

Accommodation Establishments

Third Quarter, 2020

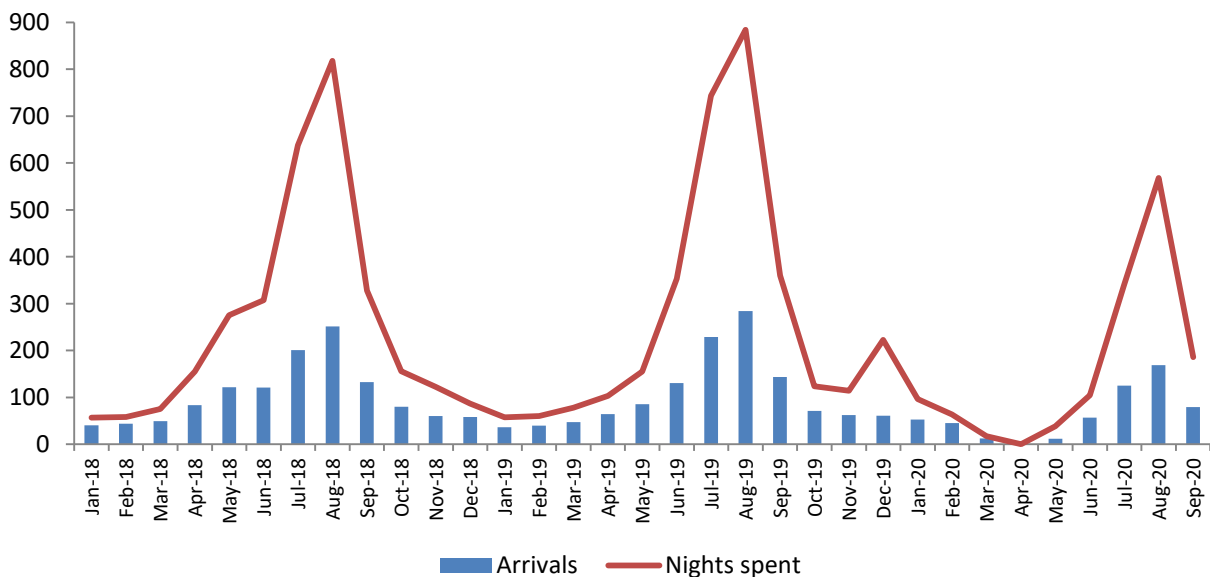
Tiranë, 19 November: INSTAT, publishes on a quarterly basis the results of the Tourism Survey "Accommodation Establishments". The survey is conducted to hotels and similar establishments and aims to measure the performance of statistical variables about Albanian tourism supply side, which are important for drafting policies on capacity development of tourism sector.

In the third quarter 2020, the variables for occupancy of accommodation establishments are presented as bellows:

- number of arrivals decreased by 43.3 %, compared to the third quarter 2019;
- number of nights spent has decreased by 44.9 %, compared to the third quarter 2019;

The number of nights spent for the third quarter 2020 follows the same trend as the number of visitors.

Fig. 1 Total arrivals and nights spent, January 2018 - June 2019, (number in thousand)



During the data analysis of the third quarter of 2020, it is noticed that the highest number of nights spent was realized:

- by region, "Southern Region" (42.1 %);
- by location close to the sea, "Coastal areas" (79.0 %);
- by type of accommodation establishments, "Hotels and similar accommodation" (90.4 %);

Tab 1. Arrivals and nights spent by region, location close to the sea and type of accommodation

	Arrivals			Nights spent		
	Q.III 2019	Q.III 2020	Annual change (%)	Q.III 2019	Q.III 2020	Annual change (%)
Regions						
Northern region	194,992	83,108	-57.4	758,782	376,213	-50.4
Central region	172,710	108,610	-37.1	482,552	257,045	-46.7
Southern region	288,450	180,583	-37.4	744,999	460,757	-38.2
Type of location close to the sea						
Coastal area	388,688	261,294	-32.8	1,390,983	864,204	-37.9
Non-coastal area	267,464	111,007	-58.5	595,350	229,811	-61.4
Type of accommodation						
Hotels and similar accommodation	599,619	344,139	-42.6	1,815,385	988,524	-45.5
Holiday and other short-stay accommodation	44,140	24,291	-45.0	148,151	96,319	-35.0
Camping grounds, recreational vehicle parks and trailer parks	12,393	3,871	-68.8	22,797	9,172	-59.8

During the third quarter of 2020, the number of visitors decreased as follows:

- the number of resident arrivals decreased by 9.2 %, compared to the third quarter of 2019;
- the number of non-resident visitors decreased by 59.3 %, compared to the third quarter of 2019;

If we analyze resident visitors by region, location close to the sea and the type of accommodation establishments, the indicator that does not follow this trend is the number of resident visitors who have frequented the South Region increasing by 0.4 %, the number of resident visitors in the Coastal Areas increased by 25.7 %, compared to the same period of the previous year.

Tab.2 Arrivals by region, location close to the sea and type of accommodation

	Resident			Non-resident		
	Q.III 2019	Q.III 2020	Annual change (%)	Q.III 2019	Q.III 2020	Annual change (%)
Regions						
Northern region	48,859	33,008	-32.4	146,133	50,100	-65.7
Central region	41,991	33,698	-19.7	130,719	74,912	-42.7
Southern region	119,409	124,225	4.0	169,041	56,358	-66.7
Type of location close to the sea						
Coastal area	102,866	129,263	25.7	285,822	132,031	-53.8
Non-coastal area	107,393	61,668	-42.6	160,071	49,339	-69.2
Type of accommodation						
Hotels and similar accommodation	190,309	174,363	-8.4	409,310	169,776	-58.5
Holiday and other short-stay accommodation	16,485	14,049	-14.8	27,655	10,242	-63.0
Camping grounds, recreational vehicle parks and trailer parks	3,465	2,519	-27.3	8,928	1,352	-84.9

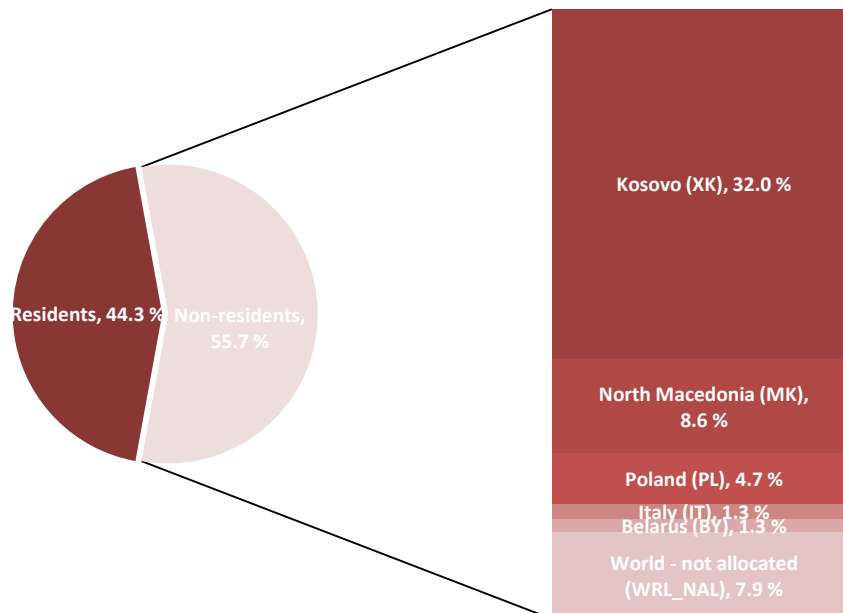
During the third quarter of 2020, the number of nights spent decreased as follows:

- number of nights spent by residents decreased by 9.2 %, compared to the third quarter of 2019;
- number of nights spent by non-residents decreased by 58.0 %, compared to the third quarter of 2019;

If we analyse the performance of resident visitors according to the nights spent, it is observed that Albanian resident visitors have preferred to rest during July, August and September in the South Region spending 5.3 % more nights spent, in Coastal Areas spending 10.7 % more nights spent, compared to the same period of the previous year. According to the type of accommodation, the number of nights spent by resident visitors in "Holiday and other short-stay accommodation" increased by 31.7 %, compared to the third quarter of 2019 and 88.7 % of overnight stays by residents is spent in "Hotels and similar accommodation".

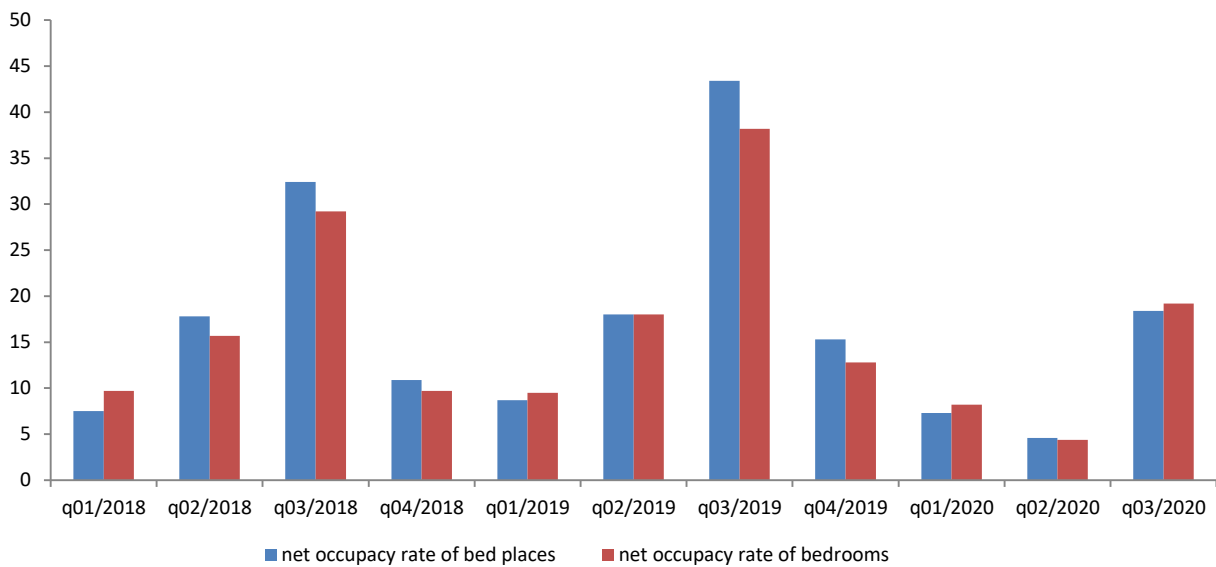
Tab.3 Nights spent by region, location close to the sea and type of accommodation

	Resident			Non-resident		
	Q.III 2019	Q.III 2020	Annual change (%)	Q.III 2019	Q.III 2020	Annual change (%)
Regions						
Northern region	181,751	138,136	-24.0	577,031	238,077	-58.7
Central region	80,316	60,639	-24.5	402,236	196,406	-51.2
Southern region	270,990	285,410	5.3	474,009	175,347	-63.0
Type of location close to the sea						
Coastal area	328,437	363,454	10.7	1,062,546	500,750	-52.9
Non-coastal area	204,620	120,731	-41.0	390,730	109,080	-72.1
Type of accommodation						
Hotels and similar accommodation	488,027	429,359	-12.0	1,327,358	559,165	-57.9
Holiday and other short-stay accommodation	37,249	49,043	31.7	110,902	47,276	-57.4
Camping grounds, recreational vehicle parks and trailer parks	7,781	5,783	-25.7	15,016	3,389	-77.4

Fig.2 Non-residents nights spent by country of residence, Third quarter 2020 (%)

Net occupancy rates, of bedrooms and bed places, are two indicators that measure the percentage of accommodation capacities use, bedrooms and bed places available for visitors. During this quarter, net occupancy rate of bedrooms of "Hotels and similar accommodation" is 19.2 %, compared to 38.2 % in the third quarter of 2019. Net occupancy rate of bed places of "Hotels and similar accommodation" is 18.4 %, compared to 43.4 % in the third quarter of 2019.

Fig.3 Net occupancy rates, (%)



Note: Statistics in this News Release should be interpreted in context of the COVID-19 situation.

Methodology

General information:

INSTAT for the first time calculates and publishes the indicators of accommodation statistics which represent the tourism capacity offer in the country.

The purpose of the survey to hotels and other similar accommodation establishments is to monitor tourism activities, to calculate statistical variables about accommodation offer of Albanian tourism, which are important to determine the trend of capacity development in the tourism sector. Data are collected every month through the questionnaire "Survey of Accommodation Establishments".

Coverage area

The scope of observation (or the target population) in accommodation statistics includes all tourist accommodation establishments from the Statistical Business Register of 2018. Tourism accommodation establishments are classified and described in groups according to NACE Rev. 2 classification as follow:

55.10 Hotels and similar accommodation. This class includes accommodation provided by: hotels, resort hotels, suite/apartment hotels and motels.

55.20 Holiday and other short-stay accommodation. This class includes: provision of accommodation in campgrounds, trailer parks, recreational camps and fishing and hunting camps for short stay visitors, provision of space and facilities for recreational vehicles

Non-registered visitors and accommodation establishments are not subject of this survey.

Indicators collected from the survey include:

- Arrivals of residents;
- Arrivals of non-residents;
- Nights spent of residents;
- Nights spent of non-residents;
- Occupied bedrooms by residents;
- Occupied bedrooms by non-residents);
- Occupied bed places by residents;
- Occupied bed places by non-residents;
- Number of bedrooms;
- Number of bed places;

Data collection and data processing methodology is based on Annex I of Regulation (EU) No 692/2011 of the European Parliament and of the Council of 6 July 2011 concerning European statistics on tourism.

Definitions:

The accommodation establishment in the accommodation statistics includes all tourist accommodation establishments providing, as a paid service (although the price might be partially or fully subsidised), short-term or short-stay accommodation services.

Bedroom: a bedroom in an accommodation establishment or dwelling is the unit formed by one room or groups of rooms which are rented by tourists as a whole (and constituting an indivisible rental).

Bed place: the number of bed places in a tourist accommodation establishment is determined by the number of persons who can stay overnight in the beds set up in the establishment, ignoring any extra beds that may be set up upon customer request. The term bed place applies to a single bed; a double bed is counted as two bed places.

An arrival is defined as a person who stays at least one night in the hotel, children included.

Resident: is considered a person who has resided in Albania for more than 12 consecutive months.

Non-Resident: is considered a person who has not resided in Albania for more than 12 consecutive months.

A night spent (or overnight stay) is each night a guest / tourist (resident or non-resident) actually spends (sleeps or stays) in a tourist accommodation establishment or non-rented accommodation.

The net occupancy rate of bed places = $\frac{\text{Number of nights spent}}{\text{Number of available bed places}} * 100$ measures the percentage of occupied bed places for "Hotels and similar accommodation".

The net occupancy rate of bedrooms = $\frac{\text{Number of occupied bedrooms}}{\text{Number of available bedrooms}} * 100$ measures the percentage of occupied bedrooms for "Hotels and similar accommodation".

Statistical regions at level 1, 2 and 3 are defined according to the NUTS II territorial division, which is a unified classification and is used as a basis for the collection and processing of European Regional Statistics. The information below includes which prefectures are in the North, Centre and South region.

Northern Region: Dibër; Durrës; Kukës; Lezhë; Shkodër

Centre Region: Elbasan; Tiranë

South Region: Berat; Fier; Gjirokastër; Korçë; Vlorë

Coastal areas are Local Administrative Units (LAUs) that are on or near a coastline. Coastal areas are classified according to the following two categories:

- **Coastal areas:** LAUs bordering the coastline or LAUs having at least 50% of their surface at a distance of 10 km from the coastline;
- **Non-coastal areas:** LAUs that are not "coastal areas"; which means LAUs that are not bordered by the coastline and have less than 50% of their surface at a distance of 10 km from the coastline.