

Measuring the Regional Tourism Activity in Romania: an EU Pre- and Post-Accession Comparative Analysis

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Abstract

Tourism is one of the industries that recorded notable increases in the last decades. Emergence of the regional policy and of EU regions has led to the necessity of tourism analysis according to its regional profile. We will try to outline an overview of the place and role of tourism in the regional development policy and in the achievement of its objectives. In this article we aim to observe the distribution of tourism activity at regional level in Romania, both before EU accession and after accession. Moreover, choosing the two moments (2 years before and 2 years after EU accession) allows us to highlight a possible influence of this process on regional configuration in terms of tourism. We use the aggregation of 7 tourism indicators, which will lead to a single ranking of tourist activity. Following this analysis, we see both the development of tourism in each region and any possible changes between the periods before and post-accession, in terms of the contribution of each region to the national tourist activity.

Key words: *tourism, regional development, Romania, EU accession, tourism activity measuring, tourism indicators, relative distances method*

JEL Classification: *L83, R59*

Introduction

Tourism is one of the fields of activity which has registered impressive development in the last decades, evolving from an activity with limited importance to one of the greatest industries on earth. Besides this, the development of tourism has also stimulated other related economic sectors.

Tourism is also considered an essential factor in the regional development process, both in the EU and in Romania, which is why it is present in the Regional Operational Program, an important part of the Regional Development Policy. The analysis of tourism from a regional perspective has become necessary as a result of the development regions creation in the European Union, of the decentralization trend and of the role of structural funds which follow the EU directives for social and economic cohesion (mainly the *European Fund for Regional Development*).

The regional development policy of EU aims at diminishing the existing regional imbalances, while stimulating a balanced development and revival of the areas with delayed development. The regionalization has become a common tendency in the process of territorial organization of

the EU states; non-administrative areas have been created with the purpose of absorbing funds - especially the European Fund for Regional Development (EFRD).

The tourism activity can stimulate the internal development of a region, reduce the regional imbalances and geographically redistribute the welfare from the metropolitan areas towards the poor, peripheral ones. The development of tourism can also stimulate other related economic sectors, contribution which is known as multiplier effect of tourism. Thus, the respective sector contributes, directly or indirectly, to the economic growth.

Regarding the general coordinates of the regional development frame in Romania, it has to be mentioned that the Regional Development Agencies, afferent to the 8 regions, have the essential role in implementing the corresponding policies.

The Role of Tourism in Achieving the Regional Development Objectives

In the frame of the regional development policies conducting, tourism is, undoubtedly, a highly important sector. We are going to mention a few reference points concerning the place and the role of the tourist phenomenon within the regional development policy. A large number of the objectives suggested in the context of the regional development policies can be carried out by stimulating tourism, which has some undeniable advantages. Next, we are intending to briefly present some arguments sustaining the importance of tourism for regional development.

Tourism in Romania has necessarily to be a part of the sustainable regional development, together with the other components of the local economy. This situation is mainly explained by the fact that tourism is a clean industry, which *does not affect environment and needs little investments*. The expenditure becomes even less if a sustainable development project is very well integrated in the frame of a regional development program. It is important to mention that a great number of remote, peripheral areas, some of them poor, too, have been included in the tourist market. In these areas tourism has become a source of new jobs and income, being in the same time a part of the economic development policies. Some strategies propound the consolidation of the local SMEs (in several sectors, including tourism) in order to create new jobs and to obtain new income. In this way we can stop the cashed money leaking outside the local economy, fact which takes place in the presence of the multinational operators.

The general objective of the regional development policy, namely *diminishing the existing regional imbalances*, can also be fulfilled by stimulating the areas with a tourist potential for which tourism could represent a way of increasing the living and progress standard (especially in rural areas). The development of tourism through the exploitation of the existing potential can lead to the achievement of one of the objectives suggested by EFDR, *the stimulation of the development and the structural adjustment in the needy areas* (with a GDP per capita inferior to the level of 75% of the community average). *The favoring of the economic and social reconversion of the areas with structural difficulties*, another objective of EFDR, can also be achieved through the development of tourism, in the same time with the employment of a part of the unoccupied population in the declining rural or urban areas. The funds from EFDR explicitly support *the development of tourism and the investments in the cultural and natural heritage, on condition that they create new jobs*.

There are, of course, other activities which are encouraged by the FEDR funds, such as increasing the potential of the infrastructure, which can contribute, directly or indirectly, to the development of that area due to the stimulation of some activities, including tourism. Tourism can stimulate the internal development of a certain area, diminish the regional imbalances and geographically redistribute the welfare from the metropolitan areas towards the poor, peripheral ones. Thus, tourism turns out to be a *viable alternative of developing* various areas. In this

context, grace to its geographical position and its rich natural and anthropogenic potential, Romania has every chance to become highly appreciated by tourists, as long as the necessary strategies of tourism development are conceived, implemented and promoted, both at national and regional level.

The recent regional development policies and plans pay more and more attention to tourism. This is considered to be a strategic sector that can ensure a dynamic and lasting economic growth of some areas which have an important tourist potential. However, there still seems to be some deficiencies regarding the materialization of these strategies, fact rendered obvious by the poor progress registered by tourism in Romania.

The idea that *tourism* is an important factor which needs to receive special attention is also illustrated by its presence in the Priority Axis 5 of the 6 ones existing in the Regional Operational Plan - Regio (POR). *The Priority Axis 5* of the Regional Operational Plan entitled "*The Development and Promotion of Tourism*", receives 15% from the POR budget and contains 3 *important sectors of intervention*. We notice that a greater extent within the Axis is given to the Priority Sector that deals with infrastructure and exploitation of natural resources, followed by the one referring to cultural tourism. It is logical that money intended for promotion is in a smaller amount, as this activity is less expensive compared to the others within the Axis. The manner in which this Priority Axis 5 is organized makes us believe that the focus was on the improvement of those aspects of the Romanian tourism considered to be insufficiently developed: exploiting the natural and cultural potential, modernizing infrastructure and making promotion efficient. We believe that there is also another complementary aspect worthy of attention, namely assisting the people who wish to make use of such funds, in order to ensure a better utilization of these resources. The funding of Axis 5 and its Intervention Sectors is covered 78.08% by EFDR. This is a positive thing, as most of the expenditure is covered by EFDR, and so, the national budget is not too much exploited compared to the obtained results.

If we refer to the fund granting, things seem to be well organized. One possible problem refers to the necessity that these funds should be accessed and used in due time limit. The aspects which need careful observance are the difficulty of accessing funds and the difficulties of authorities in terms of organization. Despite a seeming concision and simplicity in organization, the access to these programs and their efficiency have been relatively low, at least in the first 4 years after Romania's accession to EU (2007-2010). The level of fund-absorption can be considered modest, both for Structural Funds and the Priority Axis 5 of POR (proved by the modest progress of tourism in the post-EU accession years).

So, compared to the EU countries from the central and eastern part of Europe, Romania has registered the lowest level of fund contracting and absorption. This situation could be explained by a series of factors, such as: exaggerated bureaucracy, difficulty in accessing European funds, lack of initiative and poor involvement of authorities in stimulating economic agents to use such resources.

Yet, in Romania, POR (together with POSDRU) is the program with the highest level of contracting and absorption (significantly higher than the average level): 70% and, respectively, 13% for the first 4 years from the period 2007-2013¹. According to the data from the Authority for Coordinating Structural Instruments (ACIS), 4300 projects amounting to 9.7 billion euros have been approved and 2500 contracts to the sum of 5.3 billion euros have been signed.

We consider that there are still steps to take in order to increase the absorption level of Structural Funds. As it has already been presented, in the first years after our country's accession to EU, this level was not very high. However, we can notice a certain progress in the authorities' attitude, since 2007. In this case, we could conclude that tourism has every chance

¹ KMPG, *E.U. Funds in Central and Eastern Europe, Progress Report 2007-2010*, 2011, p.39

of becoming the development engine for all the areas with tourist potential if we take advantage of all these opportunities.

The investments in tourism and culture will allow the developing areas to use the advantages offered by their tourist potential and their cultural heritage. In this way, distinct regional identities will be identified and consolidated, the competitive advantages will be improved in those sectors with great value added and high qualitative and cognitive content, both on the traditional markets and on the new, emerging ones².

The exploitation of the tourist attractions from various areas of the country can contribute to the economic growth of some urban centers in decline. This can be carried out by supporting the setting up and consolidation of the local companies. In this way, the regions with low economic competitiveness will turn into attractive areas for investors.

As we have already presented, the Priority Axis 5 of Regio aims at improving the infrastructure of the tourist areas, the accommodation and leisure services, together with a strong promoting of Romania's image both nationally and internationally. The implementation of this Axis is expected to bring about a qualitative improvement, at European standards, in the whole set of conditions required for practicing tourism, having as direct impact the increasing demand for tourism in Romania, as a European tourist destination. However, in the process of modernization and adaptation of tourist services to the demand, it is necessary also to measure the customer satisfaction. The advantage of measuring the global quality of products is providing valuable information to the economic agents about the qualitative level of several subsystems that come in direct contact with customers and influence their level of satisfaction³.

The Hierarchy of Regions, in Terms of Tourist Activities, Based on the Method of Relative Distances (before and after the EU Accession)

We will further investigate the manner in which the tourist activity in Romania is regionally spread. We will also notice if the regional distribution of the tourist activity has changed in the post-accession period compared to the pre-accession one. In order to get a general picture of the tourist activity at regional level, we are going to analyze the evolution of *seven indicators* at the developing regions level:

- the existing accommodation capacity;
- the number of tourists arriving in tourist accommodation structures;
- the number of overnight stays in the tourist accommodation structures;
- the indicators of occupation rate;
- the share of the turnover of hotels and restaurants (HR) in all;
- the share of the gross investment of HR in all;
- the share of the average number of employees of HR in all.

The comparison will refer to the situations from 31 December 2004 and 31 December 2008 (2 years before Romania's accession to EU and, respectively, 2 years after this moment).

The investigation we are going to carry out is intended to make a classification of regions in terms of the level of tourist activity, taking into consideration a multitude of indicators. This multifactorial hierarchy is important for quantifying the existing gaps and building some development strategies. Moreover, the choice of the two moments (2 years before and after EU accession) gives us the possibility to point out a possible influence of this process upon the

² Ministry of Development, Public Works and Housing, *Regional Operational Programme 2007-2013*

³ Stancu, A., Globalizarea calității versus calitate globală, *A XI-a Sesiune de Comunicări Științifice a Cadrelor Didactice cu participare internațională*, „Creșterea Competitivității Economice a României în Contextul Integrării în Uniunea Europeană”, 19-20 mai 2006, Universitatea Româno-Americană Bucharest, pp.115-119

regional configuration of tourism. We prefer to use the data from 2008 and to avoid the ones from 2009 and 2010, when the tourist activity registered some circumstantial decreases caused by the global economic crisis. The aggregation of the selected factors will lead to a single classification of the tourism activity.

Although many elements of the hierarchies corresponding to each of the 7 indicators have not changed in these 4 years, we can still notice a few changes in these rankings of the regions. Most of the regions have registered some increase in the absolute values of the indicators (Table 1).

Table 1. The values of the indicators to be used for evaluation of tourism activity at regional level in 2004 and 2008

Region	Existing accommodation capacity, in development regions (number of beds)	Arrivals of tourists in tourist facilities, in development regions (thousands)	Overnight stays in tourist facilities, in development regions (thousands)	Indices of capacity in function utilization (%)	Share of HR turnover in total (%)	Share of HR gross investment in total (%)	Share of HR average number of employees in total (%)
2004							
North-West	24576	698	2221	33.2	1.04	2.15	2.66
Center	34365	986	2665	29.4	1.26	3.05	2.99
North-East	17183	619	1490	29.5	0.90	2.05	2.35
South-East	130854	1133	5397	39.2	1.14	4.67	3.28
South-Muntenia	22494	576	1782	27.7	0.72	0.88	1.73
Bucharest-Ilfov	11467	730	1359	35.3	0.91	1.34	2.39
South-West Oltenia	13936	361	1648	44.5	0.94	1.79	2.57
West	21066	536	1939	35.9	1.06	1.89	2.63
2008							
North-West	26484	908.1	2536.9	32.7	1.35	2.56	2.30
Center	39302	1291.5	3152.1	30	1.35	3.78	2.83
North-East	18986	725.6	1676.8	29.3	1.43	2.84	1.96
South-East	132668	1308.6	5317.6	42.5	1.57	3.60	2.82
South-Muntenia	21464	750.2	2115.9	32.8	0.91	1.76	1.62
Bucharest-Ilfov	18937	1038.1	2212.9	34.6	0.95	2.52	2.63
South-West Oltenia	14973	429.4	1730.2	41.2	1.23	1.61	1.97
West	21396	673.8	1983.6	35.1	1.26	1.79	2.28

Source: *Romanian Statistical Yearbook*, INS, Bucharest, 2005, p.740 and 2009, p.968; *Statistici teritoriale 2008*, pp.584-598; *Statistici regionale* http://www.insse.ro/cms/files/statistici/Statistici_teritoriale2007/rom/57a.htm; www.insse.ro.

Due to the fact that each indicator leads to different classifications, we consider it important to have a single hierarchy which will take into account all the 7 essential indicators for the tourism activity. This is possible only by using *the method of the ranks or the method of the relative distances*.

The method of the ranks implies a classification of units, in turns, based on each indicator that is analyzed. The assigning of ranks is as follows: rank 1 corresponds to the unit which has the

highest value, the maximum rank (equal to the number of the investigated units) will be assigned to the unit with the smallest value. After repeating this procedure for each indicator, we will add up the ranks assigned to each unit, thus obtaining the total score, which will be the basis of the final rank.

As the method of the ranks levels the differences among regions, replacing them with an arithmetic progression with ration 1, we will use *the method of the relative distances*. This implies creating a fictitious unit which is characterized by maximum qualitative performance, based on the level of the analyzed units. Then, we choose a method of calculation of the distances between the real units and the fictitious unit, for each characteristic that is studied. Finally, there comes the aggregation of the results obtained for every real unit. In our research, the expression of the distance noticed at every analyzed characteristic will be under the shape of the coordinating relative dimension, calculated for each region, by reference to the unit with maximum qualitative performance. The basis of comparison is the maximum variation of every characteristic, so the comparisons of units will be between 0 and 100%. The calculation of the average synthetic index was realized by using the geometric average. Table 2 presents the calculation made so as to determine *the average synthetic index*.

Table 2. Hierarchy of development regions of Romania, based on statistical indicators of tourism, using the relative distances method

Region	Relative distance according to capacity of existing accommodation	Relative distance according to tourist arrivals in tourist units	Relative distance according to overnight stays in tourist units	Relative distance according to capacity in function utilization indexes	Relative distance according to share of HR turnover in total	Relative distance according to share of HR gross investment in total	Relative distance according to share of HR average number of employees in total	Average Synthetic Index (%)	Final rank
2004									
North-West	18.78	61.61	41.15	74.61	82.54	46.04	81.10	52.47	3
Center	26.26	87.03	49.38	66.07	100.00	65.31	91.16	64.08	2
North-East	13.13	54.63	27.61	66.29	71.43	43.90	71.65	43.50	5
South-East	100.00	100.00	100.00	88.09	90.48	100.00	100.00	96.81	1
South-Muntenia	17.19	50.84	33.02	62.25	57.14	18.84	52.74	37.38	8
Bucharest-Ilfov	8.76	64.43	25.18	79.33	72.22	28.69	72.87	40.22	7
South-West Oltenia	10.65	31.86	30.54	100.00	74.60	38.33	78.35	42.04	6
West	16.10	47.31	35.93	80.67	84.13	40.47	80.18	48.18	4
2008									
North-West	19.96	69.39	47.71	76.94	85.99	67.72	81.27	58.72	3
Center	29.62	98.69	59.28	70.59	85.99	100.00	100.00	72.49	2
North-East	14.31	55.45	31.53	68.94	91.08	75.13	69.26	50.33	5
South-East	100.00	100.00	100.00	100.00	100.00	95.24	99.65	99.26	1
South-Muntenia	16.18	57.33	39.79	77.18	57.96	46.56	57.24	46.06	7
Bucharest-Ilfov	14.27	79.33	41.61	81.41	60.51	66.67	92.93	54.55	4
South-West Oltenia	11.29	32.81	32.54	96.94	78.34	42.59	69.61	42.99	8
West	16.13	51.49	37.30	82.59	80.25	47.35	80.57	50.02	6

Source: calculated from data in Table 1

Next, we will draw up the graphic representation of the hierarchy of the development regions in Romania for 2008, based on the statistic indicators of the tourism, using *the method of the relative distances* (Figure 1).

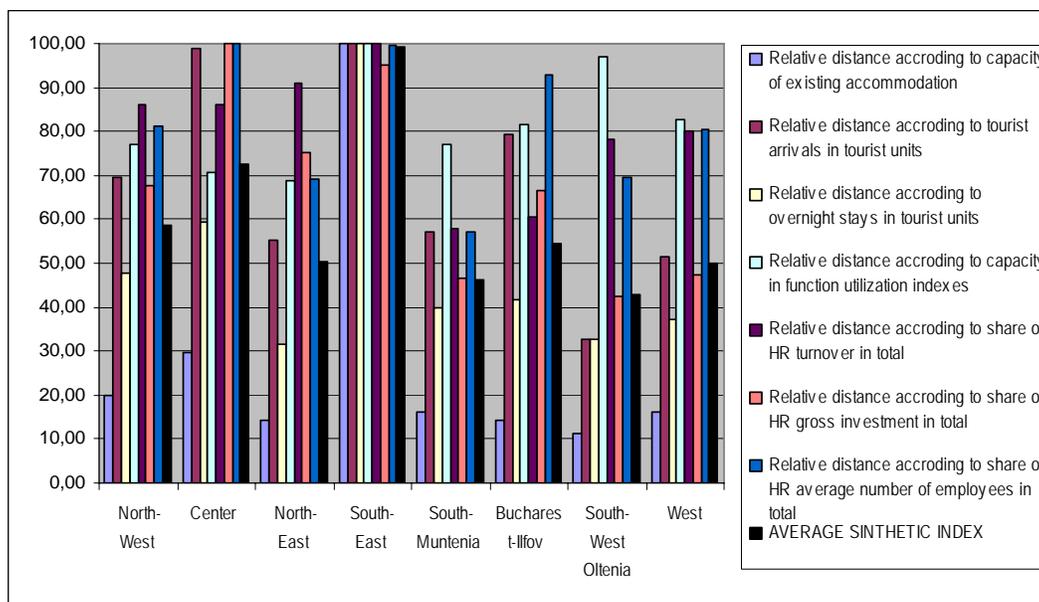


Fig. 1. Hierarchy of development regions of Romania for 2008, based on statistical indicators of tourism, using the relative distances

Source: elaborated from data in Table 2

We can notice that the intensity degree of the indicators is quite heterogeneous, certain regions having high values for some indicators, and low values for other ones. The role of the average synthetic index is to unite the seven classifications which could be obtained by ordering regions according to each of the 7 indicators, in a single hierarchy. This results in one classification referring to the tourist activity, in general.

By analyzing the indicators in Figure 2 we notice the existence of some relative increases in the tourism activity in most of the regions, compared to the maximum value of the synthetic index. Thus, the differences among areas in terms of tourism activity reduced.

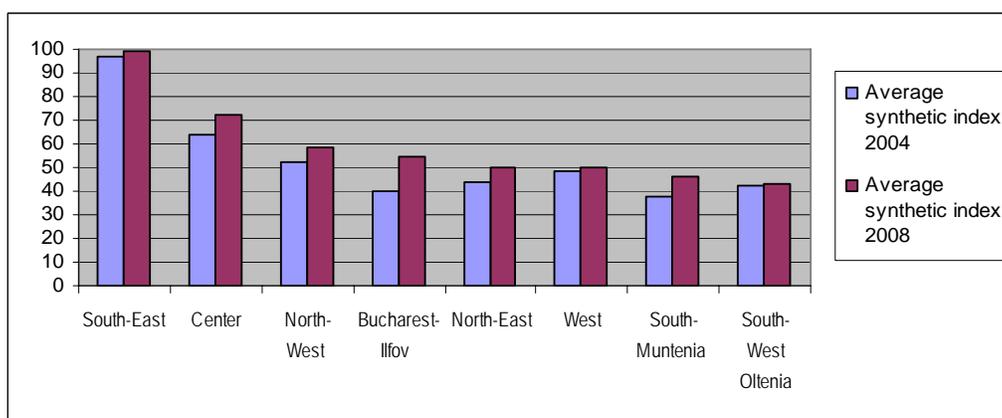


Fig. 2. Average synthetic index for 2004 and 2008 (%)

Source: elaborated from data in Table 2

The analysis of the previous graph shows that in 2004 the first position belonged to the South-East area, followed at a high distance by the Center, North-West, West, North-East, South-West Oltenia, Bucharest-Ilfov and South-Muntenia. In 2008, on the first place there was still the South-East region, followed at a big distance by Center, North-West, Bucharest-Ilfov, North-East, West, South-Muntenia and South-West Oltenia.

Although, to a large extent, the classifications of 2004 and 2008 are not very different, there are some notable differences. Thus, the lower growth of tourism activity registered in the West and South-West Oltenia regions, compared to other regions, determines their inferior positions in the classification of 2008, compared to that existing in 2004. The situation is reversed for Bucharest-Ilfov region, whose high rhythm of growth determines its positioning on the fourth place in 2008 (from the seventh place in 2004). By comparing the situations of the tourism activity of 2004 and 2008, we can notice that the inter-regional differences are gradually fading, as a result of a higher growth registered in some areas.

The graphical representation below (Figure 3) illustrates the importance of the tourist activity in every region, having as calculation basis *the average synthetic index*, previously obtained through the method of relative distances. Thus, we notice that in 2008 the South-East region had 20.92% of total, being followed at a big distance by the Central (15.28%) and North-West (12.38%) regions. The proportions for the other regions illustrate a fairly balanced distribution of the tourism activity.

By comparing the regional distribution of this field of activity in 2008 with the one in 2004 we see that there have been no important changes. Small increases have been registered in the Center, North-West, North-East, Bucharest-Ilfov, West, South-Muntenia, and insignificant decreases have been reported in South-East and South-West Oltenia. The highest growth rate of the tourism activity was reported in Bucharest-Ilfov area, from 8.78% to 11.50%.

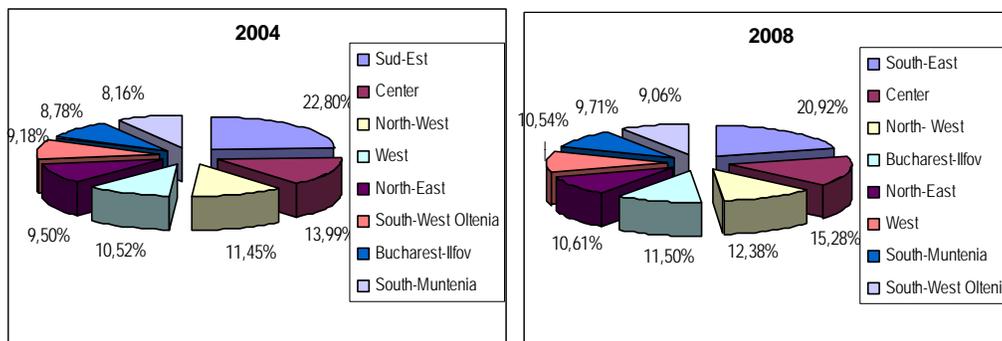


Fig. 3. The share of tourism activity in regional profile, by average synthetic index in 2004 and 2008

Source: calculated from data in Table 2

Thus we notice that the regions with the most intense tourism activity are South-East, Center and North-West, where there is a notable tourist potential. The Bucharest-Ilfov region is also known for its business tourism, together with the cultural attractions. As far as the contribution of each region to the national tourism activity is concerned, there are no visible changes between the pre and post accession moments.

Conclusions

Romania's accession to EU had no significant impact on the course of tourism activity, mainly because of an insufficient exploitation of the existing opportunities (attracting tourists from EU, accessing Structural Funds).

Through a more intense development of tourism, this sector could become an essential component of economy in some areas (especially in the places where there is potential but limited possibilities of economic development). Therefore, tourism could contribute to the improvement of the social-economic development standards in the areas with a low GDP (for instance, North-East, South-West Oltenia, South-Muntenia regions). Consequently, it is necessary to exploit the existing potential in those areas favorable to certain types of tourism, taking into account that no region can fit homogeneously for tourism activities.

Besides the South-East area (which includes the seaside), there are other areas which have an important potential for developing mountain, cultural and religious tourism. The expansion of infrastructure is a prerequisite for developing tourism in these areas. Lately, there has been noticed a certain intensification of tourism. We anticipate a continuation and even a boost of this trend, especially with the perspective of attracting EU tourists.

The comparison of the 8 regions in terms of tourism highlighted the opinion that the differences between them were reduced, fact explained by the intensification of the tourism activity in the majority of regions.

The present research allows us to state that, as far as the contribution of each region to the national tourism activity is concerned, there are no significant changes between the pre- and post-accession moments. However, we need to add that the regional distribution is more balanced.

Tourism development will determine the impact of its multiplier effect. The positive results will reflect on people's income and on the other sectors of activity that are not directly related to tourism.

The development of tourism leads to the boost of other sectors connected to it. The concept of multiplier effects, determined by the revenues / expenditures in tourism, becomes relevant as long as a significant number of sectors benefit from the tourism activities.

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Comensurarea activității turistice la nivel regional în România: o analiză comparativă ante-și post-aderare la UE

Rezumat

Turismul este una din industriile care a înregistrat creșteri notabile în ultimele decenii. Apariția politicii de dezvoltare regională și a regiunilor în UE a condus la necesitatea analizei turismului și în profil regional. Vom încerca să conturăm o imagine de ansamblu a locului și a rolului turismului în cadrul politicii de dezvoltare regională și în îndeplinirea obiectivelor acesteia. În acest articol ne propunem să surprindem modul de repartizare al activității turistice la nivel regional în România, atât înaintea aderării la UE, cât și după aderare. Mai mult decât atât, alegerea celor două momente (cu 2 ani înainte și după aderarea la UE) ne permite să evidențiem și o posibilă influență a acestui proces asupra configurației regionale în ceea ce privește turismul. Vom recurge la agregarea a șapte indicatori turistici, care va duce la un singur clasament al activității turistice. În urma acestei analize, vom observa atât nivelul de dezvoltare a activității turistice în fiecare regiune, cât și eventuale modificări între perioada ante- și cea post-aderare, sub aspectul contribuției fiecărei regiuni la activitatea turistică națională.