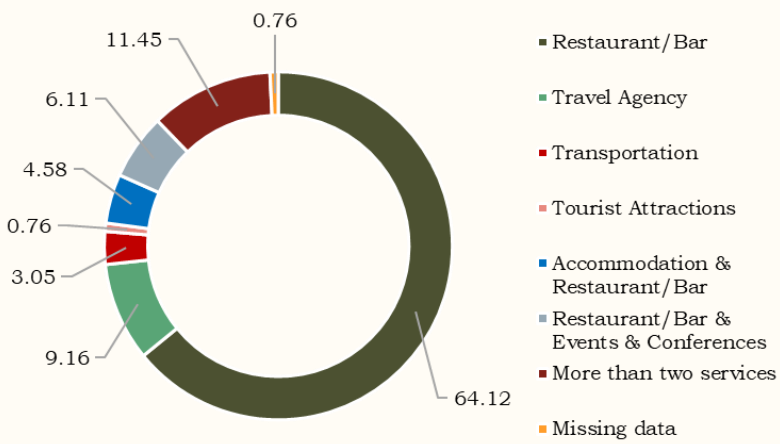
Graph 4. Business/enterprise location



Source: ISA (2025)

The data on the distribution of enterprises by location show that the majority of them are concentrated in Peja, with 25.19% of the total. After Peja, Deçan and Klina have a significant share with 16.03% each, while Malisheva occupies 14.50% and Prizren 8.40%. Other municipalities such as Junik and Suhareka represent 7.63% of enterprises, while Istog and Gjakova have a lower representation, with 2.29% and 1.53% respectively. The share of unspecified data is only 0.76%. This distribution reflects the areas where the most information collection from businesses was carried out, indicating the municipalities with the highest representation in this survey. The respective percentages provide an overview of the geographical focus of the collected data and the territorial representation of the businesses included in the analysis. This helps to understand more clearly from which areas the most inputs were received for assessing the overall structure of the tourism sector.

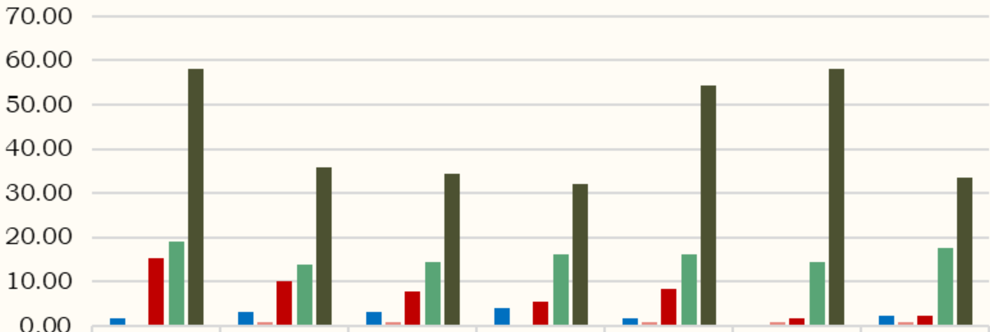
Graph 5. What tourist services do you offer?



Source: ISA (2025)

Data on the types of tourism services offered show that the majority of businesses are focused on the activity of restaurants and bars, with a dominant percentage of 64.12%. Another significant part, with 11.45%, offers more than two services simultaneously, indicating a tendency to diversify the offer and to benefit from synergies between different tourism activities. Combined categories such as “Restaurant/Bar & Events and Conferences” occupy 6.11%, while the combination “Accommodation & Restaurant/Bar” represents 4.58%, which indicates the combination of hospitality and food services as a common package for tourists. Travel agencies represent 9.16% of enterprises, while transportation and tourist attractions have a modest participation, with 3.05% and 0.76%, respectively. The share of unspecified data is also 0.76% and does not affect the overall structure of the data. This distribution shows that the tourism market in this context is dominated by providers of food and beverage services, while services related to travel organization, transportation and tourist attractions have a relatively low representation. This highlights the opportunity to expand the offer with new tourism products that can enrich the tourist experience and increase the length of stay in the destination.

Graph 6. Describe the quality of the tourist services you offer?



	Quality of hotel accommodation	Quality of transportation	Quality of service of tour guides and staff	Quality of activities and attractions included in tour packages	Quality of food and restaurant services	Quality of communication and customer support	Quality of overall travel experience
Very low quality	1.53	3.05	3.05	3.82	1.53	0.00	2.29
Low quality	0.00	0.76	0.76	0.00	0.76	0.76	0.76
Average quality	15.27	9.92	7.63	5.34	8.40	1.53	2.29
High quality	19.08	13.74	14.50	16.03	16.03	14.50	17.56
Very high quality	58.02	35.88	34.35	32.06	54.20	58.02	33.59

Source: ISA (2025)

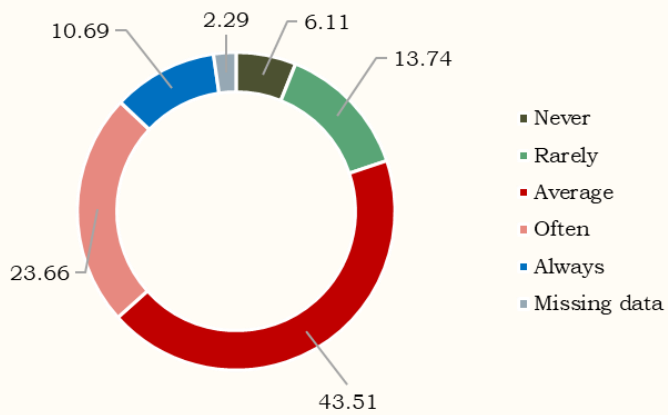
The data on the assessment of the quality of tourist services provided by enterprises show a generally very positive perception in all the main components of the tourist experience. The quality of accommodation in hotels is rated the highest, with 58.02% of enterprises considering it as “very high” and 19.08% as “high”, while no entity assesses this component as of low quality. A very similar assessment is given to the quality of food and restaurant services, with 54.20% of enterprises classifying it as “very high” and 16.03% as “high”, with only 2.29% of the statements including low ratings.

The quality of communication and customer support also results in very positive results, with 58.02% of enterprises rating it as “very high” and 14.50% as “high”, and no ratings in the “very low” category, reflecting a clear focus on the customer experience. Regarding the quality of transport and tour guide services, the percentages of positive ratings are more moderate, at 49.62% and 48.85% respectively, while these two areas have the highest percentages of “very low” and “low” ratings, at 3.05% respectively, suggesting the need for additional investments in infrastructure and specialized human resources.

The quality of tourist activities and attractions, although positively assessed by the majority of enterprises (48.09% of responses are in the “high” and “very high” categories), also includes 3.82% “very low” ratings, which may be a consequence of the lack of diversity or insufficient capacities in organizing activities. While the quality of the overall travel experience receives a significant percentage of “very high” (33.59%) and “high” (17.56%) ratings, a wider distribution is observed across all levels of assessment, including 3.05% in the lower categories, which underlines the importance of integrated improvement of all components of the tourist experience.

In summary, tourism enterprises perceive the quality of the services they offer as very high in aspects related to accommodation, food and customer support, while the main challenges are identified in transportation, guide services and tourist attractions, which require strategic interventions to increase competitiveness and tourist satisfaction.

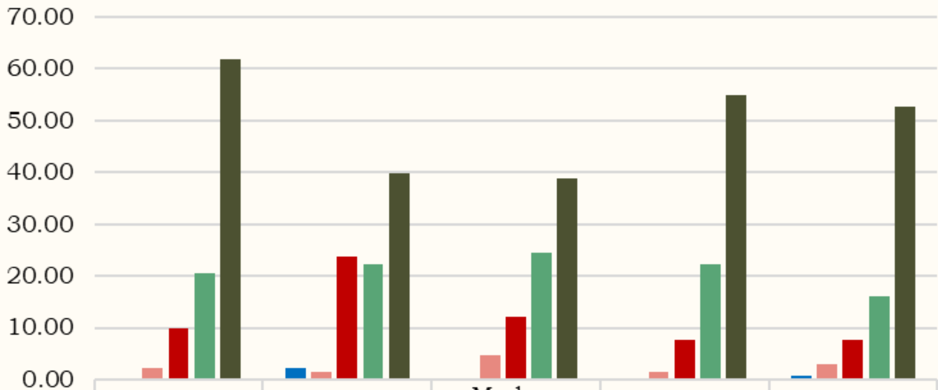
Graph 7. How often does your enterprise conduct quality assessments of the services it provides?



Source: ISA (2025)

Data on the frequency of service quality assessments show that the majority of enterprises carry out this process to an average extent, with 43.51% of businesses reporting that they conduct quality assessments from time to time. A significant proportion, 23.66%, declare that they conduct assessments frequently, while only 10.69% do so always, showing a continuous commitment to improving services. On the other hand, 13.74% of enterprises rarely assess quality, while 6.11% never do this process. The share of unspecified data accounts for 2.29%. This distribution shows that, although there is a solid base of businesses that regularly engage in quality monitoring, there is still room to raise awareness and support enterprises that rarely implement this practice or do not have it structured. Strengthening the culture of continuous quality assessment can directly impact on increasing tourist satisfaction and improving the competitiveness of the tourism offer.

Graph 8. How do you assess the importance of the following factors in improving the quality of tourism services?



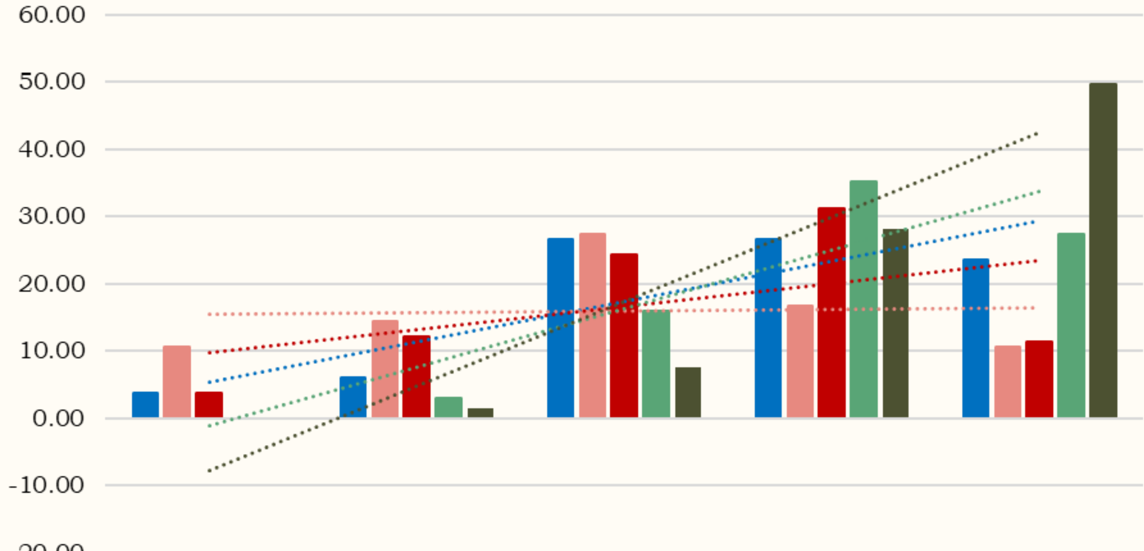
	Staff training	Advanced technology	Modern infrastructure	Service standards	Customer feedback
Not at all important	0.00	2.29	0.00	0.00	0.76
A little important	2.29	1.53	4.58	1.53	3.05
Moderately important	9.92	23.66	12.21	7.63	7.63
Important	20.61	22.14	24.43	22.14	16.03
Very important	61.83	39.69	38.93	54.96	52.67

Source: ISA (2025)

The data on the assessment of the importance of factors for improving the quality of tourism services show a clear consensus on the essential role that certain components play in the development of the sector. The most highly rated factor is staff training, with 61.83% of enterprises considering it as “very important” and 20.61% as “important”, which constitutes a broad support of over 82% in total. This reflects the high awareness of tourism stakeholders about the importance of human capacities and the need for continuous professionalization in the provision of services. After staff training, the factor of standardization of services ranks second in importance, with 54.96% assessing it as “very important” and 22.14% as “important”. This indicates a strong need for harmonizing quality across all links in the tourism chain and establishing unified practices to guarantee a sustainable experience for tourists. Customer feedback also turns out to be a key factor, rated as “very important” by 52.67% of companies, while for 16.03% it is “important”. This indicates a growing orientation towards a culture of continuous improvement based on customer experience and evaluation.

In comparison, advanced technology and modern infrastructure, although considered important components, have slightly lower percentages of maximum evaluation. Only 39.69% of enterprises consider technology as “very important”, while 23.66% assess it as “moderately important”. Likewise, 38.93% of entities consider modern infrastructure as “very important” and 24.43% as “important”, while a modest percentage of 4.58% assess this factor as “slightly important”. Overall, the data show that tourism enterprises give high priority to investing in human resources and raising service quality standards, seeing them as essential for competitiveness and sustainability in the market. Technology and infrastructure are assessed more as supporting tools than fundamental factors, while the voice of the customer remains a valuable source for the strategic orientation of improvements.

Graph 9. How would you assess the progress of demand for tourist consumption over the last 5 years?



	Very low progress	Low progress	Average progress	High progress	Very high progress
2019	3.82	6.11	26.72	26.72	23.66
2020	10.69	14.50	27.48	16.79	10.69
2021	3.82	12.21	24.43	31.30	11.45
2022	0.00	3.05	16.03	35.11	27.48
2023	0.00	1.53	7.63	28.24	49.62

Source: ISA (2025)

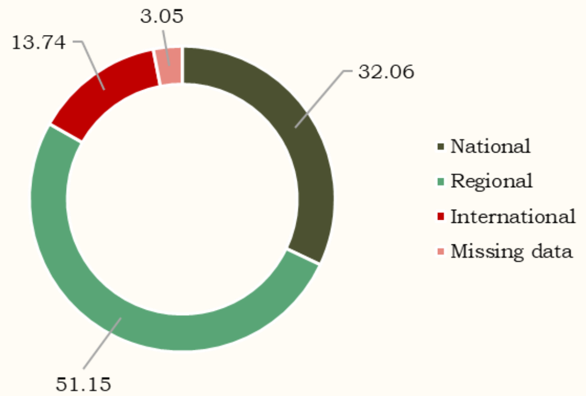
Data on the progress of tourism consumption demand over the last five years show a clear trend of improvement, with a progressive shift from negative assessments to very positive assessments, especially after 2020. In 2019, before the pandemic, the perception of tourism demand was generally positive, with 26.72% of enterprises assessing it as “high progress” and 23.66% as “very high progress”, while 9.93% considered the progress as low or very low. In 2020, as a result of the COVID-19 pandemic, there was a noticeable decrease in positive assessments: only 16.79% of enterprises reported “high progress” and only 10.69% “very high”, while the percentage of negative assessments increased significantly to 25.19%, reflecting the constraints and uncertainty in the tourism sector during that period.

The year 2021 marked a slow recovery, with positive perceptions starting to increase again - 31.30% reported “high progress” and 11.45% “very high progress”, however the presence of low assessments remained significant (16.03%). In 2022, the improvement was much more noticeable: 62.59% of enterprises reported “high progress” or “very high progress”, while only 3.05% gave negative assessments, indicating a clear recovery of the sector.

The most positive trend is observed in 2023, where 49.62% of enterprises assessed progress as “very high” and 28.24% as “high”, reaching the highest perceived level of tourism demand in the last five years. Meanwhile, negative evaluations are practically negligible (only 1.53%), indicating a stabilization and steady expansion of tourist consumption.

In summary, the data evidence a full cycle of development in the tourism sector: pre-pandemic growth, decline in 2020, and a gradual recovery culminating in significant demand growth in 2022 and 2023. This positive trend signals high confidence in the market and creates a strong basis for long-term planning in the tourism industry.

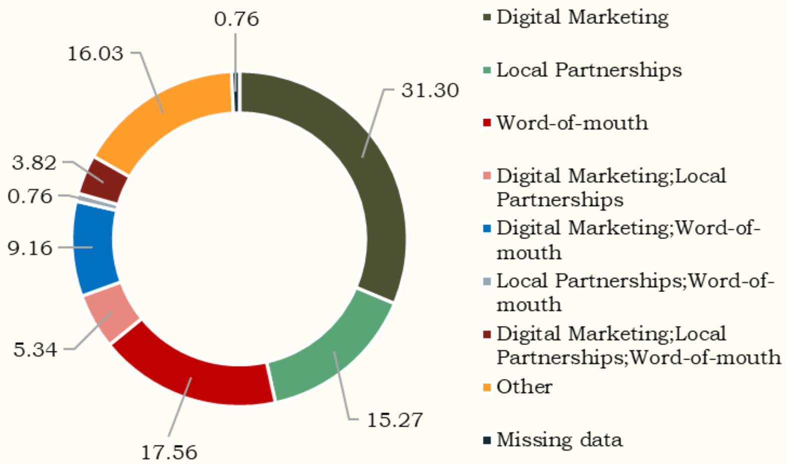
Graph 10. What are the main markets you are targeting?



Source: ISA (2025)

Data on the main markets targeted by enterprises show that the majority of them are oriented towards the regional market, with 51.15% of the total, demonstrating the importance of connectivity and circulation of tourists within the region. In second place is the national market with 32.06%, which indicates that a significant part of businesses rely mainly on domestic tourists as a sustainable source of income. International markets represent only 13.74% of businesses, signaling a still modest level of orientation towards inbound tourism from abroad. The share of unspecified data is 3.05% and does not affect the overall structure. This distribution shows that tourism activity is still focused mainly within national and regional borders, while the potential for expansion and diversification in international markets remains an open opportunity that can be strengthened through investments in promotion, improvement of services and creation of more sustainable links with international partners.

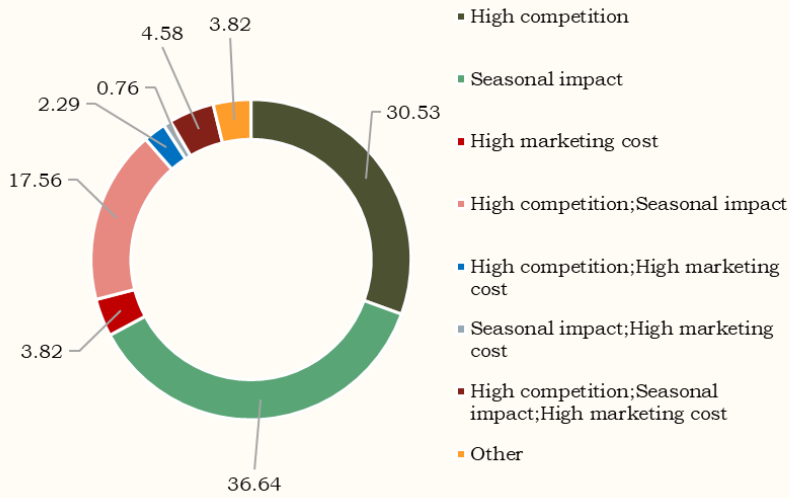
Graph 11. How do you gain and retain customers?



Source: ISA (2025)

Data on how businesses acquire and retain customers shows that digital marketing remains the most widely used strategy, with 31.30% of businesses relying primarily on this channel to reach and retain customers. Word-of-mouth accounts for a significant share at 17.56%, reflecting the importance of personal recommendations and good experiences from existing customers. Local partnerships represent 15.27% of responses, indicating that collaboration with other local actors remains an important tool for increasing tourist traffic. The combinations between these methods show a tendency to diversify channels, with digital marketing and word-of-mouth being used simultaneously by 9.16% of businesses, while a combination of all three strategies (digital marketing, local partnerships and word-of-mouth) is used by 3.82%. The “Other” option, which accounts for 16.03%, reflects ways based mainly on providing quality service, good behavior and hospitality, highlighting the fact that many businesses support their efforts in building lasting relationships through commitment to quality and customer care. This group includes responses such as repeat customers, adequate communication, hospitality and seriousness in providing services. The share of unspecified data is minimal, 0.76%, and does not affect the overall structure. Overall, this distribution shows that enterprises do not rely only on formal marketing channels, but consider real customer experience and long-term relationships as decisive factors in ensuring loyalty and expanding the customer base.

Graph 12. What are the main challenges you face in reaching your target audience?

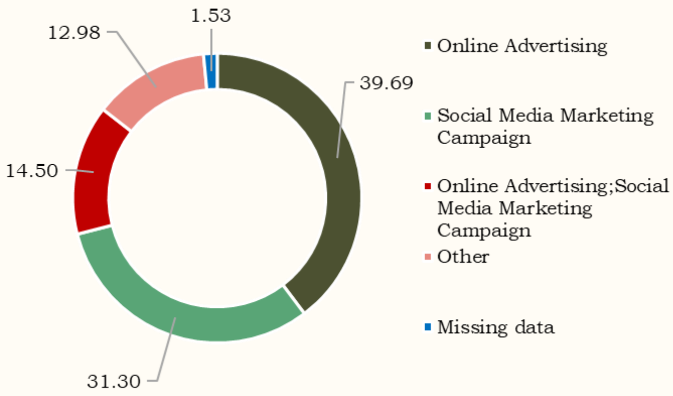


Source: ISA (2025)

Data on the main challenges faced by businesses in reaching their target audience show that seasonality has the highest percentage, at 36.64%, highlighting the high dependence of economic activity on the seasons and the influx of tourists at certain times of the year. High competition ranks as the second biggest challenge at 30.53%, reflecting the density of similar service providers in the market and the challenges of maintaining differentiation and positioning. A portion of businesses perceive these two challenges combined, with 17.56% reporting high competition and seasonality together, indicating that these factors often appear interrelated. To a lesser extent, businesses have also faced the high cost of marketing, which, as a single challenge, accounts for only 3.82%, while its combinations with other factors are less prevalent (2.29% for competition and marketing cost; 0.76% for seasonality and marketing cost; and 4.58% for the combination of all three challenges).

The “Other” option, with 3.82%, includes specific challenges that go beyond the usual factors, such as the lack of professionally trained staff, the low level of digitalization, and issues related to low prices and high operating costs. These elements suggest additional needs for support in human capacity development, technological modernization, and sustainable financial management. Overall, this structure shows that seasonal factors and competition remain the dominant challenges for most businesses, reflecting the need for clear diversification strategies, off-season planning, and capacity reinforcement to remain competitive in a fragmented and seasonally dependent market.

Graph 13. What channels do you use to promote your tourism services?



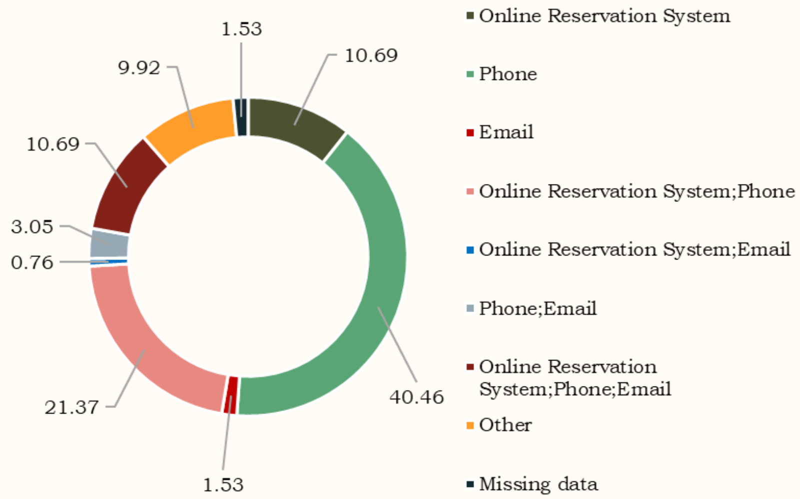
Source: ISA (2025)

Data on the channels used to promote tourism services show that the majority of businesses rely on online advertising, with 39.69% of the total, demonstrating the importance of having a presence on various digital platforms to reach the target audience. Social media marketing campaigns account for 31.30%, indicating that direct communication and interaction with customers through social media remains a very important tool for promoting the offer. A portion of businesses, 14.50%, use a combination of online advertising and social media campaigns, reflecting a more integrated and comprehensive approach to digital marketing.

The “Other” option, which accounts for 12.98%, includes other forms of promotion, such as the use of specific platforms including Instagram, Facebook and LinkedIn, as well as posters for menu offers, indicating that some businesses also focus on personalized visual communication channels and social networks to reach their target segments more directly. The share of unspecified data is only 1.53% and does not affect the overall structure of the data. This distribution shows that digital marketing remains the foundation of the promotional strategy for most companies, while specific channels and creative forms of presentation continue to be complementary ways to increase visibility and strengthen the connection with potential customers.

Data on the methods of managing reservations and bookings show that the majority of businesses still rely on traditional communication via telephone, with 40.46% of the total, making this method the most used channel for receiving and confirming reservations. A significant portion of businesses use a combination of online and telephone reservation systems, with 21.37%, indicating an attempt to combine traditional and digital methods to offer flexibility to customers. The use of the online reservation system alone accounts for 10.69%, while another 10.69% manage reservations through a complete combination: online system, telephone and email. Electronic mail (email) as a single channel is very little used, with only 1.53%, while combinations of telephone-email (3.05%) and online system-email (0.76%) remain unproliferated. The “Other” option, which accounts for 9.92%, includes reservations made physically in the office or through social networks, reflecting the importance of direct contact and the use of social channels for fast and direct communication with customers. The share of unspecified data accounts for 1.53% and does not significantly affect the overall picture.

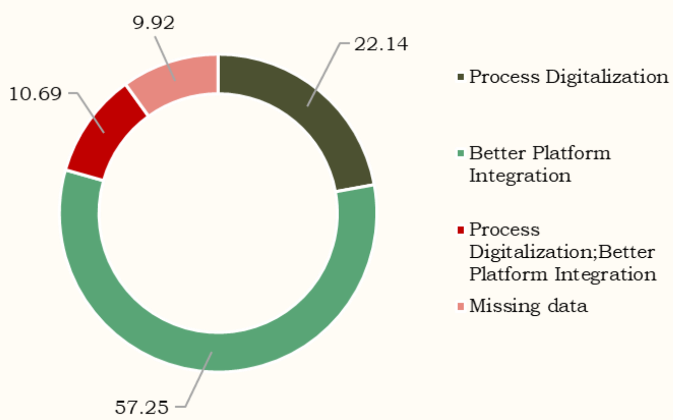
Graph 14. How do you manage reservations and bookings?



Source: ISA (2025)

This distribution shows that, although digital reservation management practices are gaining ground, traditional communication methods, such as phone calls and physical presence, still continue to be applied, reflecting the level of personal interaction that customers require and the flexibility that these channels offer businesses in managing their services.

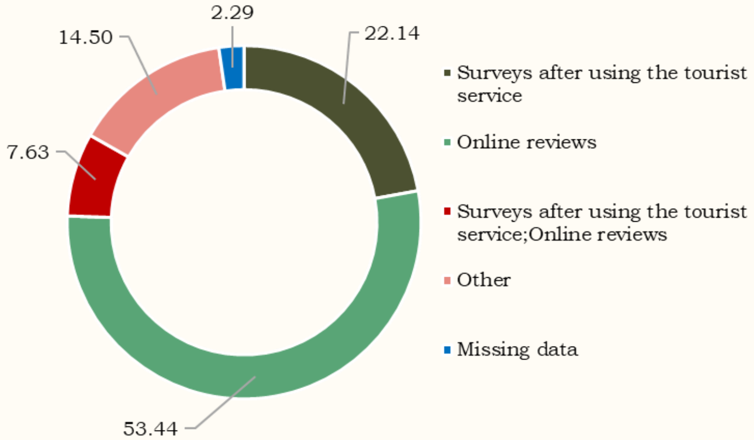
Graph 15. What improvements would you like to make in your business operations?



Source: ISA (2025)

Data on the improvements that enterprises would like to make in their operations shows that most of them see better platform integration as a priority, with 57.25% of businesses reporting this need. This shows that unified management of different operational systems and tools is seen as a key factor to increase efficiency and provide a better experience for customers. Digitalization of processes was declared by 22.14% of businesses, indicating that a significant part of them are aware of the importance of automation and digital transformation to improve productivity and reduce manual interventions. A part of businesses, 10.69%, emphasized the need for both at the same time - digitalization of processes and better platform integration - reflecting a more comprehensive and strategic approach to improving operations. The share of unspecified data accounts for 9.92%. This structure shows that most enterprises are oriented towards technological modernization and internal optimization, with a focus on creating interconnected and functional systems that support more effective service management and increased competitiveness in the market.

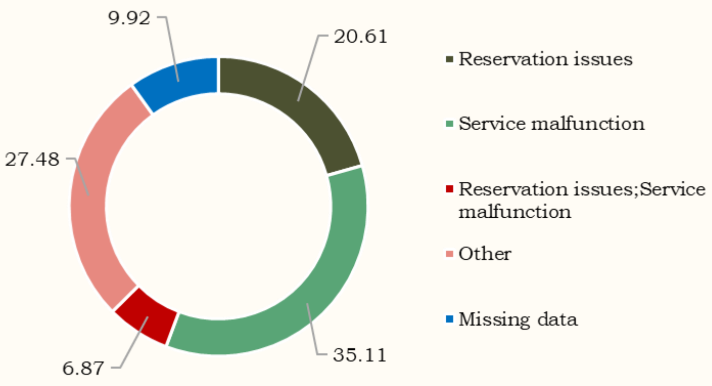
Graph 16. How do you currently measure customer satisfaction?



Source: ISA (2025)

Data on the ways in which customer satisfaction is measured show that the majority of companies rely on online reviews, with 53.44% of businesses using them as the main tool to understand customer perception and experience. Surveys after the use of tourism services are given importance by 22.14% of businesses, while 7.63% use a combination of both, indicating a more comprehensive approach to collecting information both digitally and through direct feedback. The “Other” option, with 14.50%, includes more traditional and practical methods, such as physical meetings with customers, evaluation based on the behavior of regular customers, hospitality, direct service or measurement through the increase in the number of customers. This shows that some enterprises still rely on close relationships and continuous monitoring of customer frequency as an indicator of satisfaction. The share of unspecified data is 2.29% and does not affect the overall structure. This distribution highlights that online reviews have become an important source of information, reflecting the role of digital platforms and social networks in creating and maintaining business image, while traditional direct monitoring practices continue to be important for those who rely on personal customer relationships and assessing long-term loyalty.

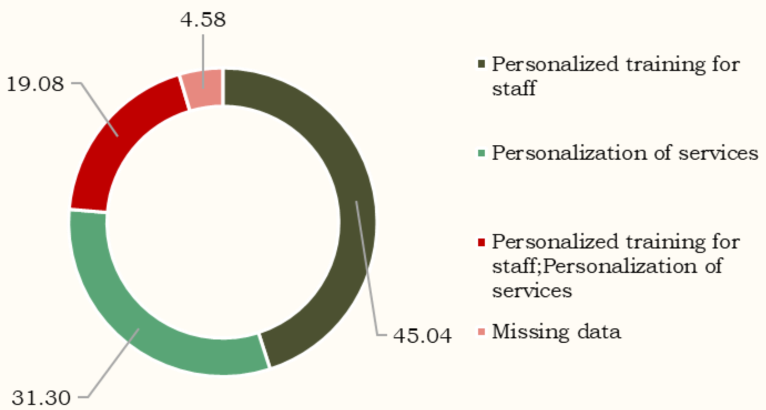
Graph 17. What are the most common complaints you receive from customers?



Source: ISA (2025)

Data on the most common complaints received by businesses show that service disruption is the most frequently reported concern, with 35.11% of responses, reflecting the need to improve the quality and sustainability of tourism service provision. Problems with reservations account for 20.61% of complaints, indicating that inefficient booking management remains a critical point that directly impacts customer experience. A portion of businesses, 6.87%, reported both challenges simultaneously - problems with reservations and service disruption - highlighting that they often appear interrelated and require coordinated solutions. The “Other” option, representing 27.48%, includes a wide range of other concerns, such as cases of flight or hotel check-in delays, schedule changes and cancellations by companies, parking issues, high costs or living standards that affect price perception. Some businesses have stated that they do not receive complaints, which may be related to the small nature of the operation or to the close relationship with customers. The unspecified data portion is presented in 9.92% of cases. Overall, this structure shows that aspects related to functionality and operational organization remain areas where businesses should focus improvements, including increasing the standard of services, more efficient management of reservations and strengthening communication with customers to minimize misunderstandings or delays that impair the tourist experience.

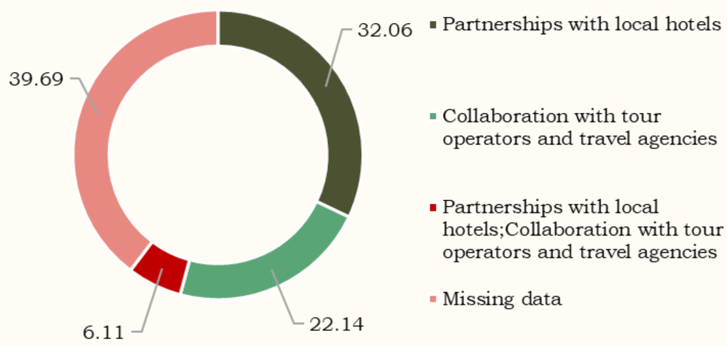
Graph 18. What initiatives have you taken to improve the customer experience?



Source: ISA (2025)

Data on initiatives undertaken to improve customer experience show that the majority of businesses focus on personalized staff training, with 45.04% of enterprises having invested in building employee capacities to provide better quality services tailored to customer needs. Service personalization ranks second with 31.30%, reflecting efforts to provide more flexible and individualized solutions that increase tourist satisfaction and loyalty. A portion of enterprises, 19.08%, combine both approaches - staff training and service personalization - indicating a more complete and integrated commitment to improving customer experience in all operational chains. The share of unspecified data is 4.58%. This distribution shows that businesses are aware of the crucial role that trained staff and a flexible approach to the customer have in providing a sustainable and quality experience, prioritizing building human capacities and adapting services to growing market expectations.

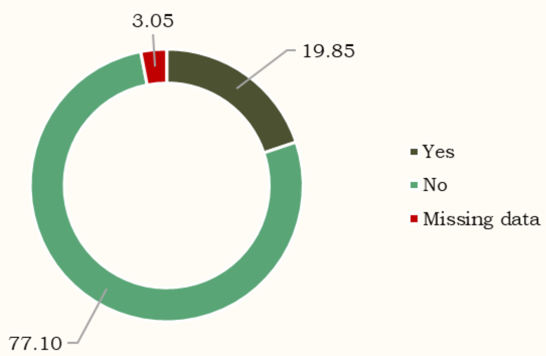
Graph 19. Do you collaborate with other companies or organizations in the tourism industry?



Source: ISA (2025)

Data on the cooperation of enterprises with other companies or organizations in the tourism industry show that a significant part of businesses have established partnerships with local hotels, with 32.06% of the total, reflecting the importance of cooperation within the community to offer more complete packages and maximize benefits for all parties. Cooperation with tour operators and travel agencies was reported by 22.14% of businesses, which shows the important role that these actors have in generating clientele and expanding the target market. A smaller part, 6.11%, stated that they combine both forms of cooperation - with local hotels and tour operators/travel agencies - signaling a more integrated approach to networking services. However, the share of unspecified data is relatively high, 39.69%, suggesting that a part of businesses either have not formalized cooperation relationships, or do not have their partnerships structured in a clear way. This distribution shows that cooperation remains an important element in the development of the tourism industry, however the potential for strengthening and expanding existing networks is still great, especially in the creation of joint packages, information sharing and better coordination between local and national actors.

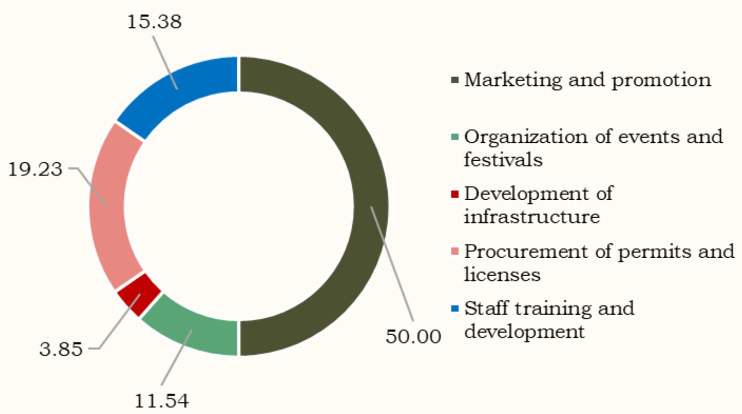
Graph 20. Have you collaborated with municipalities or local institutions during the last year?



Source: ISA (2025)

Data on the level of cooperation with municipalities or local institutions over the last year show that the majority of businesses have not had a cooperative relationship with local authorities, with 77.10% of the total declaring this absence. Only 19.85% of enterprises report having cooperated with municipalities or local institutions, signaling that the levels of institutional coordination and mutual support remain limited. The share of unspecified data is 3.05% and does not affect the overall structure. This distribution shows that there is considerable scope to strengthen cooperation between the private sector and local institutions, especially in planning and developing activities that can boost tourism, promoting destinations, improving infrastructure and creating joint mechanisms to address specific challenges of the sector. Strengthening this relationship would enable a more coordinated approach, contributing to the sustainable growth and competitiveness of the tourism industry at local and regional level.

Graph 21. If YES, what are the main areas of your cooperation with municipalities and local institutions?

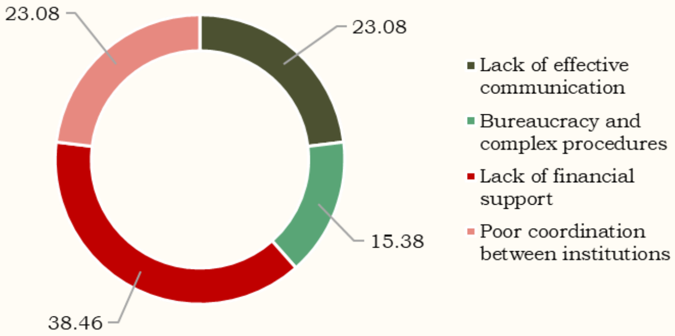


Source: ISA (2025)

Data on the main areas of cooperation of businesses with municipalities and local institutions show that marketing and promotion account for the largest share, with 50.00% of cases, proving that institutional support is seen mainly as an opportunity to increase visibility and attract more tourists through joint promotional activities. Providing permits and licenses ranks second with 19.23%, which indicates that part of the cooperation focuses on administrative and regulatory aspects, facilitating procedures related to the legal functioning of businesses. Staff training and development accounts for 15.38%, reflecting the interest in building professional capacities through support from local institutions. Organizing events and festivals accounts for 11.54% of cases, signaling the role that cooperation can have in creating joint activities that generate tourist flows and revitalize the tourist offer. Infrastructure development is declared to a lesser extent, with only 3.85%, suggesting that this area has not yet received due attention in cooperation relations. This structure shows that, although cooperation with municipalities and local institutions exists in some cases, it remains mainly focused on promotional activities and regulatory aspects, while important areas such as infrastructure investments and involvement in sustainable development projects still need further strengthening and support.

In the question *"Is there a specific project in which you have collaborated with the municipality or local and international institutions?"*, the data show that enterprises have collaborated with municipalities and local and international institutions mainly in marketing and promotion projects, as well as in the organization of local events. These initiatives include activities aimed at increasing the visibility of tourist destinations and greater community engagement through cultural and festive events. In addition, some enterprises have participated in various projects and other initiatives aimed at developing tourism and promoting local culture. These collaborations indicate a commitment of enterprises to collective efforts to strengthen the tourism sector through joint projects, benefiting from institutional support and networking with local and international actors. This approach can contribute to increasing local capacities, more effective promotion of the tourism offer and sustainable economic development in the region.

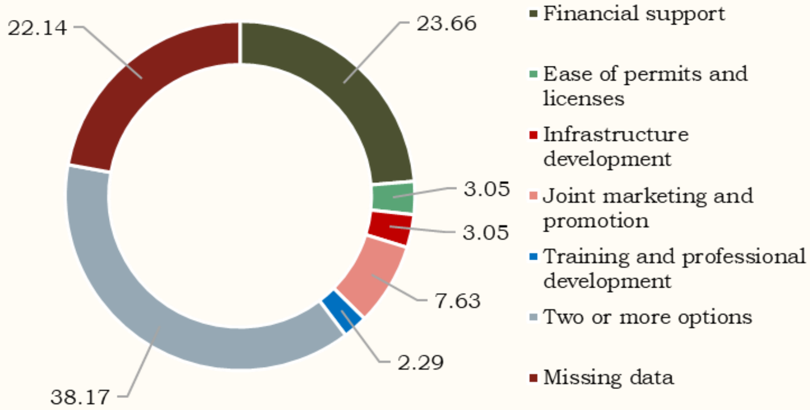
Graph 22. What are the main challenges you have encountered during cooperation with municipalities and local institutions?



Source: ISA (2025)

Data on the main challenges that enterprises have encountered during cooperation with municipalities and local institutions show that the lack of financial support is the biggest obstacle, with 38.46% of cases, highlighting the need for more stable and sufficient financial resources for the implementation of joint projects and for the advancement of local development. Lack of effective communication and poor coordination between institutions were each declared by 23.08% of businesses, highlighting challenges in organizational cooperation and the need to improve dialogue and coordination between different actors to ensure the most successful implementation of initiatives. Bureaucracy and complex procedures were reported by 15.38% of respondents, indicating that administrative challenges often slow down or make it difficult to implement cooperation and projects with local institutions. Overall, these data highlight the importance of improving institutional cooperation mechanisms, with a focus on facilitating procedures, increasing transparency, and providing financial support to businesses, in order to create a more favorable environment for the development and consolidation of the local tourism sector.

Graph 23. What do you need most from municipalities and local institutions to improve your tourism services and activities?

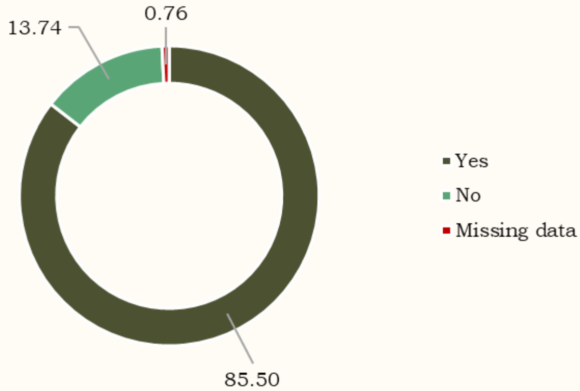


Source: ISA (2025)

Data on the main needs that enterprises seek to be met by municipalities and local institutions to improve tourism services and activities show that a significant part of them requires financial support, with 23.66% of cases, highlighting the importance of funds for investment, development and sustainable operation. Facilitation of procedures for obtaining permits and licenses as well as infrastructure development account for 3.05% of cases respectively, indicating that these areas, although with a smaller weight, remain important elements for improving operational capacities. Joint marketing and promotion is mentioned by 7.63% of cases, reflecting the need for closer institutional cooperation in increasing the visibility and attractiveness of tourist destinations. Training and professional development account for 2.29% of cases, signaling the demand for building human capacities and the quality of services. A large percentage, 38.17%, chose two or more options, indicating that the needs are multifaceted and complex, including a combination of financial support, infrastructure improvement, procedural facilitation and increased professional capacities. The share of unspecified data is 22.14%, indicating that a significant number of businesses may not be clear or have not stated specific needs. This distribution shows that to advance the sustainable development of the tourism sector, a comprehensive and coordinated approach is needed by local institutions, addressing in an integrated manner the financial, infrastructural, administrative and professional needs of businesses.

In the question *"Do you have any specific recommendations on how cooperation with municipalities and local institutions can be improved?"*, the recommendations given by the enterprises mainly focus on several key areas. A large part of them call for greater financial support and subsidies, which are essential for the growth and sustainable development of tourism businesses. The need for professional training and staff capacity building is also emphasized, as a way to improve the quality of services and operational efficiency. In the administrative and institutional aspect, it is recommended to facilitate procedures for obtaining licenses and permits, improve road infrastructure, and create more open communication closer to the needs of businesses. Other recommendations highlight the importance of joint promotion and marketing, requesting support from institutions for advertising local tourism agencies and products, as well as for promoting cooperation between different actors in the tourism industry. In addition, the recommendations include more sustainable measures to support women-led businesses, as well as suggestions for better organization and tax cuts to stimulate local economic development. Overall, these proposals reflect the need for a comprehensive and collaborative approach, where local institutions are closer to businesses, demonstrate flexibility and continuous communication, and provide sustainable financial, infrastructural, and professional support for the growth and consolidation of the tourism sector.

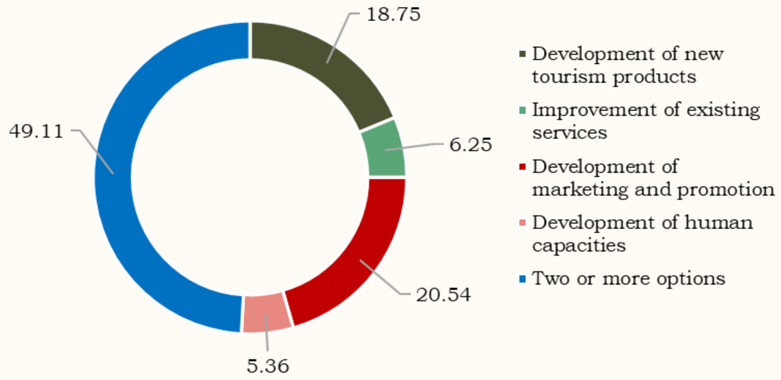
Graph 24. Are you interested in developing new projects in collaboration with municipalities and local institutions?



Source: ISA (2025)

Data on interest in developing new projects in cooperation with municipalities and local institutions show a very positive trend on the part of enterprises. The vast majority, 85.50% of them, express readiness and interest in being part of new joint projects, signaling a clear will to strengthen institutional cooperation and to benefit from the opportunities offered by local support in the development of the tourism industry. Only 13.74% of businesses have declared that they are not interested in developing new projects, while 0.76% of the data is missing. This result shows that there is great potential to build new partnerships between the private sector and local institutions, especially in areas such as marketing, promotion, infrastructure development, capacity building and facilitation of administrative procedures. Strengthening this cooperation would enable more sustainable development, more effective management of resources and increased competitiveness of tourist destinations at the local and regional level.

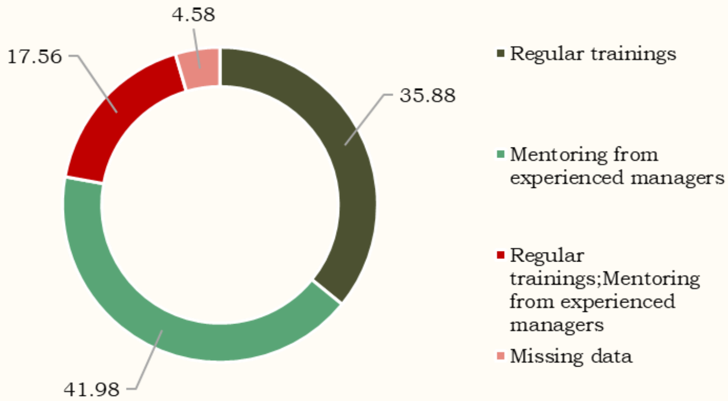
Graph 25. If YES, in which areas would you like to focus these projects?



Source: ISA (2025)

Data on the areas where enterprises would like to focus new projects in cooperation with municipalities and local institutions show a clear orientation towards comprehensive approaches. The majority, 49.11%, have chosen more than one option, signaling that the needs are interconnected and cannot be addressed through a single area of intervention alone. This reflects the need for integrated projects that simultaneously include the development of new products, the improvement of existing services, the increase of professional capacities and the strengthening of marketing. Of the individual areas, the development of marketing and promotion accounts for 20.54% of the preferences, highlighting the importance that enterprises attach to increasing the visibility and more effective promotion of the tourist offer. The development of new tourist products ranks immediately after it with 18.75%, which indicates the willingness of businesses to diversify the offer and adapt services to changing market demands. Improving existing services is stated by 6.25% of enterprises, while developing human capacities by 5.36%, indicating that raising service standards and staff training continue to be aspects that require attention, but are often addressed together with other areas. Overall, this distribution clearly demonstrates that businesses are aware of the importance of a combined approach, where product development, promotion, quality improvement and building professional capacities are combined to increase the sustainability, attractiveness and competitiveness of tourist destinations in close cooperation with local authorities.

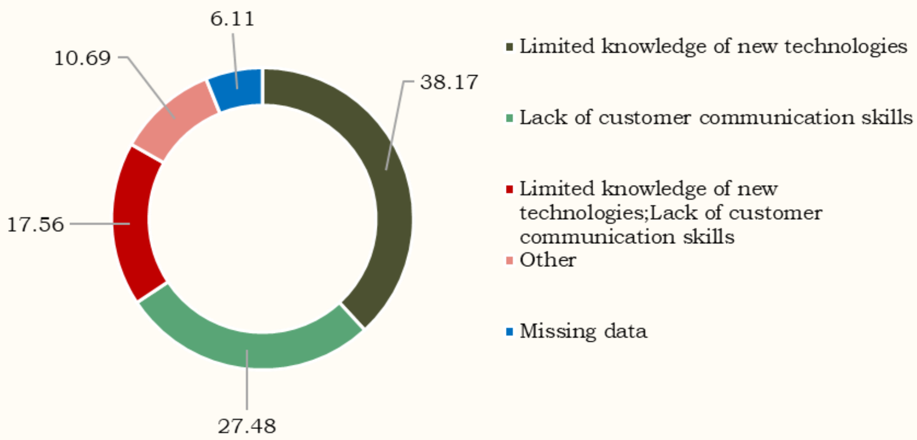
Graph 26. How do you train and develop your staff to meet industry standards and customer expectations?



Source: ISA (2025)

Data on the ways in which enterprises train and develop staff to meet industry standards and customer expectations show a clear orientation towards a combination of practical and theoretical forms of professional development. Mentoring by experienced managers accounts for the largest share at 41.98%, reflecting the importance attached to the transfer of practical knowledge and direct experience from more qualified employees to younger staff. Regular training accounts for 35.88%, which shows the commitment of a significant part of businesses to provide structured and continuous professional development in accordance with tourism industry standards. A part of enterprises, 17.56%, apply a combined approach, combining formal training with practical mentoring, which signals a more complete commitment to building internal capacities and increasing the quality of services. The share of unspecified data is 4.58% and does not affect the overall picture of the data. This structure shows that businesses in the tourism sector are aware of the importance of continuous professional development and see it as one of the key elements for meeting customer expectations and ensuring a sustainable and competitive standard of the services they provide.

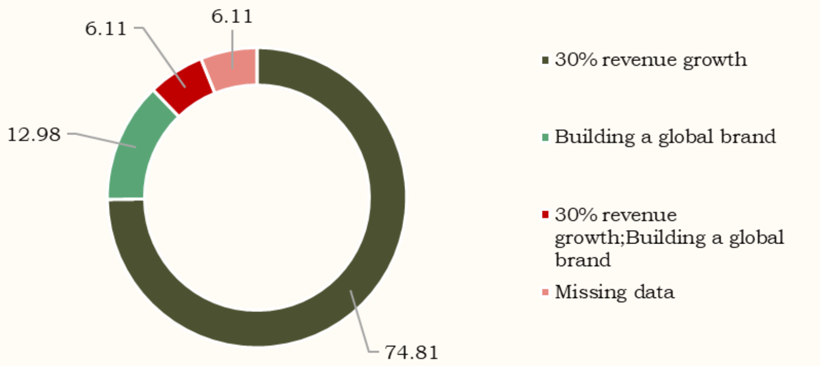
Graph 27. What are the obvious skill or knowledge gaps among your employees?



Source: ISA (2025)

Data on perceived skills or knowledge gaps among employees shows that the biggest challenge is related to limited knowledge in the use of new technologies, with 38.17% of enterprises identifying this as a key issue. This reflects the need for staff to adapt to new digital trends, especially in an industry where technology is increasingly impacting operational processes and customer experience. Lack of customer communication skills ranks second with 27.48%, highlighting the importance of developing interpersonal and customer service skills as key factors in ensuring tourist satisfaction and loyalty. A proportion of businesses, 17.56%, reported both of these gaps simultaneously, indicating that these are often interrelated and require an integrated approach to staff training. The “Other” option includes 10.69% and can be related to more specific challenges such as the lack of adequate staff, while the share of unspecified data is 6.11% and does not change the overall structure. This distribution shows that in order to improve industry standards and meet increasingly complex customer expectations, businesses need sustainable investments in practical training, with a focus on developing digital competencies, improving communication skills and strengthening a culture of professional service.

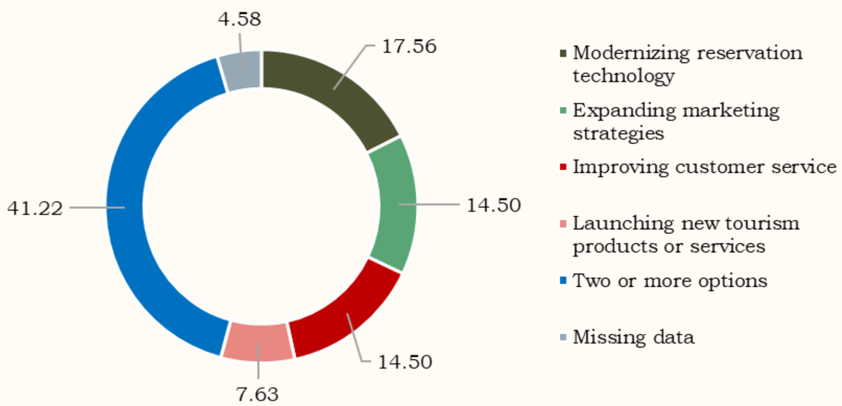
Graph 28. What are your strategic goals for the next 1-3 years?



Source: ISA (2025)

Data on the strategic goals of enterprises for the next 1-3 years show a clear focus on sustainable financial growth. The vast majority, 74.81% of businesses, aim to increase revenues by 30%, reflecting the ambition to strengthen the market position and maximize the profitable capacity in the medium term. Building a global brand is the main goal for 12.98% of enterprises, which signals aspirations for expansion beyond the local and regional market, as well as for improving the image and international recognition of their products or services. A part of businesses, 6.11%, aim to simultaneously achieve both objectives - increasing revenues and creating a global brand - demonstrating a more integrated and ambitious approach to development. The percentage of unspecified data is also 6.11%, and has no impact on the overall trend. This distribution clearly shows that enterprises are oriented towards sustainable growth and expansion, with a focus on strengthening financial capacities, consolidating market presence, and building a distinctive identity that can better position them in an increasingly competitive market, including the international one.

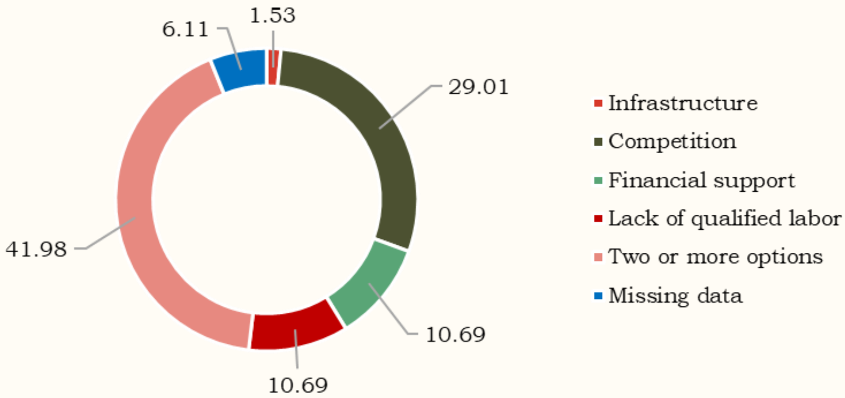
Graph 29. What specific investments or developments do you plan to undertake to grow your business?



Source: ISA (2025)

Data on specific investments or developments that enterprises plan to undertake to grow their business indicate a diverse and combined approach to strengthening capacities and expanding the market. The majority, 41.22% of businesses, have stated that they intend to invest in two or more areas simultaneously, which demonstrates an integrated strategy where technological modernization, marketing and service improvement are combined to maximize growth potential. Individually, the modernization of reservation technology is a priority for 17.56% of enterprises, reflecting the awareness of the importance of digitalization and efficiency in reservation management as a key factor for improving the customer experience. Expanding marketing strategies and improving customer services are stated by 14.50% each, indicating that businesses consider these aspects necessary to strengthen their market presence and increase tourist satisfaction. The launch of new tourism products or services has a smaller share, at 7.63%, but nevertheless highlights efforts to diversify the offer and address new market demands. The share of unspecified data constitutes 4.58%. This distribution shows that businesses are oriented towards investments that improve operational aspects, strengthen customer relationships and increase competitiveness, reflecting a clear vision for sustainable growth and adaptation to new trends in the tourism industry.

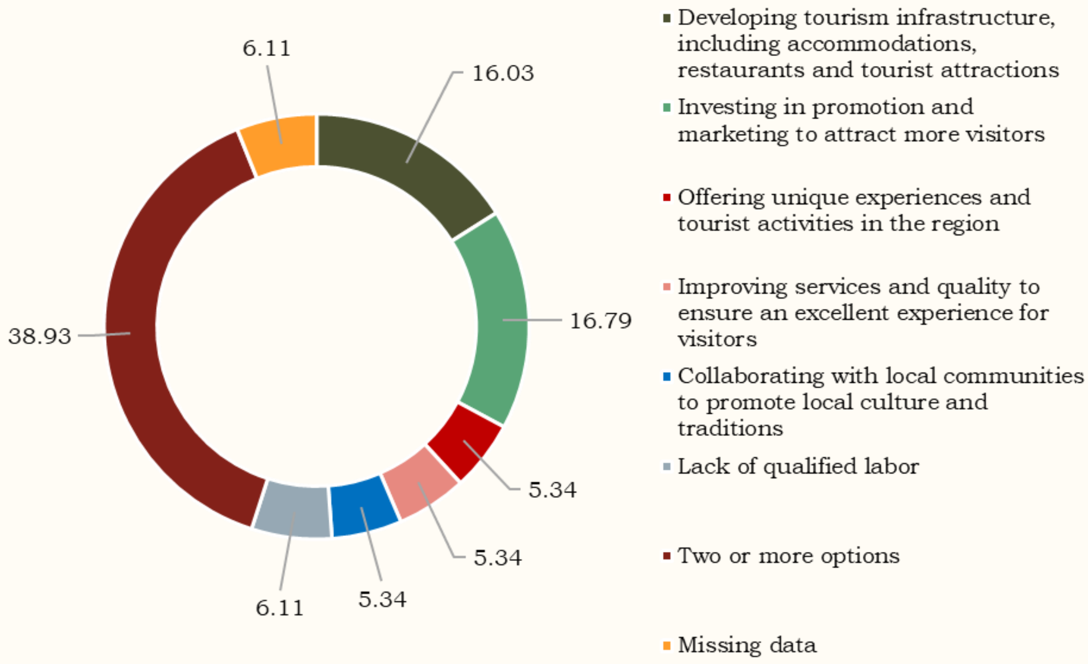
Graph 30. What are the main challenges your company faces in providing tourism services?



Source: ISA (2025)

Data on the main challenges faced by enterprises in the provision of tourism services show a range of interrelated challenges that directly affect the development and sustainable functioning of the sector. The majority, 41.98%, have highlighted that they face two or more challenges simultaneously, which indicates the complex nature of the obstacles that require an integrated approach to solution. Competition is identified as the most prominent challenge with 29.01% of cases, reflecting the high intensity of rivalry in the tourism market and the need for differentiation through innovation and service quality. Financial support and the lack of qualified workforce account for 10.69%, indicating that for many enterprises, financial challenges and human capacities remain critical factors limiting the growth and improvement of the tourism offer. Infrastructure is declared by a smaller percentage, 1.53%, but remains an element that can have a direct impact on the ease of operation and the experience of tourists, while the percentage of unspecified data is 6.11%. This distribution signals that to address existing challenges, businesses require multifaceted support - including favorable financial policies, infrastructure improvements, investment in professional training, and measures that promote fair competition - in order to strengthen the sustainability and competitiveness of the tourism industry at the local and regional level.

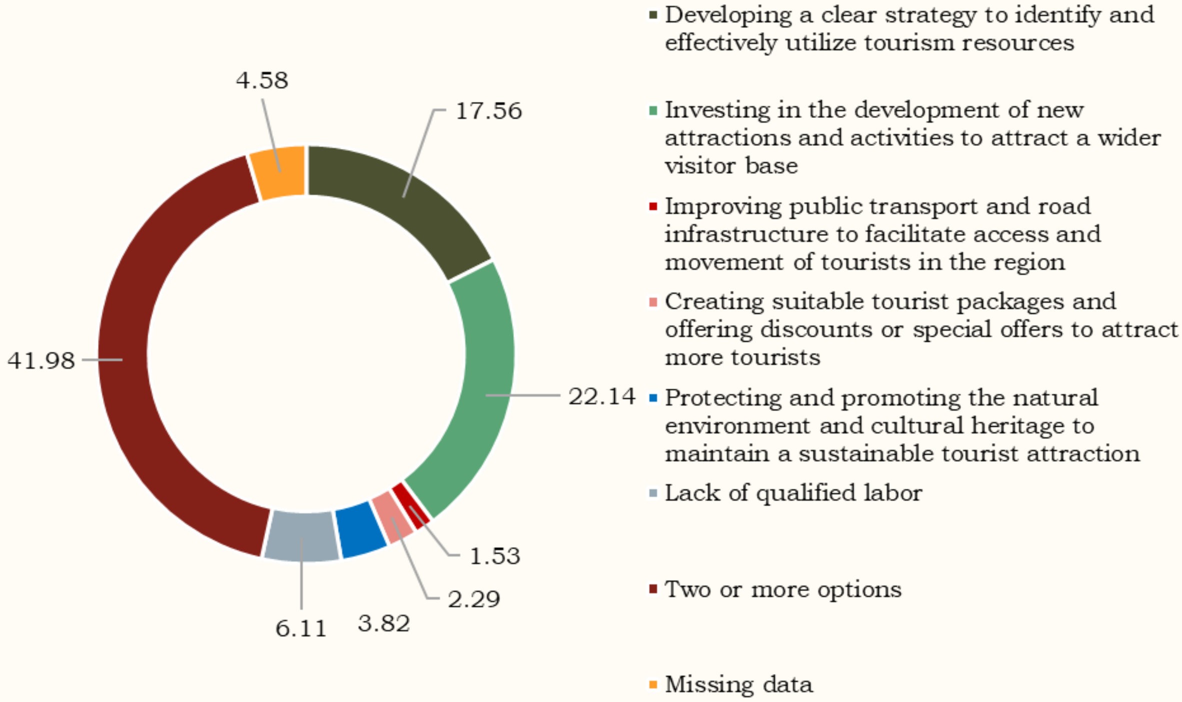
Graph 31. What do you suggest for improving the tourism industry in the region?



Source: ISA (2025)

Data on business suggestions for improving the tourism industry in the region clearly show the need for a comprehensive and coordinated approach, encompassing several key areas of development. The majority, 38.93%, emphasized the need to address two or more directions simultaneously, which indicates that businesses see tourism development as an interconnected process that cannot rely on a single element. Of the options presented, the development of tourism infrastructure - including accommodations, restaurants and attractions - is mentioned by 16.03% of respondents, indicating that investments in infrastructure continue to remain a priority to provide a better and more attractive experience for tourists. Investment in promotion and marketing ranks immediately after it with 16.79%, signaling that increasing the visibility of the destination is equally important to attract new tourists and consolidate the competitive position of the region. Other suggestions, such as offering unique experiences and tourist activities (5.34%), improving services and overall quality (5.34%), and collaborating with local communities to promote local culture and traditions (5.34%) clearly reflect the assessment that businesses give to diversifying the tourist product and preserving local authenticity as elements that can differentiate the region in the tourist market. The lack of qualified labor force, stated in 6.11% of cases, also remains an aspect that requires continuous attention through training and development of professional capacities, and the share of unspecified data is also 6.11%. Overall, these suggestions show that in order to improve the tourism industry in the region, a balanced strategic approach is needed that combines infrastructure investments, effective marketing, increasing the quality of services, promoting local values, and strengthening the professional workforce, building a sustainable and competitive tourism model.

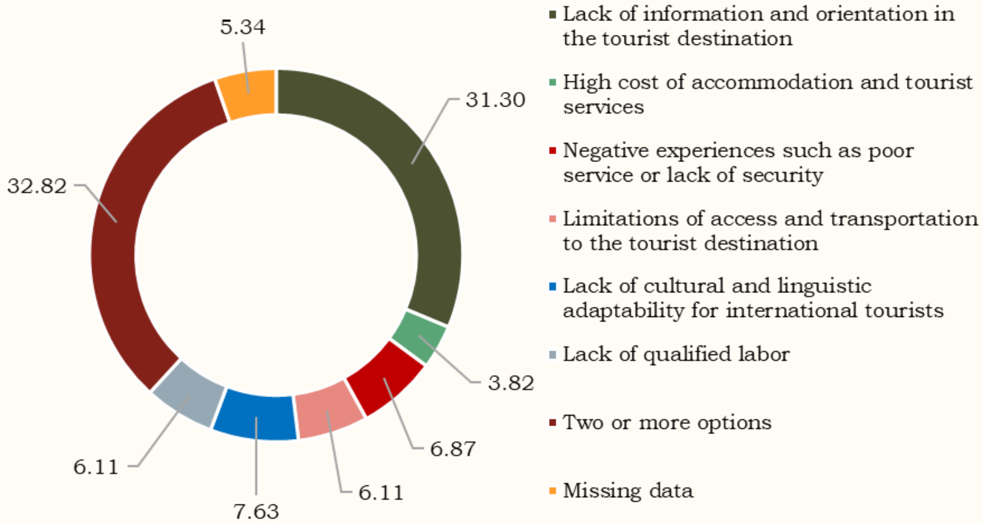
Graph 32. What do you think could be improved to increase tourism development in the region?



Source: ISA (2025)

The data on aspects that can be improved to promote tourism development in the region show a strong comprehensive and combined approach. The majority, 41.98% of respondents, have emphasized that it is necessary to address two or more areas simultaneously, reflecting the complexity of the challenges and the need for coordinated interventions in several directions. On the other hand, investment in the development of new attractions and activities to attract a broader base of tourists occupies the highest percentage with 22.14%. This shows that businesses consider the diversification of the tourism offer a decisive factor to expand the market and increase the attractiveness of the region. Developing a clear strategy to identify and effectively utilize tourism resources ranks second with 17.56%, emphasizing the importance of proper and resource-based planning, so that tourism potentials are used in a sustainable and competitive manner. Other aspects such as improving public transport and road infrastructure (1.53%), creating discounted tourist packages and special offers (2.29%) and protecting the natural environment and cultural heritage (3.82%) clearly reflect that supporting factors, which affect ease of access, tourist experience and resource conservation, are also an important part of this process. The lack of qualified workforce, declared by 6.11% of businesses, remains an element that constantly requires attention through human capacity development policies. The share of unspecified data accounts for 4.58% of cases. Overall, these results show that in order to promote sustainable and competitive tourism development in the region, a coordinated strategic approach is required that includes the development of new products and attractions, resource-based planning, investments in infrastructure and transport, strengthening the workforce and preserving natural and cultural values.

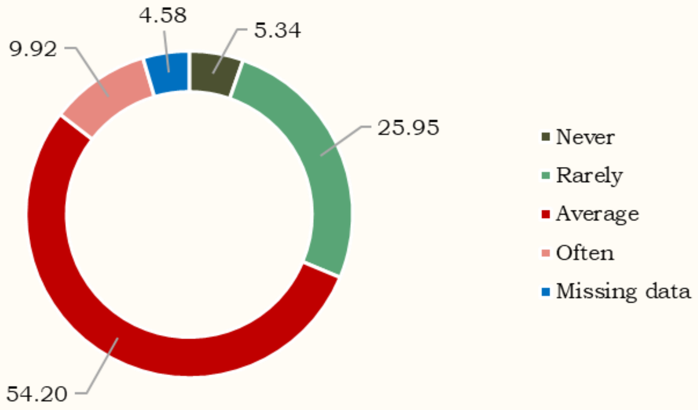
Graph 33. What are some of the main challenges that tourists face?



Source: ISA (2025)

Data on the main challenges faced by tourists in the region clearly show that the problems are multifaceted and often interconnected, directly affecting the quality of the tourist experience. The majority, 32.82% of respondents, identified two or more challenges simultaneously, which shows that negative tourist experiences are not usually related to a single factor, but to a combination of aspects that require coordinated solutions. Lack of information and orientation in the tourist destination was assessed as the most frequent challenge with 31.30%, highlighting the importance of providing clear, accessible and updated information to tourists. This constitutes a key element for facilitating movement, organizing itineraries and increasing satisfaction during the stay. Lack of cultural and linguistic adaptability for international tourists accounts for 7.63%, indicating that language barriers and cultural differences continue to be an obstacle for some tourists, especially for those visiting less developed tourist areas. Restrictions on access and transportation to the destination (6.11%) and the lack of a skilled workforce (6.11%) are also reported as challenges faced by tourists. Negative experiences such as poor service or lack of security account for 6.87%, signaling the need to strengthen quality and safety standards. The high cost of accommodation and tourist services, reported by 3.82%, indicates that for some tourists the financial aspect may pose a challenge, especially when the level of service does not match the prices. The share of unspecified data is 5.34%. Overall, these results show that in order to improve the tourist experience, an integrated approach is needed that focuses on improving information and orientation, increasing the quality of services, facilitating access, addressing language and cultural barriers as well as strengthening the professional capacities of staff, thus contributing to building a more welcoming, accessible and competitive tourist destination.

Graph 34. How often does your company identify training and skills needs (different knowledge and competencies)?

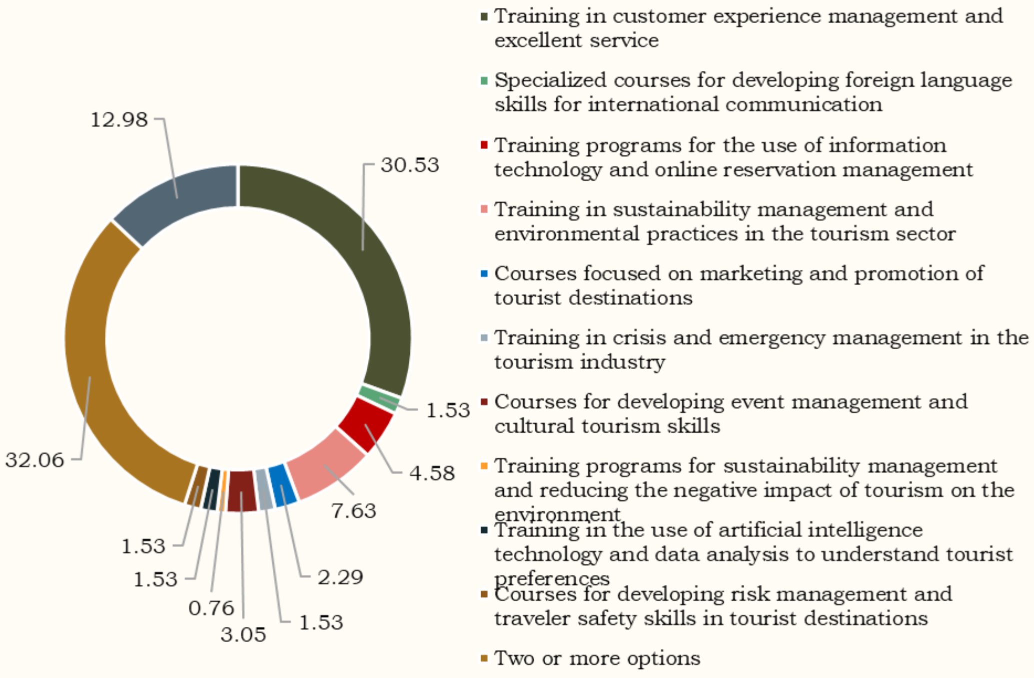


Source: ISA (2025)

Data on the frequency with which enterprises identify training and skills development needs show a significant concentration on the average level of this process. More than half of the businesses, specifically 54.20%, state that training and skills improvement needs are identified on average, which suggests a periodic, but not fully structured, approach to staff capacity development. A significant proportion, 25.95%, assess this process as rare. Meanwhile, only 9.92% of enterprises carry out this assessment frequently, indicating that there is still potential to turn the identification of training needs into a regular and standardized practice. The percentage of businesses that never carry out this process is 5.34%, while 4.58% of the data is missing. This structure suggests that, in order to strengthen competitiveness and improve the quality of services, it is necessary for enterprises to focus more on drafting clear staff development plans, adapting them to market demands and contemporary tourism industry standards.

Data on the specific areas of skills or training most frequently identified as needs by enterprises clearly show that the main focus of the industry remains improving the customer experience and strengthening practical competencies related to modern tourism management. The highest percentage, 30.53%, belongs to training in customer experience management and excellent service, which highlights the importance that businesses attach to strengthening staff capacities to provide a service that meets the increasingly high expectations of tourists and differentiates them in the competitive market. A significant percentage, 32.06%, reported that a combination of two or more skills is needed, which suggests that the requirements are not isolated, but intertwine between customer management, the use of new technologies, marketing and other supporting skills that increase operational efficiency and service quality. Other specific areas, although with lower percentages, clearly reflect the trend for modernization and adaptation to new industry challenges. For example, training in sustainability management and environmental practices (7.63%) and the use of information technology and online reservations (4.58%) show awareness of developing a more sustainable and digitalized tourism.

Graph 35. If the answer is rarely, moderately or frequently, then which skill/training or set of skills/training do you identify and are needed most frequently?



Source: ISA (2025)

Training in foreign language development, event management, marketing, artificial intelligence, as well as crisis management and traveler safety, although with a smaller individual weight, remain areas that complete the mosaic of skills needed for a competitive tourism sector and adaptable to global challenges. The percentage of incomplete data, 12.98%, shows that there is still room for further clarification regarding concrete needs on the ground. Overall, these results clearly signal that businesses are aware of the necessity of continuous investment in focused training, combining practical experience with technological knowledge, to increase the quality and competitiveness of the tourism industry at the regional level.

Finally, in the question *"Which study programs (Bachelor/Master) do you think the tourism industry needs most to develop/upgrade its personnel?"*, based on the comments collected, it is clearly observed that the tourism industry expresses diverse needs for practically oriented study programs updated with contemporary trends in the sector. The answers show that ***Bachelor*** and ***Master programs*** are considered necessary to cover a wide range of competencies required in the labor market.

The main priorities identified are:

→ ***Cultural tourism and event management:*** The demand for programs that address the development of cultural tourism and event management reflects the importance of cultural heritage and the professional organization of activities that attract tourists.

- → ***Accommodation and gastronomy management:*** These areas remain essential to raise service standards in hotels and restaurants, as an integral part of the tourist experience.
- → ***Transport and passenger safety:*** The need for qualified personnel in logistics, risk management and security shows awareness of the need to increase professionalism in this important link in the tourist chain.
- → ***Sustainable development and digital marketing:*** These areas remain priorities to ensure balanced development and competitiveness in the global market.
- → ***Foreign languages and information technologies:*** Increasing international communication skills and the use of digital platforms for booking management are practically indispensable elements.
- → ***Business Administration, Banking, Finance, Accounting:*** These fields remain important for efficient financial management and increasing the sustainability of enterprises.

A particular element is the demand for ***seminars and practical training*** in the field of tourism, which underlines the need for continuous and flexible training, beyond the classical university curricula.

In summary, the results clearly signal that the development of study programs should be comprehensive, interdisciplinary and closely linked to practice, combining academic knowledge with the concrete needs of the industry to enable the tourism sector to have qualified personnel, adaptable and ready to face the challenges of the contemporary market.

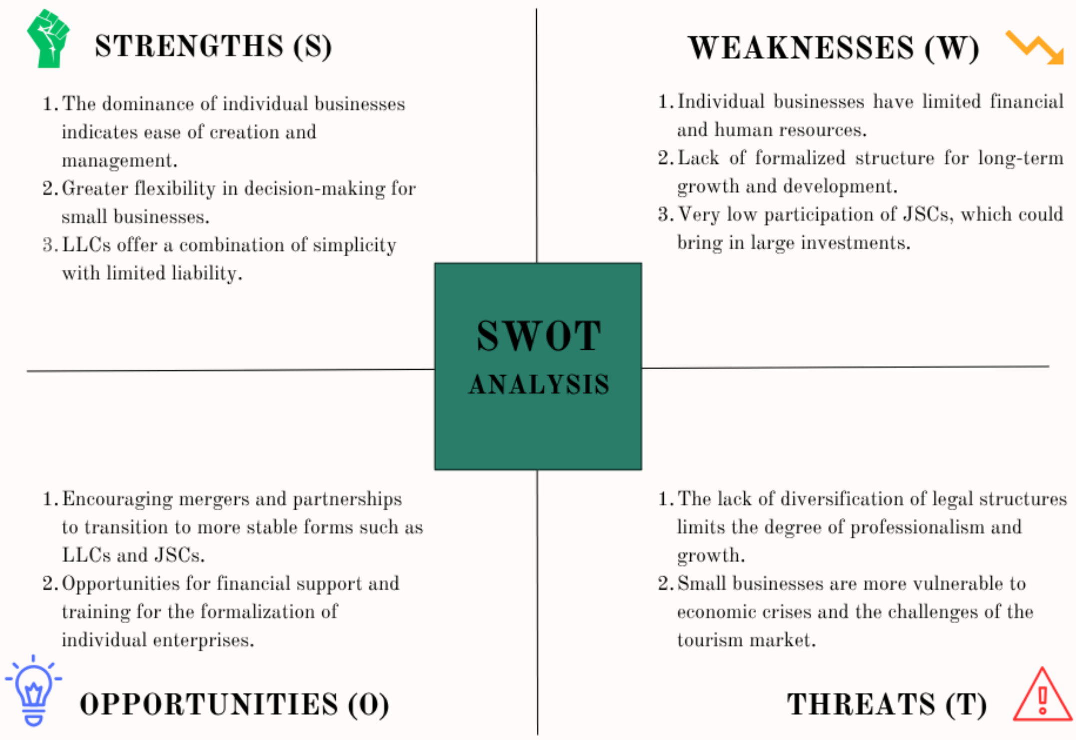
4. SWOT ANALYSIS OF FINDINGS IN REPORT NO. 4

1. Type of Business/Enterprise

The presented data show that the tourism industry in the Dukagjini Plain is strongly dominated by individual businesses, which represent 78.63% of enterprises. This structure shows an ecosystem geared towards small, flexible, and often family-owned operations. While the LLCs make up a smaller part (13.74%), they represent a step towards formalization and protection of limited liability ownership.

The very low participation of joint stock companies (only 0.76%) suggests the lack of large capital and strategic investments in the sector. This simplified structure may be positive for startups, but it limits the opportunities for sustainable growth, innovation, and competition in the broader tourism market.

Interventions to promote consolidation, managerial training and the establishment of entrepreneurial collaborations are necessary to improve this structure and ensure more balanced and sustainable development in the industry.



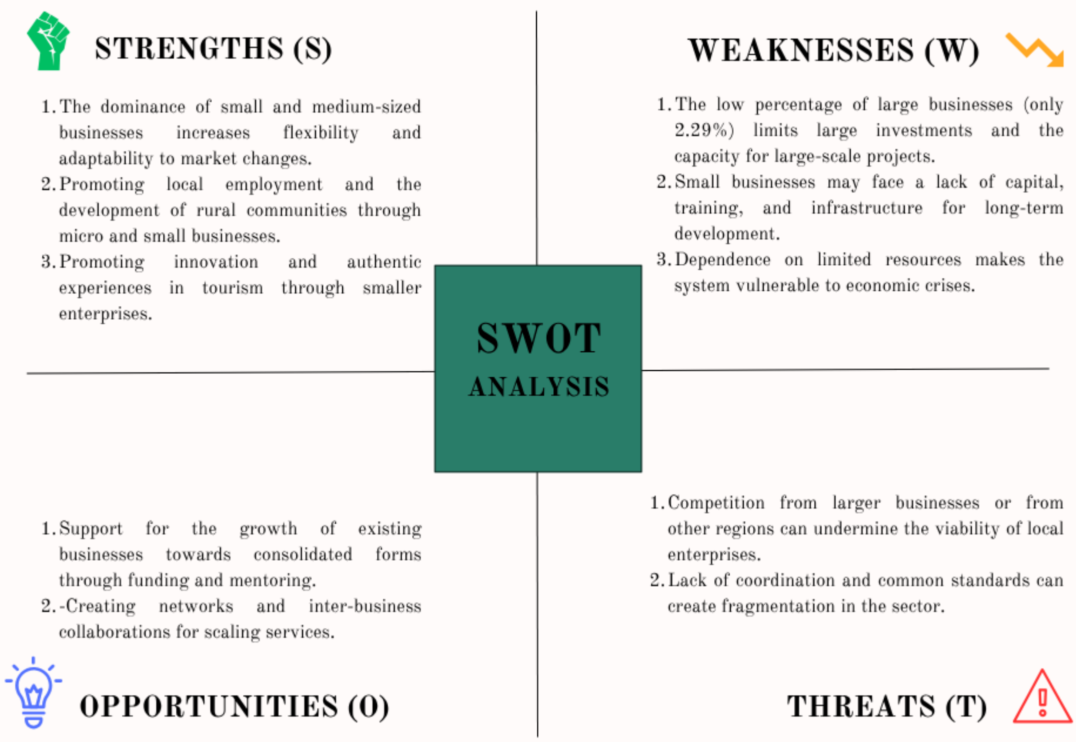
Source: ISA (2025)

2. **Size of Business/Enterprise**

The structure of the tourism industry in the Dukagjini Plain mainly relies on **small and medium-sized businesses**, which represent over **78%** of enterprises. This structure is typical for an emerging market, where economic dynamics are maintained through flexibility, personalized services, and local engagement.

Small businesses are essential for employment and for providing unique tourism experiences. However, the lack of **large businesses** - only 2.29% - indicates a **lack of high capacities**, in-depth professionalisation and wide-impact investments in infrastructure, promotion and innovation.

This reality requires dedicated policies to **empower small enterprises**, facilitating access to funding, training, and collaboration opportunities. Institutional support for networking and capacity building will affect the gradual transition of these businesses towards a more stable and competitive structure in the region and beyond.



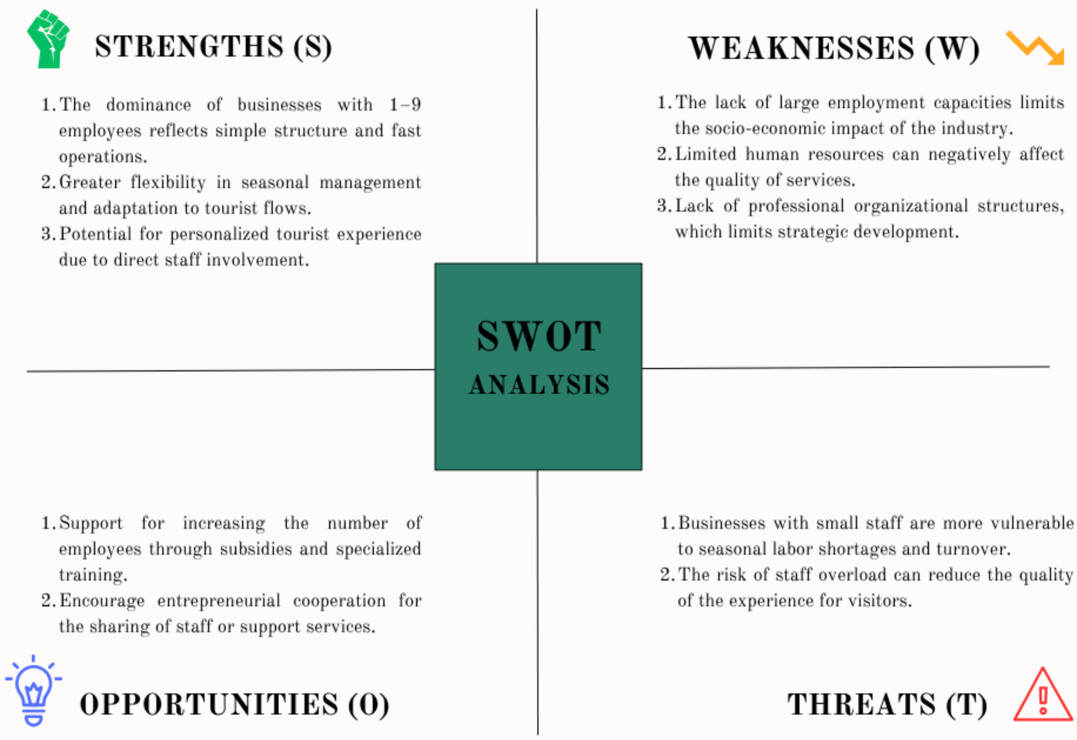
Source: ISA (2025)

3. Number of Employees

The data clearly show a dominance of **enterprises with few employees** in the tourism sector in the Dukagjini Plain: **71.76%** of businesses have from **1 to 9 employees**, while only **3.05%** have more than 50 employees. This fragmented structure reflects a sector built on the basis of micro-enterprises, often with a family or seasonal character.

On the one hand, this structure favors flexibility and quick adaptation to market demands. On the other hand, it **limits the capacity to provide broad employment**, attract investment, and develop services with a high professional standard.

In order to build a stronger and more competitive industry, it is necessary to take measures for **the gradual increase of human capacities**, through financial support schemes, vocational training, organized internships and the inclusion of young people in the sector.



Source: ISA (2025)

4. Location of the Business/Enterprise

The geographical structure of businesses in the tourism sector in the Dukagjini Plain shows a **notable concentration in the city of Peja (25.19%),** placing this municipality as the central node of industry development. The significant presence of enterprises in Deçan, Klina and Malisheva underlines their role as growing destinations for local tourism.

On the other hand, municipalities such as **Istog (2.29%)** and **Gjakova (1.53%)** show a **disproportionate underrepresentation to the potential they have**, which underlines the need for targeted policies for the economic and tourism activation of these areas.

Uneven territorial development poses a strategic challenge for the sustainable development of the sector, therefore **a balanced approach is needed to diversify tourism destinations**, including more actors from less developed areas, to avoid dependence on a limited number of locations and to spread economic benefits throughout the region.

SWOT

STRENGTHS (S)

1. Peja as the main tourist center has the highest concentration of businesses (25.19%), acting as a regional development hub.
2. Deçan, Klina and Malisheva are well represented, reflecting good potential for local tourism.
3. The data clearly reflects priority areas for further development of infrastructure and support.

WEAKNESSES (W)

1. The low representation of municipalities such as Istog and Gjakova indicates uneven territorial development.
2. Some areas with tourism potential are not sufficiently included in the development of the industry.
3. The lack of balance in geographical development can cause congestion in central areas and neglect in the suburbs.

OPPORTUNITIES (O)

1. Expanding the tourist map to include municipalities with undeveloped potential such as Junik, Istog, Gjakova.
2. Opportunity to promote geographical diversity to reduce dependence on a limited number of locations.

THREATS (T)

1. The lack of development in some municipalities can lead to the migration of businesses and talents to more developed areas.
2. Excessive concentration of tourism activities in a few areas can jeopardize ecological and social sustainability.

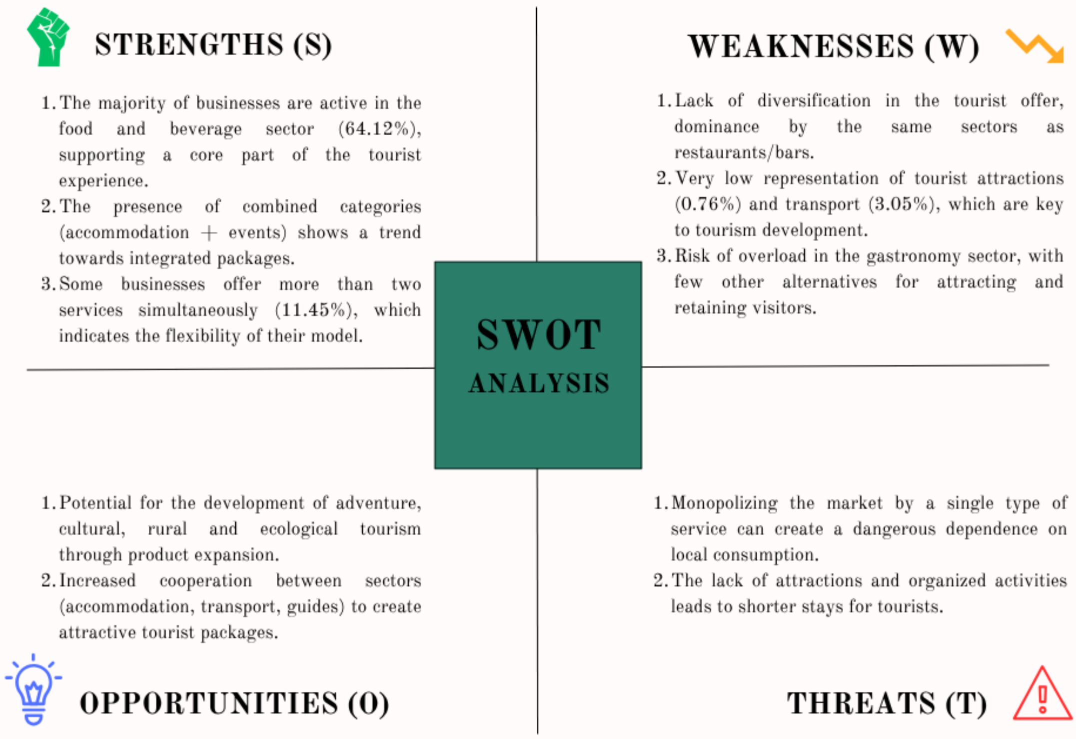
Source: ISA (2025)

5. Types of Tourist Services

Data shows that the tourism industry in the Dukagjini Plain has been **strongly dominated by the gastronomy sectors**, with 64.12% of businesses operating as **restaurants and bars**. This is characteristic for regions where tourism is still in development stages, and where infrastructure and supply are focused on the basic needs of visitors.

However, the modest representation of travel agencies (9.16%) and transport and tourist attractions (only 3.05% and 0.76%) shows that the **tourist offer is incomplete** and **there is a lack of an integrated chain of services** that would enable rich experience and longer stays.

The combination of several services in combined packages (accommodation + restaurant; events + conferences) is a positive sign that should be supported and expanded. In this regard, **the promotion of active and cultural tourism**, as well as **the creation of local attractions and itineraries**, would be key steps for enriching the offer and increasing the attractiveness of the destination.



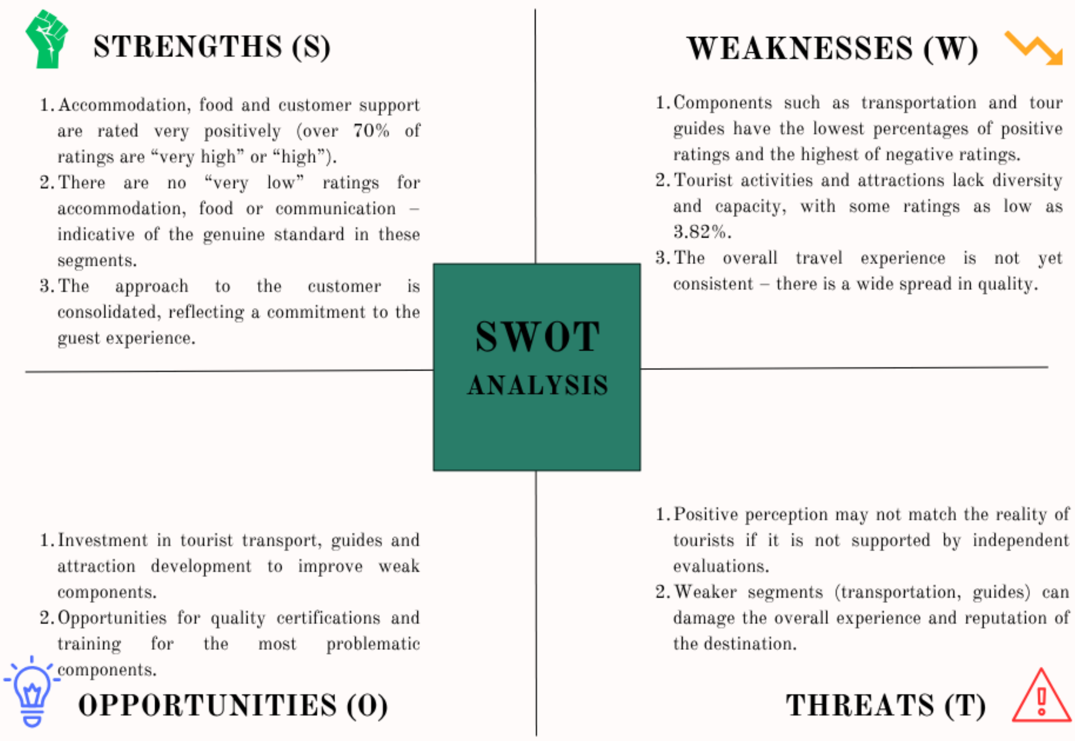
Source: ISA (2025)

6. Quality of Tourist Services

Self-assessment data from tourism enterprises in the Dukagjini Plain provide a **generally positive picture**, with components such as **accommodation, food and customer care** being rated as the most successful. This is an encouraging indicator for the basic quality of services, which are often crucial for the satisfaction of tourists.

On the other hand, **tourist transport and guides** turn out to be the most problematic components, with significant percentages of “low” and “very low” ratings. Also, **tourist attractions and activities**, although generally positively evaluated, contain a percentage of critical evaluations, signaling the need for **innovations, better packaging and richer organization of the tourist experience**.

The overall tourism experience, as a summary component, reflects that although there is progress, there is still a need for harmonization of standards among all sub-components of tourism. In this sense, **improvement policies should be integrated and comprehensive**, aiming at quality standardization in all links of the tourism chain.



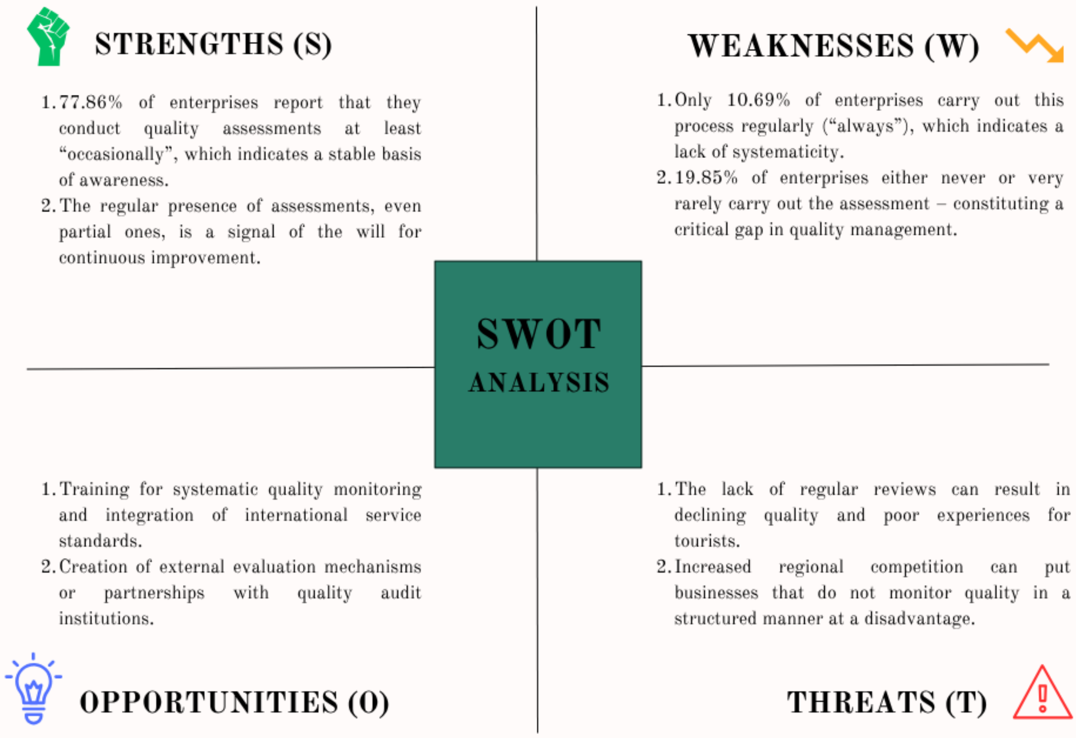
Source: ISA (2025)

7. **Service Quality Assessment Frequency**

The data show a **moderate presence of the culture of quality assessment in the tourism industry** in the Dukagjini Plain. Almost **44% of enterprises carry out this process "occasionally"**, while **about 24% do it "often"**, and **only 10.69% implement it continuously**, which would be optimal practice.

On the other hand, **about 20% of businesses** report that they do not make quality assessments at all or very rarely, which constitutes **a serious gap in the management of performance and tourist satisfaction**. This fragmentation shows a lack of a systematic culture of quality improvement and requires direct intervention in terms of educating managers, providing measurement tools, and fostering transparency and accountability.

The development of internal quality manuals, the provision of training for standardization of services and **the implementation of regular mechanisms for feedback from customers** would improve not only the quality of the offer but also raise the credibility of the destination in the regional and international market.



Source: ISA (2025)

8. Factors Affecting the Quality of Services

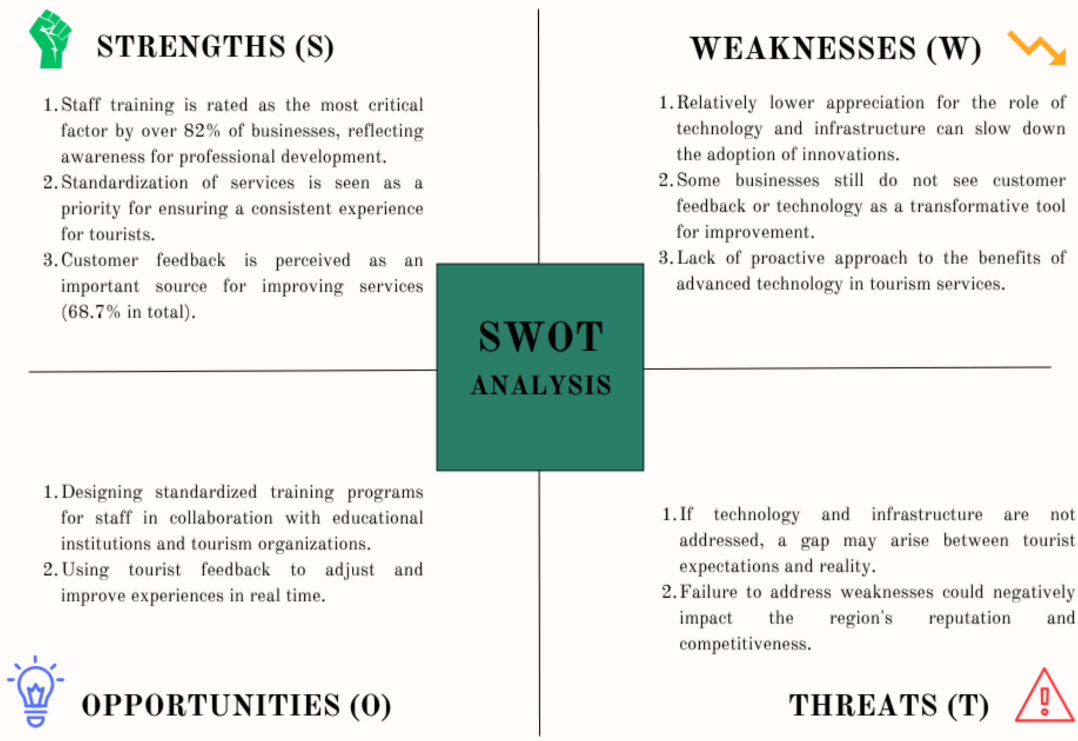
The data show a **clear orientation of tourism enterprises towards improving quality through staff development and standardization of services**. With **over 82% of companies considering staff training as "very important" or "important",** the need for sustainable investment in **human capacities** is highlighted as a key link for improving the visitor experience.

Standardization is also seen as an essential factor, which testifies to **the demand for unification of services and quality assurance**, regardless of the type of enterprise. **Customer feedback** occupies an important place as a source of orientation, showing that some companies already understand the value of reflecting on real tourist experiences.

On the other hand, **technology and infrastructure**, while recognized as important, do not receive the same level of priority. This shows a **still conventional approach to digital transformation and physical modernization**, which in a competitive and rapidly growing time of global tourism can turn into an obstacle.

It is recommended that support policies and strategic interventions focus on:

- continuous staff development,
- the establishment of standardized service systems,
- the active inclusion of technology for quality management and real-time feedback analysis,
- and investing in infrastructure to meet the ever-increasing expectations of tourists.



Source: ISA (2025)

9. Progress of Demand for Tourism Consumption

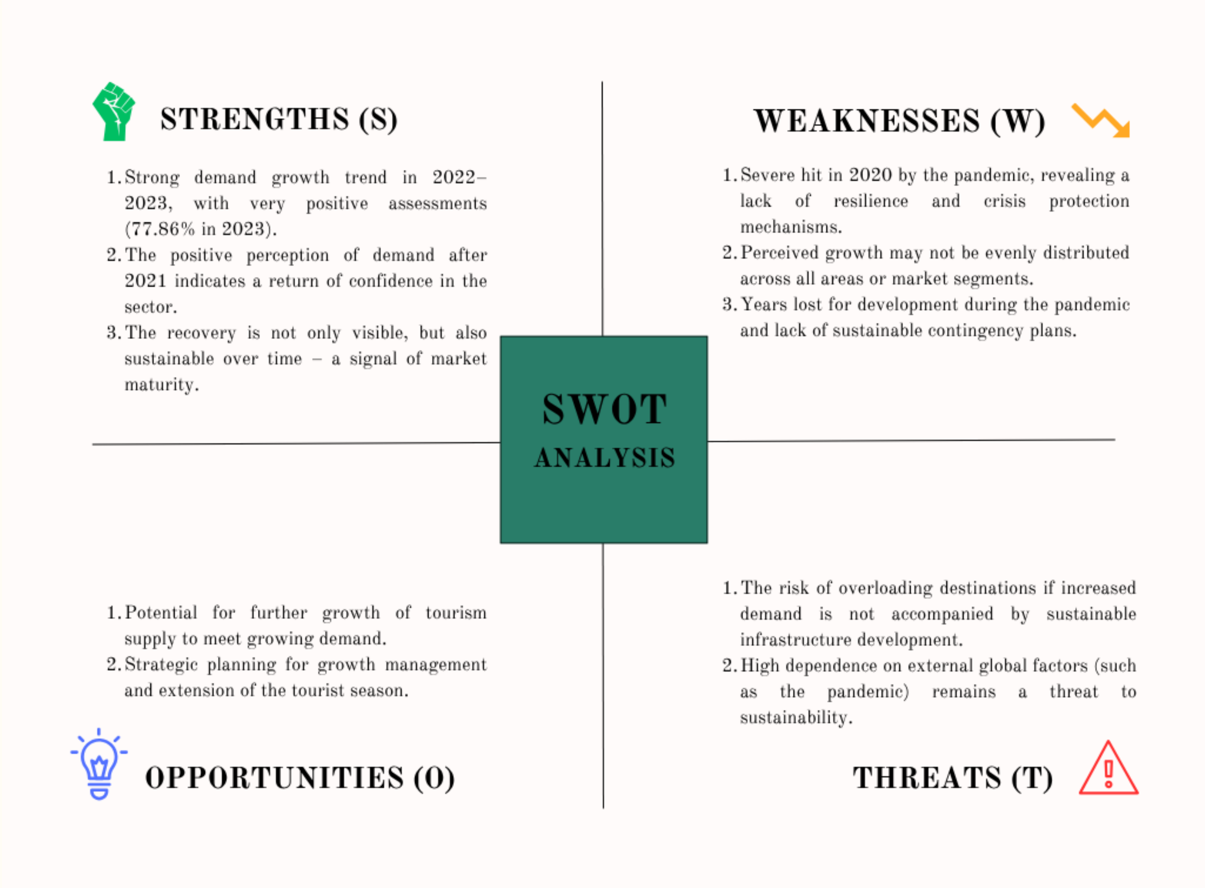
Data on the performance of tourism demand over the last five years describe a **full cycle of economic development**:

→ **Progressive growth until 2019**,
→ **Strong shock in 2020** due to the pandemic, and
→ then **gradual recovery culminating in a strong comeback in 2023**, with almost **78% of businesses reporting “high” or “very high” progress**.

This perceived increase in demand is **a key indicator of confidence in the tourism industry**, and a signal of the maturity of the market to cope with and take advantage of the increasing flows of tourists. It provides **a strong foundation for strategic planning**, including:

- → expansion of accommodation and service capacities,
- → improving attractions,
- → and the development of marketing for the extension of the tourist season.

However, **the experience of 2020 remains a valuable reminder of the need to create crisis protection mechanisms**, such as emergency funds, digitalization of services, and orientation of supply towards domestic or alternative tourism.



Source: ISA (2025)

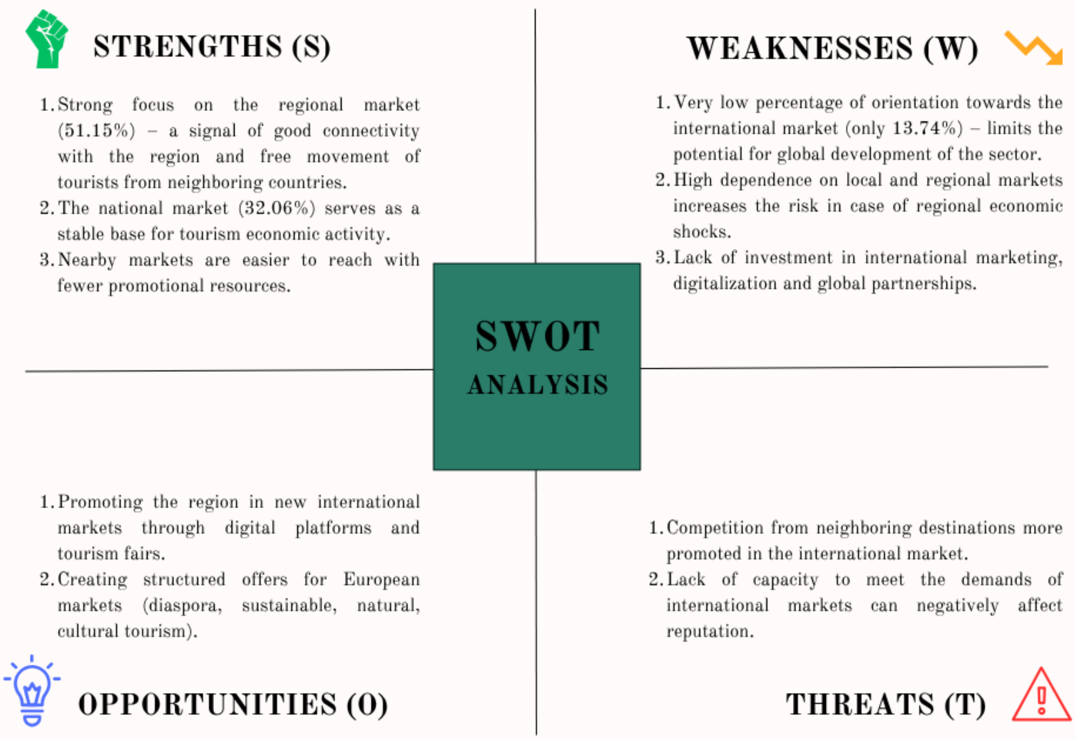
10. Main Target Markets

Graph 10 data clearly shows that **the tourism industry in the Dukagjini Plain is mainly focused on regional (51.15%) and national (32.06%) markets**, relying on tourists from Kosovo and neighboring countries such as Albania, North Macedonia, Montenegro and Serbia.

This positioning is strategically valuable to ensure a stable income base, **especially in post-crisis periods such as the pandemic**, when international movement is limited. However, **the very low representation of international markets (only 13.74%)** points to a **lack of exploitation of global potential**, especially in a region that has natural and cultural assets to offer.

Developing a **medium-term strategy for internationalization**, including:

- → establishing links with international travel agencies,
- → participation in tourism fairs,
- → increasing online presence in foreign languages, and
- → the adaptation of the offer for certain markets (p.sh. the Albanian diaspora in Switzerland, Germany, Austria), would help to **increase the presence in international markets** and to **extend the tourist season**.



Source: ISA (2025)

11. Customer Acquisition and Retention & Key Challenges

Data shows that **digital marketing is the most used method for customer acquisition and retention (31.30%),** signaling a **clear orientation towards modern communication and promotion channels**. However, the importance of **word-of-mouth (17.56%) and personal hospitality** as a source of loyalty remains very high - typical for areas where **human interaction and local reputation** are of great value.

Local partnerships (15.27%) are an important strategy that reinforces tourist turnover and interaction between different actors. Meanwhile, **many businesses combined digital marketing strategies with quality experience**, reflecting a trend towards **integrated strategies for customer management** - but still at relatively low percentages.

On the other hand, **the main challenges** faced by businesses are:

→ **the impact of the season (36.64%)** - which indicates the **dependence on the seasonality of tourism**, and
→ **high competition (30.53%),** highlighting **the density of similar providers and the lack of differentiation**.

Only 3.82% of businesses cite the **cost of marketing as the only challenge**, but when combined with other factors, it is seen that **smaller businesses have consistent difficulties in attracting audiences through paid means**.

This shows that enterprises need:

→ **assisting in integrated marketing strategies**, combining digital promotion with hospitality, partnerships and personalized offering;
→ **reducing the impact of seasonality** through the extension of the tourist season and the development of new products;
→ and **clearer differentiation of the company's identity**, to cope with the tight competition in the region.

STRENGTHS (S)

1. Digital marketing is used by most businesses (31.30%), indicating the adoption of modern technologies for promotion.
2. Personal recommendations (17.56%) and quality hospitality are the basis for customer loyalty.
3. Local partnerships (15.27%) help in customer turnover and strengthen regional cooperation.

WEAKNESSES (W)

1. Many businesses are still dependent on traditional channels (word-of-mouth), which limits outreach outside of established networks.
2. Only a small proportion use an integrated marketing strategy, limiting the potential for growth.
3. Lack of structures for systematic customer relationship management (CRM).

SWOT ANALYSIS

1. Developing integrated digital marketing strategies + partnerships + quality experience for long-term sustainability.
2. New digital platforms for promotion, customer management and building personalized relationships.

OPPORTUNITIES (O)

1. Seasonality (36.64%) and high competition (30.53%) pose ongoing challenges in attracting customers.
2. The cost of marketing is an obstacle for small businesses in competing with larger players.

THREATS (T)

Source: ISA (2025)

12. Tourism Industry in the Dukagjini Plain

The tourism industry in the Dukagjini Plain is a dynamic structure with great development potential, mainly based on **small and individual businesses**, which offer **quality services in accommodation and gastronomy**. Enterprises have shown **adaptability and commitment to the customer**, reflecting positive experience in terms of hospitality and communication.

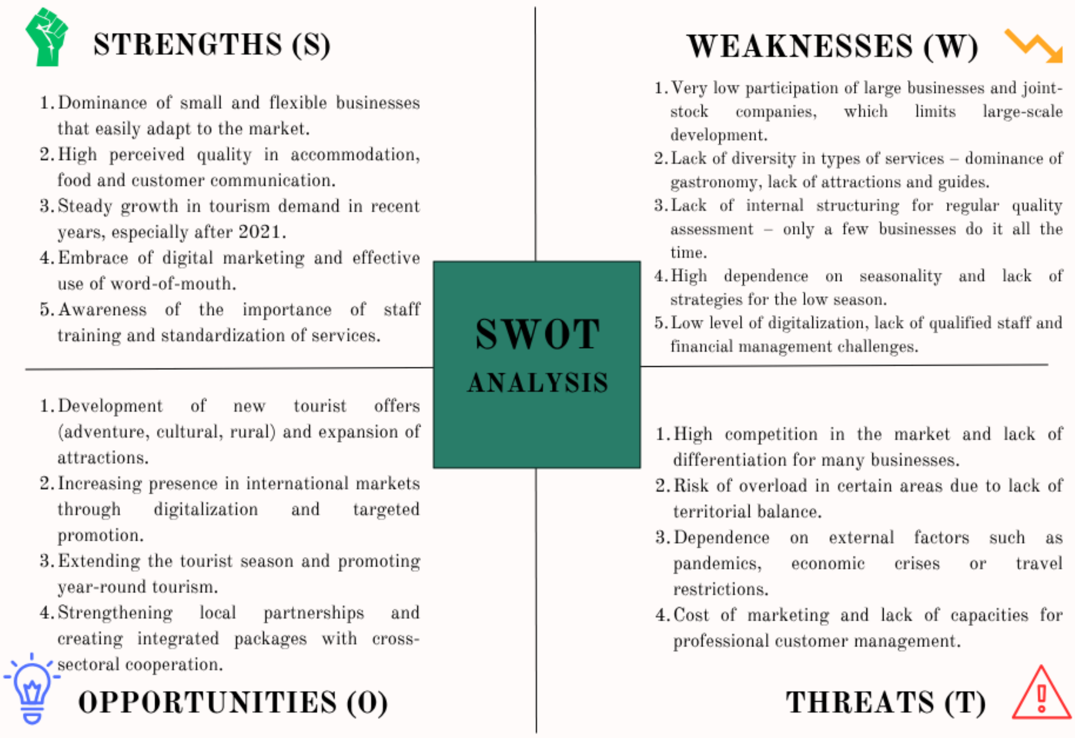
The post-pandemic recovery is evident, with a **continued increase in tourism demand in 2022 and 2023**, creating a strong basis for long-term investment and planning. Meanwhile, the assessment of important factors for quality improvement shows a **growing awareness of the need for professionalism and standardization**, while digital marketing is emerging as an important channel for attracting and retaining clientele.

However, **structural and organizational weaknesses** are highlighted: lack of diversified offer, low percentage of large enterprises, lack of professional attractions and guides, as well as **deficiencies in access to international markets**. Additional challenges such as **lack of qualified staff, seasonality, competitiveness and low digitalization** increase the need for strategic interventions and institutional support.

To take advantage of existing opportunities, it is vital to:

→ **diversify the tourist offer** and integrate missing components such as attractions and transport,
→ **staff is professionalized** through sustainable training,
→ **strengthening digital and promotional capacities** in international markets, and
→ to establish **local and regional collaborations**, which help to share resources and build an integrated tourism product.

Only through a coordinated and inclusive approach, the Dukagjini Plain can be transformed into a **stable, competitive and attractive destination for the local, regional and international market**.



Source: ISA (2025)

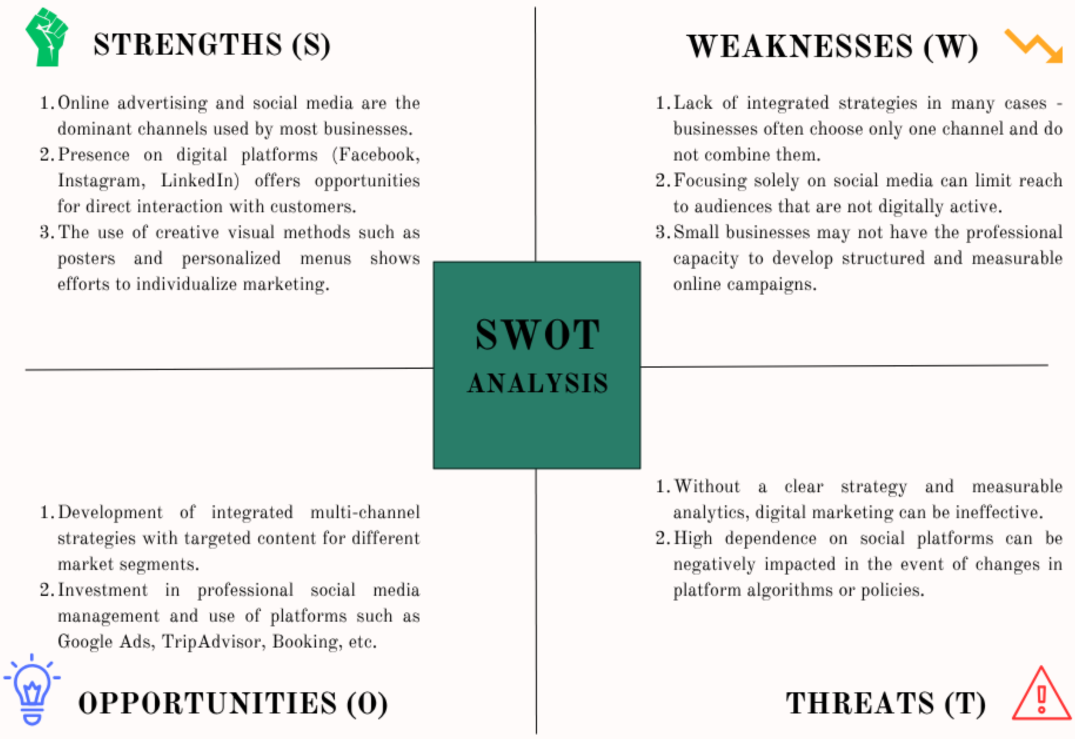
13. Tourism Services Promotion Channels

The data clearly shows that **digital marketing is the foundation of the promotion strategy** for most tourism enterprises in the Dukagjini Plain. Online advertising and campaigns on social networks (such as Facebook and Instagram) take the leading place, reflecting **the growing awareness of the impact that online presence has on modern customer behavior**.

Many businesses exhibit **trends of integrating different methods**, including combining online advertising with social networks or using personalized visual platforms. This is a positive sign for **the development of a more intentional and targeted communication**, which increases engagement and emotional connection with the customer.

However, some businesses **still do not have a structured or professional strategy** in their promotional approach. The lack of campaign performance analysis, as well as **relying only on limited channels**, can reduce marketing effectiveness and create dangerous dependencies on platforms that are out of the control of businesses themselves.

To increase impact, **businesses should orient their efforts towards structured, measurable and market-segmented campaigns**, combining digital marketing with creative content, professional social media management and collaborations with international tourism platforms.



Source: ISA (2025)

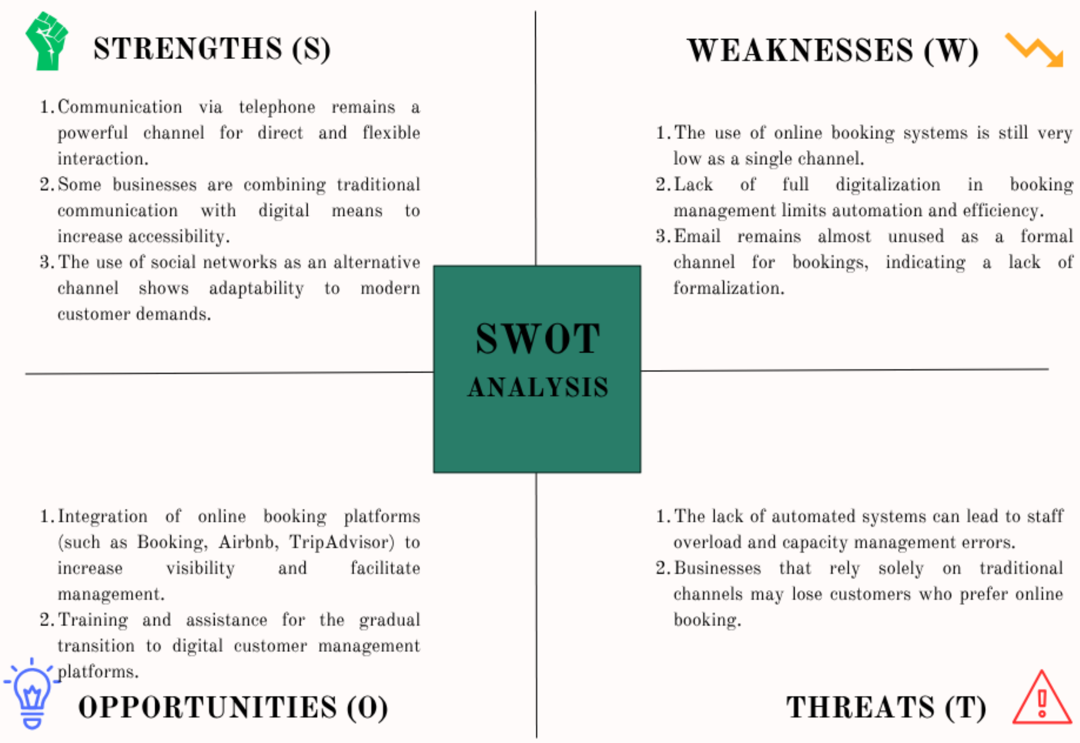
14. Reservations & Booking Management

Data on ways of managing bookings and bookings shows that **traditional communication over the phone is still the most widely used method**, reflecting the culture of direct interaction and the need for flexibility in communication. Many businesses prefer in-person contact as a safer way to manage customer requests and guarantee quality in processing bookings.

On the other hand, an **increasing number of businesses are combining traditional and digital channels**, such as online bookings and email, but these are still at low levels. This underscores that **the use of automated systems for booking management is at an early stage**, which limits the ability of businesses to provide faster, synchronized and remotely bookable services, at any time.

The “Other” option, which includes social networks and physical contact, emphasizes the importance that **informal and face-to-face interaction** continues to have in the local market, especially in small communities. However, in order to remain competitive and increase utilization capacity, it is necessary to **modernize reservation systems and integrate them with international online booking channels**.

The transition to full digitalization in booking management should not exclude traditional contact, but be built as a **hybrid strategy**, which maintains human interaction and offers high efficiency in operational management.



Source: ISA (2025)

15. Desired Improvements in Business Operations

The data of this graph clearly show a **strategic orientation of tourism businesses towards technological modernization and optimization of operations**. The main priority that is identified is **the better integration of the various platforms and tools** used in the daily management of services, reservations, marketing or communication with customers. This reflects **a high awareness of the importance of interconnectedness and efficiency in the workflow**.

In the same vein, the **digitalization of processes** presents itself as an urgent need for many businesses, which understand that **automation** would reduce manual interventions, improve accuracy, and increase speed in service delivery. Some businesses have also embraced a **combined approach**, which includes **both interconnection of platforms and digitalization** - an approach that shows **a vision for long-term modernization** and improved competitiveness.

However, the challenges lie at the level of **practical implementation** - many enterprises may lack **trained human resources and technological infrastructure**, which requires **organized support through training, mentorships and grants**. This orientation towards improving operations constitutes **a solid basis for institutional interventions**, for the creation of a more stable, interconnected tourism sector capable of adapting to the modern demands of the market and tourists.

SWOT ANALYSIS

STRENGTHS (S)

1. Enterprises are aware of the importance of platform integration for operational efficiency and cohesion.
2. Digitalization is perceived as a priority for improving productivity and automating work.
3. Some businesses require an integrated approach – digitalization + platform interconnection – reflecting strategic thinking.

WEAKNESSES (W)

1. Current systems are fragmented, not interconnected, leading to delays and duplication of work.
2. Lack of technical capacity and knowledge to implement advanced digital systems.
3. Delays in implementing modern technologies can limit growth and innovation in the market.

OPPORTUNITIES (O)

1. Development of IT infrastructure and training of staff in the use of interconnected systems.
2. Financial and technical support for digitalization through public funds, donors or collaborations with universities.

THREATS (T)

1. Lack of prompt action can widen the gap between local businesses and those in competitive regions.
2. Reliance on manual and non-standard methods can lead to operational errors and customer dissatisfaction.

Source: ISA (2025)

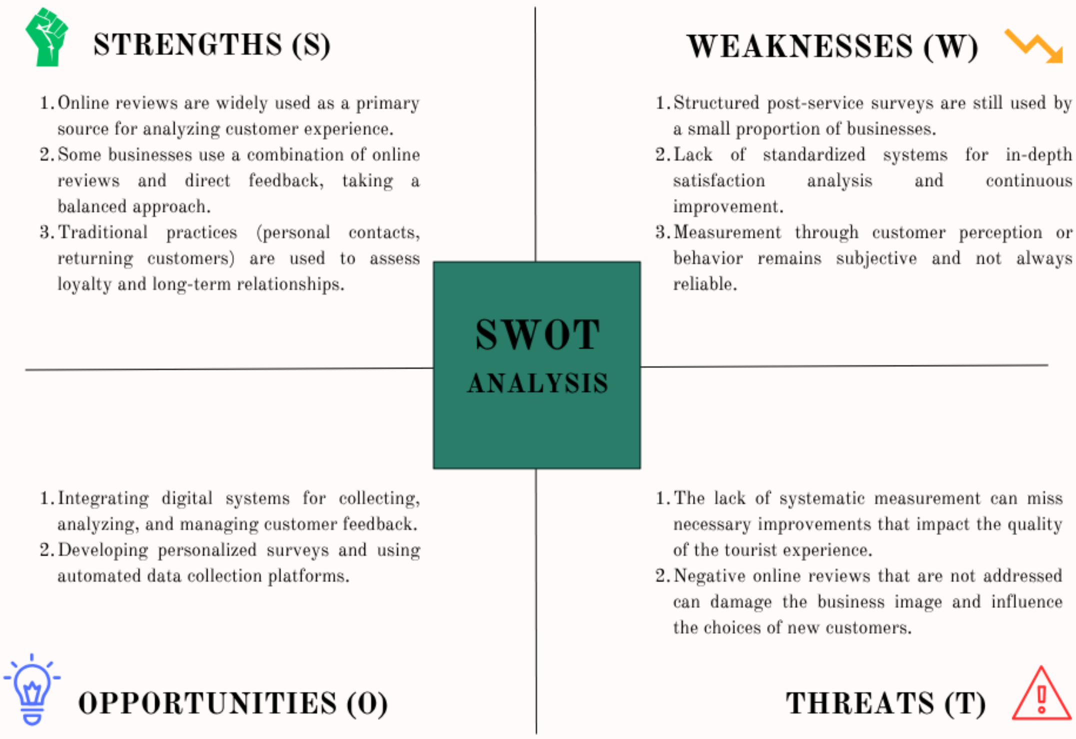
16. Customer Satisfaction Measurement

The data shows that **tourism businesses in the Dukagjini Plain attach considerable importance to online reviews**, which constitute the most used tool to understand customer perceptions and experience. This focus on comments and feedback coming through platforms such as Google, TripAdvisor, Booking or social networks is a positive indicator of **inclusion in the digital environment** and **online reputation monitoring**.

Meanwhile, some enterprises use **traditional after-service surveys**, but this method has not yet been standardized or applied in a structured way in the tourism sector. **More traditional practices** such as personal contacts, customer return, and appreciation through consumer behavior remain relevant, especially for small businesses that rely on **close relationships and individual hospitality**.

However, **the lack of a built-in system for satisfaction analysis** limits businesses' ability to undertake strategic and data-driven improvements. To improve performance and stay competitive, it is imperative that businesses to:

→ implement **real-time satisfaction measurement mechanisms**,
→ analyze the collected data to understand customer needs and preferences,
→ and to take **concrete measures for continuous improvement of the quality** of services provided.



Source: ISA (2025)

17. Most Common Complaints from Customers

The data from this graph notes that **the main problems reported by customers are related to the malfunction of services and deficiencies in the booking system**, which are two critical links in the tourist experience. When these two issues appear together, as happens in some cases, their impact on customer satisfaction and loyalty is even deeper.

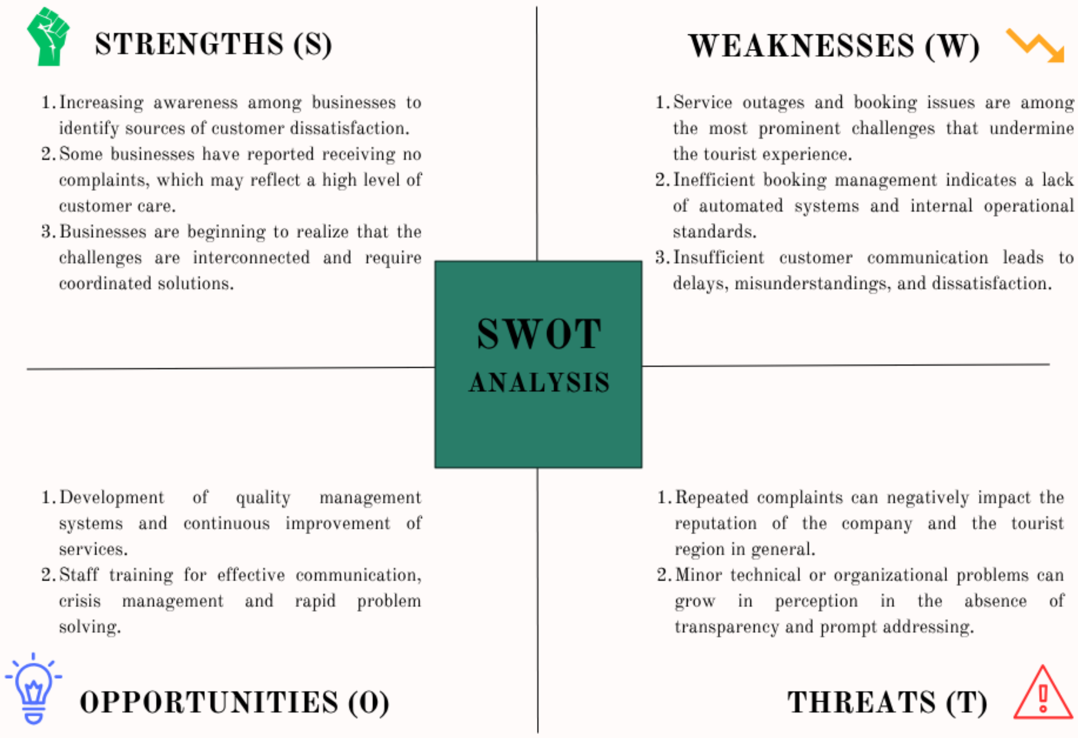
This shows that many businesses **do not yet have a standardized operation and capacity management system**, creating space for inaccuracies, delays, and misunderstandings with customers. **Complaints about check-in, parking, schedule changes or high prices** expand the spectrum of problems, reflecting **the need to improve coordination, scheduling and communication with customers**.

Meanwhile, the fact that some businesses **report a lack of complaints** may be a positive signal for commitment to quality service, but it should also be viewed with caution: the lack of complaints **does not automatically mean satisfaction**, as it can also be related to **the failure to use effective tools for collecting feedback**.

Improving customer experience requires:

- → **interventions in systems** to ensure continuous functionality of services,
- → **automation and standardization of bookings**, and
- → **training for staff in managing problematic situations and effective communication with customers**.

Only in this way can a **stable quality of service** be achieved, which increases loyalty and reinforces the image of the region as a professional and reliable tourist destination.



Source: ISA (2025)

18. Customer Experience Improvement Initiatives

The data proves that tourism enterprises in the Dukagjini Plain are **actively engaged in improving the customer experience**, investing mainly in **staff training**. This focus on building human capacities is a clear indicator of awareness **of the impact that the staff has on the quality and feeling that is conveyed to the tourist** during their stay.

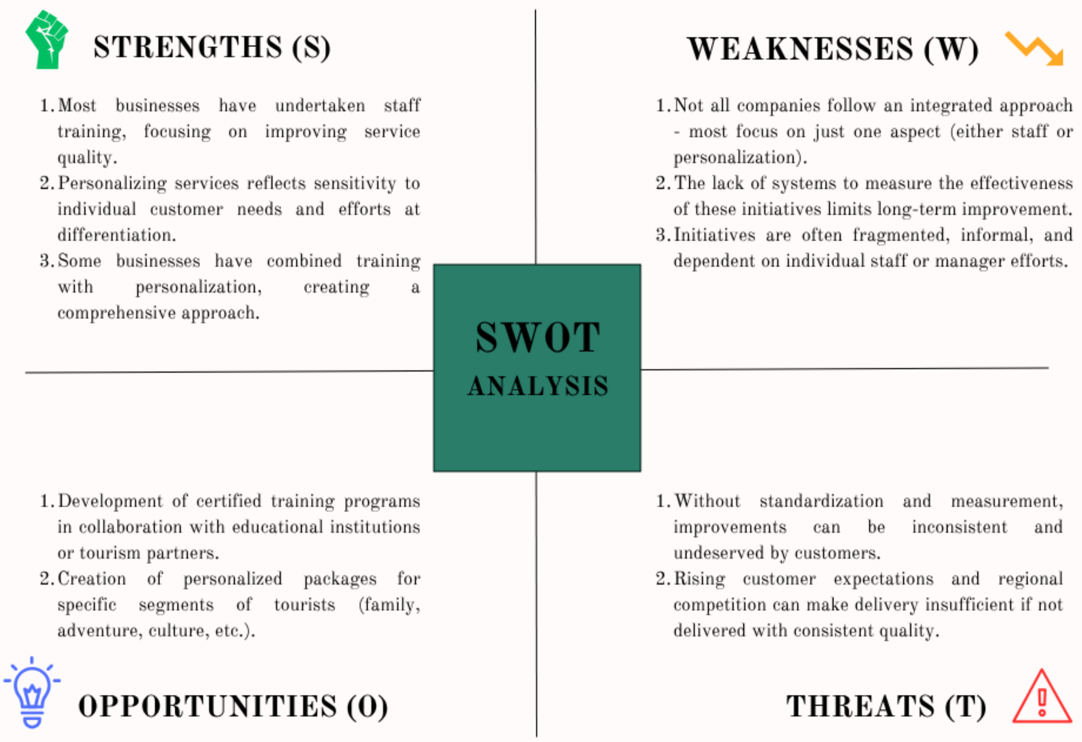
Also, a good part of businesses have paid attention to **the personalization of services**, following the global trend towards tourism adapted to the needs, interests and individual expectations of customers. When these two components are combined - as is the case in some enterprises - **an ideal basis for sustainable, differentiating and long-term experience** is created.

However, the challenge lies in the fact that **these efforts are often scattered and non-centralized**, without a formal system that measures the real impact of initiatives. The lack of analysis and common standards makes it difficult for businesses to understand whether improvements have brought a measurable effect on increased satisfaction, customer return, or economic benefit.

For a sustainable approach, it is recommended that:

- → **training to be standardised and repeated regularly** to reinforce knowledge,
- → **personalization should not remain intuitive**, but rely on customer data and profiling,
- → and **to establish a system of measuring performance and satisfaction** after the implementation of each initiative.

Only in this way, improving the customer experience will become not only a priority, but also **a sustainable competitive advantage for the region**.



Source: ISA (2025)

19. Cooperation with Other Stakeholders in the Tourism Industry

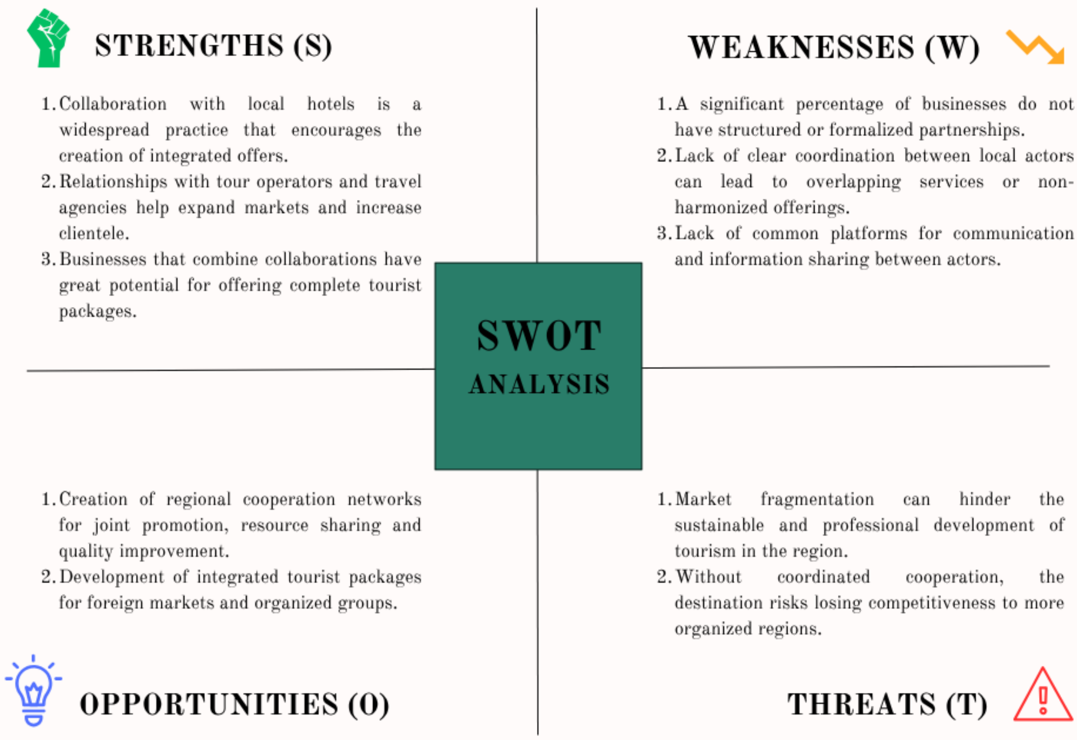
Data show that a **significant number of enterprises in the tourism sector are involved in collaborations** with local hotels and tour operators/travel agencies, which provides a good basis for developing **integrated packages and increasing the value of services**. These partnerships help not only increase customer visibility and turnover, but also the **economic and operational efficiency of the sector**.

However, a significant part of businesses **do not have structured collaborations**, or do not have clear forms of cooperation, which indicates a **lack of networking strategy and institutional coordination**. This fragments efforts in the market and creates barriers to developing a unified and competitive offer for local and foreign tourists.

In this regard, it is necessary to:

→ to create **local and regional cooperation platforms** for joint tourism planning,
→ to promote **cross-sectoral cooperation** (accommodation - transport - guides - attractions - gastronomy),
→ and to develop **coordinated products for promotion and sales**, especially for international markets and for organized groups.

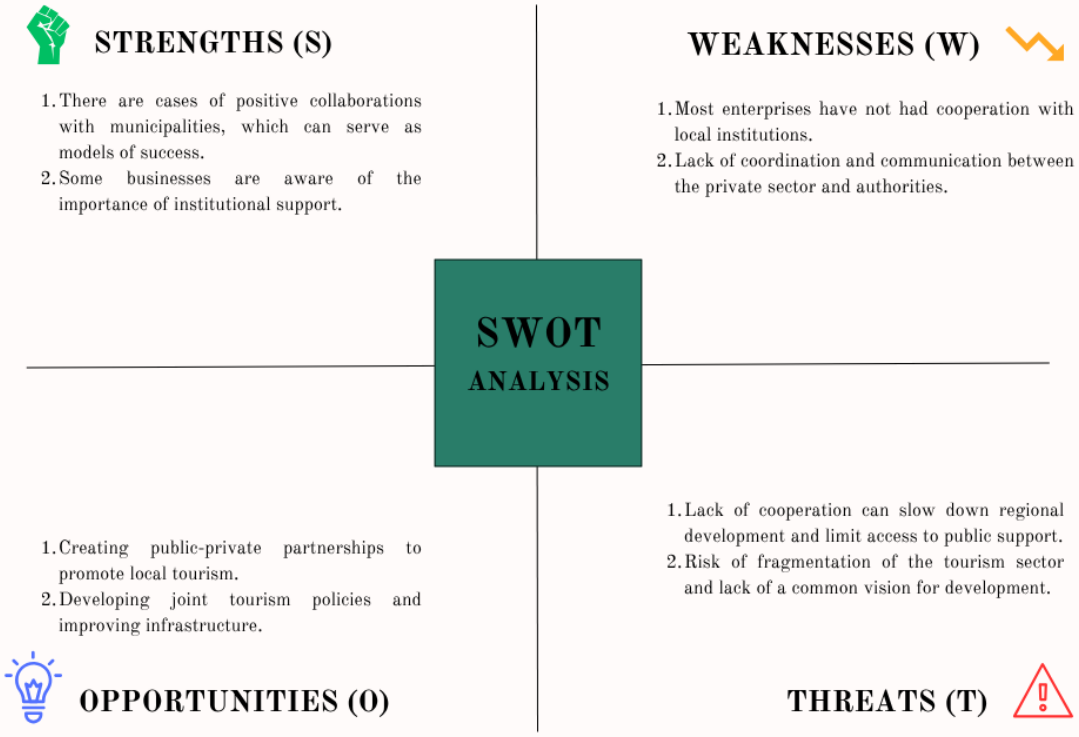
These steps would help not only to **increase the sustainability of the individual business**, but also to **strengthen the positioning of the Dukagjini Plain as a coordinated and professional tourist destination**.



Source: ISA (2025)

20. Cooperation with Municipalities/Local Institutions

The data show that the cooperation between tourism enterprises and local institutions is limited, which represents a significant gap in the management and strategic development of tourism in the Dukagjini Plain. With over three-quarters of businesses reporting a lack of cooperation, there is a need to build a more structured platform for dialogue and cooperation. Joint initiatives to promote destinations, improve infrastructure, and support for training would help increase the competitiveness and sustainability of the industry.

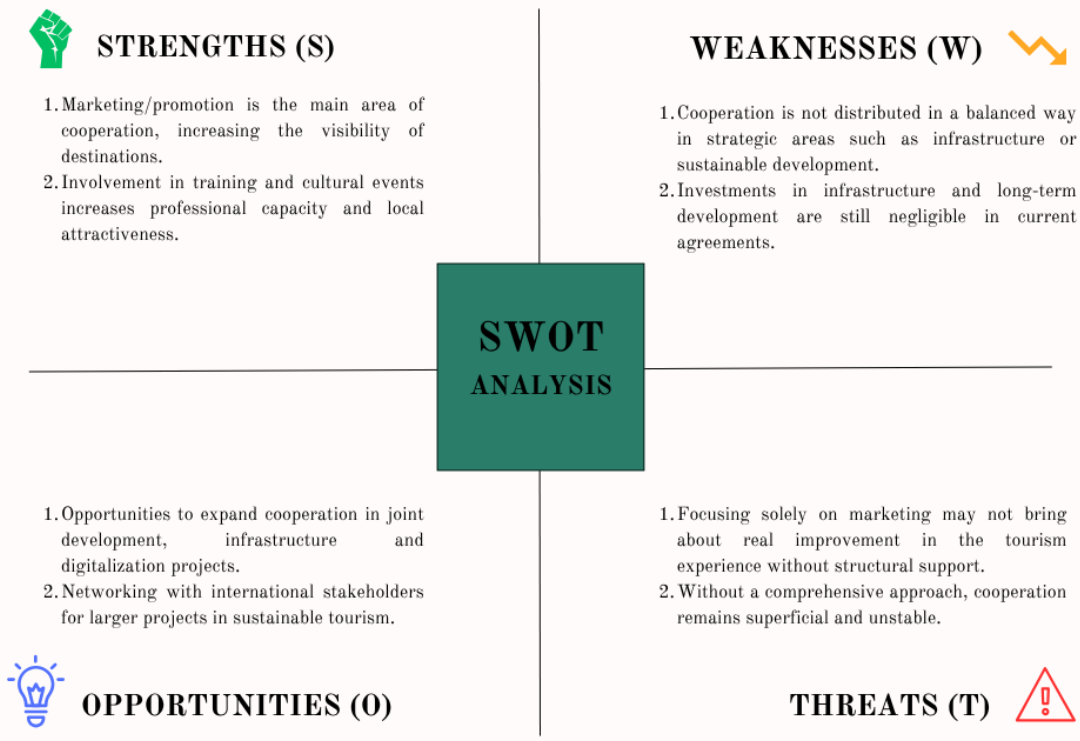


Source: ISA (2025)

21. Areas of Cooperation with Municipalities/Local Institutions

Data shows that where collaboration exists, it is primarily focused on the areas of marketing and promotion, helping to increase the visibility of tourist destinations. This is a positive force that must be maintained, but the lack of balance in strategic areas, such as infrastructure improvement, digitalization or involvement in long-term development projects, is emphasized.

The fact that many collaborations are related to seasonal activities rather than structural reforms means that the potential of cooperation has not been fully exploited. There is a clear need for orientation towards sustainable and inclusive projects that help build an integrated tourism ecosystem, with long-term benefits for the community and the private sector.

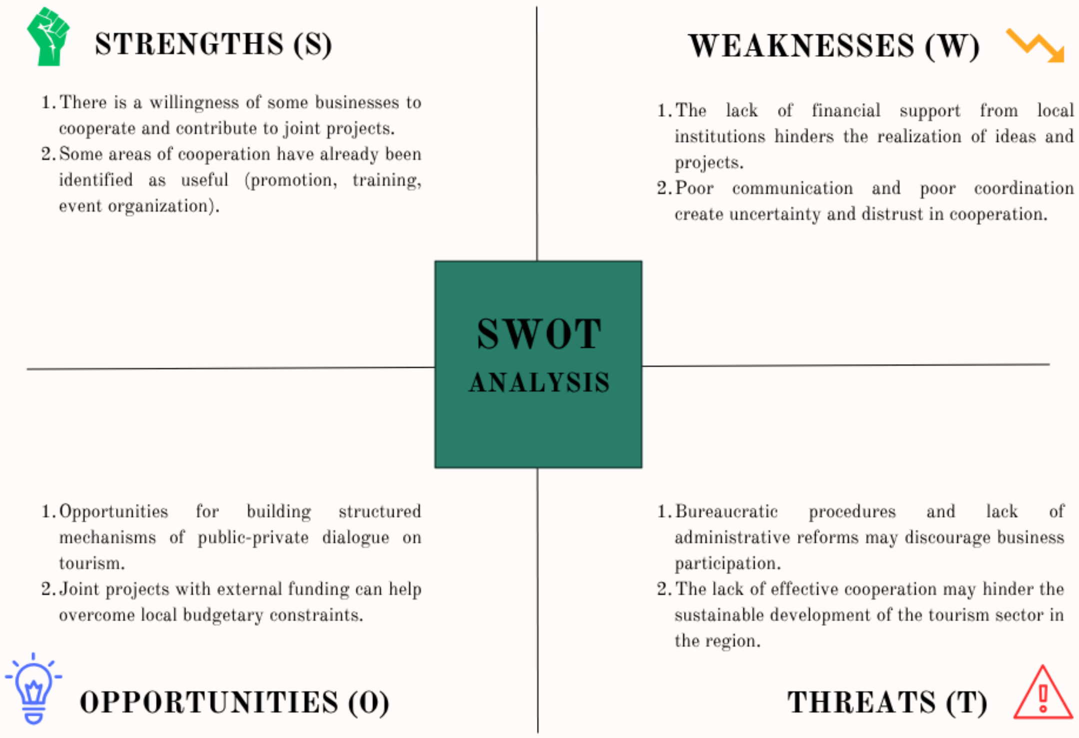


Source: ISA (2025)

22. Challenges of Cooperation with Municipalities and Local Institutions

The data clearly show that cooperation between the private sector and local institutions faces serious challenges, especially in financial and organizational terms. The lack of financial support is one of the biggest obstacles, reflecting the lack of capacities to support joint projects that can really contribute to the development of local tourism.

Problems in communication and coordination, along with excessive bureaucracy, point to an environment of cooperation that has not yet been sufficiently professionalized or institutionalized. However, these challenges also present an opportunity for improvement through the establishment of regular cooperation structures, institutional capacity building and the development of common financial and technical instruments. Strengthening this relationship is essential for the development of an integrated and sustainable tourism at the local level.



Source: ISA (2025)

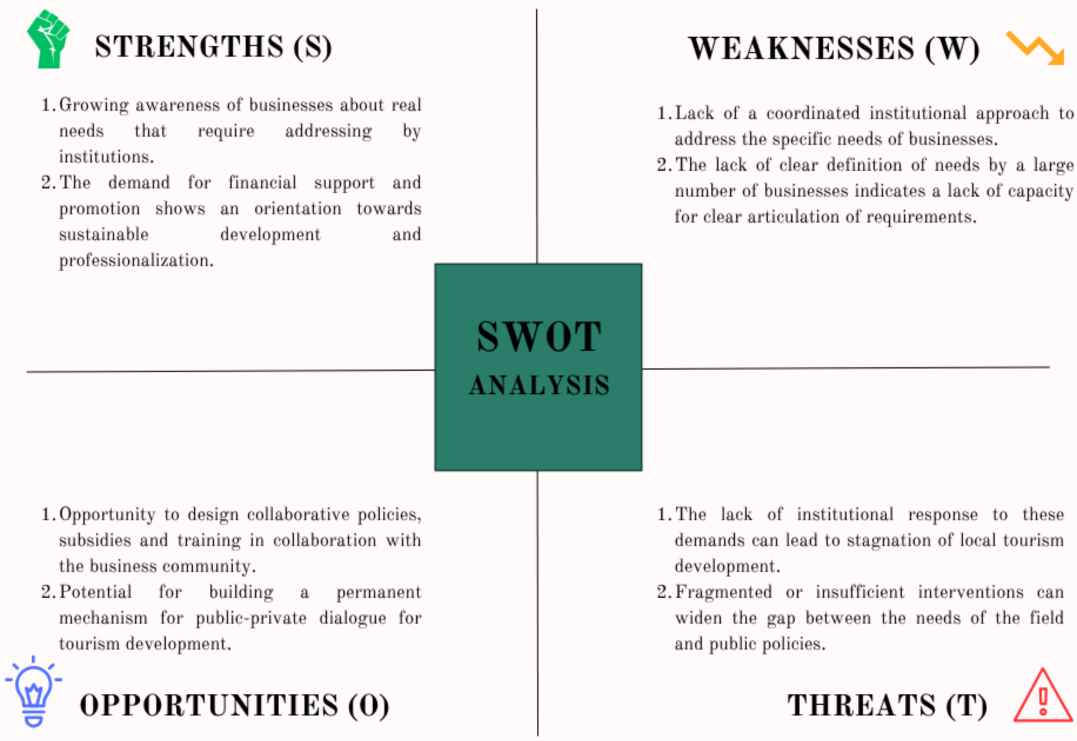
23. Needs Towards Municipalities and Local Institutions

The data presented for Graph 23 highlight a mosaic of the needs of tourism enterprises, which are of a multidimensional nature: from the request for **financial support**, to **promotion, infrastructure, training and facilitation of procedures**.

A high percentage of businesses choose to list more than one need, highlighting the complexity of the challenges they face. This reflects the need for an **integrated and inclusive approach** by public institutions, which should not be limited to one aspect of development, but should address financial, infrastructure, administrative and human capacity development issues in a balanced manner.

The recommendations of businesses for improving cooperation clearly underline that a **greater institutionalization of communication, more flexibility and accountability**, as well as **concrete commitment to joint projects** is required. A special emphasis is also placed on support for women-run businesses and fiscal support, which shows social sensitivity and desire for inclusive inclusion in tourism development.

In this way, in order to achieve a sustainable and competitive development in the tourism sector, the cooperation between the private sector and local institutions must be reformulated on a strategic, transparent basis and with a clear orientation towards results.



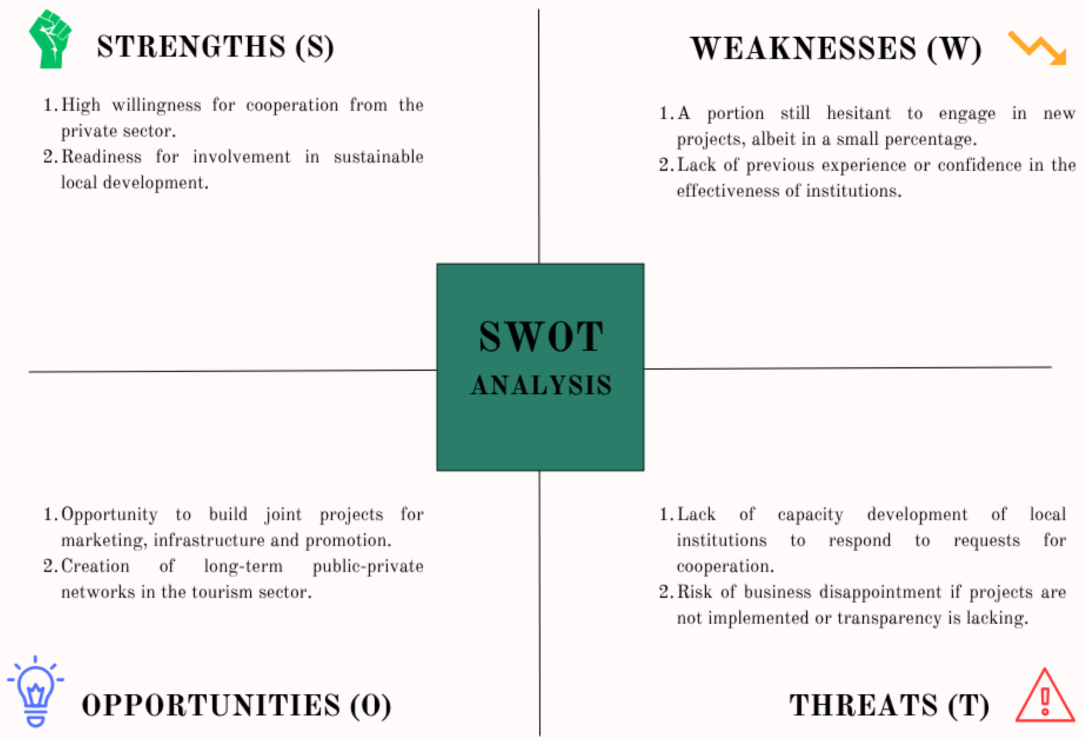
Source: ISA (2025)

24. Interest in New Projects with Municipalities and Local Institutions

The data presented in this graph reflect a **very positive climate for cooperation**: the vast majority of tourism businesses have expressed a clear interest in engaging in new projects with local institutions. This represents an important potential for **the development of strategic partnerships** that can directly impact the quality, sustainability and attractiveness of local tourism.

This interest represents a strong signal that **municipalities and local institutions should use**, by developing support programs, calls for co-financing, or cooperation networks in various fields such as: digitalization of tourism, staff training, joint promotion and management of tourism events.

However, in order to really benefit from this high will, **institutional capacity**, a **comprehensive and transparent approach**, as well as a **stable cooperation structure**, are needed, which would ensure not only the creation, but also the effective implementation of projects that respond to the needs of the tourism sector in the Dukagjini Plain.



Source: ISA (2025)

25. Priority Areas for New Projects with Municipalities and Local Institutions

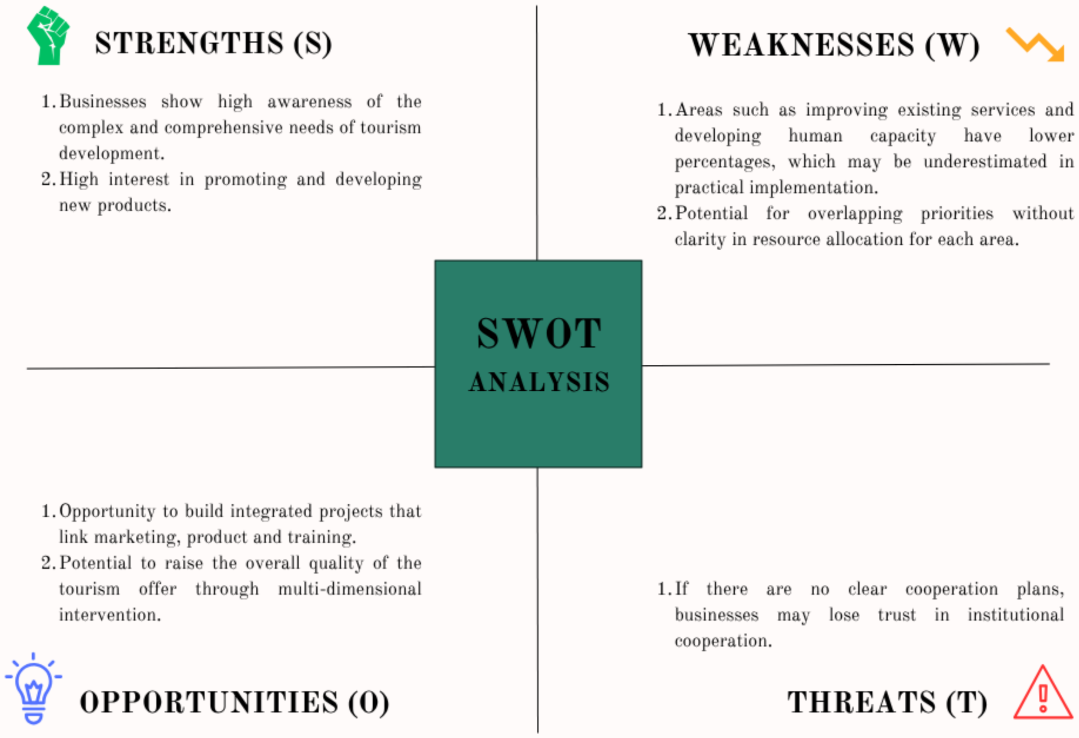
The data presented in this graph underline a clear orientation of businesses towards an **integrated development approach** in the tourism sector. Most enterprises do not see the development of the sector only from a single perspective, but require new projects to include **combinations of key elements**, such as:

→ Development of new tourism products,
→ Improving the quality of existing services,
→ Increasing the professional capacities of the staff,
→ And more effective promotion of destinations through marketing.

This shows **the maturity of the strategic approach by the private sector**, which already understands that in order to be competitive and sustainable, multilateral and coordinated interventions are required.

On the other hand, lower percentages for service improvement and capacity development show that these areas **may remain in the shadows**, if they are not clearly addressed in concrete projects by institutions.

Overall, this result represents a **solid basis for the design of local policies and cross-sectoral projects**, in order to maximize the interest and readiness of the private sector to be an active part of sustainable tourism development in the Dukagjini Plain.



Source: ISA (2025)

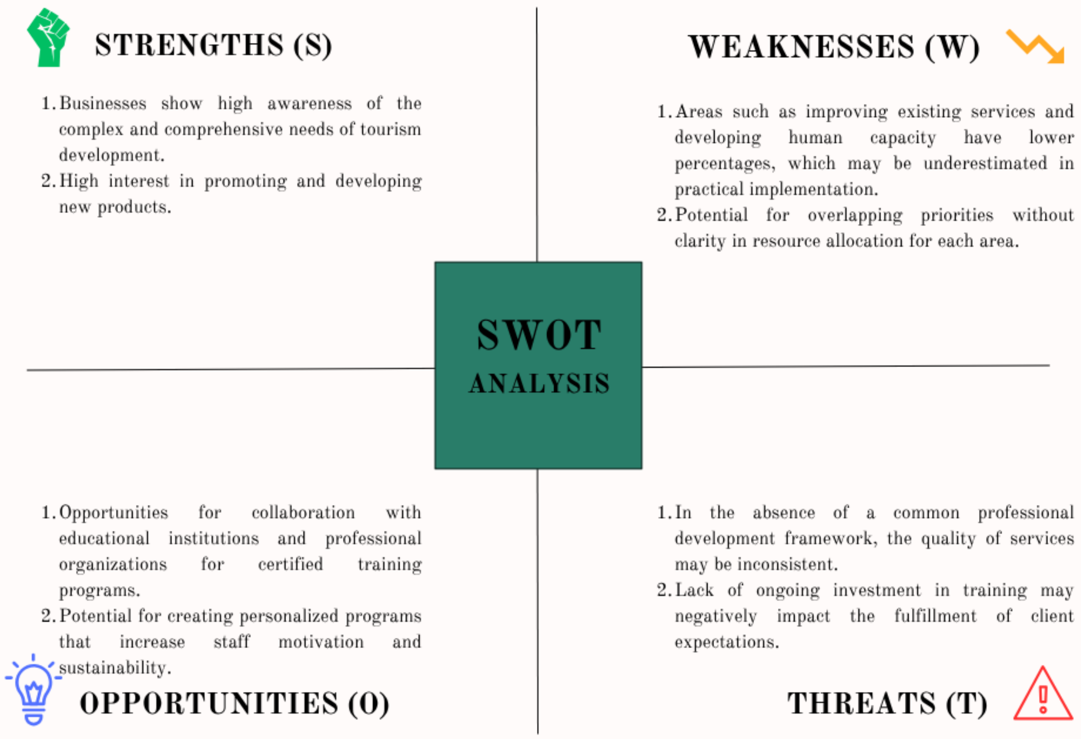
26. Staff Development in the Tourism Sector

The data shows that enterprises in the tourism industry in the Dukagjini Plain are **aware of the key role that staff development has in ensuring the quality of services and meeting the expectations of tourists**. The most commonly used practices include mentorship by experienced managers, which is valued for its practical effectiveness and for the transfer of knowledge through example and direct experience.

Also, a significant percentage of businesses use **regular training**, demonstrating a commitment to the continuous improvement of staff knowledge and skills. The combined approach between mentorship and structural training is also a positive model that contributes to the inclusive and balanced development of human resources.

However, **standardization and formalization of training approaches remains a challenge**, as professional development is not yet unified across the sector. In the absence of cooperation with educational institutions or partners for certification programs, capacity development may remain at the level of internal experience, which does not guarantee long-term and sustainable growth.

It is recommended that local institutions and tourism organizations establish a **common training and mentoring platform**, with **standard modules**, **professional certifications** and networking **opportunities between tour operators**, in order to increase quality and professionalism throughout the sector.



Source: ISA (2025)

27. Deficiencies in the Knowledge and Skills of Staff in the Tourism Sector

The data presented in Graph 27 highlight two main challenges of the workforce in the tourism sector of the Dukagjini Plain:

1. **Use of new technology** - with 38.17% of businesses considering this as the biggest shortcoming.
2. **Customer communication skills** - with 27.48% of enterprises reporting problems in human interaction and professionalism in service.

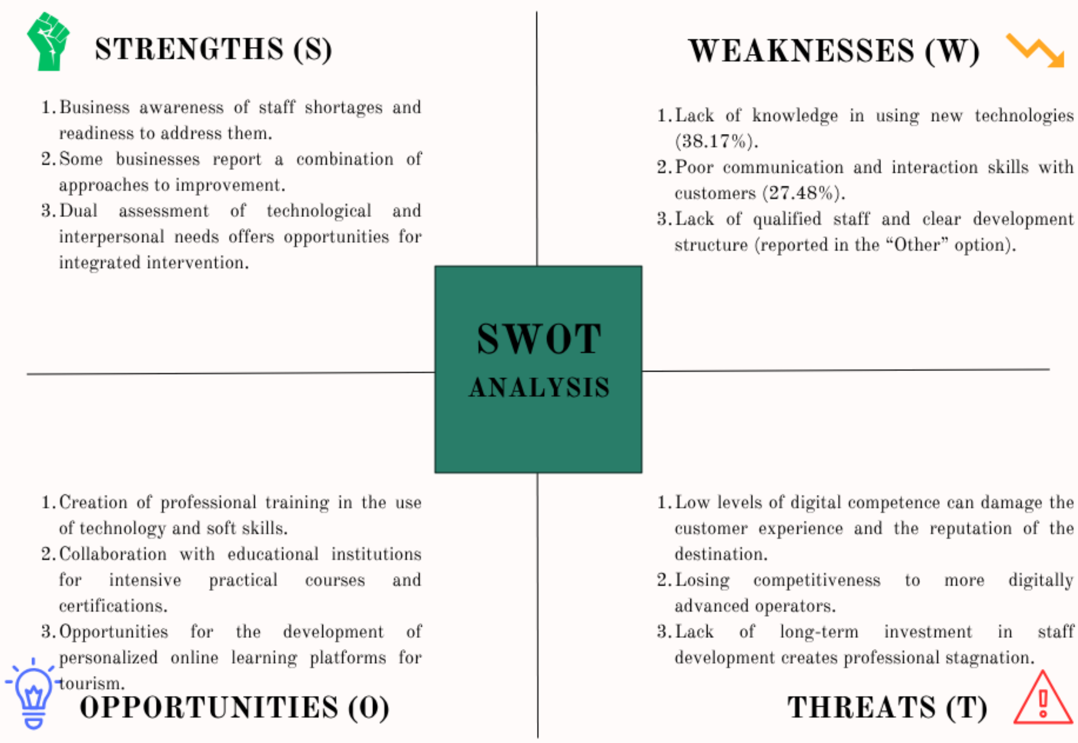
These two components are essential for the modern tourism industry, where digitalization and personalized customer experience are key indicators of success. Increasing demands from tourists and advancing technology require a **profound transformation of staff capacities**.

The fact that 17.56% of businesses report these two shortcomings together shows that **the challenges are not isolated**, but intertwined and require **integrated training** covering technological competencies and soft skills.

Strongly recommended:

- → **Development of personalized training** modules, with content covering the use of booking systems, customer management, use of social networks, as well as effective communication.
- → **Partnership with Centers for Professional Education and Universities** for the provision of **certified programs** for existing and new staff.
- → **Municipal and state incentives** to support businesses that invest in the development of their staff.

In summary, addressing these shortcomings represents a strategic opportunity for **improving competitiveness**, **increasing tourist satisfaction,** and **strengthening the tourism industry** in the region.



Source: ISA (2025)

28. Strategic Goals of Businesses in Tourism (1-3 years)

The data show a strong orientation of businesses in the tourism sector towards **financial growth**, with **74.81%** aiming to increase revenues by 30% in the medium term. This ambition signals a **willingness to invest, expand services, and improve management in** order to ensure economic sustainability.

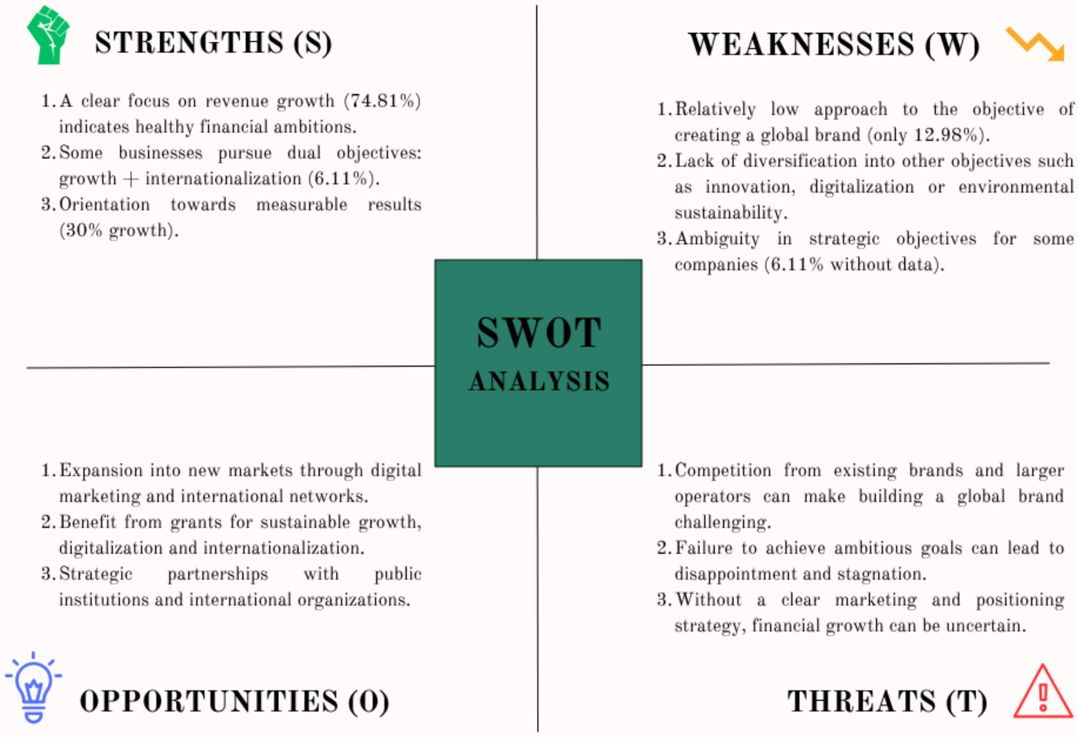
On the other hand, only **12.98%** of businesses have the strategic goal **of building a global brand**, showing that **the potential for international positioning has not yet been fully exploited**. This could be related to a lack of capacities for digital marketing, brand management, or even a lack of experience in foreign markets.

Only a handful of businesses (6.11%) follow an **integrated approach** that includes both revenue growth and brand building, which should be further encouraged through supportive policies and strategic mentorships.

Recommendations:

- Enterprises must develop **clear marketing and branding plans**, to create a consistent and recognizable identity.
- The goal for financial growth should be **supported by investments in technology, quality and innovation**, not just by volume expansion.
- Increasing **international partnerships** and using EU funds to promote tourism would reinforce long-term objectives.

In summary, businesses are in an **optimistic and development-oriented phase**, but need strategic support in marketing and internationalization to maximize results.



Source: ISA (2025)

29. Investments and Planned Developments in Tourism Businesses

The data shows that tourism businesses in the Dukagjini Plain are in a **dynamic phase of growth planning**, with **41.22%** of enterprises intending to invest simultaneously in several areas, reflecting **strategic maturity and integrated approach** to development.

Modernization of booking systems (17.56%) and focus on marketing (14.50%) show high awareness of the importance of **digitalization and building customer relationships**. These aspects are essential in an industry where **customer experience is a differentiating factor**.

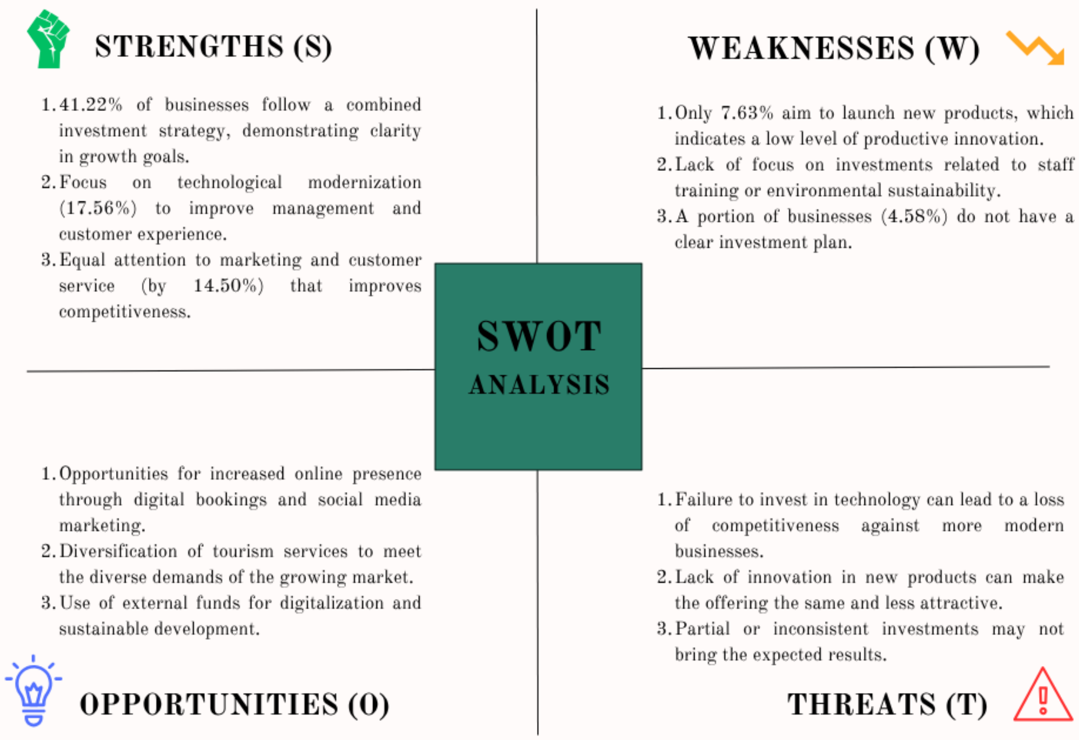
However, only 7.63% plan to launch **new products**, which signals a **low level of innovation**, which may limit long-term development and the opportunity to attract new markets or different tourist segments.

In addition, the lack of emphasis on **human resource development** or improvements in **terms of environmental sustainability** suggests that there is a need for a **better balance between investing in technology and improving quality and responsive service**.

Recommendations:

- Promoting **innovation in tourism products**, creating new offers for different markets.
- Fostering **training and improving staff skills** in parallel with technological investments.
- Using **grants, funds, and public supports** to implement sustainable and inclusive projects.
- Designing an **integrated investment plan** that includes technology, marketing, product, and service.

In summary, enterprises show **courage and clear orientation towards growth**, but must **strengthen innovation and sustainable approach**, so that investments can bring sustainable growth and long-term competitiveness in the tourism market.



Source: ISA (2025)

30. Challenges in the Provision of Tourism Services

The data shows that businesses in the tourism sector of Dukagjini face a **significant number of related challenges**, with **41.98% of them declaring two or more obstacles simultaneously**. This reflects a **high operational complexity**, where factors such as competition, lack of qualified staff and limited financial support combine and make sustainable development difficult.

Competition is the most mentioned challenge (29.01%), which underlines the high pressure that businesses experience to maintain their position in an increasingly dynamic and fragmented market. In this context, the lack of differentiation and innovation may further worsen the position of small and medium-sized businesses.

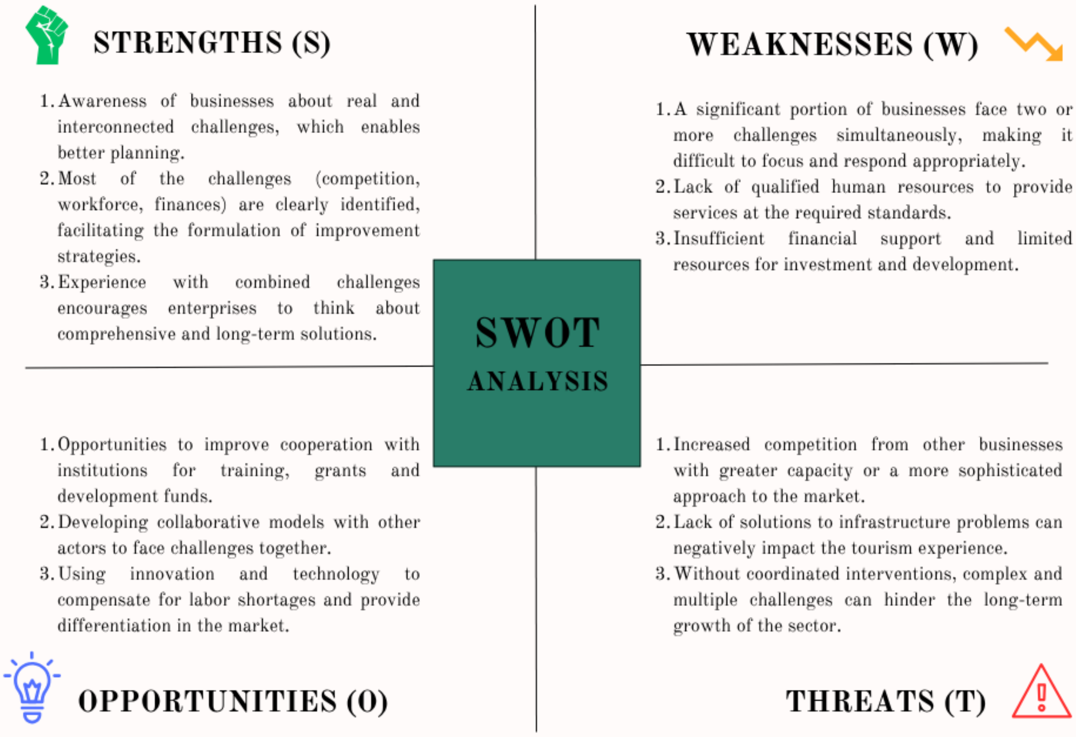
Shortages of **qualified labor** and **financial difficulties** are also critical challenges that directly affect the capacity to provide quality services and invest in innovation or infrastructure.

Although challenges such as infrastructure are reported less (1.53%), they have **a major indirect impact** on the tourist experience and the efficiency of the daily operation of businesses.

Strategic recommendations:

1. **Targeted trainings** for human capacity building, especially in the areas of communication and use of technology.
2. **Institutional and financial support**, through subsidies or co-financing schemes for the tourism sector.
3. **Focus on differentiation and innovation**, through the creation of unique products and experiences that increase value for the customer.
4. **Cross-sectoral partnerships** to share the burden of common challenges and benefit from economies of scale.

Improvement of basic infrastructure and tourist access, as part of a regional integrated tourism development strategy.



Source: ISA (2025)

31. Suggestions for Improving the Tourism Industry

Graph's data proves a **conscious and versatile approach** of tourism businesses to the development of the industry in the region. **38.93% of enterprises emphasize the need for intervention in more than one area**, indicating that the problems and opportunities are interconnected.

Development of tourism infrastructure (16.03%) and **promotion and marketing** (16.79%) are two of the most mentioned priorities, reflecting the need for a strong material base and a strong presence in the market.

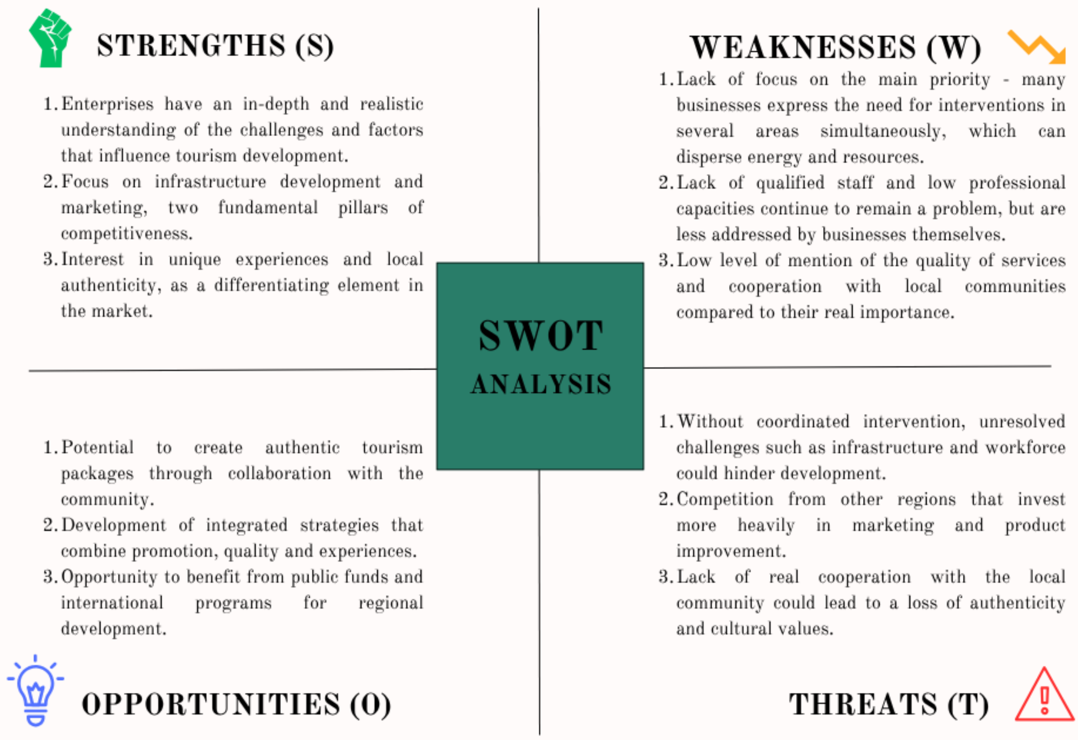
However, softer but long-term impactful elements such as **providing authentic experiences**, **collaborating with the local community**, and **improving the quality of services** are mentioned by only 5.34% of businesses each, although these factors are **key differentiators in modern tourism markets**.

The shortage of **professional labor** (6.11%) remains a persistent structural challenge, which is not receiving due attention compared to the importance it has in the final quality of the tourism offer.

Strategic recommendations:

1. **An integrated regional approach** that includes investments in infrastructure, promotion, quality and culture - not separately, but in a coordinated strategy.
2. **Professional training** for local staff, with a focus on sustainable tourism and communication with international tourists.
3. **Active collaboration with local communities** to create authentic experiences that preserve cultural heritage.
4. **Developing the regional identity** as a tourism brand, to create a unique and distinctive image.
5. **Facilitating access to public and international funds**, as well as involving businesses in development projects with municipalities and other institutions.

In conclusion, the improvement of the tourism industry in the Dukagjini region requires a **common vision and coordinated action**, which does not rely only on infrastructure and marketing, but which gives equal importance **to the quality of the tourism experience**, **the professional labor** and the **in-depth cooperation with the local communities**. Only in this way can a **sustainable and competitive tourism model be created in the long term**.



Source: ISA (2025)

32. Tourism Development in the Region

The Graph 32 data highlight an **advanced awareness by businesses** in the region regarding areas that require improvement to foster tourism development. **41.98% of respondents** emphasize the need for combined improvements, which clearly shows that the challenges are interdependent and require a coordinated and multisectoral approach.

The diversification of the offer through new attractions (22.14%) and **the strategy for the exploitation of tourism resources** (17.56%) represent two clear directions for sustainable growth. These priorities show an **orientation towards innovation and strategic management**, in line with international best practices in destination development.

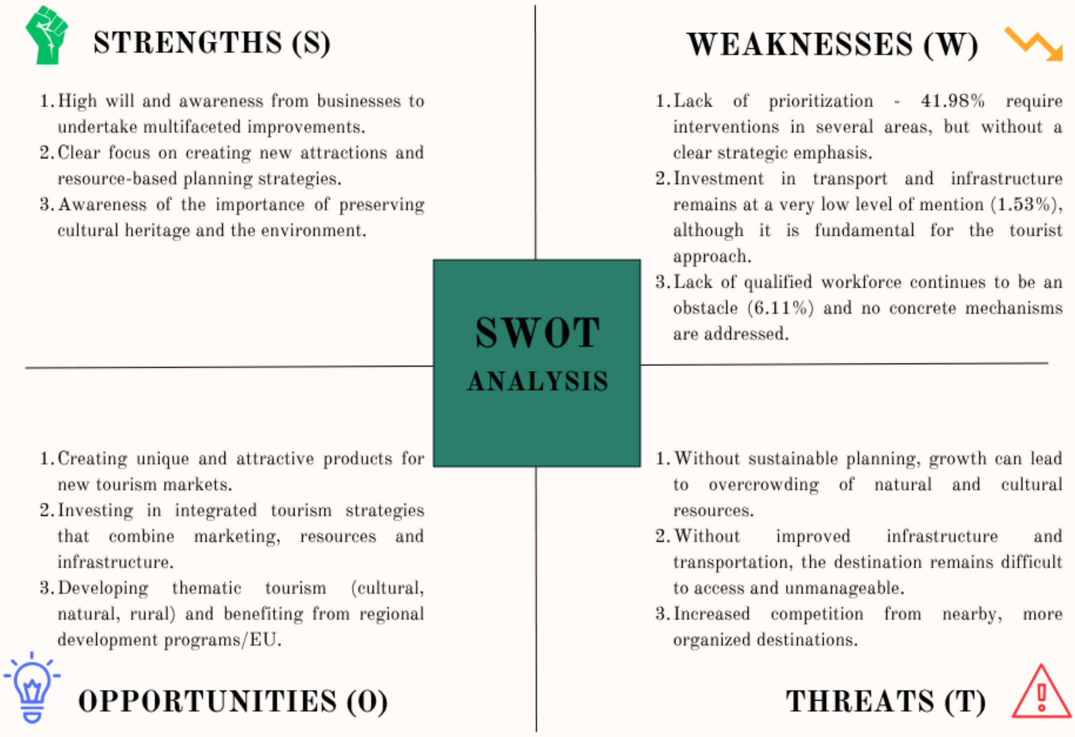
On the other hand, vital factors such as **road infrastructure and public transport** are mentioned to a very small extent (1.53%), signaling an **underestimation of the impact they have on visitor access and experience**.

Cultural heritage and environmental protection (3.82%) and **tour packages with special offers** (2.29%) are also mentioned, but less than expected, suggesting that these areas may also need greater awareness.

Strategic Recommendations:

1. **Creation of a regional tourism development strategy**, which combines new attractions, heritage conservation, marketing and resource management.
2. **Direct investment in infrastructure and transportation** to enhance tourism access and experience.
3. **Fostering public-private partnerships** to develop new projects, with a focus on thematic products and sustainable tourism.
4. **Developing the professional workforce** through targeted training and involvement of young people in the industry.
5. **Digitalization of tourism offer and services**, including technology for bookings, guides and targeted marketing.

In conclusion, in order to foster the long-term and sustainable development of tourism in Dukagjin, it is essential to build an **integrated model that relies on new products, local resources, skilled workforce, and modern infrastructure**. Businesses have given strong signals for action - it is now the turn of local institutions and development actors to create the mechanisms to make this a reality.



Source: ISA (2025)

33. Challenges faced by tourists

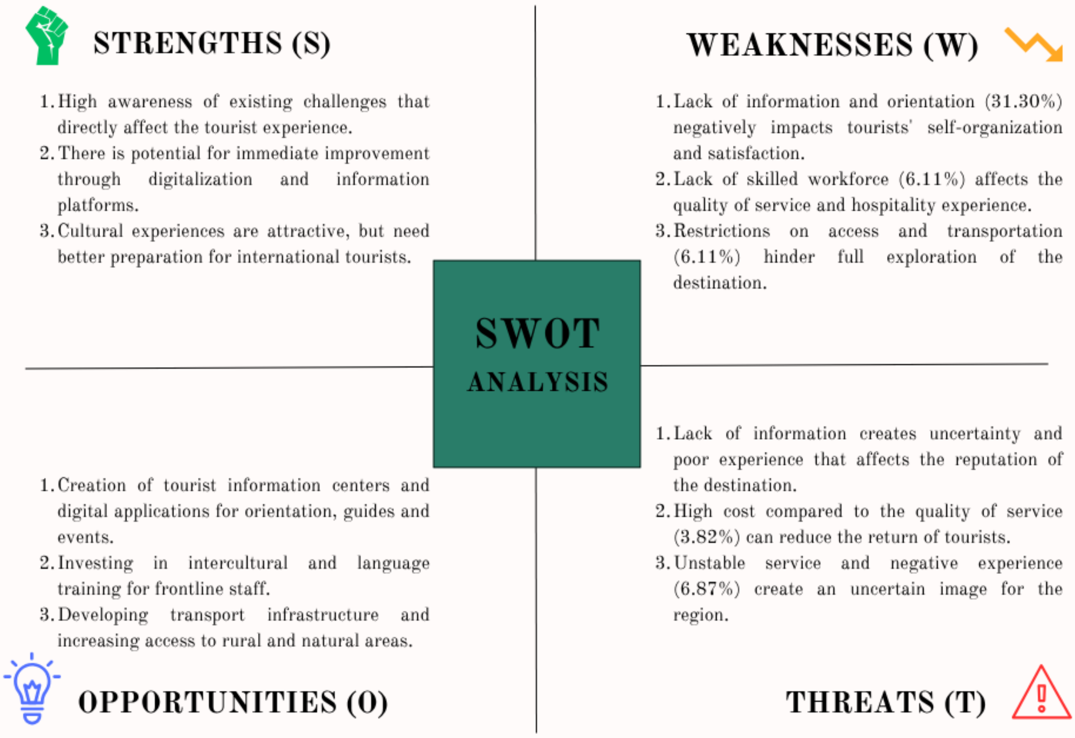
Data from Graph 33 highlights some of **the most sensitive issues affecting the tourist experience**, with a direct impact on **the destination's satisfaction, return, and promotion** through recommendations.

The lack of information and orientation (31.30%) is the most pronounced challenge. This suggests that the region needs functional information systems: clear orientation signs, mobile apps, tourist centers, guides in several languages, and physical or digital brochures to facilitate access to attractions, services and activities.

Intercultural and linguistic challenges (7.63%) point to the need for **training for professional staff** in the field of communication with international tourists. This would enable a more professional hospitality and the creation of a more personalized experience.

Poor service, safety, and low quality (6.87%), along with **a lack of professional labor**, pose a long-term risk if not addressed. Hands-on training, standardization of services, and building a dedicated culture of hospitality are critical.

The high cost compared to the perceived value (3.82%) suggests an **imbalance between prices and quality**, which can negatively affect the positioning of the destination in the competitive market.



Source: ISA (2025)

Strategic Recommendations for Institutions and Businesses:

1. **Creation of a unique digital information platform** for tourists with maps, suggestions, audio guides, timetables, and practical information (in several languages).
2. **Investment in staff education** for intercultural communication, foreign languages and professional hospitality.
3. **Installation of physical information points** at the main destination locations, with trained staff and promotional materials.
4. **Development of a simplified local and orientation transport system**, connecting rural areas, natural attractions and urban centers.
5. **Creating** value-added packages that balance price with benefits, including discounts, free guides, or personalized local experiences.
6. **Setting standards of safety and hospitality ethics**, through periodic inspections and practical manuals for the tourism sector.

In conclusion, addressing the challenges faced by tourists requires **coordinated and systematic actions** in information, infrastructure, quality and intercultural communication. By making the destination more accessible, understandable and safe, the region will be able to increase **tourist satisfaction and long-term competitiveness in the international tourism market**.

34. Identifying Training and Skills Needs

The presented data clearly show that tourism enterprises in the Dukagjini Plain have a **moderate awareness** of the importance of training, but the approach remains **non-systematic and not institutionalized**.

The fact that **54.20% of businesses identify training needs on average** shows that **there are still no formalized mechanisms** for assessing staff capacities and adapting them to contemporary industry standards. This prevents enterprises from reacting in a timely manner to changes in the market and increases the competitiveness of other more advanced sectors.

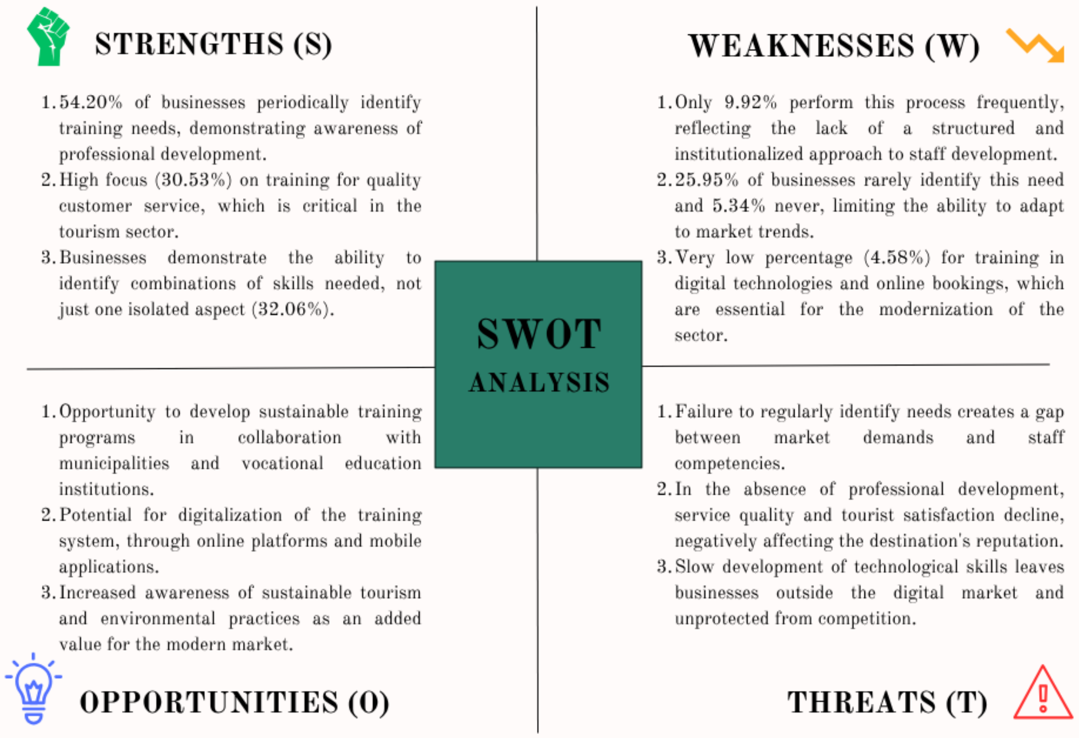
However, **a clear focus on customer experience management training (30.53%)** is a positive indicator that needs to be supported and institutionalized. Quality service is one of the most influential factors in tourism, so focusing on this aspect is crucial for differentiating the destination and increasing visitor satisfaction.

It is worth noting that **only a very small percentage (4.58%) of businesses report needs for training in technology and online booking systems**, which indicates a **significant digital gap**. At the time of automation and bookings through platforms such as Booking, Expedia, Airbnb or other OTAs, this is a **serious strategic risk** that needs to be addressed urgently.

Recommendations for improvement:

1. **Establishment of a regular training needs assessment mechanism**, integrated into the company's operating system (every 6 months or 1 time per year).
2. **Partnering with local institutions and vocational education providers** to build customized training modules for tourism.
3. **Focus on digital skills** - including the use of booking platforms, social media, digital marketing, and customer management (CRM) systems.
4. **Increasing inclusion in sustainability, environmental management and alternative energy training**, integrating these as competitive values of the tourism offer.
5. **Formation of an "annual training calendar"** in cooperation with municipalities and Chambers of Commerce of the region.

In conclusion, to increase competitiveness, businesses in the tourism industry need to build **organizational cultures based on continuous learning**, making **identifying and developing staff capacities a strategic priority**. This will be directly reflected in **the quality of services, customer satisfaction, and the steady growth of the industry in the region.**



Source: ISA (2025)

35. Skills required for tourism sector development

Data from graph shows a **growing awareness of enterprises about the skills needed** in an increasingly complex and technological market. The demand for **foreign languages**, **marketing** and **event management** reflects the demand for **adaptation to international markets**, while the inclusion of **artificial intelligence** and **passenger safety** shows an **openness towards innovation and risk management**, which are essential in modern times.

These training needs are not in isolation, but interconnected with new tourist demands and global developments. **Quality service, security, flexibility and technology** are the key elements for competition, and businesses understand this.

The interest in **practice-oriented Bachelor's/Master's programs** underlines the need to **restructure the academic offer**, so that it is **closer to industry practice and more flexible for students and active professionals**. Such programs should include:

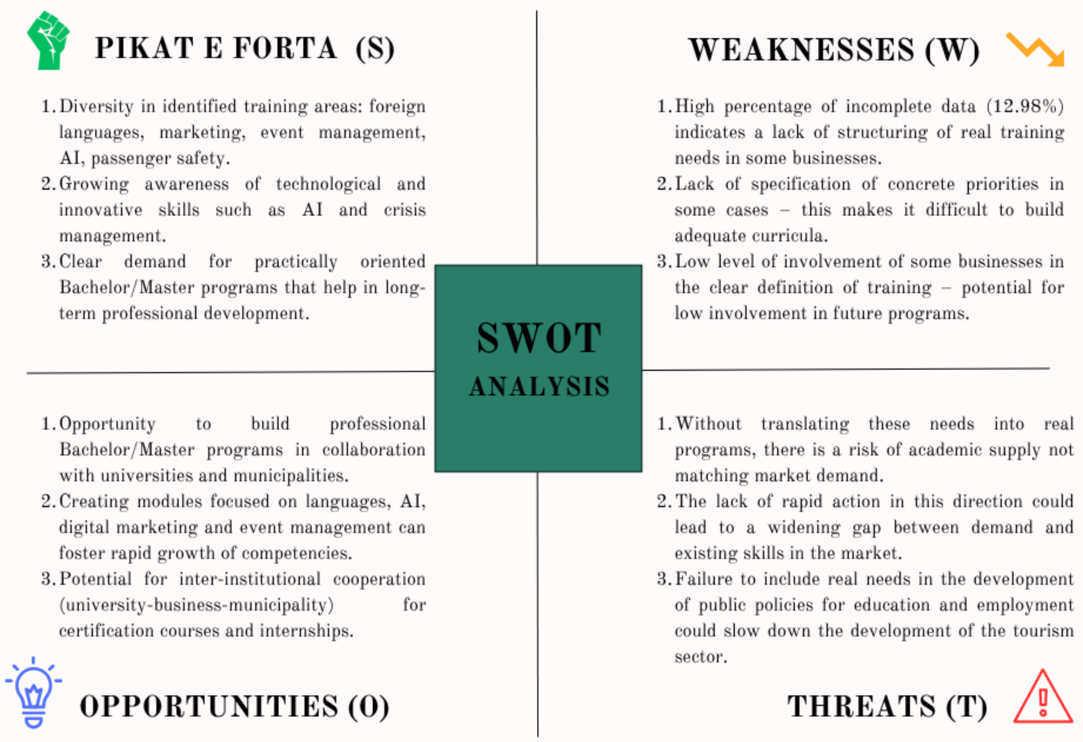
→ Tourism experience management
→ Event and destination management
→ Digital marketing and international promotion

→ Foreign languages for tourism
→ Artificial intelligence and data analytics in tourism

Concrete recommendations:

1. **Designing a catalogue of priority trainings** in cooperation with businesses and professional education providers.
2. **Building professional Bachelor's/Master's programs**, with a focus on practical skills and innovation.
3. **Incorporating new technologies (AI, CRM, booking management systems)** into existing curricula.
4. **Development of short-term certification modules** for existing staff in areas such as: language, marketing, security and tourism protocol.
5. **Strengthening cooperation with local universities and colleges** for professional internships and direct engagement in the sector.

In conclusion, enterprises in the tourism sector are showing an **increasing orientation towards professionalism and technological adaptation**. Now is the ideal moment for educational institutions, municipalities and development agencies to **channel these requirements into concrete training and formal education projects**, to build a **competitive, modern and sustainable tourism industry**.



Source: ISA (2025)

GENERAL SWOT ANALYSIS

STRENGTHS

- → High willingness of enterprises to **cooperate with local institutions** (85.5%).
- → **Awareness of businesses** on the importance of training and human capacity development.
- → **Integrated enterprise approach** to product development, marketing, and service improvement.
- → Clear focus on **increasing revenue and building a global brand**.
- → Active participation in **identifying priority areas** for training and technological innovations (AI, digitalization, online bookings).
- → Recognizing the importance of **customer experience** and communication as a key part of success.

WEAKNESSES

- → **Low** and non-standardized frequency in identifying training needs (only 9.9% do so frequently).
- → **Lack of clear structuring** of priorities and strategies for training in many businesses.
- → **Lack of qualified labor**, especially in technology and customer communication.
- → **Constant problems in infrastructure**, orientation and access for tourists.
- → A significant part of enterprises that **do not carry out frequent assessments of the quality of services**.
- → **Lack of information about tourists** and language and cultural barriers for international tourists.

OPPORTUNITIES

- → **Creation of Bachelor's/Master's programs** practically oriented to the needs of the tourism industry.
- → **Developing new attractions and unique tour packages** to increase diversification and visibility.
- → **Cooperation with universities and municipalities** for professional training and institutional support.
- → **Investments in technology, digital marketing, and customer services** to increase competitiveness.
- → Opportunities for **internationalization of the tourism offer** through regional and global networks.
- → Use of **subsidies and public funds for sustainable development**.

THREATS

- → **Fierce competition** from other more touristically developed regions.
- → **The lack of coordination of local actors and the lack of clear development policies**.
- → **The risk of non-implementation of training strategies**, deepening the competence gap.
- → **Increase in tourist dissatisfaction** due to lack of inconsistent information and services.
- → **Increasing costs** without quality improvement can lead to **loss of the destination**'s reputation.
- → **Institutional fragility** in addressing the real needs of the industry through concrete and efficient measures.

CONCLUSION FOR SWOT ANALYSIS

Tourism in the Dukagjini Plain has **a high potential for sustainable and competitive development**, relying on the energy of local businesses, awareness for professional development and the desire for institutional cooperation. However, internal and external challenges require **a strategic, coordinated approach with concrete actions**, to bridge the gap between potential and reality.

It is recommended that public, academic and private institutions draw up **a joint action plan for the period 2025-2030**, which includes:

- → Investments in infrastructure, marketing and technology,
- → Building targeted educational programs and certifications,
- → Increasing the public-private dialogue on development policies,
- → Improving the tourist experience through professionalism and clear orientation.

5. CONCLUSIONS AND RECOMMENDATIONS

5.1. Conclusions

The collected data and detailed interpretations show that the tourism industry in the region is characterized by a structure based mainly on individual businesses and micro and small enterprises, which represent a larger part of the tourism operators. This indicates a more flexible but more sensitive organizational structure, where managerial and financial responsibility is often based on limited human and material resources.

In terms of services offered, the sector is dominated by gastronomy and accommodation, while tourist attractions and integrated packages still remain at a low level of development. This constitutes a clear indicator of the need to diversify the offer, creating opportunities for richer tourist experiences and increasing economic sustainability throughout the year.

It is noted that a significant part of the businesses are focused mainly on the regional and national market, with a limited orientation towards international markets. This highlights the challenges associated with promotion and marketing beyond local borders, as well as the need for more advanced digital and linguistic skills and capacities.

In terms of quality management and customer satisfaction, most businesses conduct customer satisfaction assessments at an average level and rely mainly on online ratings, indicating a potential for continuous improvement through more systematic mechanisms for collecting and analyzing customer feedback.

The main challenges identified are related to high competition, seasonality, lack of qualified labor, and marketing costs. At the same time, the still low use of integrated reservation systems and incomplete digitalization practices limit the potential for operational modernization.

In relation to cooperation with municipalities and local institutions, it turns out that it is still weak and not sustainable. However, interest in new projects exists, reflecting a willingness for more structured cooperation directed towards investments in infrastructure development, joint promotion, and professional capacity building.

An important element is the growing awareness of the need for continuous training and development of human resources, especially in the areas of customer experience management, the use of information technology, sustainability and digital marketing. Furthermore, businesses emphasize the need for sustainable investments, whether for modernizing reservation technology, expanding marketing strategies, improving services, or launching new products, confirming the ambition for growth and creating competitive brands.

5.2. Recommendations

In line with the conclusions, improving the tourism industry in the region requires well-defined measures and coordinated actions. Hence the following recommendations such as:

→ ***Developing human capacities and improving the educational offer:***

- Strengthen cooperation with educational institutions to offer Bachelor's and Master's programs focused on cultural tourism, event management, gastronomy, transportation, and tourism security.
- To promote practical training, seminars and professional mentoring, with a focus on new technologies and foreign languages.

→ ***Strengthening public-private cooperation and institutional support:***

- Establish regular communication and coordination mechanisms with municipalities, to reduce bureaucracy and facilitate permit and licensing procedures.
- Provide financial support, subsidies and incentive measures for investments in infrastructure and innovation.

→ ***Diversification of the tourism offer and development of new products:***

- To encourage the creation of integrated tourist packages linking accommodation, gastronomy, attractions and cultural activities.
- To invest in new attractions and unique experiences that extend the tourist season and strengthen the local identity.

→ ***Improving Destination Marketing and Promotion:***

- Expand the use of digital platforms, online advertising and social networks to target international markets.
- To develop joint marketing campaigns at regional and inter-municipal level.

→ ***Modernization of Reservation and Service Management Systems:***

- To increase the integration of modern technologies for booking management and communication with customers.
- Invest in advanced data analytics to better understand the needs of tourists.

→ ***Development of supporting infrastructure and improved accessibility:***

- Improve road infrastructure, public transport and information signs for better orientation of tourists.
- Involve local communities in the development of projects that promote cultural heritage and the environment.

Based on these findings, the tourism sector in the region has significant potential for development, but requires sustained interventions and continuous cooperation between businesses, local institutions and the community. Investing in people, digitalization, diversification of services and increasing public-private cooperation are the main pillars to guarantee competitive, sustainable and value-added tourism for the local economy and society.

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