

Changes in the Tourism of Vlora Region: A Statistical Data Analysis for the Period 2015-2025

Deana Delaj¹, Entela Kostrista¹, Mithat Mema^{2*}

¹PhD candidate,
Department of
Economics, University
"Aleksandër Moisiu"
Durrës, Albania

²Profesor, Department
of Economics, University
"Aleksandër Moisiu"
Durrës, Albania

***Corresponding author:**
mithatmema@uamd.edu.al



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ABSTRACT: This paper analyzes the dynamics of tourism development in the Vlora Region over the period 2015-2025, within the theoretical framework of Butler's Tourism Area Life Cycle (TALC) model (1980, 2006). The study draws on a systematic review of Albanian and international academic literature on tourism in Albania, and in Vlora specifically, together with official statistical data from the Institute of Statistics (INSTAT), the Ministry of Tourism and Environment, and local institutions. Using a mixed-method desk-research approach, the paper identifies the main trends in accommodation capacity, Vlora's relative attractiveness as a destination, length of stay, and supporting infrastructure. The results show that Vlora Region has moved from an "exploration-involvement" phase toward a "development-consolidation" phase in TALC terminology, temporarily interrupted by the COVID-19 pandemic and accompanied by environmental and institutional risks (e.g., pressure on the Narta Lagoon, a RAMSAR-designated wetland). The paper concludes with a critical discussion and policy recommendations grounded in sustainable tourism principles.

KEYWORDS: tourism, Vlora Region, TALC, regional development, sustainable tourism.

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Introduction

Tourism is one of the most dynamic sectors of the Albanian economy and a key source of employment and income for the country's coastal areas (Kosova & Sinaj, 2021). Vlorë Region, with a long coastline along the Adriatic and Ionian Seas, is considered one of the four most preferred destinations in Albania according to official INSTAT surveys (Berisha, Licaj, & Murati, 2025).

During the 2015–2025 decade, Albanian tourism in general, and that of Vlorë Region in particular, went through distinct development phases: continuous growth until 2019, a sharp decline in 2020 due to the COVID-19 pandemic, rapid recovery after 2021, and a new consolidation phase toward year-round tourism during 2023–2025, accompanied by major infrastructure investments but also by environmental and institutional challenges (Delaj et al., 2025; Berisha et al., 2025; Qosja, Liçaj, Mbrica, & Braholli, 2022).

This paper aims to (i) situate Vlorë's tourism development within an internationally recognized theoretical framework, (ii) synthesize existing statistical data for the 2015–2025 period, and (iii) discuss the policy implications for sustainable regional sector development.

Theoretical Framework and Literature Review

The main theoretical framework used in this paper is the Tourism Area Life Cycle (TALC) model, proposed by Butler (1980, 2006). The model describes the evolution of a tourist destination through six stages – exploration, involvement, development, consolidation, stagnation, and subsequent decline or rejuvenation – depending on visitor numbers, investment levels, and pressure on natural and infrastructural resources. This model has also been widely applied in the Albanian tourism literature, including quantitative analyses of foreign arrivals (Kosova & Sinaj, 2021).

The academic literature on Albanian tourism has grown considerably over the last decade. Caca, Ladias, and Polo (2016) highlighted the importance of cultural tourism alongside coastal tourism (2000–2013); Lusha and Hasani (2025) found that tourist flows remain concentrated along the coast, while the natural and cultural resources of the mountainous inland remain underutilized. The study most directly related to this paper is that of Berisha, Licaj, and Murati (2025), which examines tourism development on the Vlorë Peninsula and identifies offer diversity, infrastructure, the growing number of tour operators, and destination marketing as the main growth factors. In the same vein, Qosja et al. (2022) pointed to the seasonal fragmentation of Vlorë's tourism offer; Agaraj and Pulaj (2024) recommended better natural-resource management and digitalization; Sika (2023) noted the lack of a structured digital-innovation approach in Vlorë Municipality's strategy; while Brokaj (2014) argued for the key role of local governance in destination sustainability.

Building on this literature, the present paper serves as a synthesis and update covering the full 2015–2025 period, situating the Vlorë case within the TALC framework and comparing regional trends with national ones.

Problem Statement and Research Questions

Despite the strategic importance of tourism for the economy of Vlorë Region, the literature suggests that its development has been unbalanced, accompanied by: pronounced seasonality (Qosja

et al., 2022); pressure on public infrastructure in areas of seasonal congestion such as Dhërmi, Jalë, and Palasë (Berisha et al., 2025); environmental risks from major projects such as Vlora Airport near the Narta Lagoon, a RAMSAR-designated site (Berisha et al., 2025; Ramsar Convention Secretariat, n.d.); and a shortage of qualified staff and digital innovation (Sika, 2023). Against this background, the paper seeks to address the following research questions:

- RQ1: What have been the main quantitative trends in the development of tourism in the Vlora Region during 2015–2025?
- RQ2: In which stage of the TALC model can Vlora Region's tourism currently be positioned?
- RQ3: What are the main economic and institutional factors driving these changes, and what are the risks to the sector's long-term sustainability?

Methodology

The paper follows a mixed-method desk-research approach, based on secondary analysis of: (a) peer-reviewed academic literature on tourism in Albania and Vlora; (b) periodic official INSTAT publications, in particular the “Holidays and Travel” survey (2018–2023) and the Accommodation Establishments statistics; (c) strategic and legal documents of the Council of Ministers and the Ministry of Tourism; and (d) secondary media and local institutional sources, used as supplementary evidence.

An important methodological limitation should be noted (also acknowledged by Berisha et al., 2025): INSTAT often publishes data aggregated at the national level or by broad zones (“coastal” versus “non-coastal”), without a complete, continuous annual breakdown by region for the entire 2015–2025 period. For this reason, the paper combines national indicators as a comparative context with Vlora-specific indicators, where available, particularly the “Holidays and Travel” survey, which measures only the preferences of resident (i.e., not foreign) tourists.

Analysis and Results

Vlora's Relative Attractiveness as a Destination (2018–2023)

INSTAT's annual “Holidays and Travel” survey, cited and processed by Berisha et al. (2025), measures the share of resident tourists who chose Vlora as their main domestic travel destination. Table 1 summarizes these data.

Table 1

Percentage of resident tourists

Year	% of resident tourists choosing Vlora	Context / key event
2018	11.1%	Start of the study period
2019	11.6%	Pre-pandemic peak of Albanian tourism (6.4 mln foreign tourists)
2020	16.1%	COVID-19 pandemic; relative rise of domestic tourism due to border closures

Year	% of resident tourists choosing Vlora	Context / key event
2021	16.3%	Peak of relative preference for Vlora; rapid post-pandemic recovery
2022	15.2%	Beginning of a mild decline in relative preference
2023	14.5%	Rising competition from other domestic destinations (Saranda, mountain areas)

The data show a rise in relative preference for Vlora during 2018–2021, also influenced by international travel restrictions during the pandemic, which temporarily favored domestic tourism. From 2022 onward, a mild decline in this share is observed (from 16.3% in 2021 to 14.5% in 2023), which may be interpreted as a result of growing competition from other domestic destinations (Saranda, mountain areas) and/or a sign of market maturation, consistent with the predictions of the TALC model (Butler, 2006).

Length of Stay and Infrastructure Development

An important qualitative indicator of destination evolution is the average length of tourist stay, which in Vlora's case rose from about 2.5 days in 2014 to about 4.8 days in 2024 (Berisha et al., 2025). This near-doubling reflects improvements in accommodation standards, tourism infrastructure, and the diversity of activities on offer, and is consistent with a shift from the “involvement” stage toward the “development” stage of the TALC model.

Table 2 summarizes the main infrastructural and institutional milestones accompanying this evolution.

Table 2

The impact of infrastructural and institutional developments

Year	Infrastructure / policy development	Main impact
2014 → 2024	Average length of tourist stay in Vlora	Increase from ~2.5 days (2014) to ~4.8 days (2024)
2018	Completion of the A2 Motorway (Fier–Vlora)	Significant reduction in Tirana–Vlora travel time
2019–2023	National Strategy for Sustainable Tourism Development 2019–2023 (Council of Ministers Decision No. 413/2019)	First medium-term strategic framework for tourism, including Vlora
2022	Designation of “Karaburun–Sazan” Marine National Park (Council of Ministers Decision No.	Expansion of protected area from 12,428 to 12,437.7 ha

Year	Infrastructure / policy development	Main impact
	59/2022)	
July 2024	Opening of the Llogara Tunnel (6 km)	Easier access to the Southern Riviera (Palasë, Dhërmi, Jalë)
2024-2030	National Tourism Strategy 2024-2030	Target: +138% overnight stays; division of the country into 6 tourism regions
2025-2026 (pending)	Vlora Airport, near the Narta Lagoon (RAMSAR site)	Repeated delays; environmental risks identified in the literature

The completion of the A2 Fier-Vlora Motorway in 2018 and the opening of the Llogara Tunnel in July 2024 represent two key milestones in improving the region's accessibility, significantly reducing travel time from Tirana and easing access to the Southern Riviera (Berisha et al., 2025). By contrast, the Vlora Airport project has experienced repeated delays. Its location near the Narta Lagoon – a wetland with international Ramsar protection status – has been identified in the literature as a potential source of environmental risk and legal conflict with the country's international biodiversity conservation obligations (Berisha et al., 2025; Ramsar Convention Secretariat, n.d.).

National Context and Economic Contribution

The 2015–2019 period was characterized by continuous growth in foreign tourists, culminating in a record 6.4 million in 2019 (AIDA, 2024). The year 2020 brought a sharp decline due to the pandemic: the net occupancy rate of hotel rooms fell to 10.6% (from 26.5% in 2019) (INSTAT, 2021), while in 2021, visitor numbers grew by 85.1% and overnight stays by 98.5% (INSTAT, 2021). For 2024, INSTAT reported 11.7 million entries, of which about 8.2 million are considered “real” tourists after excluding transit travelers – a methodological point that is also important for interpreting Vlora's figures. The 2026 season began with a 25–30% rise in bookings and up to a ~35% rise in visitor numbers compared with the previous year, with ~90% of visitors being foreign in some areas (Bota Sot, 2026).

At the national level, tourism's direct and indirect contribution to GDP rose from ~26% (2016) to ~29% (2022), while the direct contribution alone reached 6.41% of GDP in 2023 (ALTAX, 2024). The services sector in Vlora Region accounts for ~49.1% of total employment, a level comparable to Durrës and Lezha (ALTAX, 2024), reflecting the structural weight of tourism in the local economy.

This study applies the Toda-Yamamoto (TY) approach to examine the causal relationship between economic growth and fertility rate. The time series data used in this model were obtained from the World Bank's World Development Indicators (WDI) database, accessed in December 2024. The dataset includes annual observations on the fertility rate (births per woman) and GDP growth (annual %) for the selected country, covering the period from 1993 to 2021.

First, we tested for stationarity using the Augmented Dickey-Fuller (ADF) test, which is a

prerequisite for determining the maximum order of integration required for the TY procedure. Both the fertility rate and GDP growth were found to be stationary at the level, so no differencing was required.

Subsequently, the optimal lag length for the unrestricted Vector Autoregressive (VAR) model in levels was determined using standard information criteria (AIC, BIC, and HQC), all of which consistently selected a lag order of two. This lag structure was then employed to estimate the VAR model and to conduct the Wald test to assess Granger causality. The estimation results from the VAR(2) model demonstrate a strong model fit, with an adjusted R-squared value of 0.9969 in the fertility rate equation and no evidence of residual autocorrelation (Portmanteau test p-value = 0.5653).

In the fertility rate equation, the GDP growth variable was marginally significant ($p = 0.077$, significant at the $\sim 10\%$ level), suggesting a potential influence. The Wald test, as shown in [Table 2], applied to jointly test the null hypothesis that all lags of GDP growth do not affect fertility rate, yielded a chi-square statistic of 3.9475 with a corresponding p-value of 0.0469.

Discussion

The results allow an initial answer to the research questions posed in Section 3. Regarding RQ1, Vlora's tourism has followed the national trajectory (growth, pandemic shock, recovery), but with a distinct regional dynamic, reflected in the rising length of stay and the evolution of relative preference. Regarding RQ2, the combination of rising infrastructure investment, an extended season, and partial diversification toward cultural and mountain tourism (Llogara, Karaburun) suggests a transition from the "development" stage toward "consolidation" under TALC (Butler, 1980, 2006) – a stage typically characterized by slower growth rates and increasing pressure on carrying capacity, consistent with Berisha et al.'s (2025) findings on congestion in Dhërmi, Jalë, and Palasë.

Regarding RQ3, the main drivers identified are: improved accessibility (A2, Llogara Tunnel), a growing number of tour operators, diversification of source markets, and the national strategic framework (2019–2023, 2024–2030). The main risks to long-term sustainability stem from high informality, the lack of carrying-capacity planning, and the environmental-legal conflict between the Vlora Airport project and the RAMSAR status of the Narta Lagoon (Berisha et al., 2025). These findings are broadly consistent with the existing literature (Caca et al., 2016; Lusha & Hasani, 2025), which repeatedly highlights the contrast between rapid, largely uncontrolled coastal tourism development and the relative under-utilization of the region's cultural and natural inland resources.

Conclusions and Recommendations

Based on the analysis conducted, grounded in academic literature and official statistical data, the following main conclusions can be drawn:

- Tourism in the Vlora Region experienced sustained long-term growth during 2015–2025, interrupted only by the COVID-19 pandemic in 2020, with a rapid recovery from 2021 onward.
- The average length of tourist stay in Vlora nearly doubled (from ~ 2.5 to ~ 4.8 days, 2014–2024), indicating a qualitative maturation of the destination, consistent with progression toward more advanced TALC stages.

- Infrastructure development (A2 Motorway, Llogara Tunnel) has played an important role in improving accessibility, while other projects, such as Vlora Airport, remain uncertain and pose environmental risks due to their proximity to internationally protected areas.
- Structural challenges – seasonality, informality, lack of carrying capacity planning, and shortage of qualified staff – remain the main obstacles to fully realizing the region's tourism potential and long-term sustainability.

Based on these findings, the following recommendations are proposed for policymakers and industry stakeholders: (i) accelerating the formalization of accommodation establishments, in line with the National Tourism Strategy 2024–2030; (ii) conducting a formal carrying-capacity analysis for areas with high seasonal congestion (Dhërmi, Jalë, Palasë), as also suggested by Berisha et al. (2025); (iii) reviewing the location or reinforcing environmental mitigation measures for the Vlora Airport project, in line with the country's international obligations under the RAMSAR Convention; (iv) diversifying the tourism product toward cultural, mountain, and rural tourism, in line with the recommendations of Lusha and Hasani (2025) and Qosja et al. (2022); and (v) investing in human-resource training and the digitalization of tourism services, as recommended by Sika (2023) and Agaraj and Pulaj (2024).

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