

Elisabeta ROȘU, Dan-Marius VOICILAȘ

*Institute of Agricultural Economics, Romanian Academy, Bucharest
betty_rosu@yahoo.com*

STUDIES OF THE COMPETITIVENESS OF TOURISM IN SOUTH-EAST AND NORTH-EAST REGIONS OF ROMANIA

ABSTRACT

Tourism, through its important role in economic development, contributes to the increase of living standard. Tourism is closely dependent on natural and human resources. Romania is characterized by a great variety and diversity of sites of national and international interest. These are the main reasons for which we want to focus, in this paper, on the evolution of tourism in two important tourism regions of Romania, namely South-East and North-East. For this approach, we will use the comparative analysis, in dynamics, of the main indicators used in tourism. For the purpose of our analysis, we use available statistical data, at regional level (NUTS 2), provided by the National Institute of Statistics and other specialized publications in this field.

Key words: tourism, competitiveness, Romania, regions.

JEL Classification: Z30, L83, R10.

1. INTRODUCTION

Romania is among the world's countries with a rich tourism potential. With a balanced relief and an accessible geographic location, Romania meets all the conditions to become a competitive tourist attraction not only at regional level, but also worldwide. Yet the reality was different if we have in view that besides the above-mentioned natural conditions, the other factors of influence, pertaining rather to anthropic actions, have not contributed to putting into value this potential.

There were numerous moments in the last decades when we lost the start in the international competition or we acted too slowly in this direction. As a result, at present, Romania's position worldwide as regards the economic results from tourism activities or its competitiveness is lower than those of other countries that do not have the same potential. Let us not forget that in certain countries, tourism industry is an important contributor to GDP formation and generator of incomes, jobs and social protection.

These are only some of the arguments that oblige us to focus more on tourism evolution in Romania and its role in the development of overall economy. To analyze what has been done, right or wrong, what has not been done, or what

should be done for this sector to develop at the level of its potential, to significantly contribute to the state budget and to be competitive at international level.

The purpose of this study is to analyze two development regions from Romania, which differ from each other and are much diversified from the tourism point of view, namely the North-East (NE) region and the South-East (SE) Region, which are considered representative for the Romanian tourism.

2. STATE OF KNOWLEDGE

Tourism is “the most dynamic sector of the economy” and “its development is based on innovative actions in the use with high efficiency of natural, material and human resources” (Popescu, 2016:411).

The tourism potential of an area is based on the natural and anthropic tourism potential. The natural and the anthropic factors, especially “the quality of the anthropic ones represents the essential motivation for travelling, forming the raw material of tourism” (Honţuş, 2014:147).

The tourism potential of an area represents an essential condition for tourism development, and the essential requirement that is imposed is to best capitalize on this potential with the help of the suppliers of tourism products and services.

3. MATERIAL AND METHOD

The methodology comprised the statistical analysis of primary data using Excel quantitative analysis program as working tool. The statistical data on which the analysis was based were national data and data for two development regions: North-East and South-East, which covered the period 2007–2017 and had the following sources: i) statistical data from the National Institute of Statistics (NIS) available online – www.tempo-online; ii) the web sites of the North-East and South-East Regional Development Agencies; iii) other official sources.

The first part of the study contains a brief characterization of the two development regions from Romania, subject to the analysis, focusing on the natural and anthropic potential; the second part contains the analysis of the main indicators of the tourism activity: tourist reception structure with accommodation functions, tourist existing accommodation capacity, tourist existing accommodation capacity in operation, tourist arrivals and overnight stays. On the basis of these synthetic indicators of tourism activity we calculated:

a. net utilization index of the tourist accommodation capacity in operation, according to the formula: $I_n = (N/C_f) \times 100$, where: I_n is the net utilization index of the tourist accommodation capacity in operation; N is the number of overnight stays in a certain period; C_f is the tourist accommodation capacity in operation;

b. average length of stay, according to formula: $DM = (Nin/Ns)$, where: Nin is the number of overnight stays, and Ns is the number of tourist arrivals in a certain period.

4. RESULTS AND DISCUSSIONS

Descriptions of the two regions. The region North-East borders on Ukraine in the north, on the region South-East in the south, on the region North-West in the west and on Moldova Republic in the east. Its total area is 36,800 km² and consists of 6 counties: Bacău, Botoșani, Iași, Neamț, Suceava and Vaslui. It is the largest among the eight development regions of Romania, both in terms of area (15.5% of Romania's total area) and of population, accounting for 16.5% of the country's total population in 2017.

The relief of the region is characterized by a mix of three relief units: 30% mountains, 30% hills and 40% plateau. The different relief units create climate areas with significant differences between the mountainous, hilly and plain areas. In the mountain area of the region, the climate is of moderate continental type, with cool summers and winters rich in precipitations, mainly snow, while in the hilly and plain areas there is a continental climate, with hot and dry summers and very cold winters, most often without precipitations.

The hydrographical network consists of eight major water courses, among which the largest hydrographical basins are those of the Siret and Prut rivers, the latter forming a natural border between Romania and the Republic of Moldova.

The region South-East borders on the region North-East in the north, on the region Center in the west, on the regions South Muntenia and Bucharest-Ilfov in the south-west and on the Republic of Moldova, Ukraine and the Black Sea in the east. Its total area is 35,762 km², covering 15% of the country's total area; it is the second largest region in the 8 development regions of Romania. The region has 6 counties in its componency: Brăila, Buzău, Constanța, Galați, Tulcea and Vrancea. In the year 2017, the region's population accounted for 12.5% of Romania's population. All the relief units can be found in the region South-East: river plain (the Danube River Plain), plain (Bărăgan Plain), plateau (Dobrugea Plateau), mountains (the Carpathians Mountains – the Carpathians and the Curvature Sub-Carpathians, Măcinului Mountains). The region's climate is of temperate continental type, yet with significant variations depending on the relief. In the mountain area, in the north, the climate is of moderate continental type; in the river plain and plain areas there is an arid continental climate, and on the Black Sea shore and the Danube Delta there is a mix of steppe and Pontic bioclimate.

The region is crossed by the Danube and it is bordered by the Black Sea coast in its eastern part, with a length of 245 km. At the place where the Danube flows into the Black Sea, the Danube Delta was formed, which, together with the Black Sea, are specific only to the region South-East.

Natural potential in the two regions. *The region North-East* is part of the two historical provinces, Moldova and Bucovina and here history, culture and tradition complement the extremely attractive natural environment.

There are many natural reserves and nature monuments in this region, protected natural areas of national interest, and 3 out of the 13 national parks of Romania are found here, namely: National Park Călimani Mountains National Park, Cheile Bicazului – Hășmaş National Park and Ceahlău National Park. The natural reserves and nature monuments from the region North-east, 126 in number, lie on 49,183 ha. The ecologic network “Natura 2000” comprises 55 natural areas.

The climate of the region North-East is suitable for therapeutic treatments, including areas with a tonic, sedative and saline bioclimate. The balneary factors are put into evidence by numerous sources of therapeutic mineral waters used in internal and external cures, the therapeutic gases (used for the treatment of cardiovascular diseases and the saltwater springs (Vatra Dornei, Slănic Moldova, Târgu Ocna, Sărata Băi, Durău, Câmpulung Moldovenesc, Gura Humorului, etc), which add to the existence of two salines (Târgu Ocna and Cacica) that enjoy a specific microclimate for the treatment of respiratory diseases.

The region North-East has a rich vine growing tradition, recognized both nationwide and worldwide, with renowned vineyards (Cotnari, Bucium, Huşi), wine tasting centers and wineries.

The region South-East is part of three historical provinces: Dobrugea, Moldova and Muntenia. The region has a very rich natural heritage comprising protected areas, the only seaside and delta areas from Romania, therapeutic lakes and springs, together with unique natural sites in Europe (the Danube Delta and the Muddy Volcanoes).

The region South-East ranks first in Romania as regards biodiversity conservation: on one hand, it is the region with the largest natural protected areas from Romania (45% of total natural protected areas), and on the other hand 35% of the region’s area is covered by natural protected areas. There are 144 natural protected areas of national interest on the region’s territory, including a biosphere reserve (Danube Delta Biosphere Reserve), a national park (Măcinului Mountains National Park) and 3 natural parks (*Balta Mică a Brăilei* Natural Park, *Lower Prut River* Natural Park and *Putna – Vrancea* Natural Park). The Danube Delta has a triple status: Biosphere Reserve, Ramsar Site and World Natural and Cultural Heritage Site. The Community Network Natura 2000 comprises 133 sites, out of which 80 sites of Community importance – SCI and 53 special avifauna protection areas – SPA.

The region’s climate is suitable for different therapeutic cures, starting from the Black Sea coast adequate for the treatment of rheumatic diseases and ending up with the mountain area in its northern part, with a clean and tonic bioclimate adequate for the treatment of respiratory and nervous system diseases. The mineral water springs with different properties, together with the therapeutic mud from lakes (*Balta Albă, Lacul Sărat*) represent important natural curative factors.

The most renowned vineyards and wine centers from Romania are located on the region's territory (Murfatlar, Odobești, Panciu, Nicorești, Pietroasele, etc.), the region ranking first in Romania as regards the area under vines on bearing.

Anthropic potential of the two regions. *The region North-East* has 4003 historical monuments¹ that include archaeological sites, buildings of historical and archaeological interest, memorial houses, and religious monuments. There is quite an impressive number of churches and monasteries in the region, which besides a religious and cultural value also have a great historical and architectural value, preserving their beauty after more than 450 years. Eight churches on the region's territory are in UNESCO world heritage. Besides these, we can also find in the region: fortresses (Seat Fortress of Suceava, Neamț Citadel), princely courts (Princely Court of Suceava, Princely Court of Piatra Neamț), palaces (Ghica Palace, Princely Palace of Alexandru Ioan Cuza, Sturza Palace, Duke Palace), manor houses (Cantacuzino manor house) and princely houses.

The region South-East is part of a space with a very rich history, which left behind a heritage of cultural vestiges and gave birth to a specific ethnical and cultural diversity. 3000 historical monuments are located here², the cultural heritage consisting of: historical vestiges (the getic citadel Troesmis, the Roman fortress Dinogetia, Argamum citadel, the Roman citadel Halmyris, the Roman castrum Noviodunum, Enisala citadel, the Roman castra Carsium and Capidava, the Roman citadel Tropaeum Traiani, the Greek citadel Histria, the oldest attested town on Romania's territory, the archaeological site Tomis, the Greek citadel Calatis), religious establishments (Orthodox, Catholic, Greek-Catholic Armenian, Evangelical churches, Orthodox monasteries and hermitages, mosques and synagogues,) as well as cultural establishments, monuments and museums.

Due to the natural conditions, beautiful places, mainly in the mountains, together with the rich cultural, historical and religious heritage, which add to the folk traditions and customs, specific cuisine, tasting of wines from the regions' vineyards, both regions have high tourism potential.

Forms of tourism practiced in the two regions. *The mountain tourism* can be practiced in both regions due to the existence of mountain massifs in both regions. The mountain areas in the two regions are suitable for practicing *active tourism* activities, such as: mountain hiking/mountaineering, alpinism, mountain cycling, horse riding, rafting, delta plan flying and paragliding.

Balneary factors are found in both regions, ranging from mineral or saltwater springs to therapeutic mud and salt mines, which led to the development of spas. *Balneary tourism* can be practiced in both regions.

¹ Grouped into two categories according to Romania's legislation into effect: historical monuments of national or universal value (category A) and historical monuments representative for the local cultural heritage (category B), according to the Ministry of Culture and National Identity, *List of Historical Monuments*, Order of the Minister of Culture no. 2828 of 2015.

² Order of the Minister of Culture no. 2828 of 2015.

The cultural and historical monuments that exist in both regions and the fact that the regions are overlapping the territories of certain historical provinces from Romania led to the development of *cultural and historical tourism*.

The presence of churches and monasteries, as well as of religious personalities, together with religion-based objectives (hermitages, cells, religious monuments, tombs of saints) led to the development of *ecumenical tourism* in both regions.

Rural tourism and agro-tourism have significantly developed lately. Bucovina area from the region North-East and Dobrugea area in the region South-East are well-reputed tourism areas, with well-known brands across the border inclusively.

Both regions have a rich wine tradition, with famous vineyards, which led to the development of *viticultural tourism*.

Summer tourism is specific only to the region South-East, due to the presence of the Danube Delta and the Black Sea, because in both places tourism activities are specific to the summer season.

Indicators of tourist circulation. In this chapter, we shall investigate the main indicators of tourist circulation, and on this basis we shall briefly outline the tourist trends in the two regions and the main factors that have determined the respective evolutions. Among the existing indicators, we selected the following: tourist reception structures with accommodation functions, tourist existing accommodation capacity, tourist existing accommodation capacity in operation, tourist arrivals, tourist overnight stays, net utilization index of accommodation capacity and average length of stay.

In the investigated period, the number of tourist reception structures was lower in the region North-East than in the region South-East, with an increasing trend for North-East (similar to that at national level) and a decreasing trend for the region South-East. This decrease, which was manifested only in the year 2011, is explained by the effects of the legislative changes in that year with regard to meeting the criteria of obtaining the (re)accreditation/authorizations as tourism operators. These changes mainly affected the agro-tourism boarding houses, bungalows, tourist small houses, motels, tourist villas, children camps which are mainly found in the Black Sea shore area.

Table 1

Tourist reception structures with accommodation functions (number)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
RO	4694	4840	5095	5222	5003	5821	6009	6130	6821	6946	7905
NE	459	463	548	554	604	690	725	745	830	858	985
SE	1247	1258	1311	1385	974	1079	1090	1101	1111	1129	1208

Source: Based on NIS data, www.tempo-online (TUR101D).

In the year 2007, the tourist reception structures in the two development regions together accounted for 36.4% of total tourist reception structures at national level, while in the year 2017 they accounted for 27.8%.

In the period 2007–2017 in the region North-East the number of tourist reception structures significantly increased for all types of structures, except for camping places and school camps. In the tourist reception structures, the tourist and agro-tourist boarding houses had the highest share, 61% of total in the year 2007; in the year 2017, their share increased to 67%.

The existence and mainly the increase in number of tourist and agro-tourist boarding houses in the region North-East reveals the development of entrepreneurial spirit in the tourism sector. The tourist boarding houses and agro-tourist boarding houses in particular are located in the rural area, and tourism activity in the rural area represents an economic alternative for the rural people. The existence of a great number of tourist reception structures in the year 2007 is a consequence of accessing the European pre-accession programs. The fact that in the year 2017 the number of these categories of tourist reception structures grew significantly is a consequence of Romania's EU membership and of using the non-refundable financing for the tourism sector development.

In the investigated period, even though in the region South-East the total number of tourist reception structures followed a decreasing trend, the number of hotels, hostels, motels and tourist halting places increased. The remaining tourist reception structures decreased in number, except for the number of inns and holiday villages that remained constant in the investigated period.

In the region South-East, the hotels prevailed in the tourist reception structures, accounting for 31.4% in the year 2007 and 33.9% respectively in 2017 in total structures.

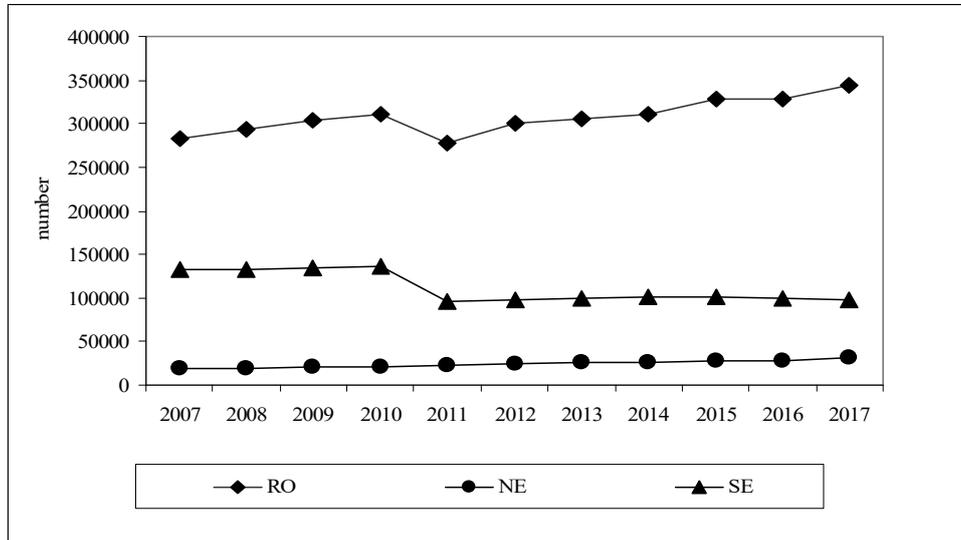
The accommodation spaces on river and sea vessels, along the Danube river banks, are specific to the region South-East. The bungalows, made from wood or masonry, are tourism structures that operate on seasonal basis. The great number of such structures, usually located on the Black Sea shore and in the Danube Delta, reveals the specificity of tourism practiced in these areas, namely summer tourism.

The increase of the number of tourist reception structures in the region North-East led to the increase on the number of accommodation places, 1.7 times in the year 2017, as compared to 2007.

Directly related to the decrease in number of tourist accommodation units, there was a decrease in the accommodation capacity (in the year 2011) in the region South-East. After this moment, the increasing trend of the accommodation capacity was resumed, yet at a lower rate dictated by the new legal provisions referring to the accreditation of the tourist reception units.

The tourist accommodation capacity in operation, representing the number of accommodation places put at the disposal of tourists, taking into account the number of days when the respective units are open, had positive evolutions in both development regions.

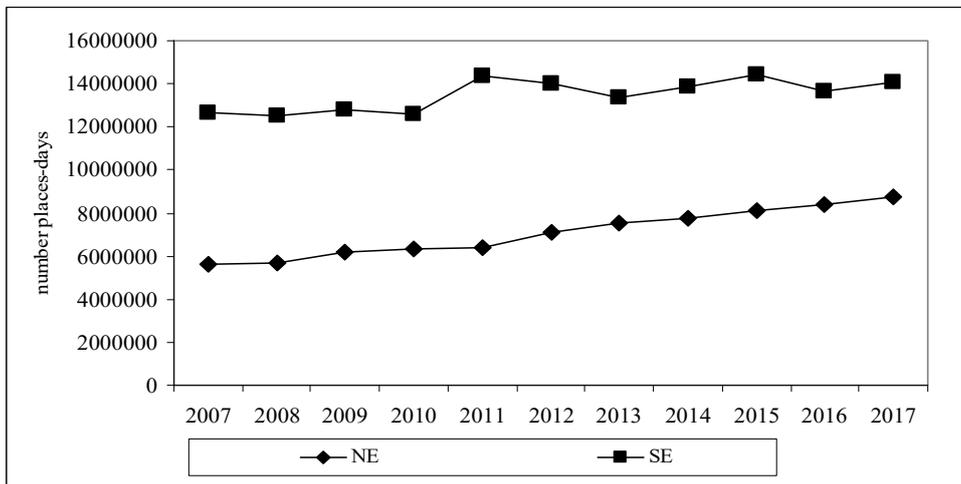
In the region North-East, under the background of the increase in the number of tourist reception structures and of the number of places in these structures, the tourist accommodation capacity in operation was by 36% higher in 2017 as compared to the year 2007.



Source: Based on NIS data, www.tempo-online (TUR102D).

Figure 1. Tourist accommodation capacity existing at national level and in the two regions.

It is worth mentioning that in the region South-East, even though the number of tourist reception structures and the number of places in these structures had a negative trend, the tourist accommodation capacity in operation in the period 2007–2017 had a positive evolution, which reveals that the tourist accommodation capacity has been more efficiently used in the region South-East.

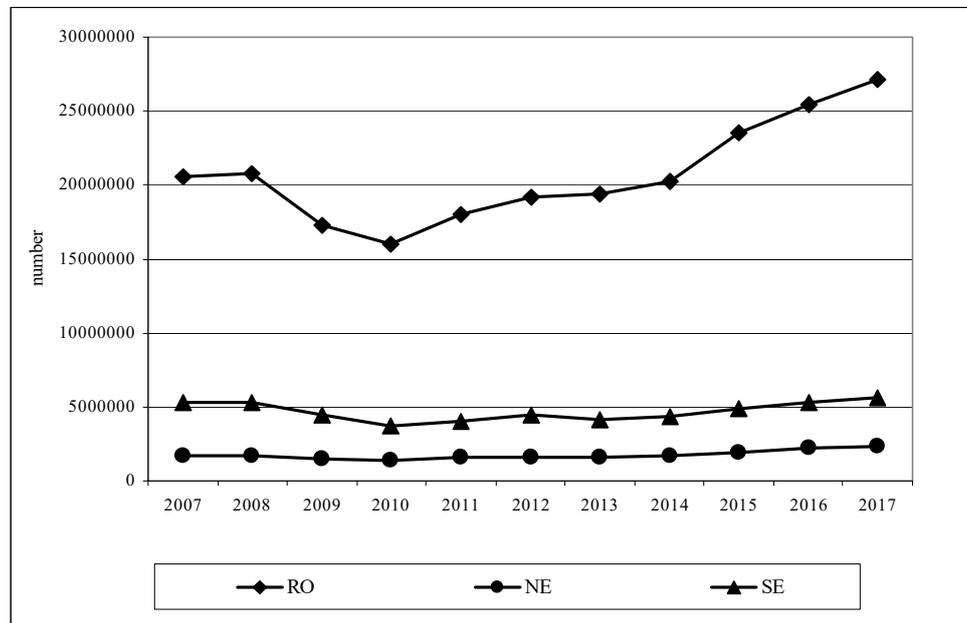


Source: Based on NIS data, www.tempo-online (TUR103B).

Figure 2. Tourist accommodation capacity in operation.

In the year 2017, the tourist accommodation capacity in operation was by 12.3% higher than in 2007 in the region South-East. The number of tourists who arrived in the region South-East was higher than the number of tourists who arrived in the region North-East. This is explained by the presence of the Black Sea and the Danube Delta, as tourist attraction points mainly in summertime. Although fluctuating, the number of visitors was higher in the year 2017 than in 2007 in both regions.

In the two investigated regions, similarly to the national level, the number of tourist arrivals in the tourist reception structures had a fluctuating trend. The economic crisis led to the compression of tourist circulation. In the year 2007, the number of tourist arrivals in the two regions accounted for 27.9% of total, while in the year 2017 this share was 23.3% of the total number of tourists at national level.



Source: based on NIS data, www.tempo-online (TUR105D).

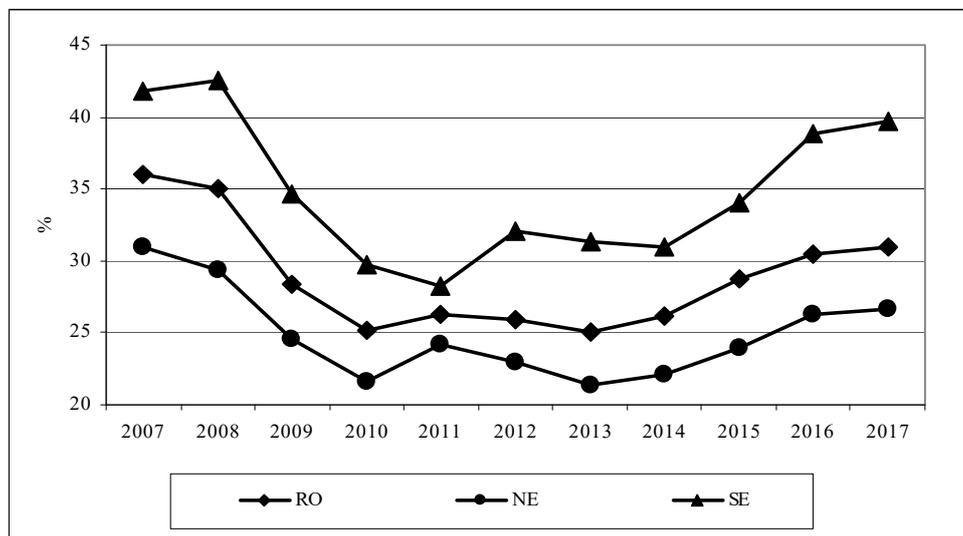
Figure 3. Overnight stays of tourists in Romania and in the two regions.

The number of tourists who stayed overnight in different tourist reception structures nationwide had an oscillating evolution; a similar evolution was also found at the level of the two development regions, in the region South-East in particular, which has a high tourism potential, but much more exposed to fluctuations in tourists' preferences and expectations with regard to accommodation services. Yet a difference exists. The region North-East is less vulnerable as it has tourism attractions offered throughout the year, unlike the tourism seasonality specific to the seaside and the Danube Delta.

Throughout the investigated period, about one-third of tourists who stayed overnight in different tourist reception structures opted for the two regions, which reveals once again the tourism importance of these regions. In the year 2007, the number of tourists who stayed overnight in the two regions accounted for 33.9% of the national level, and 29.2% in the year 2017. By comparison, a much higher number of tourists stayed overnight in the region South-East than in the region North-East.

The net use index of accommodation capacity, both nationwide and at the level of the two development regions significantly decreased in the period 2007–2017. At national level, this index had a maximum value of 36% in the year 2007, while in the year 2017 it decreased by over 5%, to reach 30.9%. The same decreasing trend can be noticed for the net use index of accommodation capacity in the region North-East, from 30.9% in 2007 to 26.6% in 2017 and in the region South-East, from 41.8% in 2007 to 34.1% in 2017. This decrease of the net use index of the tourist accommodation capacity, both nationwide and at the level of the two development regions, indicates that a regress in the activities in this sector took place. The decreasing level of the net use index of accommodation capacity may be attributed to the negative effects of the economic and financial crisis that led to the diminution of population's incomes and to the contraction of demand for tourism services implicitly.

In the region North-East, the low net use index of accommodation capacity, as against the national average and the other analyzed region, also indicates other causes, such as: low accessibility to certain tourism zones, poor quality of services provided in certain tourism areas, unequal modernization of existing infrastructure, poor promotion of existing tourism potential.



Source: authors' own calculations based on NIS data.

Figure 4. Net use index of accommodation capacity in Romania and in the two regions.

The net use index of tourism accommodation capacity in the region South-East was clearly higher than that in the region North-East throughout the investigated period. Moreover, in the region South-East this index value was higher than the national average. The calculated values show that tourists are more attracted by the picturesque areas of this region, by the much more varied tourist offer and by the adequate conditions, which make them opt for this region as tourism destination. At the same time, the removal of inadequate structures and focusing the investments on those activities attractive for tourists led to a more efficient tourism in the region.

In the region South-East, the average duration of tourists' stay was noticeably higher than that in the region North-East and than the national average.

Table 2

Average length of stay in Romania and in the two regions (number of days)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
RO	3.0	2.9	2.8	2.6	2.6	2.5	2.4	2.4	2.4	2.3	2.2
NE	2.4	2.3	2.3	2.2	2.2	2.2	2.1	2.1	2.1	2.0	2.0
SE	4.3	4.1	3.8	3.6	3.6	3.6	3.6	3.6	3.6	3.5	3.4

Source: authors' own calculations based on NIS data.

The average length of stay, both nationwide and in the two regions had a decreasing trend. A short length of stay reveals a high mobility of tourists, their program including visits to several places, but with shorter stays in the same area. At the same time, this situation also has some other causes, factors that have contributed to the recent evolutions, namely: low incomes in the investigated period, poor quality of services for certain accommodation structures, diversified supply, both at national and international level, modification of tourism consumer behaviour. This type of stay is the equivalent of itinerant or circulation tourism. On the other hand, a longer length of stay reveals a lower mobility of tourists. This type of stay is equivalent to stay tourism and can be longer or shorter.

5. CONCLUSIONS

Owing to the existing natural and anthropic factors, there is a wide range of practiced tourism forms in both development regions, mostly being common forms. The existence of the Black Sea shore and of the Danube Delta on the territory of the South-East region confers a unique status of this region, which is also similar to the development of its particular form of tourism, namely summer tourism.

In the region North-East the tourist reception structures had an upward trend in the period 2007–2017, while in the region South-East the trend was similar to that at national level, i.e. a downward trend. By comparison with the national level, an extremely important share of tourist reception structures was found in the two regions, in the investigated period.

The analysis by types of tourist reception structures revealed significant differences between the two regions: in the region North-East the tourist and agro-tourist boarding houses prevailed, while the hotel and tourist villa structures prevailed in the region South-East.

In the investigated period, the tourist accommodation capacity increased in the region North-East, but it decreased instead in the region South-East. However, the tourist accommodation capacity in operation followed an increasing trend in both regions.

In the year 2017, the number of tourists who arrived in the two development regions was higher than in 2007, a similar trend to that at national level. In the region South-East, the number of tourist arrivals was higher compared to that in the region North-East.

The two indices that were calculated on the basis of statistical data revealed the following: i) the net use index of accommodation capacity in the region South-East was higher than that of the region North-East and the national index. In dynamics, this index decreased both nationwide and in the two regions; ii) the average length of stay had higher values in the region South-East, by comparison with the region North-East and the national average. Yet in dynamics, this index also decreased both nationwide and in the two investigated regions.

To sum up, we can make the following comments with regard to the main factors that have influenced tourism evolution in the investigated regions. There are *negative factors*, such as: economic crisis outbreak, legislative changes in the year 2011, with regard to the new classification and authorization conditions, more attractive international tourism offers; *positive factors*: internal and external promotion campaigns; *both negative and positive factors*: provided services and prices practiced, tourism seasonality for the region South-East, changes in tourism consumer behaviour.

REFERENCES

1. *** Honţuş, Adelaida, Cristina, (2014), *Analysis of tourism demand and supply – one of the essential elements of an area in tourism planning*, in Scientific Papers Series management, Economic Engineering in Agriculture and Rural Development, vol. 14, Issue 1, pag. 147, http://managementjournal.usamv.ro/pdf/vol4_1/Art23.pdf
2. *** Popescu, Agatha, (2016), *Research on the economic efficiency in Romania's tourism*, in Scientific Papers Series management, Economic Engineering in Agriculture and Rural Development, vol. 16, Issue 1, pag. 411, http://managementjournal.usamv.ro/pdf/vol.16_1/Art64.pdf
3. *** ADR Nord-Est, Nord-Est Regional Development Plan 2014–2020, <http://www.adrnordest.ro/>
4. *** ADR Nord-Est, Nord-Est Regional Development Plan 2007–2014, chapter 1.6. Tourism, <http://www.adrnordest.ro/>
5. *** ADR Nord-Est, Nord-Est Regional Development Strategy 2014–2020, <http://www.fonduri-structurale.ro/>
6. *** Sud-Est Regional Development Agency (ADR SE), (2014), *Sud-Est Regional Development Plan 2014–2020*, <http://www.adrse.ro>
7. *** NIS, database available on www.tempo-online