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Article

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New Developments in the Romanian Tourism vs the Old Challenges. A Regional Approach

Victor Romeo Ionescu[1]

Abstract: The paper deals with the analysis of the tourism development from a regional point of view. The unfavourable situation of the tourism in Romania is doubled by the same situation at regional level. In order to point out the regional disparities in tourism developing, a regression analysis becomes useful. The analysis is focused on representative indicators as: tourist accommodation establishments, nights spent at tourist accommodation establishments, seasonality in tourism nights per month, net occupancy rates of bed-places and bedrooms in hotels, or regional GDP/capita. The intermediate results of the analysis led to the use of the cluster approach. As a result, the eight NUTS 2 regions were grouped in two dedicated clusters. The main conclusion of this research is that Romania is not able to develop a modern sustainable tourism at regional level. On the other hand, the paper offers enough data and ideas to improve the regional tourism development approach for the regional decision makers. The whole analysis is based on the latest official statistical data and is supported by pertinent diagrams.

Keywords: Tourism development; regional tourism disparities; disparities related to net occupancy rates; disparities related to nights spent; disparities related to regional GDP/capita

JEL Classification: O18

1. Introduction

Tourism maintained its main role in developing sustainable economies. All Member States are interested in improving their touristic offers in order to attract more money and to support a sustainable approach for the economy.

According to the latest official statistical data, 41.5% of the EU residents prefer European touristic destinations (Eurostat, 2016). The Top 3 destinations are Spain, France and Italy (see Figure 1).

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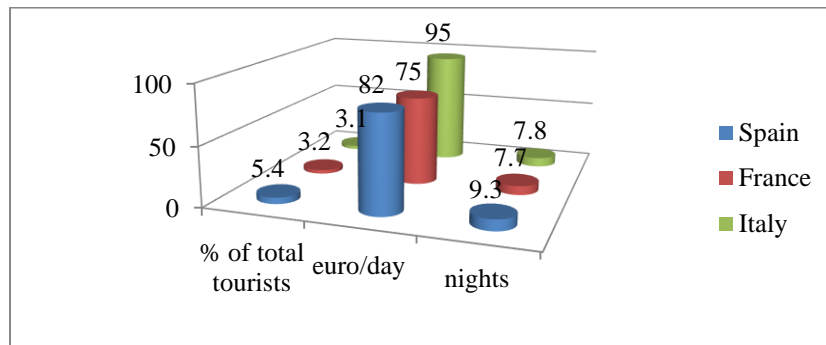
Figure 1. Top 3 European destinations

86.4% from the Romanian residents stayed in Romania. Those who travelled abroad spent 24 euro per day and stayed only 3.8 nights. On the other hand, the most tourists in Romania came from Germany (2.3%), other Asian countries than China, Japan and Republic of Korea (2.0%) and Italy (1.8%).

There are great disparities between the Member States related to the touristic indicators. The total nights spent indicator leads to the following ones (Eurostat, 2015):
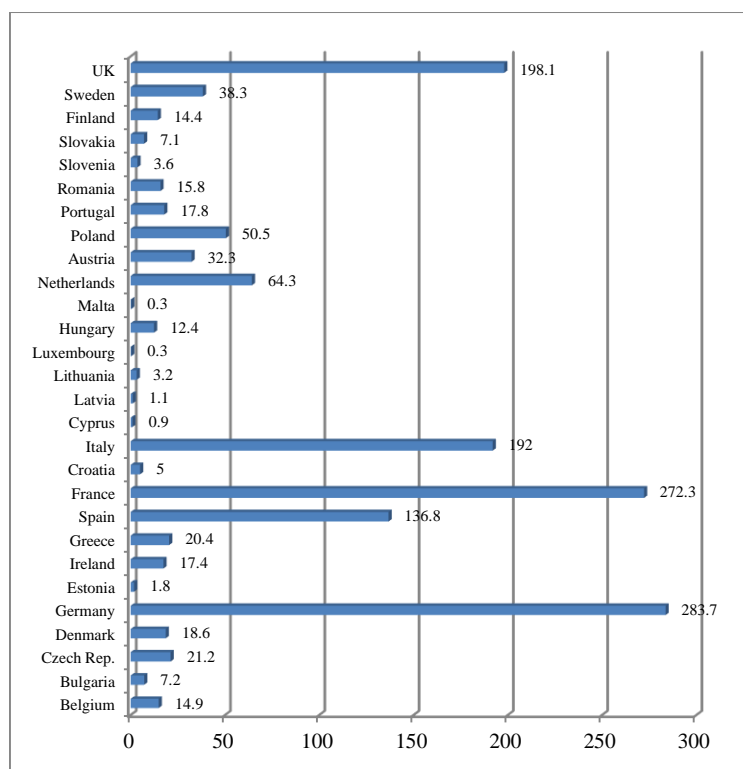
Figure 2. Total nights spent by residents in country (million nights)

The situation changes when the non-residents are taken into consideration (Figure 3).
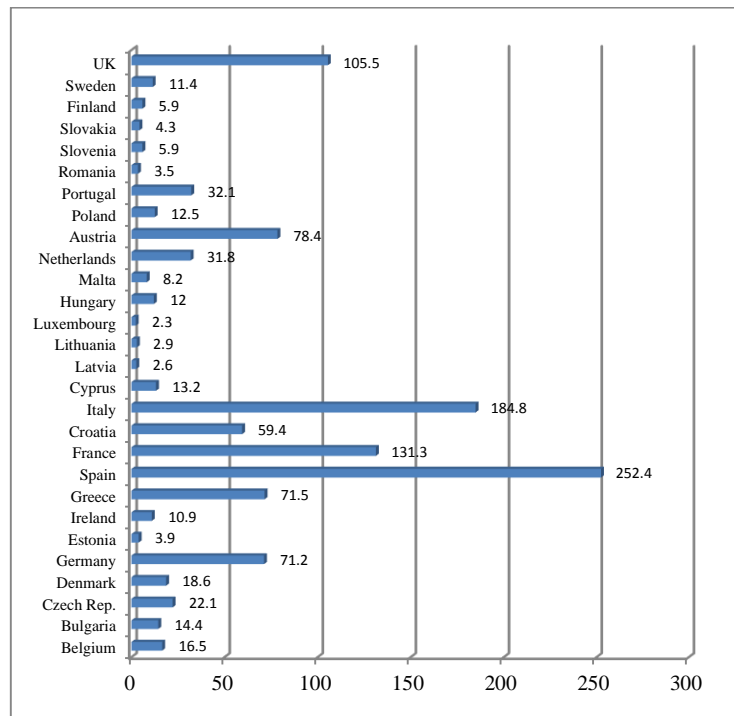
Figure 3. Total nights spent by non-residents in country (million nights)

According to Figure – 3, Romania faced to less total nights spent than Estonia, Bulgaria or Slovenia. The most popular touristic regions in Romania are Sud-Est for residents and Bucharest-Ilfov for non-residents.

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2. Related Work

For the beginning, it is useful to put into discussion even the status of the researches on tourism. A dedicated paper is focused on two essential targets. The first deals with the current status of tourism and hospitality management programs are a country in global perspective, in order to point out the factors which contribute to the current status. The second is related to national touristic programs in connection to the rest of the world. Moreover, the author realizes a world Top 30 where ranked the countries according to "Tourism, Leisure and Hospitality Management" publications during 1996-2012. The first five ranks in this top are covered by USA, UK, Australia, Canada and New Zealand (Hara, 2014).

An important goal for the modern tourism is its sustainable development. A special analysis puts into discussions the tourism sector worldwide using five sustainability indicators: population, peace, prosperity, pollution and protection. The first conclusion of this approach is that actual tourism is far away from a sustainable development. This is why the author recommends the use of environmental restrictions and regulations. Moreover, the main priorities in tourism have to include: sustainability accounting, individual responsibility and conservation tourism (Buckley, 2012).

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A more consistent analysis is that connected to the tourism management. The book starts with the tourism system definition in order to present the evolution and growth of the tourism. Distinct parts of the book are focused on the tourism products, markets and marketing. The analysis continues with the economic, sociocultural and environmental impact of the tourism development. Finally, the sustainable tourism is presented as the most viable solution for the future (Weaver & Lawton, 2013).

The analysis of the tourism market and tourists' behavior is realized by Fletcher, J. at al. in 2013. The book deals of the analysis of the tourism demand, its nature and the tourism consumer behavior. The next step is to measure and to model the tourism demand and to use forecasting procedures related to it. Important chapters are connected to tourism destinations and the economic, environmental and socio-cultural impact on the tourism sustainable development. Distinct parts of the book deals with management, marketing and planning in tourism in connection with transport and dedicated public policies (Fletcher, Fyall, Gilbert & Wanhill, 2013).

Other research deals with the connection between tourism impacts, tourism planning and tourism management. It is supported by a lot of international case studies. Even that the book starts with the classical approach of the key players involved (tourists, host communities or industry members), the next chapters introduce new data, ideas and concepts related to terrorism, sustainability, climate change, sex tourism, heritage tourism, theories of tourism planning. The paper is based on big statistical databases. These databases allow introducing case studies connected to urban tourism, pro-poor tourism, cruise ship tourism, coral reef tourism, historic monuments, etc. Moreover, the statistical data cover both developed and developing regions from Australia, Europe, Africa and the Arctic and Antarctica (Mason, 2015).

An interesting approach is that connecting local festivals and events to the residents' well-being. According to this paper, the cultural and educational achievements are able to support an increase in the residences' well-being. Moreover, all concerns related to the quality life have negative impact on the well-being of residents. The analysis is supported by a case study related to a local film festival (Yolala, Gursoyb, Uysald, Kime & Karacaoğluf, 2016).

The role of the Corporate Social Responsibility in tourism is analyzed in a dedicated paper. This paper deals to the idea that the Corporate Social Responsibility was managed only at the micro level of visitors. As a result, the employee behaviors remain unknown. The analysis is built using a three phase model: cultural reluctance, cultural grasp and cultural embedment. This approach is followed by a survey which covered 68 employees, managers, volunteers, seasonal staff and tourists (Wellsa, Smith, Taheri, Manika & McCowlend, 2016).

Finally, the sustainable tourism theme is put into discussion, in a recent book, by Edgell, D.L. The philosophic approach for sustainable tourism is followed by the sense of sustainability in the 20th and 21st centuries in the context of UNO's specific goals. A distinct analysis is focused on the rural sustainable tourism. The sustainable tourism is analyzed in connection to the latest approaches from strategic planning, management and marketing. The book introduces a real challenge related to the future world tourism issues that will impact on managing sustainable tourism (Edgell, 2016).

3. Tourism Development in Romania

The analysis of the specific tourism indicators leads to interesting conclusions for Romania. For the example, the arrivals at tourist accommodation establishments grew during 2011-2013, but with the support of the residents arrivals (see Figure 4).
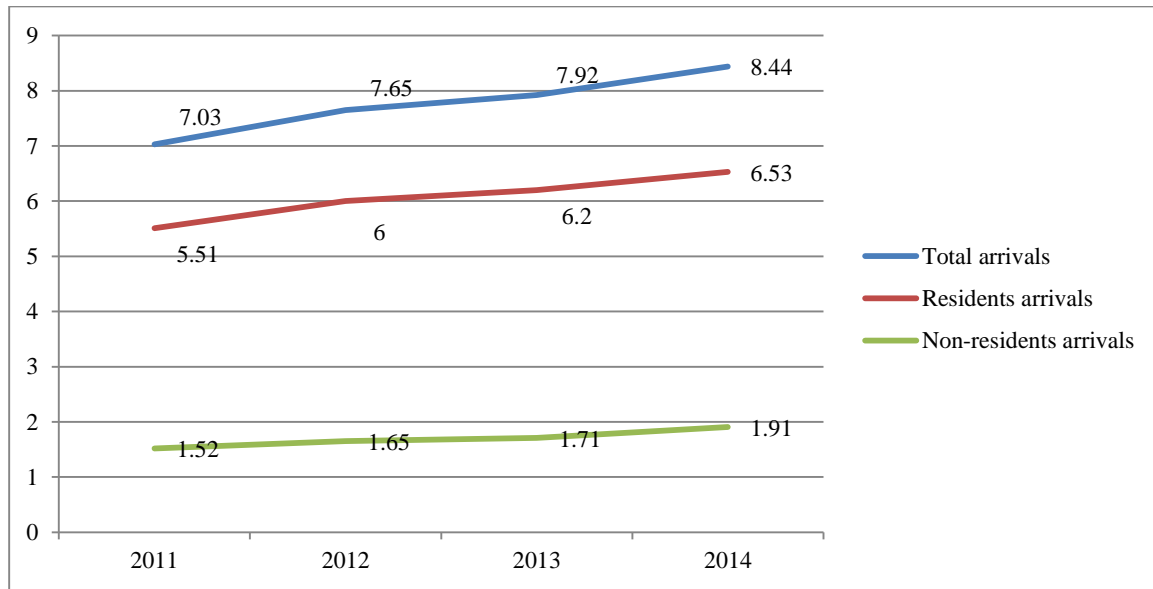

Figure 4. Arrivals at tourist accommodation establishments in Romania (million)

According to Figure 4, the residents arrivals increased only by 18.51% in 2014 compared to 2011, will the non-residents arrivals by 25.66% during the same period (European Commission, 2016).

Indirect connection to the above indicator is another: nights spent at tourist accommodation establishments in Romania. The greatest contribution to this new indicator had the residents, while the non-residents increased slowly (see Figure 5).
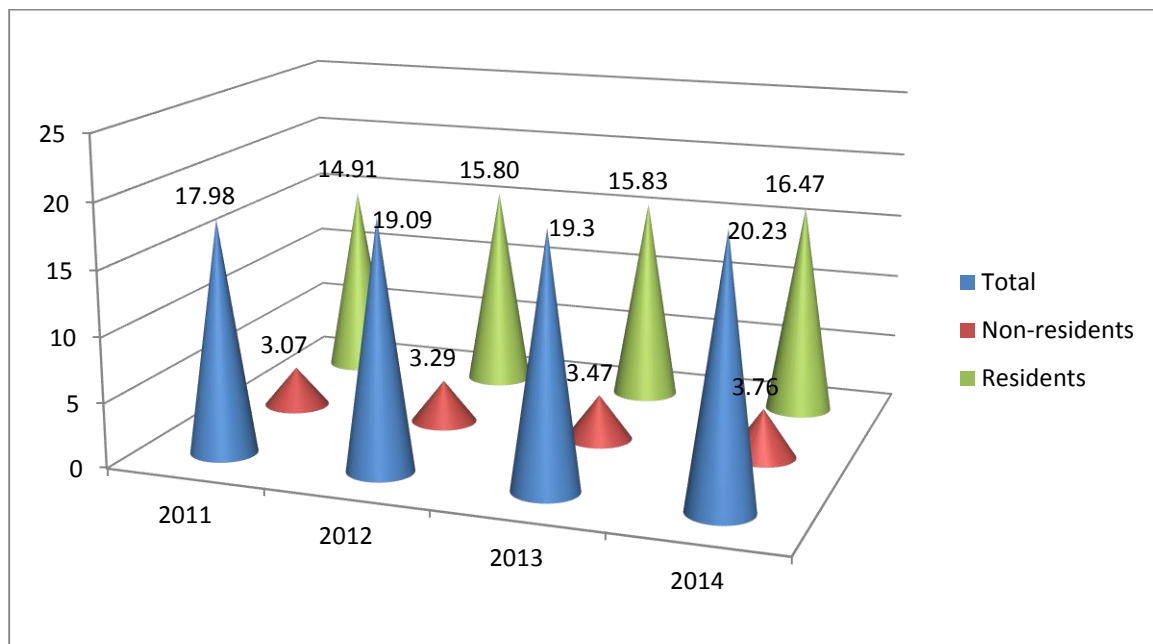
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Figure 5. Nights spent at tourist accommodation establishments in Romania (million)

In order to quantify the tourism intensity, the seasonality is very useful. Under the number of total tourism nights per month, this seasonality is big enough (see Figure 6).
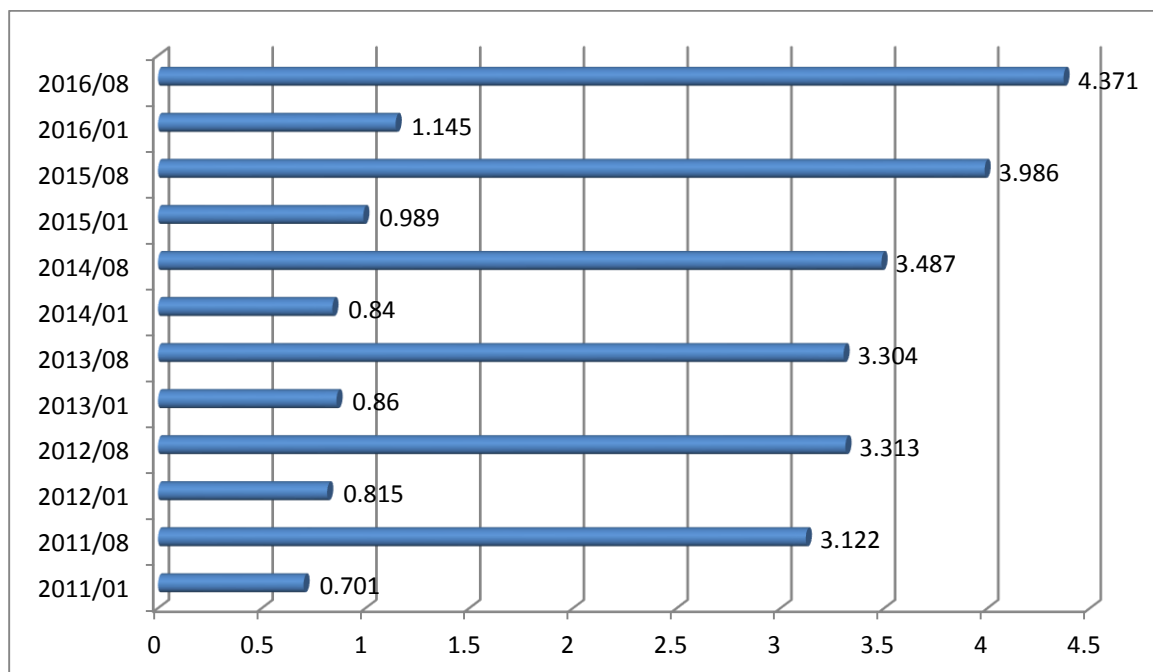
Figure 6. Seasonality in tourism nights per month in Romania (million)

According to Figure 6, the peak of the tourism nights per month is on August, while the bottom seems to be on January. The lag between these two extreme data varied, but it decreased again during 2014-2016.

4. Tourism from the Regional Point of View: Concept, Terms

The development of the tourism in Romania varies a lot at regional level. This is why an analysis at NUTS 2 level becomes more adequate.

The net occupancy rate of bed-places and bedrooms in hotels, for example had a fluctuant trend during the last three years (Eurostat, Sept. 2016).

According to Figure 7, the average net occupancy rate in Romania was 30.7% in 2014. The extreme values of this indicator (35.7% in Bucuresti-Ilfov and 23.4% in Sud) lead to a lag of 1.53: 1.
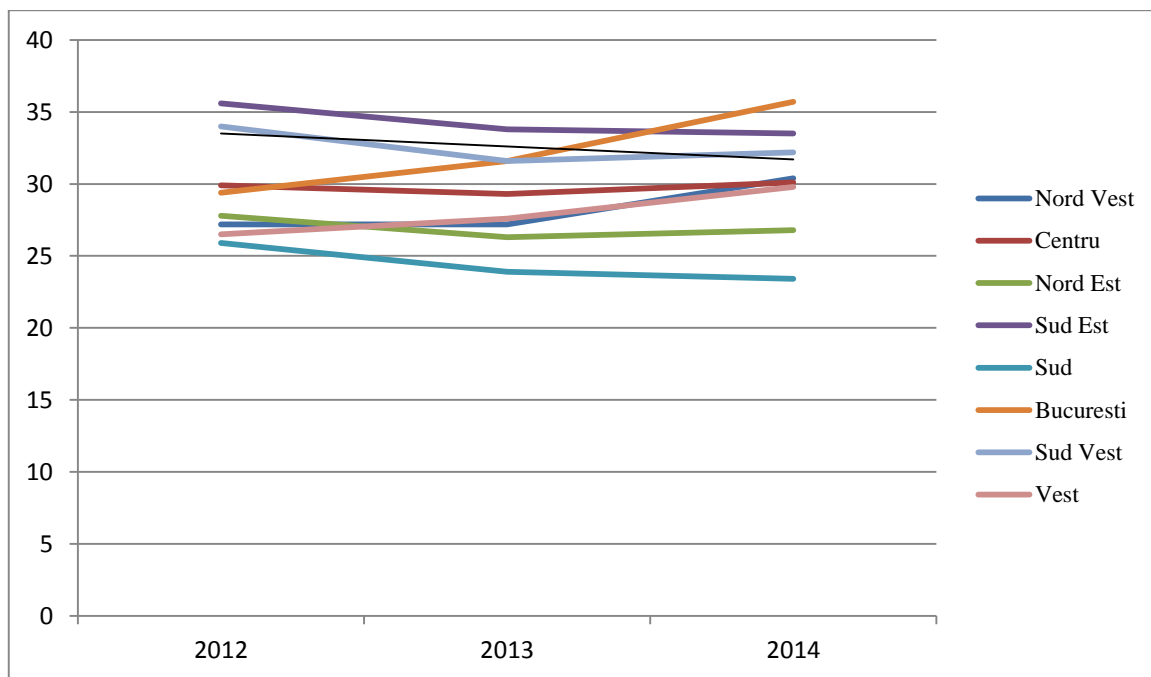

Figure 7. Net occupancy rates of bed-places and bedrooms in hotels (%)

The above indicator is directly connected to that related to the nights spent at tourist accommodation establishments. Romania succeeded in increasing the number of nights spent during 2011-2014, while the EU faced to a decrease of this indicator in 2013 (Eurostat 3, 2016).
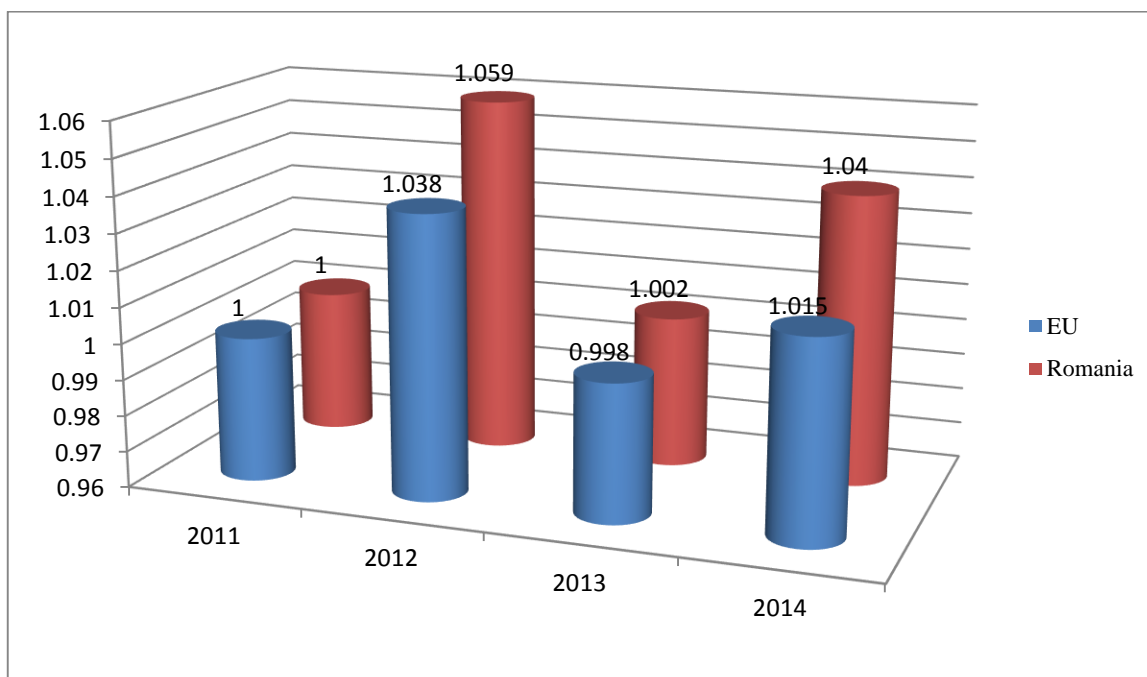
Figure 8. Nights spent at tourist accommodation establishments (2011=100%)

Each year, Romania had better results than EU average related to this indicator. The same indicator varied a lot at NUTS 2 level (see Figure 9).
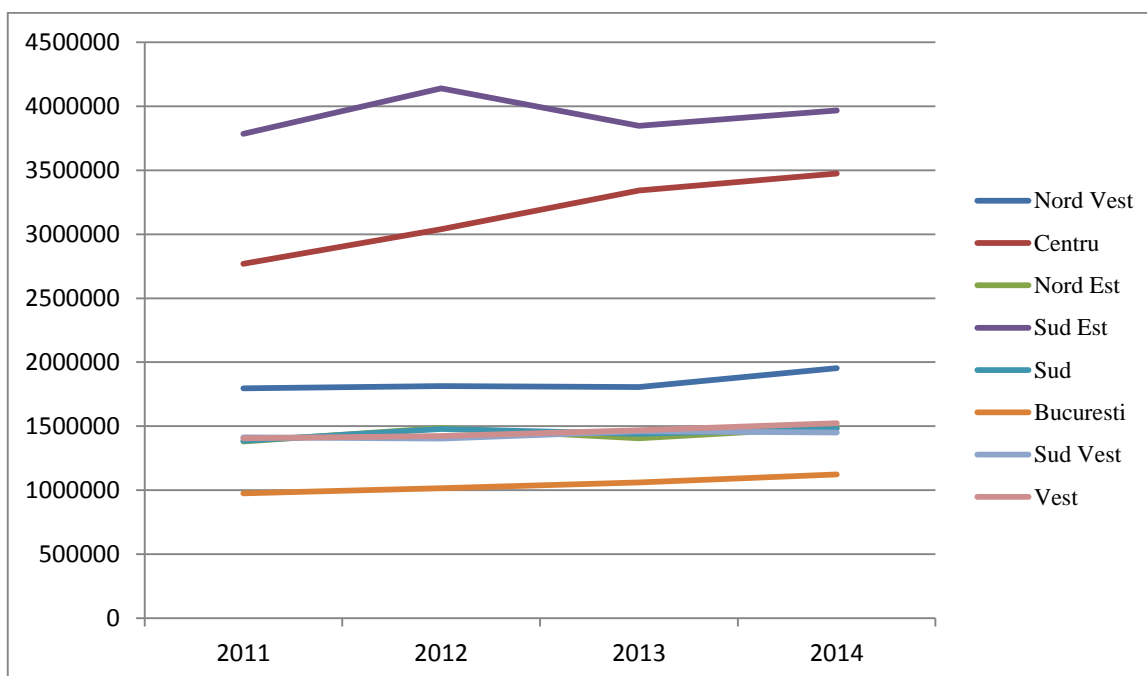
Figure 9. Nights spent at tourist accommodation establishments

According to Figure 9, four NUTS 2 regions had almost the same evolution of the nights spent at tourist accommodation establishments. The peak of this indicator was achieved in Sud Est region, while the bottom in Bucuresti-Ilfov. As a result, the gap becomes 3.53: 1.

The analysis of the above two indicators leads to the necessity of finding elements which supported the regional disparities in Romania related to the tourism activities. Romania has not the excuse of increasing terrorist actions or refugees' number in explaining the inadequate situation in tourism.

The main element is the general socio-economic development at macro and regional level. In order to demonstrate this, the analysis of the GDP/capita in NUTS 2 regions becomes essential. The latest official statistical data are presented in Figure 10 (Comisia Nationala de Prognoza, 2016).
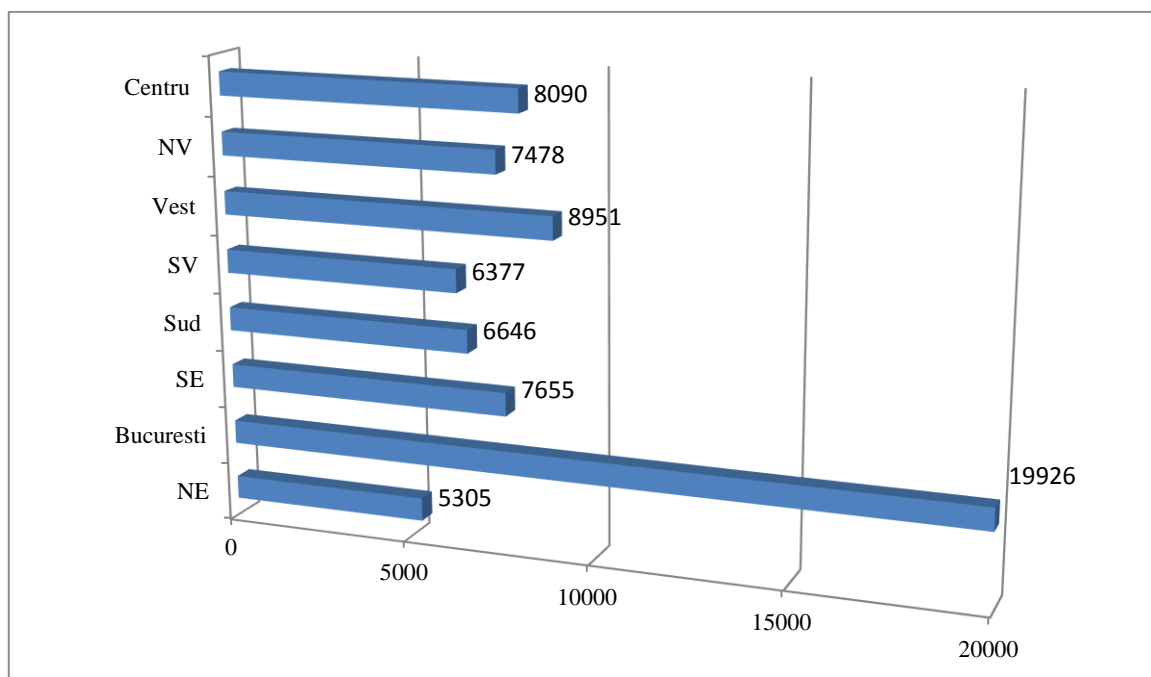

Figure 10. Regional GDP/capita in 2016 (euros)

A lag of 3.76: 1 characterizes the great disparity between the most and the less developed regions in Romania.

The general economic development, which supports the disparities in Romanian tourism development, is just a cause of the inequities in tourist activities.

These inequities are caused by accessibility on road or on air to the touristic establishments. Romania faces to an inadequate road infrastructure. At the beginning of 2016, 732 km of speedways were built in Romania. Unfortunately, the SV and NV regions are not covered by speedways, while the whole North of the Romania has no speedways.

There are 16 airports in Romania, but they do not cover the whole territory. 13 of them are international airports.

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The rail transport is not developed in Romania and is far away to become a support for tourism development, even that it covers all regions.

5. Analysis of Results

The above analysis leads to the idea of increasing regional disparities in tourism in Romania. In order to quantify the real dimension of such disparities, a regression analysis is useful. The analysis takes into account pertinent indicators as: net occupancy rates of bed-places and bedrooms in hotels, nights spent at tourist accommodation establishments or regional GDP/capita.

The analysis is supported by dedicated software, IBM-SPSS, and considers the data for the eight Romanian NUTS 2 regions as dependent variables, while time is the independent one. The analysis is realized under the ANOVA conditions.

The latest statistical data related to the net occupancy rates of bed-places and bedrooms in hotels lead to the situation presented in Figure 11.
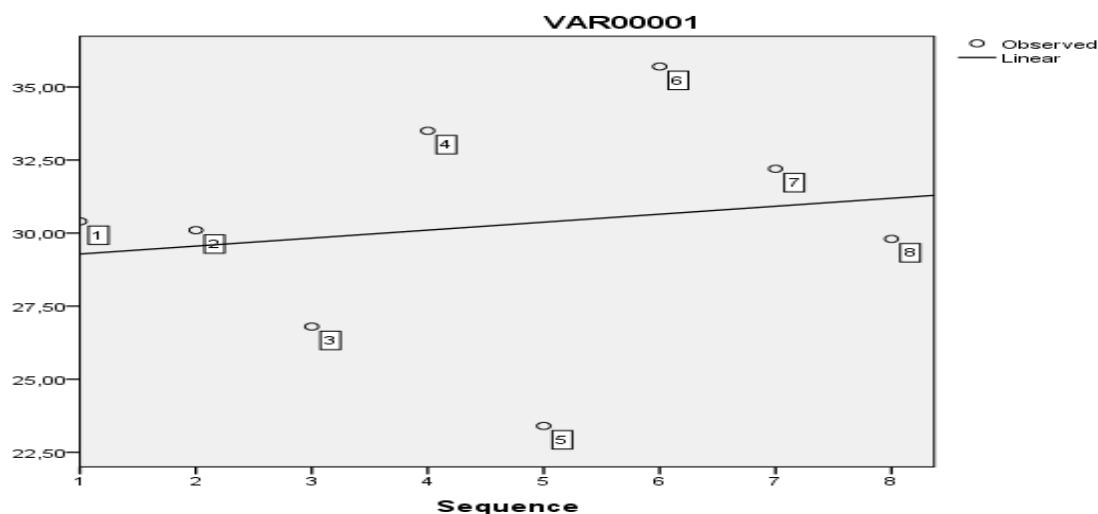
1. Nord Vest; 2. Centru; 3. Nord Est; 4. Sud Est; 5. Sud; 6. Bucuresti-Ilfov; 7. Sud Vest; 8. Vest.

Figure 11. Disparities related to net occupancy rates of bed-places and bedrooms in hotels (%)

According to Figure 11, two clusters can be built. First covers regions Nord Vest, Centru, Sud Est, Bucuresti-Ilfov and Sud Vest. As a result, Nord Est, Sud and Vest cover the second cluster. A dedicated cluster analysis supports this idea of two clusters (3 and 5 NUTS 2 regions), because the cluster quality is 0.7 (see Figure 12).
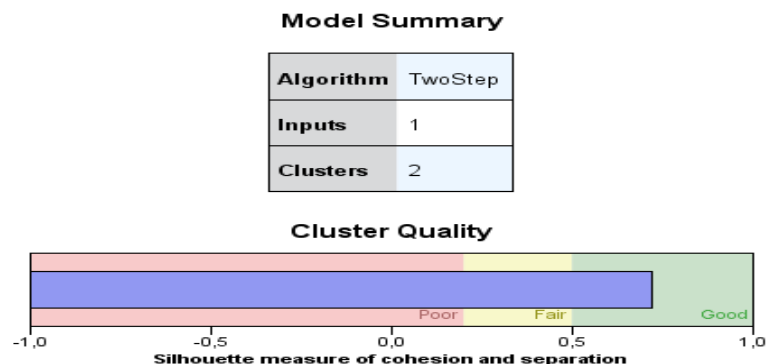
Model Summary

Algorithm	TwoStep
Inputs	1
Clusters	2

Cluster Quality

Figure 12. Cluster analysis under net occupancy rates of bed-places and bedrooms in hotels

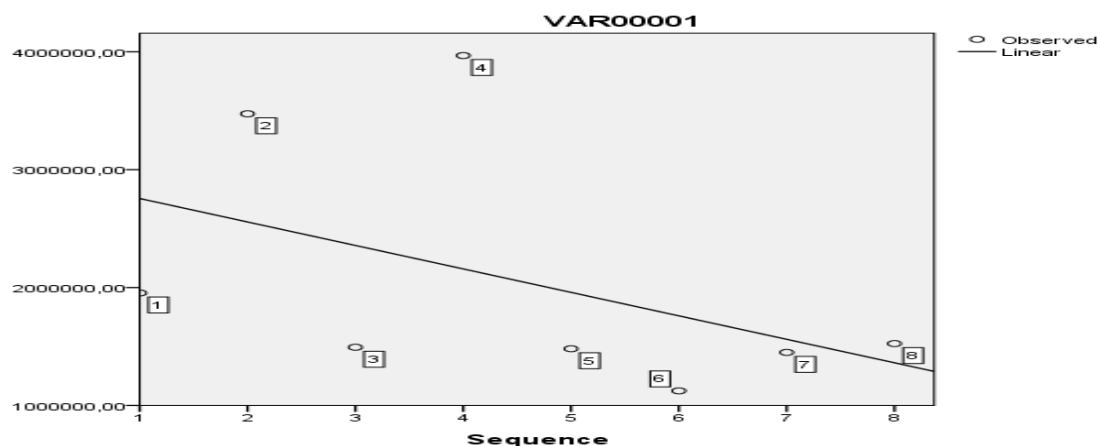The analysis of the nights spent at tourist accommodation establishments leads to the following figure.

Figure 13. Disparities related to nights spent at tourist accommodation establishments

In Figure 13, first cluster covers regions Centru, Sud Est and Vest, while the second cluster covers regions Nord Vest, Nord Est, Sud, Bucuresti-Ilfov and Sud Vest. The two-step cluster analysis certifies this approach. As the result, the cluster quality is 0.9 (see Figure 14).
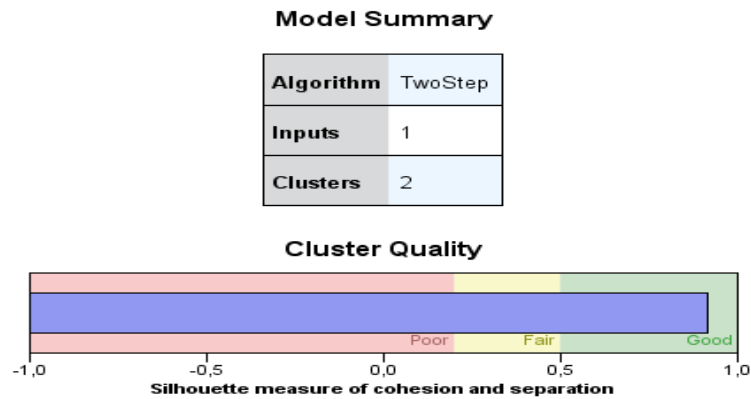
Model Summary

Algorithm	TwoStep
Inputs	1
Clusters	2

Cluster Quality

Figure 14. Cluster analysis under nights spent at tourist accommodation establishments

Last but not least, GDP/capita represents an important factor for increasing regional disparities in tourism in Romania. These new disparities are presented in Figure 15.
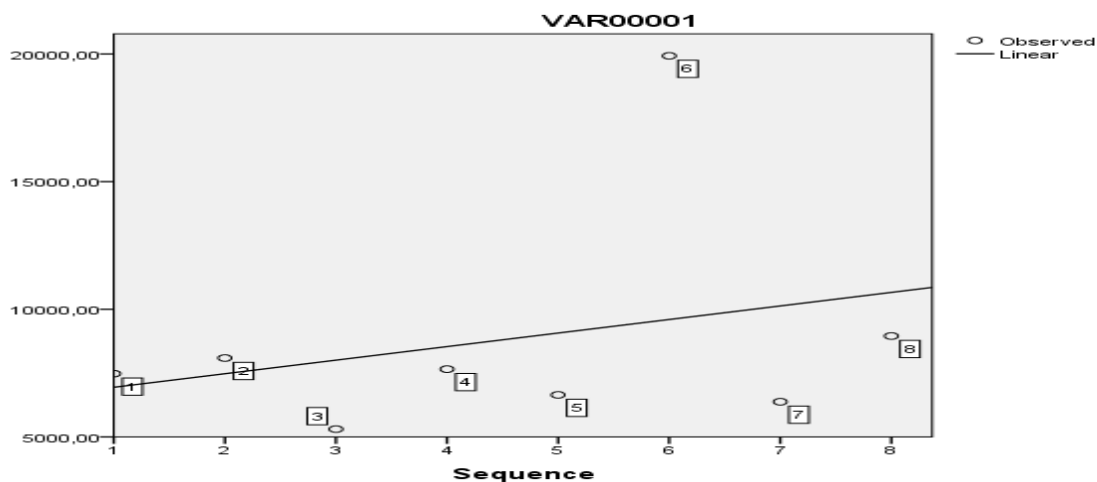

Figure 15. Disparities related to regional GDP/capita

The same number of regions and the same cluster structure (3 for the first cluster and 5 for the second) are supported by the cluster analysis in Figure 16. The cluster quality in this figure is 0.9.
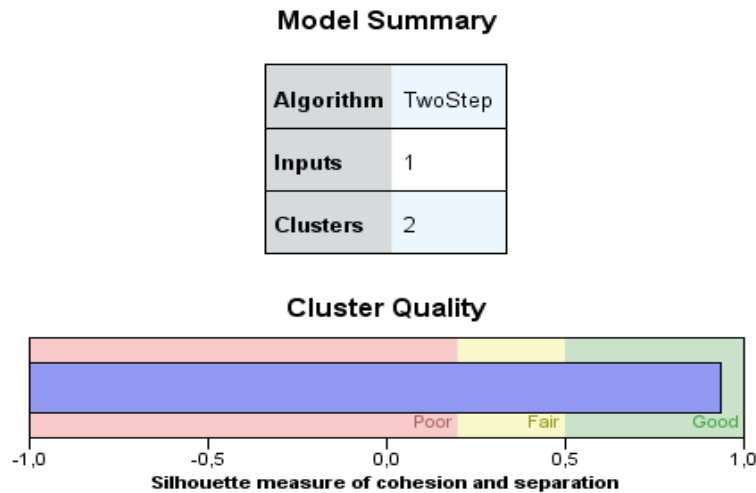
56

Model Summary

Algorithm	TwoStep
Inputs	1
Clusters	2

Cluster Quality

Figure 16. Cluster analysis under regional GDP/capita

4. Conclusions

The whole above analysis starts from the assumption that the great socio-economic regional disparities represent the main cause of an inadequate tourism development in Romania.

Representative indicators are used in order to support this approach. The regression analysis points out the great gap between Bucuresti-Ilfov and the other seven NUTS 2 regions in developing tourism.

Unfortunately, Romania faces to lowest performance in tourism. The tourism in Romania in still based on domestic tourists and has a great seasonality. The greatest tourists' flows are focused on Sud Est region in the summer, while the tourists' flows increase in the mountain regions during the winter season.

The business tourism is low developed in Romania. The transport infrastructure, the accommodation conditions, the regional accessibility are far away of attracting important tourist flows from abroad, even that the natural landscapes are fantastic in Romania.

5. Acknowledgement

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