

Barriers Inhibiting Albanian Tourism from Being Competitive: A Delphi Study

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Abstract

Albanian tourism is a major income contributor to the country's employment and economy. The industry is relatively new to the country and only recently has it been able to receive the attention it needs in regards to making it more appealing to tourists and everyone involved in it. The lack of inexperience as compared to countries in the region is very apparent especially by comparison of visitors per capita on Albania with the other destinations in the region. Research on various factors that might inhibit Albanian tourism have been conducted and while they display what the problems might be, they lack to suggest implementing strategies. A qualitative Delphi was used in this research study, which included a purposeful sample of SMEs in the field of Albanian tourism. The panel of experts were drawn from three groups: (a) government officials, (b) industry leaders, and (c) academics. The data were collected and analyzed from three rounds of questionnaires. The study found 10 factors inhibiting Albanian tourism from being competitive in the region. SMEs suggested 6 short-term and 4 long-term actions needed to be taken by Albanian tourism in order to increase its competitiveness in the Mediterranean. Recommendations for academia, government, and industry included the need for more research in the field, regulation of industry taxes and fighting of corruption, investment of infrastructure, professional training and developed, and creation on independent professional organizations.

Keywords: Tourism, Albania, Economy, Infrastructure.

Introduction

Albania has encountered some major changes to its political, economic, and social environment since the fall of the communism in 1990 (King & Vullnetari, 2003). The country's economy nearly crumbled in 1992 (Korovilas, 1999). The post-communist era, among other aspects, was an opportunity for Albania to become more like the Western countries of Europe (Teqja & Zotaj, 2014). Albania is promoting tourism because it is a ready way to generate income for countries, especially those with low industrialization, and because tourism worldwide is rapidly growing (Kruja & Hasaj, 2010). Tourism is an industry that had not been explored or even considered prior to the fall and only started initiating and developing after (Pojani & Pojani, 2011). Prior to the communist system change, Albania was isolated from receiving foreign visitors, and Albanian natives were prohibited by law from leaving and visiting other countries (Herzog, 2012). The only visitors visiting tourist destinations were Albanian citizens and this attributed to a relatively insignificant income for the country (Hall, 1992) resulting in Albania's current lack of being able to compete in tourism with other tourist destinations (Pojani, 2009). Owing to the country's undeveloped infrastructure, there were only a few tourist destinations to choose from

with limited access during the summer months, and they were owned and operated by the government, which yielded very little room for improvement and for offering competitive services to visitors (Pojani & Pojani, 2011). While Albania had almost no tourism during the communist era, the industry started gaining attention around the time that it broke from the system (Caraba, 2011).

Albania is now a country that allows its citizens to leave the country and is open to foreign nationals visiting without restrictions (King, Iosifides, & Myrivili, 1998). The new democratic system in Albania brought the rise of corporations and creation of private enterprises, which has recently made tourism a more competitive industry (Roaf, Atoyian, Joshi, & Krogulski, 2014). The country's dynamic geographic position in the area (Burghouwt, 2013) and its tolerance toward many religions (Young, 1999) promotes the possibility of creating an optimal environment for very diverse visitors (Nikolla & Miko, 2013). In addition, today, tourism in Albania is an integral part of the country's economy (Hummel & Van der Duim, 2012). Albania is a country that has a lot to offer to tourism and tourists because of its diverse destination choices, such as sea, mountain, national parks, cultural heritage, traditions, and history (Nikolla & Miko, 2013; Qirici & Theodhori, 2013). In addition, Albania is a destination that has not been invaded by mass tourism yet and offers cheaper options than other countries in the region (Qirici & Theodhori, 2013).

Tourism in Albania has changed tremendously since the break with communism (Kola & Liko, 2011). Technological advancements have also brought about major transformations to tourism in general while making it easy to compare features from one destination to another (Neuhofer, Buhalis, & Ladkin, 2014). Visitors seek to get the most out of their travels, and it is essential for travel destinations to be compatible with the industry standards, as travelers perceive them (Pesonen & Komppula, 2010).

Current Situation of Albanian Tourism

Although Albania holds a strategic geographic position in the Mediterranean (Bramo, 2013); it is not fully capable of competing with neighboring countries in tourism since that industry is still in its infancy in Albania (Kaduku, 2012). More specifically the problem is that there is a lack of (a) centralized strategies and management (Agoraki, Delis, & Pasiouras, 2011; Berisha-Malltezi & Elmazi, 2011; Noti, 2015), (b) continuous improvement (Bashi, 2014; Bejtja, 2014), (c) customer satisfaction (Marku, 2013; Seidl, 2014), (d) domestic attainment (Karagiannis & Polo, 2011; Shqau & Gjevori, 2013), (e) employee fulfillment (Tomini, Packard, & Tomini, 2013), (f) foreign investment (Kadiu & Tepelena, 2016; Prifti & Zenelaj, 2013), (g) learning (Bego & Malltezi, 2011; Kadiu et al., 2014; Noti, 2016), and (h) forward looking leaders (Mavris, 2011; Tolkach, Pearlman, & King, 2012). These deficiencies seem to inhibit Albania as a tourist destination (Vladi, 2014), and force many Albanians to spend holidays abroad rather than in the country (Kaduku, 2012). Studies are conflicting in their recommendations for how Albania's tourism industry should prioritize to best address these issues (Bashi, 2014; Bejtja, 2014; Bramo, 2013; Dibra & Oelfke, 2013; Kadiu et al., 2014; Lubonja, 2015; Matja, 2014; Nikolla & Miko, 2013; Pojani & Pojani, 2011; Prifti & Zenelaj, 2013; Shyti & Kushi, 2012; Qirici & Theodhori, 2014).

Income derived from tourism is very important for Albania (Bashi, 2015) because the industry has the potential to help employment (Prifti & Zenelaj, 2013), contribute to the GDP of the country, and holds promising potential for economic and social development (Lubonja, 2015). As of 2014, tourism appears to be undeveloped in many areas such as information, accommodation, differentiation, and even safety of travelers (Bejtja, 2014; Kadiu et al., 2014) which therefore has attributed to income loss for the industry (Dibra & Oelfke, 2013). Tourism in Albania seems to lack leadership in marketing (Matja, 2014), knowledge, and cooperation (Kaduku, 2012), as well as the expertise, experience, and stability that competing countries in the region offer (Kushi & Caca, 2012).

Research Questions

The following research questions were developed in an attempt to gain a deeper comprehension of the issue that Albanian tourism is currently encountering. Evaluation of the first research question helped understand the current inhibiting factors of Albanian tourism. While the second and third question suggested actions needed short and long-term to make Albanian tourism more competitive in the region.

Q1. What are the most important inhibiting factors that keep Albanian tourism from being competitive?

Q2. What are the most important actions the Albanian tourist industry should take in the short term to be more regionally competitive?

Q3. What are the most important actions the Albanian tourist industry should take in the long term to be more regionally competitive?

Results

Participants. Fifteen SMEs were selected to participate in the study. The SMEs were strategically chosen to represent the field of academia, local government, and industry with 5 SMEs for each respective field. The age of the SMEs ranged from 30 years old to 55+ (see Table 2). Sixty-six percent of the SMEs were between the ages of 30-40, 14% were between 40-50, and 20% were over the age of 50. Eighty percent of the SMEs have more than 10 years of experience in the respective fields they were selected to represent. Only 20% of SMEs had between 5-10 years of experience in their respective field. All of the SMEs read and write English at the 9th grade level or beyond, and 100% had access to a computer with Internet.

Round 1 (solicit responses). The first questionnaire was sent to 15 SMEs to collect their opinions regarding key factors inhibiting Albanian tourism from regional competition and what actions might help the industry over the short and long term. Two weeks were allowed for the participants to reply. All 15 of the SMEs responded prior to the target date for completion, which assisted expediting data analysis. SMEs were asked to answer in no particular order about the inhibiting factors of Albanian tourism in the context of regional competition. SMEs were also asked about the short-term and long-term actions needing consideration to make the Albanian tourism industry more competitive in general. Data were collected and tallied. Duplicate answers were removed, and outliers were identified. Outliers were identified based

on their frequency mentioned by SMEs. The final responses collected from round 1 served as the basis for the Round 2 questionnaire.

Round 2 (predictive). The panelists rated each of the responses derived from the round 1 survey and were asked to provide justification and clarification comments. Anonymity was ensured through the second round to not influence responses of SMEs by names and titles. Specifically, questions 1-20 in round 2 included a common 5-point Likert-type scale, with choices ranging from: (a) *strongly agree*, (b) *agree*, (c) *neither agree nor disagree*, (d) *disagree*, or (e) *strongly disagree*, with statements posed that closely represented their opinion. Responses to the Round 2 survey instrument were analyzed to begin the stability process. Results from Round 2 survey served to create the Round 3 questionnaire.

Round 3 (stability). At the beginning of Round 3, each panelist received feedback from Round 2, which was presented as the Round 3 Questionnaire. SMEs reviewed the feedback from Round 2 before responding to each question provided in Round 3. The Round 3 survey instrument was created from the responses to Round 2 and consisted of 20 questions. Likert-type rating items were used to explore the reasons for the differences discovered in Round 2 of the study. Responses to the Round 3 survey instrument were analyzed to begin the stability process and the final themes are presented below.

RQ1. What are the most important inhibiting factors that keep Albanian tourism from being competitive?

SMEs offered many suggestions about the inhibiting factors that prevent Albanian tourism from being competitive. One academic SME suggested poor infrastructure as the main reason. "Albania has many beautiful places but no roads to get there". One government SME suggested corruption of the local government as an inhibiting factor that "prohibits investments on infrastructure". While an industry SME suggested that "poor infrastructure is attributed in part to construction and development without any plans or proper permission from the local government".

Ten basic themes were identified as inhibiting factors of Albanian tourism during questionnaire 1 of round 1. In questionnaire 2 of round 2, SMEs were asked to rank the responses using a common 5-point Likert-type scale, with choices ranging from: (a) *strongly agree*, (b) *agree*, (c) *neither agree nor disagree*, (d) *disagree*, or (e) *strongly disagree*, with the statements posed that closely represented their opinion. In questionnaire 3, round 3, SMEs were asked to make changes based on the anonymous feedback that was provided from round two and justify their responses when they could. The following will help explain the ranking the SMEs made about the inhibiting factors of Albanian tourism.

Infrastructure. Infrastructure was mentioned by every SME. All of the SMEs agreed that infrastructure inhibits Albania from competing with other countries in the region. Infrastructure ranged in comments from roads, to technology, to water, and electricity. Furthermore, SMEs suggested that little progress is being made to invest in infrastructure.

Promotion. Albania has very little promotion of its tourism. The local government has taken the few marketing campaigns in the last decade, while private enterprises promote in local TV stations, have social media pages, and rely on referrals. All of the

SMEs agreed that promotion is not present in Albanian tourism and it inhibits the industry from competition.

Corruption. Corruption is what is inhibiting infrastructure and promotions and, therefore, affecting tourism. Bribery is seen as a common way of doing business and even obtaining a business license. Corruption is present at all levels of the government in Albania. Rules and regulations are bent owing to corruption and bribery, which makes it challenging to have standard procedures to run a tourist enterprise. All of the SMEs agreed that corruption is an inhibiting factor of Albanian tourism.

Image. Albania is still perceived around the world as an unsafe, post-communist country. The image that Albania is a tourist destination is still in its infancy. All of the SMEs agreed with the bad image of Albania compared to other competing countries in the Mediterranean.

Quality. Quality has been an issue as measured against other competing countries in the region. Many factors that affect quality such as water, electricity, roads, and even uncontrolled food. Ninety-three percent of SMEs agreed that quality was an issue inhibiting Albanian tourism, while 7% strongly disagree.

Safety and protection. There are very few laws in place to protect tourists in Albania. Furthermore, because of corrupt local government officials, laws and regulations are usually bent because of bribes, so travelers feel unsafe while 93% of SMEs agreed that safety is an inhibiting factor while 7% neither agreed nor disagreed.

Collaboration. There needs to be collaboration between the government and private enterprises. Eighty percent of the SMEs agreed that there needs to be more collaboration between the two. Twenty percent of the SMEs neither agreed nor disagreed with the concept of collaboration.

Inexperience. Albania is a country that has been competing in the field of tourism only in the past two decades. This is very apparent in practices of enterprises as well as the government, which still does not have clear laws and regulations as it pertains to tourism. Eighty percent of SMEs agreed that inexperience was very apparent as an inhibiting factor while 20% disagreed.

Training and Development. Training and development is something that is almost nonexistent among tourism enterprises. Employees are expected to know what they are supposed to do without any training. SMEs suggested the utilization of training and development schools that could fill the void they find in the field. Eighty percent of the SMEs agreed that lack of training and development of staff inhibits Albanian tourism from being competitive, while 20% neither agreed nor disagreed.

Investments. There is little or no investment to enhance the tourism enterprises. There needs to be investments in infrastructure to create better roads, investments in technology to enhance online booking, reviews, and payments, as well as investments in year round tourism so it is not a seasonal industry. Eighty percent of the SMEs agreed that investments are an inhibiting factor of Albanian tourism, 13% disagreed, and 7% neither agreed nor disagreed.

RQ2. What are the most important actions the Albanian tourism industry should take in the short term to be more regionally competitive?

Six basic themes were identified as short-term actions Albanian tourism should take to be more competitive in questionnaire 1, round 1. In questionnaire 2, round 2,

SMEs were asked to rank the responses using a common 5-point Likert-type scale, with choices ranging from: (a) *strongly agree*, (b) *agree*, (c) *neither agree nor disagree*, (d) *disagree*, or (e) *strongly disagree*, with the statements posed that closely represented their opinion. In questionnaire 3, round 3, SMEs were asked to make changes based on the anonymous feedback that was provided and justify their responses when they could. The following will help explain the ranking the SMEs made about the short-term actions Albanian tourism industry should take to be more competitive.

Alignment of prices with quality. Tourism enterprises in Albania are known to price gouge to increase their profits during the few months they operate. There are no regulations against it and the same price is not common across various tourism enterprises. Prices might change on a daily basis or even on a customer basis. This creates instability among travelers as it is challenging to check what prices should be. All of the SMEs agreed that prices should be aligned with quality as a short-term goal to make Albanian tourism more competitive in the region.

Professional training. There should be vocational training in place for tourism personnel to attend and train in customer service. The training should incorporate models from well-developed countries in the field of tourism to increase Albania's ability to compete with other countries in the region and serve customers at the highest standards possible. All of the SMEs agreed on the need for professional training of tourism enterprise staff.

Lower taxes. Albania has higher taxes than other competing countries in the region. This makes it challenging for enterprise owners to increase profits without increasing prices of products and services. Eighty percent of the SMEs agreed on this, 20% neither agreed nor disagreed.

Planned construction and development. Zoning is an issue and anyone with funding can build anywhere they wish. There are no regulations guiding the development of new tourism enterprises while taking into consideration how this might affect competing forms. Eighty percent of the SMEs agreed with having planned construction and development, while 20% neither agreed nor disagreed.

Logistics. There should be more options than just driving to a tourist enterprise. Tourists should have options available to them to get to a specific place. Eighty percent of the SMEs agreed that better transportation solutions should be in place to reach remote heritage sites because this can increase year round tourism, while 20% neither agreed nor disagreed.

Professional organizations. Currently there are no professional organizations for the industry of tourism. A big issue noted by the SMEs was the rating that tourism enterprises have in Albania. These ratings are given by owners based on comparison with other local enterprises, but are not earned. Independent professional organizations could help educate the industry but also create criteria so ratings are earned and not given with no basis. Eighty percent of the SMEs agreed on the need for professional organizations while 20% neither agreed nor disagreed.

RQ3. What are the most important actions the Albanian tourism industry should take in the long term to be more regionally competitive?

Four basic themes were identified as long-term actions Albanian tourism should take to be more competitive in questionnaire 1 round 1. In questionnaire 2 round 2,

SMEs were asked to rank the responses using a common 5-point Likert-type scale, with choices ranging from: (a) *strongly agree*, (b) *agree*, (c) *neither agree nor disagree*, (d) *disagree*, or (e) *strongly disagree*, with the statements posed that closely represented their opinion. In questionnaire 3, round 3, SMEs were asked to make changes based on the anonymous feedback that was provided and justify their responses when they could. The following will help explain the ranking the SMEs made about the long-term actions Albanian tourist industry should take to be more competitive in the region.

Infrastructure. Infrastructure is something that would be able to bring Albanian tourism to the level of other competing countries in the region. It is an expensive and lengthy task but it needs to be addressed and taken into consideration. All of the SMEs agreed on infrastructure being an important action to ensure capability of Albanian tourism enterprises to compete in the region.

Promotion. There needs to be more promotion of tourism in and out of the country. Albanian tourism should advertise locally to increase the number of Albanian travelers as well as internationally to reach foreign travelers. The promotion can help establish a brand image for the industry, which is not currently apparent. Eighty percent of the SMEs agreed that Albanian tourism needs to promote to be more competitive, while 20% neither agreed nor disagreed.

Development of year-round tourism. The majority of Albanian tourism focuses on the summer season and is coastal. Albanian tourism can take advantage of ancient historic sites, cultural tourism, as well as alpine tourism. Better promotion as well as investment needs to be performed to ensure that tourism is not just a seasonal industry but is rather productive year around. Eighty percent of the SMEs agreed with the development of year round tourism, while 20% neither agreed nor disagreed.

Investment. Entrepreneurs have been able to build resorts and restaurants to increase their earning potential. Their efforts fall short, because there needs to be investments on roads, technology, safety, and promotion to ensure the longevity and growth of tourism in general. Eighty percent of the SMEs agreed with the need for larger and more continuing investment, while 20% neither agreed nor disagreed.

Recommendations

The findings of this study suggest there are several factors inhibiting Albanian tourism from regional competition. Because of these inhibiting factors, the study findings suggest short-term and long-term actions necessary to be taken to make the industry more competitive. The study findings of the SMEs proposed more short-term actions were needed than long-terms ones. It was not clear whether more short-terms actions were suggested because of their urgency or whether this was a cultural concept because many researchers noted that tourism enterprises in Albania are only concerned with short-term results and focus. The perspective and expertise of SMEs from the field of academia, government, and industry of Albanian tourism were able to bring diversified insights into the topic research.

Recommendations for academia. Prior research has noted the lack of research in general on the tourism topic in Albania (Bramo, 2013; Karagiannis & Polo, 2011;

Matja, 2014; Vladi, 2014). While SMEs in this study suggested the need for vocational training in the field of tourism, no prior research has confirmed this need. Academia needs to contribute to the field with further research so more information becomes available. Albania is still a developing country (Kruja & Gjyrezi, 2011; Kruja et al., 2012; Lubonja, 2015; Roaf et al., 2014), and research is necessary in developing countries (Naudé, 2013).

Recommendations for government. Infrastructure, investments, corruption, logistics, and lower taxes were some of the recommendations for the local government. The local government needs to invest in building a brand image for the country through promotion as it is expensive for such a tax to be taken on by tourist enterprises. Infrastructure leaves a lot to be desired in Albania, from roads to technology. The local government needs to be involved in bringing the industry to the standards of other competing countries. Logistics was another recommendation for the government. There is usually only one way to get to many tourist destinations in Albania, and that is by car. The government should invest in more options, like busses and ferries. Lastly, it was recommended for lower taxes from the government, especially when tourist enterprises have higher taxes on their earned income than competing neighboring countries.

Recommendations for the industry. SMEs believed that ultimately, the industry is the one that suffers from all the actions that are not taken by the government. However, there are recommendations for the industry as well, such as the need for professional training of staff. If Albanian tourism plans to compete with other countries in the Mediterranean, than its standard of service should be the same as that of other countries. Creation of professional organizations was another recommendation as a third party to assure standards are being met across the industry as well as a regulating entity for reviews and ratings that hotels get. Lastly, the industry needs to have an alignment of prices with quality. While there are no laws regulating prices in Albania, SMEs recommend the industry should have self-regulating rules to not allow and practice price gouging because this is damaging to the image of Albanian tourism.

Recommendations for further research. This study treated tourism as a whole and did not take into consideration the seasonal aspects of it, or the potential for heritage and cultural tourism. In addition, SMEs were treated as one and their results were not analyzed in the context of their representing field. There was a need noted for Albanian tourism to develop year round tourism. Future research might be necessary to see the potential of various types of tourism and get more specific with the study. In addition, future research might focus on participants from a single field rather than conglomerating three disparate fields like this research study did.

Conclusions

The purpose of this qualitative Delphi study was to understand the barriers inhibiting Albanian tourism and to determine how Albania should address these issues best to improve its current practices in an attempt to be more competitive in the region. The study examined what factors influence Albanian tourism from regional competition

as well as short-term and long-term actions needing to be taken to make the industry more competitive. While there were a few factors inhibiting the industry from being competitive, the most important ones were noted to be infrastructure of the country, corruption, promotion, and image. Infrastructure of the country was not only an inhibiting factor for the industry, but also a suggested long-term action to be taken by Albanian tourism to ensure competitiveness in the Mediterranean. While short-term actions were focused on suggestions for professional training of staff and management of Albanian tourism as well as alignment of prices with quality. Additional research in the field of tourism is necessary to delve deeper into some of the issues noted in this study as well as to expand current knowledge for such an emerging industry.

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