

Territorial Structural Changes of the Supply in Romanian Rural Tourism Accommodation

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Abstract

The supply of tourist accommodation in rural areas has shown a general upward trend since 2000, despite a slight decline during the global financial crisis, whose effects were manifested in 2009-2011. On the other hand, the changes which Romania faced with the transition to a market economy have affected the tourism, having especially significant implications for the rural tourism activity due to modifications in vacation destinations. The paper presents a detailed analysis of the rural tourist accommodation transformations in time (2000-2012) and space (by region and county) in structural terms.

Keywords: *rural tourism supply, agro-tourist boarding houses, economic development regions*

JEL Classification: *C1, L11, L83, O18*

Introduction

The resilience of tourism to the negative effects of financial crisis worldwide manifested after 2008 was proved, among other things, by the evolution of rural tourism, represented by activities carried out in and by the rural communities to satisfy human needs, such as the desire of modern man to return to nature.

The practice of rural tourism is therefore a reorientation of the leisure priorities in relation to purchasing power and the rural communities have advantageous offers in this regard. Currently, returning to nature is a trend that is manifested throughout Europe.

Although many studies considered some time ago, that rural tourism is a poor area of value-added manufacturer, researcher and analyst views have changed in recent years. Thus, a European Commission survey shows that a decline in agricultural income as a result of changes in systems of care and support provided to this sector, and the growing concerns for the sustainability of economic development, as well as intensified efforts of local institutions, supported by European Structural Funds awards resulted into a diversification and an increase in rural tourism destinations, as well as increased activity in this area. As a result, there has been a

change in the rural tourism market, characterized by a reduction in travel time, a top concern for human health and the environment.

Thus, the demand for all kinds of specific rural tourism accommodation has increased along with the raising of standards in terms of minimum seasonal changes specific to this type of tourism (European Commission, *Towards Quality Rural Tourism*, 2000). EUROSTAT (European Commission, EUROSTAT, *Statistics Explained, Rural Development Statistics by urban-rural typology*, 2013), shows that in Europe, predominantly in rural regions, the share of services in regional GDP was lower in 2010 compared to predominantly urban and mixed regions (64.8% in predominantly rural regions, compared to 78.6% in the predominantly urban). In almost all European countries (except for the Netherlands and Romania), services (including tourism) contributed more than half of the value added in predominantly rural regions (46.8% in Romania). In Europe, less than one third (32.2%) of the total number of places in all collective accommodation capacities are located predominantly in rural regions.

The research objective is to assess the trends in time and space of the main indicators for assessing the supply of Romanian rural tourism accommodation: the number of agro-touristic boarding houses, existing accommodation capacity and accommodation capacity in operation-CCF.

Agro-touristic boarding houses “are tourist reception establishments having an accommodation capacity of up to 8 rooms, functioning in citizens’ dwellings or independent buildings providing tourist accommodation in special spaces as well as lunch preparation conditions and possibility to take part in household and handicraft activities” (NIS - database Tempo online).

The second indicator for assessing the supply of Romanian rural tourism accommodation is represented by the existing (installed) tourist accommodation capacity defined and presented by NIS as “the number of touristic accommodation places recorded in the last reception, homologation or classification document of the establishment of touristic reception with functions of touristic accommodation, the additional beds that can be fixed if necessary, excluded”.

Another significant indicator assessing the supply of Romanian rural tourism accommodation is tourist accommodation capacity in operation (by places-days), defined by NIS as “the number of available accommodation places for tourists in establishments of touristic reception with functions of touristic accommodation, multiplied with the number of days when the establishments are opened during the respective period”.

Regional Structural Evolution of the Rural Tourist Accommodation Supply in Romania

The presentation of the regional structural evolution of rural tourist accommodation supply includes a comparative structural analysis of each indicator in 2012 compared to 2000, in the case of the eight development regions of Romania.

Together with the increased number of agro-touristic boarding houses supply in the period 2000 – 2012, there were changes in its distribution by development regions and counties. In terms of the number of agro-touristic boarding houses (Figure 1), in 2000, over half (60.50%) were in the Central region, the other seven regions accounting for 39.5%, of which two-thirds were in the North-East 12.75%, in North-West, 8.75%, and 8.25% in South-East. At the opposite end there were regions, such as: West 1.74%, South-West Oltenia 1%, and Bucharest-Ilfov, 0.25%.

Compared to 2000, on the one hand as a result of tourism development, with different rates, by development regions, and on the other hand, due to the economic crisis triggered in 2009, the structure of the number of agro-touristic boarding houses by development regions faced

significant changes. Although the Central region ranks first, its share is almost halved, from 60.50% to 37.86%.

Decreases of the shares in the number of agro-touristic boarding houses also occurred in the South-East region (from 8.25% to 5.67%) and Bucharest-Ilfov region (from 0.25% to 0.13%). In the other five development regions, there occurred an increase in the share of the number of agro-touristic boarding houses, ranging from 2.62 percentage points in South-Muntenia to 7.31 percentage points in the North-West.

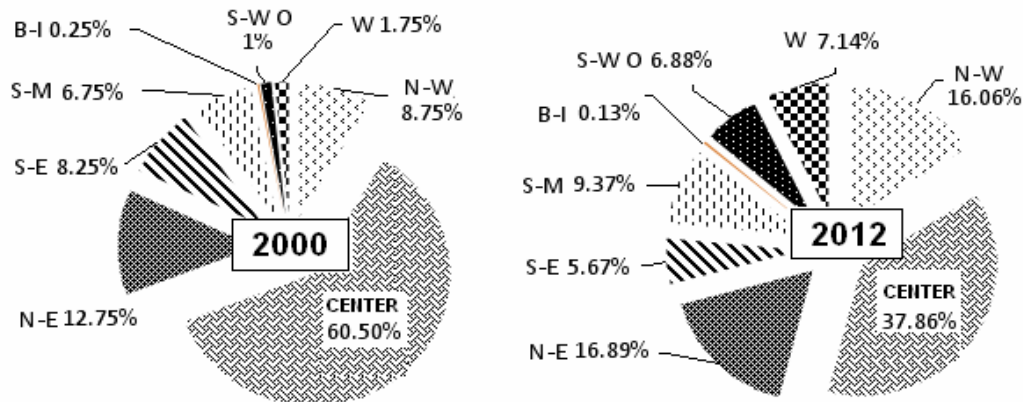


Fig. 1. Distribution of agro-touristic boarding houses by development regions of Romania

Data source: <https://statistici.insse.ro/>

The increase registered in the North-East, North-West and West regions highlights the entrepreneurs' significant growth of interest in agro-tourism in the northern and western Romania.

Analyzing the structural changes in the distribution of existing accommodation capacity in agro-touristic boarding houses in 2012 compared to 2000, we can notice (Figure 2) that they exhibit lower amplitude than the number of agro-touristic boarding houses. This is due to the increase in the average number of accommodation on the agro-touristic boarding houses which attenuated the effects of the economic crisis.

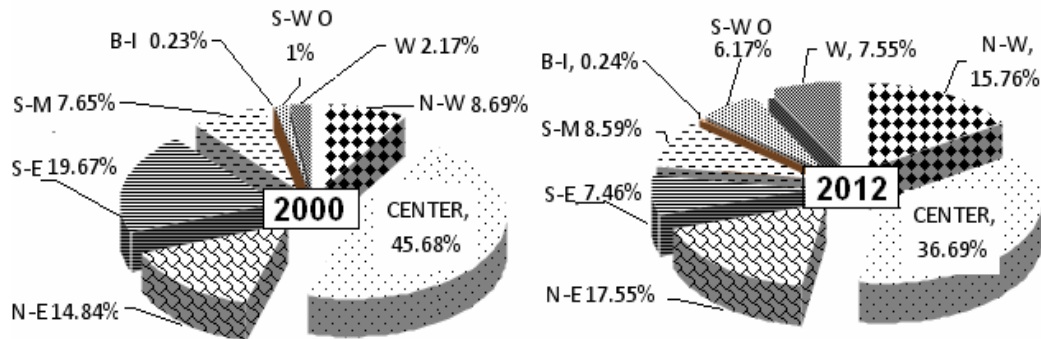


Fig. 2. Structure of the existing accommodation capacity of agro-touristic boarding houses by development regions of Romania

Data source: <https://statistici.insse.ro/>

Thus, in the Central region the share of the existing accommodation capacity in agro-touristic boarding houses in Romania was 45.68% compared to the share of the number of agro-touristic boarding houses which was 60.50%. In 2012, the share of existing accommodation capacity in agro-touristic boarding houses decreases to 36.69% (8.99 percentage points) while the share of number of agro-touristic boarding houses decreases to 37.86% (22.64 percentage points).

In the South-West Oltenia and in the West, the share of existing accommodation capacity increased at about the same rhythm with the share of agro-touristic boarding houses. In the South-West Oltenia the share of existing accommodation capacity increased by 5.10 percentage points and the share of agro-touristic boarding houses by 5.88 percentage points, while in the West the difference between the two shares is only 0.01%. In conclusion, in these two regions, the average existing accommodation capacity per agro-touristic boarding houses remained constant.

In terms of the evolution of the average existing accommodation capacity per agro-touristic boarding houses in the South-East region, there is a special situation. In this region, the share of existing accommodation capacity decreased by 12.21 percentage points (from 19.67% in 2000 to 7.46% in 2012), while the share of the number of agro-touristic boarding houses fell by 2.58 percentage points. In conclusion, while in other regions the average existing accommodation capacity per agro-touristic boarding houses increased (Central, North - East and South Muntenia) or remained approximately constant, whereas in the South-East region it decreased.

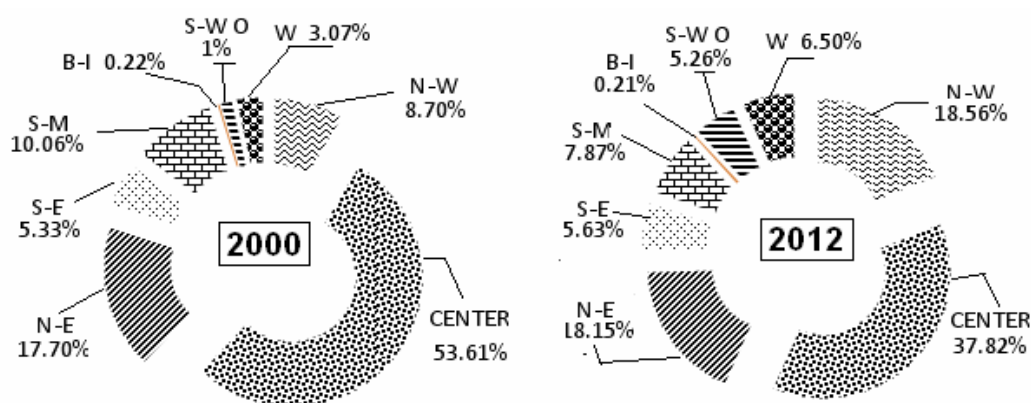


Fig. 3. Structure of accommodation capacity in operation in agro-touristic boarding houses, by development regions of Romania

Data source: <https://statistici.insse.ro/>

Accommodation capacity in operation, during the analyzed period, also faced structural changes in development regions of Romania (Figure 3). Of the 8 regions, two regions recorded decreases (the Centre and South-Muntenia), in three regions there was an increased share of accommodation capacity in operation in agro-touristic boarding houses (North-West, South-West Oltenia and West), while in others, the share of accommodation capacity in operation remained approximately constant.

The largest decrease in the share of accommodation capacity in operation was registered in the Center region of 15.79 percentage points. Note that this decrease with 3.58 percentage points was higher than the share of existing accommodation capacity. It is possible that this difference was a consequence of the lack of profitability of the respective accommodation capacity.

In contrast, the largest increase in the share accommodation capacity in operation occurred in the North-West by 9.86 percentage points, more precisely from 8.70% in 2000 to 18.56% in 2012. It is pointed out that in the period under review this region recorded the best development compared with other development regions in all three indicators analyzed.

One conclusion that emerges from the analysis in this chapter is that during the period under review in the regions North-West, North-East, West and South-West Oltenia, the growth rates of existing accommodation capacities and of accommodation capacities in operation surpassed the growth rates registered in the Center region and therefore their share in the agro-touristic boarding houses supply increased significantly.

The results of the effort made in these regions are part of the implementation of regional development strategies based on policies that included regional rural tourism development projects oriented towards developing a complete and complex supply of packages of quality rural tourism products which can compete with those designed by international standards.

Structural Changes of Regional Rural Tourism Accommodation Supply Registered in Romanian Counties

The information on the supply of rural tourism accommodation in Romania, both at the eight development regions level and at the counties level, has allowed the study of each region from the structural point of view in close relationship with their counties according to the three evaluation indicators.

In terms of supply of accommodation places in the agro-touristic boarding houses of the eight Romanian development regions, in the period under review, there were two emerging trends: a convergence trend, towards a balanced distribution between regions, and a divergent trend between regions with high levels of supply and regions with low supply. These processes occurred also between counties in the development regions.

Taking into account the very limited development of rural tourism in Bucharest-Ilfov region the study did not include the examination of its supply of tourist accommodation, but the focus was on agro-touristic boarding houses distributions, on existing accommodation capacities and on accommodation capacity in operation by counties in the other seven development regions of Romania, in 2012.

The North-West region includes the counties of Bihor, Bistrita, Cluj, Maramures, Satu Mare and Salaj. The structure of this region by number of agro-touristic boarding houses, existing accommodation capacity and the accommodation capacity in operation is shown in Figure 4. Most of agro-touristic boarding houses (67.47 %) are concentrated in the counties Cluj and Maramures, which together with Bihor, summed up 89.29 % of the total of agro-touristic boarding houses from the North-West.

In the other three counties, although they also have tourism potential that would promote the development of rural tourism (especially Bistrita), there is only 10.71 % (4.76 % Salaj, Bistrita Nasaud, 3.97 %, and Satu Mare 1.98 %) of the total agro-touristic boarding houses in the region. This is, among other things, a consequence of both the lack of transport infrastructure to connect major centers and the low demand, determined in its turn by the poor promotion of their tourism potential.

Regarding existing accommodation capacity and accommodation capacity in operation, taking into account the distribution of agro-tourism boarding houses per counties, they are concentrated in the great majority (88.14% of the existing accommodation capacity, and 88.04% of the accommodation capacity in operation) in Bihor, Cluj and Maramures. There are, however, differences in the ratio of their values. Thus, while in Cluj the share of accommodation capacity in operation surpasses the share of existing accommodation capacity with 4.66 percentage points, in Bihor and Maramures the ratios are reverse, the share of existing accommodation capacity surpasses the share of accommodation capacity in operation by 1.52 percentage points in Bihor and by 2.84 percentage points in Maramures.

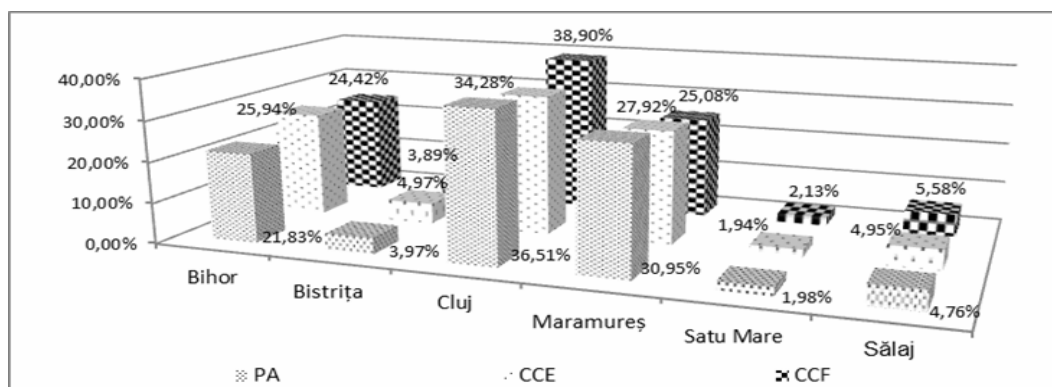


Fig. 4. Structure of North-West development region by counties and by the number of agro-touristic boarding houses, existing accommodation capacity and accommodation capacity in operation in 2012

Data source: <https://statistici.insse.ro/>

Unequal distribution by county, from the point of view of the number of agro-tourism boarding houses, existing accommodation capacity and accommodation capacity in operation, is recorded in the Center region (Figure 5), where most agro-tourism boarding houses (73.90%) are concentrated in the counties of Brasov and Harghita, while in the other four counties the share of the number of agro-tourism boarding houses in total have values between 4.21% in Sibiu and 10.27% in Alba.

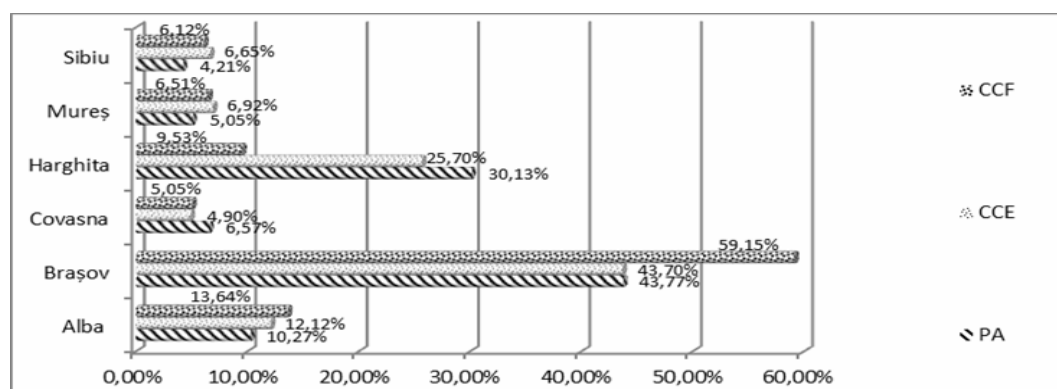


Fig. 5. Structure of Center development region by counties and by the number of agro-touristic boarding houses, existing accommodation capacity and accommodation capacity in operation in 2012

Data source: <https://statistici.insse.ro/>

The large differences between the values recorded in the counties of this region have generally similar causes to those outlined above. It should be noted that the large share of the number of agro-touristic boarding houses in Harghita is determined by the supply made by the entrepreneurs from this county for the potential tourists from Hungary. Brasov, as well, by tradition and its geographical position, favored the development of rural tourism in the area.

In six of the seven counties in the region, the shares of existing accommodation capacity and of accommodation capacity in operation register values close to the values recorded for the distribution of agro-touristic boarding houses by counties. A very special situation is recorded in Harghita. Although the share of the total number of agro-touristic boarding houses is 30.13% and the share of the existing accommodation capacity is 27.70%, the share of accommodation capacity in operation is only 9.35%, which means that almost two-thirds of the existing accommodation capacity in 2012 in this county is not used. This can represent the consequence

of the economic crisis in 2009 which had a strong impact on specific customers of agro-touristic boarding houses from Harghita.

Unequal distributions of the number of agro-touristic boarding houses, of existing accommodation capacity and of accommodation capacity in operation are also recorded in the North-East region (Figure 6). This development region includes the counties of Bacău, Botoșani, Iași, Neamț, Suceava and Vaslui. The overwhelming majority of agro-touristic boarding houses (86.79%) are concentrated in the counties Suceava and Neamț. Due to the low level of development, particularly infrastructure, on the one hand, and to the little interest to exploit the tourist potential, on the other hand, the share of agro-touristic boarding houses is only 0.38% in Botoșani.

In the other three counties, although there is tourism potential that would promote the development of rural tourism, the share of agro-touristic boarding houses is only 13.83% (4.90% in Iași, 4.53% in Bacău, and 3.40% in Vaslui) of the total region. As regards existing accommodation capacity and accommodation capacity in operation, they are concentrated also in counties Suceava and Neamț.

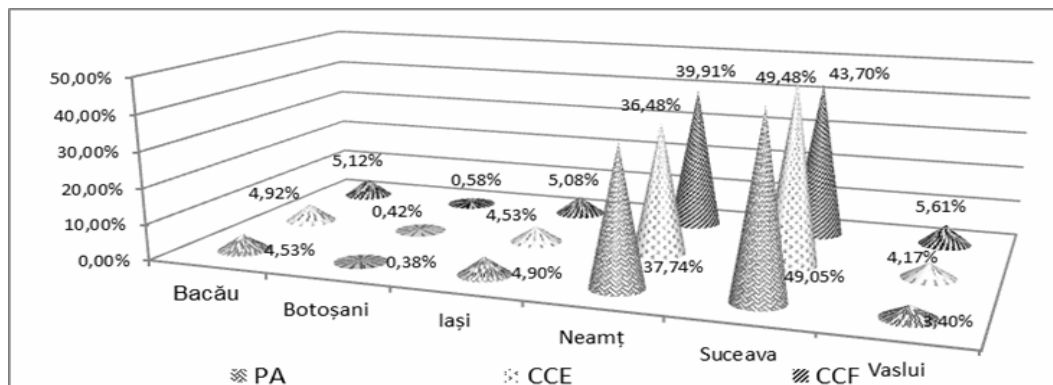


Fig. 6. Structure of North-East development region by counties and by the number of agro-touristic boarding houses, existing accommodation capacity and accommodation capacity in operation in 2012

Data source: <https://statistici.insse.ro/>

The South-East development region includes the counties of Braila, Buzău, Constanța, Galați, Tulcea and Vrancea. The structure of this region by the number of agro-touristic boarding houses, the existing accommodation capacity and accommodation capacity in operation is shown in Figure 7.

Almost half of the number of agro-touristic boarding houses (47.19%) is concentrated in Buzău County, which together with the counties of Tulcea and Vrancea totals 91.01% of the total agro-touristic boarding houses in the region. The lowest number of agro-touristic boarding houses is recorded in Braila (1.12%). In Galați there are not any officially registered agro-touristic boarding houses.

Existing accommodation capacity in the South-East region differs, to some extent, by the distribution of agro-touristic boarding houses.

Except for counties like Braila and Galați where the share is insignificant (0.49% and respectively, 0.0%), in the other four counties there are recorded values between 11.68% in Constanța, with 3.81 percentage points higher than the share of agro-touristic boarding houses in this county and 39.52% in Bacău, by 7.67 percentage points below the share of agro-touristic boarding houses. Regarding accommodation capacity in operation, 71.23% of it is in Buzău.

In the South-Muntenia development region (Figure 8), Argeș registered the highest number of agro-touristic boarding houses (59.86%), existing accommodation capacity (61.05%), and

accommodation capacity in operation (42.81%). Significant values of these indicators are recorded also in counties like Prahova and Dâmbovița, where it is worth noting that the share of accommodation capacity in operation exceeds the share of agro-touristic boarding houses (with 12.48 percentage points in Dambovita and with 6.32 percentage points in Prahova) and the share of existing accommodation capacity (with 10.01 percentage points in Dambovita and with 9.21 percentage points in Prahova).

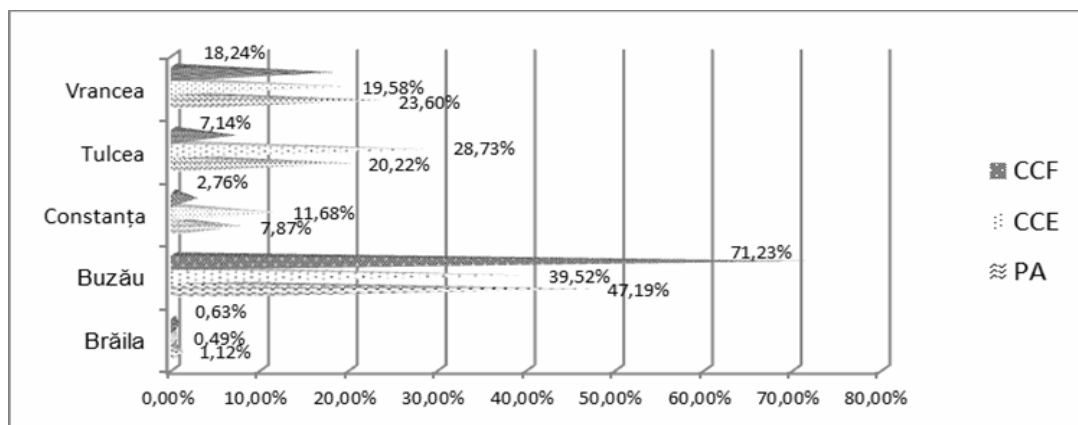


Fig.7. Structure of South-East development region by counties and by the number of agro-touristic boarding houses, existing accommodation capacity and accommodation capacity in operation in 2012

Data source: <https://statistici.insse.ro/>

The level of rural tourism in three of the seven counties that make up the South-Muntenia development region is particularly low. Thus, in Calarasi, although it represents 2.04% of the region's agro-touristic boarding houses, the share of accommodation capacity in operation in 2012 was only 0.68%.

In Teleorman the values of the analyzed indicators are sub-unitary, with values between 0.51% for the existing accommodation capacity and 0.81% for the accommodation capacity in operation. Finally, throughout the period 2002-2007, Giurgiu recorded either one or two agro-touristic boarding houses, while from 2008 to 2012 the agro-touristic boarding houses in this county are not officially registered.

The South-West Oltenia development region includes the counties of Dolj, Gorj, Mehedinti, Olt and Valcea. In 2012, Olt did not officially register any agro-touristic boarding houses, the last record (1 agro-touristic boarding house) being in 2011.

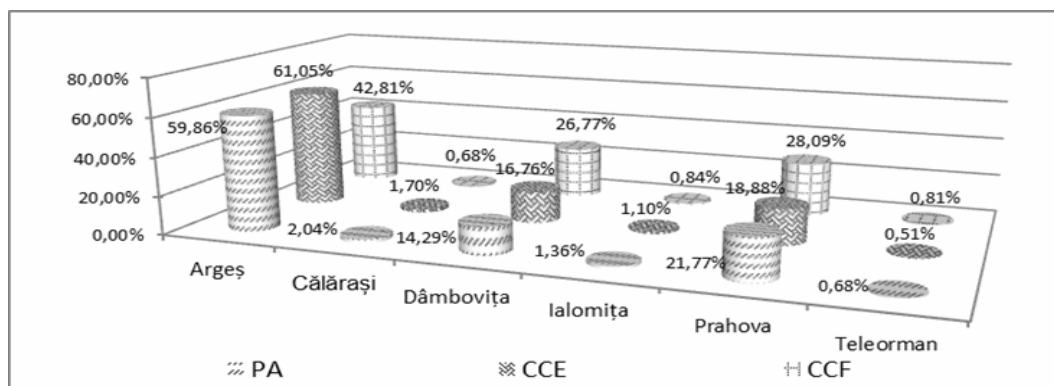


Fig.8. Structure of South-Muntenia development region by counties and by the number of agro-touristic boarding houses, existing accommodation capacity and accommodation capacity in operation in 2012

Data source: <https://statistici.insse.ro/>

The structure of this region by number of agro-touristic boarding houses, the existing accommodation capacity and the accommodation capacity in operation is shown in Figure 9. Most agro-touristic boarding houses (57.40%) are concentrated in Valcea, which together with Gorj sums up 80.55% of the total agro-touristic boarding houses in the region.

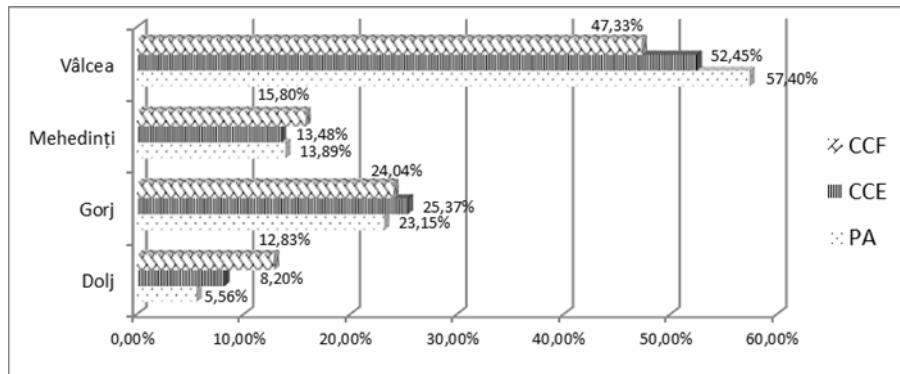


Fig. 9. Structure of South-West Oltenia region by counties and by the number of agro-touristic boarding houses, existing accommodation capacity and accommodation capacity in operation in 2012

Data source: <https://statistici.insse.ro/>

Most existing accommodation capacity and accommodation capacity in operation are concentrated in Valcea (52.45% of the existing accommodation capacity, and 47.33% of the accommodation capacity in operation). Their lower values compared to the number of agro-touristic boarding houses, especially accommodation capacity in operation (less with 5.12 percentage points), show that the demand turns towards other counties of the region.

On the other hand, in the counties Mehedinți and Dolj, where there are fewer agro-touristic boarding houses, the values of the share of existing accommodation capacities and of accommodation capacity in operation are greater than the share of agro-touristic boarding houses. Thus, although Dolj registers only 5.56% of total agro-touristic boarding houses in the South - West Oltenia region, the share of accommodation capacity in operation is more than double, 12.83%.

The share of agro-touristic boarding houses per counties in the West region, in 2012, ranged from 12.50% in Timiș to 46.43% in Caraș-Severin. Two of the counties of this region (Figure 10), Caraș-Severin and Arad both registered the highest number of agro-touristic boarding houses (73.32%), the existing accommodation capacity (73.47%) and accommodation capacity in operation (73.27%). It should be noted that the values of all these three indicators for each of these two districts are slightly different.

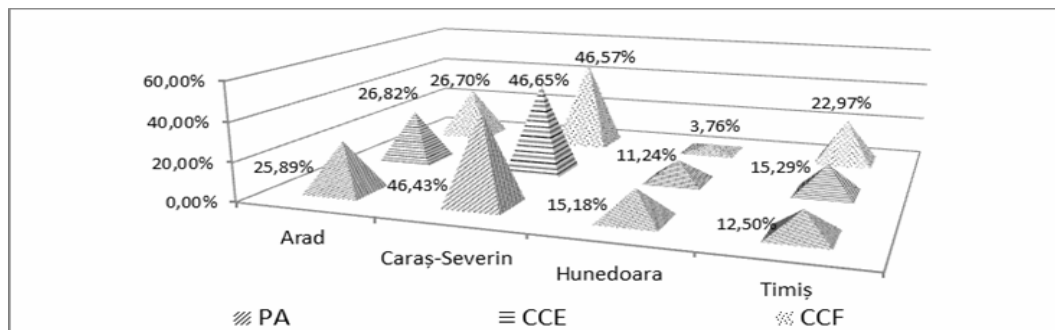


Fig. 10. Structure of the West development region by counties and by the number of agro-touristic boarding houses, existing accommodation capacity and accommodation capacity in operation in 2012

Data source: <https://statistici.insse.ro/>

In the counties Hunedoara and Timis the situation is different. While Hunedoara holds 15.18% of the region's agro-touristic boarding houses, the share of existing accommodation capacity is 11.24% (3.94 percentage points less) and the share of accommodation capacity in operation is 3.76%, which shows a significant reduction in demand.

In Timis the situation is reversed. Thus, while in this county there are 12.50% of the region's agro-touristic boarding houses, the share of existing accommodation capacity is 15.29% (2.79 percentage points more), while the share of accommodation capacity in operation is 22.97% (1.83 times higher), approaching the values registered in Arad where the share of agro-touristic boarding houses is 25.89% as compared to 12.50% in Timis.

The conclusion of structural changes in the supply of regional rural tourist accommodation manifested in the counties indicates that there are inevitable disparities, especially due to the concentration of rural tourism supply in the hills, in the Sub Carpathian area, and in the mountains. Therefore, given all policies of local and regional strategic development, counties in the plain areas with reduced natural tourist potential, despite their supply of accommodation available, can not compete with those with a very high potential, which would preserve significant disparities.

Conclusions

The supply of rural tourism accommodation, rural tourism market essential component, was analyzed in the context of the implementation of regional development strategies at national, regional and county levels, according to three evaluation indicators: the number of agro-touristic boarding houses, existing accommodation capacity and accommodation capacity in operation.

The general trend to increase the supply of rural tourist accommodation in Romania evaluated by the three indicators was maintained by sustainable rural development guidelines that included a rather extensive territorial area by 2000. The rural tourism begins to take its rightful place in the context of pollution accentuation, and the existence of stressful life. In this context, modern man needs a revival through direct contact with nature and active involvement in the development of tourism activities, requirement that mainly rural tourism can satisfy much easier than any other form of tourism.

In terms of accommodation supply of agro-touristic boarding houses from the eight development regions of Romania, in the period 2000-2012 there were both convergence trends towards a balanced distribution between regions, as well as divergence trends.

All in all, if in 2000 the Center region holds the supremacy of territorial distribution of the rural tourist accommodation supply, represented by all three indicators, which assume significant share of the total, gradually from one year to another, the concentration decreases due to applied strategies. Thus, in 2012 while still ranking first, the Center region has much lower percentages for each indicator, which means that the reduction of disparities is the result of the setting up of rural tourist boarding houses in other regions, as a result of their compliance with the strategies of regional development. The last three positions are taken by the South-West Oltenia, South-East and West development regions, due to their annual structural fluctuations and changes made to the places.

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