

Romanian Tourism - Strengths Versus Weaknesses

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Abstract. Romania has a diversified and balanced tourism potential, which allows us to develop a sector based on natural and human resources, given that tourism is on full rise worldwide, with proven beneficial results for economies of the countries that promote these activities. Throughout the paper is analyzed the evolution of the main tourism specific indicators (number and type of tourists accommodated, the number and type of tourist reception accommodation capacity, units classification by degree of comfort, the number of overnights and length of stay, etc.) for the period 2006-2012, the analysis of various statistics provided by specialized institutions. Results of the analysis undertaken allowed by interpretation of the indicators analyzed, establishing the strengths and weaknesses of this sector. Romanian tourist industry engines could be: health tourism and mountain-in the case of some resorts; seaside tourism, rural tourism, in some areas, tourism and event circuit, ecumenical tourism. Some aspects of national tourism were generated by inconsistent policies in the field, at the macroeconomic level, which are reflected until the microeconomic level.

Keywords: potential, natural resources, human resources, promotion, tourism industry, accommodation capacity, tourists

INTRODUCTION

In our country, in the last 25 years the development of tourism through a unified strategy on a long term, was achieved more in words or theory. There are numerous documents targeting reviewing and improving the overall situation of this activity sector, the National Tourism Strategy 2007-2013, the Master plan for national tourism development 2007-2026, various projects of tourism development and cultural heritage, etc., but they do failed to be put into practice or have not achieved significant developments in tourism.

Regarding the competitiveness of Romanian tourism, according to the World Economic Forum in 2011, Romania ranked 63 place in the world (139 countries) and 34th in Europe (42 countries), with an index of competitiveness in travel and tourism of 4.17 (compared to the value of 5.99 of Switzerland, which is on the first place).

As evident from the results of the literature review for the tourism sector, a project developed with the support of the Government of Romania exceptional tourism potential of Romania is marked by (Scutaru, 2006):

1. natural component, spectacular scenery, diverse mix of relief, favorable climatic conditions, the existence of natural healing factors etc.
2. anthropogenic component-vestiges of ancient civilizations, secular and religious art monuments, museums with numerous museum collections, ethnography and folklore elements of great originality etc;
3. traditional hospitality of Romanian people., food etc.

All these realize items of great attractiveness in tourism offer that allow us to organize some various forms of tourism: holiday (mountain, seaside, spa), hunting and fishing, sports, cultural and other itinerant valence (Petroman, 2011).

However the overall situation of Romanian tourism is not at all encouraged existing many weaknesses in tourism development process we include lack of continuity of government policies, high taxes, low level of infrastructure development (sewerage and water supply, especially in rural areas transport network, poor facilities in some resorts and local tourism, lack of public infrastructure facilities - parking, toilets, proper signaling, close proximity to many tourist attractions, recreational weak diversification of most destinations (Ciolac *et al.* 2009).

The evolution of main indicators specific to this sector reflects the many changes, and inconsistent government policies aiming tourism.

The objective of this paper is to identify, over the analysis of indicators that characterize tourism activity, strengths and weaknesses of national tourism. These points are set on the basis of the indicators analyzed in this paper.

MATERIALS AND METHODS

The study material used during the preparation of the paper consists of numerous statistical data provided by the National Institute of Statistics, data contained within tourism summaries, statistical yearbooks.

The method consists in synthesizing, processing and interpretation of these statistical data. Processing and interpretation of these results is the results and discussion, critical analyzes of some points of view and ideas, from studied bibliography and presentation of own opinions related to these aspects.

Range considered in calculating the ratios is 2006 (the year before the country's EU integration) - 2012.

The method is based on analysis of indicators of tourist traffic. Among the most representative indicators for tourist traffic characterization are used: the number of tourists by type, number of tourists per 1000 inhabitants, the average number of tourists, the number of tourist-days, average length of stay (Turcu and Weis, 2008).

The indicator number of tourists is obtained from the aggregation of information in different statistical documents, calculating effective at the end of the calendar year, and also by smaller period based on user needs. This indicator measures the total tourist traffic or types of actions tourist areas etc.

RESULTS AND DISCUSSIONS

Years 2011 and 2012 were good years for Romanian tourism, characterized by a positive trend in terms of growth in the number of Romanian and foreign tourist arrivals in the establishments of its kind in Romania.

Tab. 1

The number of tourists accommodated – thousand tourists

Title	2006	2009	2011	2012	2012/2006+-
Total	6216	6141	7032	7686	+1.470
Hotels	4729	4548	5368	4616	-113
Motels	255	203	221	230	-25
Guesthouses (urban)	364	412	480	538	+174
Agrotouristic guesthouse (rural)	217	326	361	385	+168

Source: INS – Travel Roundup 2007, 2010, 2011, Statistical Yearbook 2012

Tab. 2

Types of tourist-thousand tourists

Types of tourists	2006	2007	2008	2009	2010	2011	2012	2012-2006+-
Total	6216	6972	7125	6141	6073	7032	7686	+1470
Romanian	4836	5421	5659	4866	4726	5515	6030	+1194
Foreign	1380	1551	1466	1276	1346	1517	1656	+276

Source: INS-Romanian Statistical Yearbook 2007 Processing INS 2012

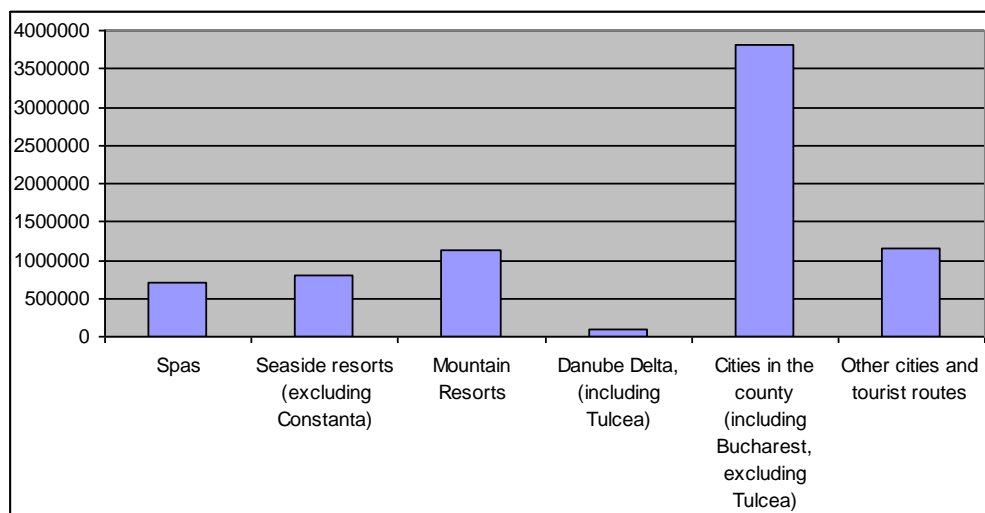
Thus, in the case of Romanian tourists in 2011 is the first year of growth (+16.6%) after two consecutive years of decline, as regards foreign tourists we are in the second year of growth, a much more robust to that of the previous year (12.7% vs. 5.5%). levels achieved in 2012, both for Romanian tourists and foreign tourists exceed the levels achieved in the period 2006-2008.

Tourist traffic density puts in direct connection the tourist traffic with the resident population of the receiving country (area, region). This indicator is calculated as the ratio between the number of tourists arriving in the X area (T) and the resident population of the X area (P).

As an expression of tourist density can be calculated the indicator number of tourists per 1000 inhabitants.

Number of tourists per 1000 inhabitants in 2012 was 376 of which 293 Romanian and 83 foreign (processing INS data 2012).

In 2012, most tourists were accommodated in the sights of Bucharest, the capital cities (49.7% of the total), while in mountain resorts arrived only 14.6% of the total number of tourists and at the seaside resorts 10.5% of the total number of tourists.



Source: Processing INS data 2011

Fig. 1. Tourist arrivals in the establishments of tourists reception with functions of tourist accommodation on tourist destinations in 2012- people

If we analyze the main reason for the trip, in 2012 for business and professional reasons were 2.8% of tourists staying and the purpose of holidays visits to the relatives and other reasons 97.8% (processing INS data 2012).

In the first 9 months of 2011, a foreign tourists spent on average 628 euros in Romania down 7% in nominal terms over the same period in 2010. Tourists who come for

business are spending on average 689 euros and those who come in particular purpose 535euros (processing INS data 2012).

Number of nights or number days-tourist is obtained from records in accommodation by adding the number of days of stay of each tourist, one can determine also by type of accomodation units, by type of action, by areas of origin of tourists etc.

Tab. 3

Total overnights-thousand nights

Title	2006	2009	2011	2011/2006+-
Total	18991	17325	17979	-1.012
Hotels	15486	13651	14331	- 1.155
Motels	379	322	376	-3
Guesthouses (urbane)	735	813	929	+194
Agrotouristic Guesthouses (rural)	459	673	741	+282

Source: INS – Tourism breviary 2007, 2010, 2011, Statistical Yearbook 2012

In 2006, 81.5% of all overnight stays were registered in hotels, 2.0% in motels, hostels 3.9% in urban guesthouses and 2.4% in the rural areas.

In 2011, these percentages were 79.7% in hotels, 2.0% in motels, 5.16% in urban guesthouse and 4.12% rural in guesthouses.

Duration of stay is on a declining path since 2000 (when record an average of 3.6days). It remains at a low level of about 2.6 days for Romanian tourists and about 2 days for foreign tourists.

The average length of stay is calculated as the ratio of total number days-tourist (ΣNZT) and the number of tourists (T). This indicator shows the average time (days) of stay of tourists in accommodation and reflect the possibility of retaining the tourist in a specific area, region, etc.

Tab. 4

Average length of stay – days

Title	2006	2009	2012	2012/2006+-
Total	3.05	2.82	2.49	-0.50
Hotels	3.27	3.00	2.63	-0.60
Motels	1.48	1.59	1.67	+0.21
Guesthouses (urbane)	2.02	1.97	1.93	-0.09
Agrotouristic guesthouses (rural)	2.11	2.06	2.05	-0.06

Source: INS - Tourism breviary 2007, 2010, 2011, Statistical Yearbook 2012

The average length of stay in urban tourist guesthouses was in 2012 of 1.85 days on which Romanian tourists was 1.81 days and foreign tourists was 2.24 days.

In rural tourist guesthouses average length of stay was 2.03 days in which Romanian tourists was 1.9 days and foreign tourists was 2.7 days (Processing INS data 2012).

The average length of stay is due to the increased number of foreign tourists staying in boarding houses both urban and in rural areas.

The indicator tourist reception gives us data regarding the evolution of the main types of accommodation (hotels, motels, hostels, lodges, etc.), showing the total weight of each material base of tourism.

The evolution of the accommodation structures since 2006 is shown in the following table.

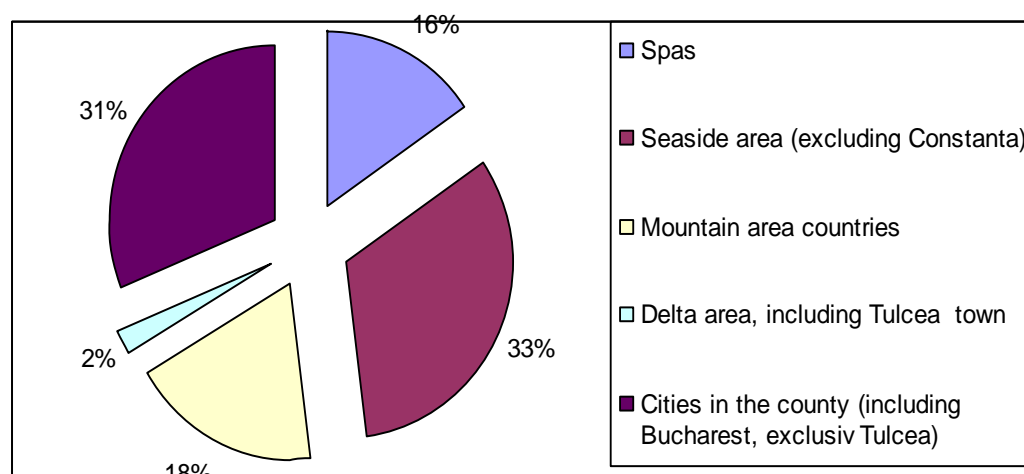
Tourist accommodation structures-number

Title	2006	2009	2011	2012	2012/2006+-
TOTAL	4710	5095	5003	5821	+1.111
%	100	100	100	100	100
Of which					
Hotels.	1066	1170	1319	1308	+242
%	22.6	23.0	26.4	22.4	-0.2
Motels	154	146	184	206	+52
%	3.3	2.9	3.7	3.5	+0.2
Tourist guesthouse (urban)	702	878	1050	1247	+545
%	15.0	17.2	21.0	21.4	+6.4
Agrotouristic guesthouses (rural)	1259	1412	1210	1569	+310
%	26.7	27.7	24.2	26.9	+0.2

Source: INS - Tourism breviary 2007, 2010, 2011, Statistical Yearbook 2012

Agrotouristic guesthouse (rural) had a sinuous evolution in the analyzed interval but - at the level of 2012 - the number is even higher than values recorded in 2009, when there was a record for this type of structure.

Regarding the territorial distribution of tourist reception structures are found to have spread outside the traditional uses, approximately 43.4% are located in Bucharest and other areas (INS, Romanian Statistical Yearbook 2012).



Source: Processing INS data2012

Fig. 2. Tourist reception with functions of tourists' accommodation on tourist destinations in %.2012

In 2012, at the county level, the first five counties where according the total number of tourist available accommodation are: Constanta (738), Brasov (646), Harghita (344), Suceava (296) and Prahova (262) (INS Processing data 2012).

Hotels had the highest share in the total accommodation capacity in operation, namely 66.9% in 2006 and 66.2% in 2011 while tourist guesthouses have a low weight respectively 6.6% in 2006 and 8,8% in 2011, still recording a slight increase during the same period.

Agrotouristic guesthouse held in 2006 accounted for 5.6% of the total accommodation capacity and 7.9% in 2011, registering an increase of 2.3% still far from the potential of Romanian countryside.

Tab.6

Accommodation capacity in operation, number of seats-day

Title	2006	2009	2011	2011/2006+-
TOTAL	56499904	61104435	68417259	+11917355
%	100.0	100.0	100.0	100
Of which				
Hotels	37777022	40712728	45342914	+7565892
%	66.9	66.6	66.2	-0.07
Motels	1693595	1719302	2239121	+545526
%	3.0	2.8	3.3	0.3
Tourist guesthouse (urban)	3745311	4903077	5999542	+2254231
%	6.6	8.0	8.8	+2.2
Agrotouristic guesthouses (rural)	3188350	4735468	5378364	+2190014
%	5.6	7.7	7.9	+2.3

Source: INS - Tourism breviary 2007, 2010, 2011, Statistical Yearbook 2012

In 2012, 75.2% of tourists stayed in hotels, 7.6% in urban guesthouses and 5.4% in rural guesthouses (calculations after INS-2012).

Tab.7

Classification of accommodation facilities

Name	total	5 *	4*	3*	2*	1*	Unclassified
2006							
Total	4710	53	251	990	2084	955	377
%	100	1.12	5.32	21.0	44.24	20.27	8.00
Hotels	1066	8	82	308	462	180	26
Motels	154	-	-	31	73	42	8
Tourist guesthouse (urban)	702	4	54	221	326	70	27
Agrotouristic guesthouses (rural)	1259	7	33	192	906	121	-
2009							
Total	5095	69	367	1487	2072	850	250
%	100	1.35	7.20	29.18	40.66	16.68	4.90
Hotels	1170	16	122	399	456	161	16
Motels	146	-	-	39	70	35	2
Tourist guesthouse (urban)	878	6	81	343	387	59	2
Agrotouristic guesthouses (rural)	1412	12	66	389	835	110	-
2011							
Total	5003	91	502	2101	1689	468	152
%	100	1.81	10.03	42.00	33.75	9.35	3.03
Hotels	1319	24	194	611	402	80	8
Motels	184	-	-	81	77	24	2
Tourist guesthouse (urban)	1050	9	100	504	372	64	1
Agrotouristic guesthouses (rural)	1210	13	107	490	539	61	0
2012							
Total	5821	115	572	2603	1899	504	128
%	100	1.98	9.83	44.72	32.62	8.66	2.20
Hotels	1400	28	233	663	395	75	6
Motels	206	-	-	88	92	25	1
Tourist guesthouse (urban)	1247	10	110	654	414	58	1
Agrotouristic guesthouses (rural)	1569	15	134	713	647	60	-

Source: INS - Tourism breviary 2007,2010,2011,2012 Statistical Yearbook 2012

In 2012, most hotels were classified in category 3 stars (47.4% of total hotels) and 2 stars (27.5%). Although it increase compared to previous years (number of 5 star hotels is

more than double compared to 2007), in 2012 only 2% of hotels were graded 5 Star and 16.6% in category 4 stars (Processing data INS 2012). Luxury hotels, 4 and 5 star represented in 2012 only 18.6% of the total accommodation capacity.

Analysis of the rate of use of tourist structures reflects the fact that it is on a downward trend since 2007, except for a single year which saw growth (2011). But usability is differentiated by category of comfort.

Over the period of the highest degree usage was recorded for a 2-star establishments, followed by 5-star and 3-star establishments (28.7%) (INS - processing statistical data, 2007, 2010, 2012).

Accommodation units occupancy Index is calculated as a ratio between the number of rooms actually occupied and those offered. In 2012, analysis of statistical data on capacity utilization indices of accommodation revealed that in case of hotels the indicator has the value 32.1% , urban guesthouses 14. 8% and 13.2% of the rural areas, the average use per year in all accommodation is 25.9% (INS- processing statistical data 2012).

Tab.8

Occupancy rate of tourist structure in the period 2006-2012

Occupancy rate / year %	2006	2007	2008	2009	2010	2011	2012
	37.1	36.0	35.0	28.4	25.2	26.3	25.9

Source: Processing data INS 2007, 2010, 2012

CONCLUSION

The analysis presented indicators may be established strengths and weaknesses of Romanian tourism. In the strengths category includes:

- Increasing the total number of tourists by about 1.5 million people between 2006-2012, is largely due to the increasing number of Romanian tourists,
- existence of diverse accommodation facilities that per total establishments recorded growth, especially given by increasing number of hotels, guesthouses urban and rural
- accommodation capacity is well developed in the capital and the capital cities of the country due for tourism business, cultural and recreational
- Accommodation capacity in operation is growing the highest rate at this indicator had in 2012 hotels and motels (63.0%), rural guesthouses (27%) and rural (21.4%),
- during the same period has increased number of 4 and 5 star , units that are preferred by foreign tourists, as by Romanian tourists with higher income because it offers better conditions and a higher degree of satisfaction

Category of weaknesses includes:

- Decrease in the number of tourists staying in motels due to the poor quality of accommodation,
- Once a favourite tourist area seaside has lost much of the interest of Romanian and foreign tourists in 2012 only about 11% of tourists have visited this area
- The practice of curative tourism resorts is reduced as a share
- The total duration overnights and average length of stay is declining mainly due to the worsening economic situation,
- This index structures is declining tourism because tourism offer grew faster than demand for accommodation,
- Poor infrastructure in some areas significantly affects tourism development at national and regional level, putting a brake on tourism demand
- Mismatch relationship between price and quality of services.

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