

EVOLUTION OF THE CAPACITY AND ACCOMMODATION ACTIVITY AT THE REGIONAL LEVEL IN ROMANIA AFTER 1990

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ABSTRACT: *After 1990 all economic aspects saw new trends in Romania, completely different compared to the previous period based on economic centralized economy. Nowadays, we face challenges strictly related to globalization and some circumstances of economic uncertainty. The Romanian tourism faces such issues too, but it continues to be seen as a lifebuoy of the Romanian economy, in terms of a proper revaluation of its valuable inheritance and of a more aggressive and a more focused promotion on these segments of consumers that must correspond to elements offered in various tourist regions. Balanced development of tourism throughout the country contributes to economic and social growth, mitigating imbalances emerged between different areas and representing an important source for increasing population's income. This work seeks to analyze the state of existing accommodation capacity for the eight regions of Romania in the last 22 years and to determine which are the factors that led to these developments, but also their specific effects on each region. For this purpose, we used data on accommodation capacity during 1990 - 2011, being the last official data available and we used appropriate statistical methods trying to determine the place of each region in the national assembly for every year and for the entire period. We also determined differences / advances in absolute size for a correct position of each region in terms of accommodation capacity.*

Keywords: accommodation capacity, tourism activity, Romania, regional level

1. THE ROLE OF TOURISM IN SOCIO-ECONOMIC DEVELOPMENT

In general, tourism development plays an important role and regional development becomes crucial for all economies of the world and their development strategies, because most countries promote development of this sector, in areas lagging behind economically and socially, to improve regional economic structure. A literature review shows that there are regional imbalances caused by a differential allocation of natural and human resources, by different, specific evolutionary environments (economic, technological, demographic, social, political and cultural).

Tourism represents an decisive factor for general economic progress, contributing to GDP growth, countervailing external balance of payments and improving the quality of life. This sector may be the most important generator of jobs, being a main source of economic recovery of those areas that have tourist resources and exploit them properly.

Diversity of activities giving content to tourism and the presence of some of them in the structure of other branches and sectors of the economy provides an industry interference character for tourism, with complex and extensive links with other economic sectors, links to be considered when drawing a sustainable regional strategy for tourism development. Tourism contributes to a higher capitalization of resources, stimulating economic development, improving social structures and living conditions, acting as a stimulating element of the global socio-economic system.

Although Romania's tourism potential was and is considered to be promising, both by Romanian and foreign researchers, Romanian tourism is still in a stage of development and rehabilitation. The number of foreign tourists visiting Romania suffered a decline in recent years. While in Romania effects of mass tourism development are not yet as strong as in the Mediterranean or Latin American countries, we can already think of possible future implications of increased flow of foreign tourists. We will try to express several recommendations in accordance with the following analysis, taking into account the main trends presented, which would contribute to improving the state of Romanian tourism and to increasing its competitiveness at international level.

Regional development of tourism is based on the principles of regional development policy which aims mainly at: reducing existing regional disparities, with emphasis on fostering the balanced development and revitalization of

disadvantaged areas (delayed development), preventing the production of new imbalances; fulfilling integration criteria in EU structures and access to financial instruments to support countries.

The contribution of tourism to economic and social life is different from one country to another, from one region to another and from one county to another depending on the level of development and of the policy promoted in connection with these activities.

As part of an economy, tourism shows itself as a means to diversify its structures by creating specific activities as the hotel industry which takes into account not only housing and creating the conditions and comfort for leisure, but also a number of additional benefits, whose range is very large, from tourists' information to business services or non-specific services. Economic effects of tourism are present in the plan of economic efficiency of the other branches of activities: their quantitative and qualitative development is stimulated, dismissed labour force is drawn from other industries and new jobs in adjacent sectors are created. Surveys undertaken in this regard show that jobs created in tourism determine another 60-80 new jobs in agriculture and construction. Direct contribution of tourism on employment is particularly significant for economies with intensive tourism.

International tourism plays an important role in increasing and diversifying exports, but it can only be achieved in tourist areas properly promoted and supported by an appropriate accommodation infrastructure. International tourism has a remarkable impact on the balance of payments through balance of foreign exchange of tourism that can compensate, reduce or aggravate a deficit of balance of payments. International tourism gives rise to activities that are part of current transactions and capital transactions.

Regional development strategy, drawn especially for regions that include objectives of certain value in their areas, must take into consideration that increasing tourist influx, of any origin, positively influences regional economy:

- directly, by total returns from tourism consumption (house, meals, taxes, shopping);
- indirectly, through bilateral contacts and local cultural influences, becoming familiar with local economic values and potential business opportunities, employment in services, creating a favourable image, civilizing infrastructure involved.
- The prosperity of a region as a result of tourism development appears in several stages:
- immediately, as a result of direct consumption of tourism product;
- in the short run, by a continuous absorption of labour and encouraging greeting trade ("aggressive");
- in the long run, through capital concentration for investment in general infrastructure and tourism, in establishments of tourists' reception and for development of urban services.

2. EMPIRICAL ANALYSIS OF ROMANIA'S TOURISM CAPACITY

For a complete and complex analysis of tourism in Romania, in terms of accommodation capacity during 1990-2011, we resorted to various representative statistical data, taking into consideration indicators which can characterize territorial tourism activity, at the level of the eight regions of the country. We refer here to:

- existing accommodation capacity;
- accommodation capacity in use;
- number of arrivals (tourists stay);
- number of overnight stays;
- net use index of capacity of tourists' accommodation.

2.1. The analysis of existing tourists' accommodation capacity in Romania from 1990 to 2011

Existing (provided) tourists' accommodation capacity represents the number of beds used for the tourists' accommodation, registered in the last reception, homologation or classification document of tourists' accommodation establishment, the extra-beds which can be provided, if necessary, excluded. The number of beds is determined for the operational establishments of tourists' reception with functions of tourists' accommodation existing on 31 December. In terms of existing tourist accommodation capacity, the state is shown in the table 1.

In Romania, the existing tourists' accommodation capacity a downward trend in the last 21 years, from 353236 thousand places in 1990 to 278503 places in 2011. The average level of available accommodation offer was 291,387.41 thousand places yearly, which corresponds to an absolute decline of 3558,71 thousand per year and a decreasing rate of 1.13%, after a period of continuous decline until 2002 and a revival of accommodation offer at country level.

Table 1 – Evolution of existing tourists' accommodation capacity (number of places) at region and country level during 1990-2011

Year	Romania	Region							
		North - West	Centre	North-East	South-East	South - Muntenia	Bucharest – Ilfov	South-West Oltenia	West
1990	353236	29102	44241	24986	162799	26900	12826	26376	26006
1991	312407	24732	38600	23321	146527	25955	10006	22230	21036
1992	302533	24270	37632	22647	141917	23398	10190	18766	23713
1993	293036	23357	35244	21134	139281	23506	9133	18046	23335
1994	292479	26259	38794	21779	132505	23583	8588	17875	23096

1995	289539	26044	37584	20250	133739	23082	8459	17462	22919
1996	288656	26943	36513	18814	134484	23641	9223	17010	22028
1997	287943	26472	36997	19096	133296	23744	8916	17118	22304
1998	287268	27231	36915	19131	133006	23139	8668	16890	22288
1999	282806	26382	36026	18832	133548	22347	9002	15363	21306
2000	280005	25547	35235	17745	134081	22433	7929	15295	21740
2001	277047	25197	34648	16971	132053	21321	9233	15326	22298
2002	272596	24561	33823	17269	130111	21456	10331	14855	20190
2003	273614	24320	32759	17965	130991	21729	10025	15112	20713
2004	275941	24576	34365	17183	130854	22494	11467	13936	21066
2005	282661	26019	35479	18718	132965	22292	11225	14672	21291
2006	287158	26816	37025	18968	134560	20827	12723	14816	21423
2007	283701	26805	35380	18414	132922	20767	13747	15219	20447
2008	294210	26484	39302	18986	132668	21464	18937	14973	21396
2009	303486	27886	38453	21121	134623	21590	20423	16349	23041
2010	311698	26103	42029	21279	136875	22625	23120	16410	23257
2011	278503	28439	45388	21927	95587	24131	21086	18274	23671
\bar{y}	291387.41	26070.23	37383.27	19842.55	134063.27	22837.45	12057.14	16926.05	22207.45
$\bar{\Delta}$	-3558.71	-31.57	54.62	-145.67	-3200.57	-131.86	393.33	-385.81	-111.19
\bar{R}	-1.13	-0.11	0.12	-0.62	-2.50	-0.52	2.40	-1.73	-0.45

Source: www.insse.ro

A survey conducted over the period 1990-2011, at regional level, shows that the evolution of accommodation capacity is extremely interesting, given that there are regions that follow the same trend as accommodation capacity at national level, but also regions out of this pattern.

When referring to the Bucharest - Ilfov Region we can see that it is the only region showing a negative growth rate of 2.40%, corresponding to an average level of available accommodation supply of 12057.14 thousand places annually, which corresponds to an absolute change of 393.33 thousand places per year.

A concrete situation existing in South-East Region interesting to be followed, where the highest decline rate of 2.50% is recorded, much above the average achieved at country level. This can be explained by an almost continuously decrease of existing accommodation capacity in the region, with small oscillations in 2007, after which the downward trend is resumed. A mid-level of available accommodation supply is 134063.27 thousand places per year, corresponding to an absolute decline of 3200.57 thousand annually. A similar situation we see at the level of South-West Oltenia Region with a high annual decline rate of 1.73%.

For a better image of the real state of existing accommodation capacity in the Romanian regions, we present the figure 1.

Analyzing the existing accommodation capacity, its delimitation in two broad areas is required, that is: an accommodation capacity in use and a non-functional one (closed temporarily for lack of tourists or due to necessary repair). This classification can bring us new information about the evolution of Romanian tourism at regional level, given that during the period analyzed there were repeated attempts to reclassify existing establishments and to close a number of establishments of accommodation which do not correspond in terms of comfort required by the new regulations for the classification.

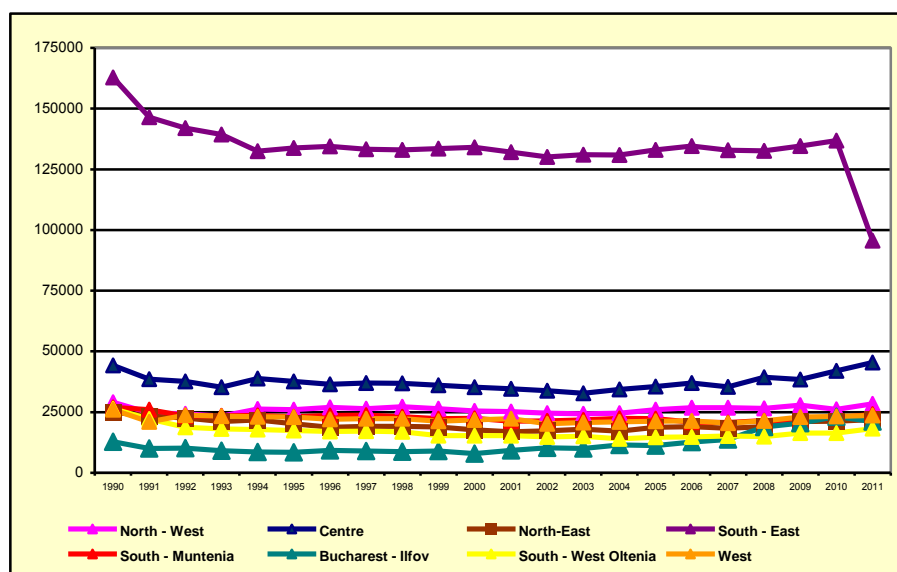


Figure 1 – Evolution of existing tourists' accommodation capacity (number of places) at regional level

2.2. The analysis of the evolution of tourists' accommodation capacity in use in Romania between 1990-2011

The tourists' accommodation capacity in use represents the number of accommodation beds put at the disposal of tourists by the establishments of tourists' reception, taking into account the number of days they are opened in that period, that is the number of days when tourists' accommodation was possible. It is expressed in places-days (number of places x number of days). The beds from the rooms or establishments temporarily closed, due to lack of tourists, for capital repairs or for other reasons, are excluded.

The average level of tourists' accommodation capacity in use at national level was 56826,52 thousand places - day yearly, which corresponds to an absolute decline of 409.75 annually and an average rate of decrease of 0,56%, given that after a period of steady decline until 2002, tourist accommodation capacity in use at national level has returned to an upward trend.

Continuing this regional analysis, we should emphasize that the only region where we find an average increase rate of 2.94% is Bucharest-Ilfov where the average level of accommodation capacity in use is 4167.10 thousand places - day, which corresponds to an annual absolute increase of 165.73 thousand places.

A significant advance of this region is observed in the last years of analysis, which increased the number of places-day in use of 8026 thousand, almost double compared to 1990. This is the only exception; the other regions are in line with the general situation existing at country level. South-Est can be nominated as the region with the highest decline, due to the continuous and significant decrease until 2005, followed by a modest recovery.

Thus, within the region with the lowest performance in terms of number of places in use, the rate of decrease is 2.84%, which corresponds to an average level of tourist accommodation capacity in use of 14853.38 thousand places annually. A high rate of decrease we see at the level of South-West Oltenia, -1.68%.

Table 2. – Evolution of tourists' accommodation capacity in use (thousand places - days) at regional and country level during 1990-2011

Year	Romania	Region							
		North - West	Centre	North-East	South-East	South - Muntenia	Bucharest-Ilfov	South-West Oltenia	West
1990	77022	7860.1	11645.4	6233.9	26260.2	7149.1	4163.7	6790.3	6919.5
1991	64124	7078	10131.4	6645.3	17965.9	6673.9	3726.2	5906.1	5997.7
1992	55870.3	6102.9	9160.5	5766.3	14602.5	6289.1	3399.2	5167.6	5382.2
1993	57434.2	7115.7	9076.7	5386.7	15428.5	6355.4	3313	4926.3	5831.9
1994	53254.6	6938.8	8244.6	5465.8	14303.8	5352.3	3273.8	4135.3	5540.2
1995	53539.8	6785.6	8585.9	5265.2	15044	4817.8	3097.7	4149.8	5793.8
1996	53638.5	6852.8	8586.5	5272.8	15086.8	4894.7	3234.2	4095	5615.7
1997	52026.3	6579.7	8681.2	5093	14190.7	4939.1	2940.5	4238.8	5363.3
1998	53163.9	6720.3	8837.9	4941.9	13929.9	6023.2	3065.9	4082.3	5562.5
1999	51275.2	6691.9	8960.5	4806.3	12863.9	6060.2	2964.8	3757.9	5169.7
2000	50197.1	6563.3	9148.9	4624.1	12182.3	6025.3	2740.7	3736.2	5176.3
2001	51182	6647	9201	4651	13230	6027	3006	3885	5235
2002	50752	6495	8030	4615	13662	5985	3325	3755	4885
2003	51632	6342	8515	4963	13630	5933	3296	3701	5252
2004	53937.3	6699.8	9071.9	5049.7	13773.6	6437.8	3850.3	3703.4	5402.1
2005	54978.8	7103.5	9422.2	5284.8	13608	6439	3885.1	3950.2	5286
2006	56499.9	7371.4	9947.6	5528.8	13176.5	6367.1	4358.6	4226.1	5523.8
2007	57137.6	7486.7	10477.2	5583.5	12679.1	6390.1	4769.8	4107.4	5643.8
2008	59188	7760.5	10501.1	5716.9	16260.2	6446.5	6392.4	4196.6	5658.9
2009	61104.4	7575.1	10738.8	6165.4	17965.9	6614.2	7203.1	4232.5	5810.7
2010	63808.3	8105.4	11664.7	6359.3	12594.3	6881.6	8026	4226.5	5950.5
2011	68417.3	8826.3	12867.4	6423.5	14336.2	7204.1	7644.1	4761.2	6354.5
\bar{y}	56826.52	7077.35	9613.47	5447.37	14853.38	6150.25	4167.10	4351.39	5607.05
Δ	-409.75	46.01	58.19	9.03	-567.81	2.62	165.73	-96.62	-26.90
\bar{R}	-0.56	0.55	0.48	0.14	-2.84	0.04	2.94	-1.68	-0.40

Source: www.insse.ro

As a general perspective, the year 2002 is the year with the smallest number of beds in use, an year when the Romanian tourism has experienced a continuous growth, due to almost complete privatization of tourist establishments, to an increase of investments for upgrading accommodations and restaurants and of "green-field" investments. Despite the increased interest for the Romanian tourism after 2000, the sector's contribution to national economic growth is still small. In terms of tourism potential, there are differences between regions, given their historical, natural and geographical peculiarities. Due to the lack of an organized planning, promotion and coordination at national level, tourist establishments have developed in an unpredictable way, touching different quality levels. The general lack of infrastructure and the low accessibility represent important barriers to domestic and international markets.

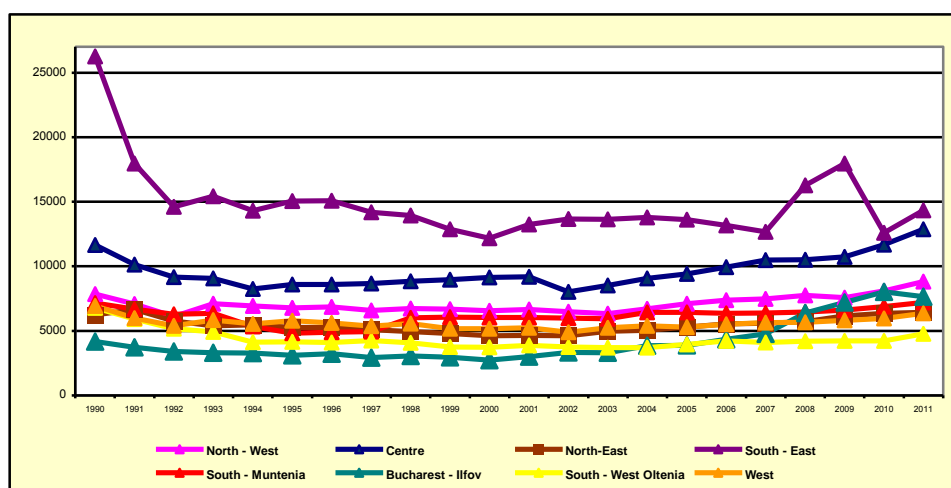


Figure 2. – Evolution of tourists' accommodation capacity in use (thousands of places - days) at regional level

Figure 2 shows us a linear evolution of accommodation capacity in use in most Romanian regions. South-East region, where oscillations are more important along the analyzed period, is an exception, with a sharp drop from 1990 to 1992 and a substantial increase since 2007, due to the private establishments emerged in all counties circumscribed to these regions, mainly in Tulcea and Constanta.

2.3. Analysis of the number of tourists in Romania at regional level during 1990-2011

Given these aspects related to the existing accommodation capacity, in use and the coefficient of use of accommodation capacity, we present statistics on the number of arrivals during the period 1990-2011 at national and regional levels, all indicators giving us a conclusive picture over regional and national accommodation capacity. A tourist's arrival in an establishment of tourists' reception with tourists' accommodation functions occurs when a person is written in the register of the establishment to be hosted for one or more continuous nights. Only one arrival per tourist is counted for each establishment, regardless of the number of overnight stays. Tourists recorded in previous month are not included in the reported number of arrivals. For families housed in accommodation establishment, each family member is counted for the number of arrivals, if at least one place is paid.

Table 4 - Number of arrivals (accommodated tourists) for the eight regions of the country and at country level (thousands)

Year	Romania	Region							
		North - West	Centre	North-East	South-East	South - Muntenia	Bucharest - Ilfov	South-West Oltenia	West
1990	12297	1505.8	2001.7	1558.7	2343.2	1368.1	1024.5	1375.1	1375.1
1991	9603	1099.6	1494.5	1389.8	1789.2	1184.9	928.9	793.2	923.8
1992	8015	910.3	1287.1	1120.3	1517.2	1045.8	708.5	642.5	783.5
1993	7566	1053.8	1177.9	923.9	1400.0	903.7	825.0	576.0	705.9
1994	7005	850.2	1114.8	846.4	1283.9	763.7	955.1	495.4	695.2
1995	7070	805.6	1172.9	820.0	1395.4	816.5	867.1	544.6	648.1
1996	6595	781.0	1234.7	780.8	1293.8	729.5	649.9	506.2	619.0
1997	5727	619.2	980.2	662.8	1128.7	666.9	718.9	433.8	515.9
1998	5552	605.4	927.6	636.0	1170.7	641.7	675.2	374.4	520.3
1999	5109	601.1	855.7	568.7	1007.4	569.7	624.4	343.1	539.4
2000	4920.1	559.6	868.0	543.0	980.8	552.6	520.0	327.1	568.9
2001	4875.0	596.0	837.0	535.0	994.0	546.0	488.0	338.0	541.0
2002	4847.0	629.0	753.0	535.0	984.0	549.0	554.0	350.0	493.0
2003	5057.0	637.0	847.0	553.0	1019.0	572.0	585.0	324.0	520.0
2004	5638.5	698.2	986.2	618.4	1133.1	575.7	729.9	361.1	535.9
2005	5805.1	733.4	1067.9	621.6	1108.0	573.5	831.3	334.2	535.2
2006	6216.0	780.6	1164.0	678.3	1080.7	627.3	900.5	370.8	613.8
2007	6971.9	889.7	1330.1	717.6	1231.1	729.2	996.7	403.0	674.5
2008	7125.3	908.1	1291.5	725.6	1308.6	750.2	1038.1	429.4	673.8
2009	6141.1	732.5	1072.8	656.5	1157.1	591.2	989.8	366.1	575.1
2010	6072.8	702.9	1126.9	620.9	1044.0	572.9	1125.2	337.1	542.8
2011	7031.1	799.3	1435.8	696.2	1134.8	616.4	1282.6	426.9	639.7
\bar{y}	6601.81	795.38	1137.60	764.02	1250.21	724.84	823.35	459.15	647.27
$\bar{\Delta}$	-250.76	-33.64	-26.95	-41.07	-57.54	-35.80	7.77	-28.46	-35.02
\bar{R}	-2.63	-2.97	-1.57	-3.77	-3.39	-3.73	0.65	-4.08	-3.58

Source: www.insse.ro

Data presented in the table above shows us that, if in 1990 in Romania 12297 thousand arrivals were registered, in 2002 when a minimum point is achieved, we have three times fewer arrivals and in 2008 we may consider a resurgence in the number of arrivals, which count 7125 thousand tourists, a trend denied by the values of the next year when a new decline is observed, registering two times fewer arrivals than in the first year of our analysis. This latter decrease is due to economic instability period started in 2008 which has clear effects on Romanian tourism. 2011 seems to be a year that has brought the number of arrivals (accommodated tourists) on an upward trend for all the Romanian regions. All regions have the same evolution, recording bigger or smaller decreases, issues clarified by applying statistical methods to calculate the average arrivals, the absolute regress and the average rate.

The average level of arrivals at national level was 6601.81 thousand tourists accommodated, which corresponds to an absolute annual regress of 250.79 thousand arrivals and an average decrease rate of 2.63% down. This real state is provided after a period of continuous decrease until 2002, followed by an upward trend of the number of arrivals and a downward trend to 2010. The most significant average decrease rate of 5.41% is recorded in the South-West Oltenia region, a region where the number of arrivals in 2010 is 3 times lower than in 1990, but 2011 reducing this at -4.08%. A similar position is noticed in the South-East (-3.77%), South (-3.73%) regions or West region (-3.58%). Figure 3 is eloquent to describe a general image of arrivals in the Romanian regions.

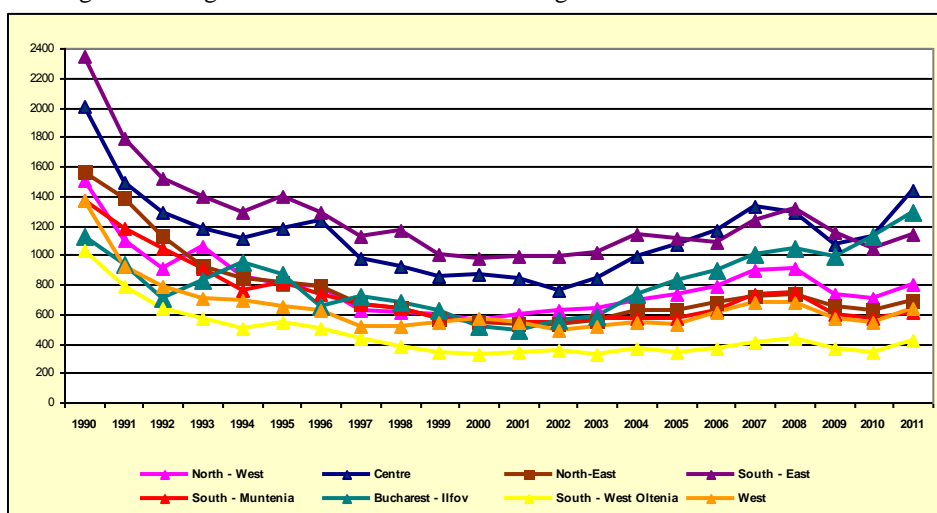


Figure 3. – Evolution of arrivals (accommodated tourists) for the eight regions of the country and at country level (thousands)

An issue closely related to aspects previously analyzed is the number of overnight stays. The **overnight stay** represents a 24 hour period, starting with the hotel hour, when a person is recorded in the accommodation establishment and receives accommodation in the account of the tariff paid, even if effective residence time is less than the period already mentioned. Additional beds for overnight stays are also considered (paid by customers).

2.4. The analysis of the number of overnight stays in Romania during 1990-2011 at regional level

The number of overnight stays in Romania has an interesting development at national level and beyond, following the same pattern as other indicators discussed above, that is a continuous and significant decrease until 2002 that we can call the watershed year of Romanian tourism, and an oscillating evolution in the next period, with similar downward trend in 2005 and in 2011. The average level of overnight stays at national level was 22091.55 thousands, which corresponds to an absolute decline per year of 1265.35 thousand overnight stays and an average decrease rate of 4.23%. The average decrease rate is recorded in all regions of Romania in line with the national trend.

Table 5 - Number of overnight stays for the eight regions and at the country level (thousands)

Year	Total	Region							
		North – West	Centre	North-East	South-East	South - Muntenia	Bucharest - Ilfov	South-West Oltenia	West
1990	44551.8	4909.9	6341.5	3824.5	14115.6	4205.8	3019.7	4045.6	4089.2
1991	45478.1	5063.5	6982.3	3530.8	14040.8	4252.3	3028.9	4239.2	4340.4
1992	26076.0	2557.0	3798.0	2520.0	7642.0	2864.0	1982.0	2369.0	2344.0
1993	24768.6	2714.1	3517.2	2176.1	7655.9	2614.1	1919.6	2069.9	2101.7
1994	23295.7	2518.3	3495.5	2052.9	6926.7	2385.5	1721.8	1974.9	2220.1
1995	24111.2	2542.2	3552.0	1987.3	7733.7	2386.2	1626.2	2044.1	2239.5
1996	21837.9	2194.3	3337.7	1894.9	7114.1	2207.3	1405.7	1791.9	1891.9
1997	19611.5	1951.2	3020.2	1615.8	6097.5	2135.2	1397.2	1682.1	1712.1
1998	19183.2	1920.5	2831.2	1642.1	6205.5	1961.1	1253.9	1618.9	1749.9
1999	17669.8	1937.6	2627.7	1440.4	5335.1	1789.1	1142.2	1569.8	1827.7

2000	17646.7	1960.8	2560.3	1467.8	5451.9	1740.5	996.1	1591.2	1878.1
2001	18121.7	2117.5	2591.2	1406.3	5601.9	1758.8	967.5	1745.2	1933.2
2002	17276.8	2132.0	2316.1	1332.0	5214.2	1623.2	1059.7	1690.9	1908.7
2003	17844.6	2250.9	2424.3	1450.4	5153.5	1704.1	1183.8	1643.2	2034.4
2004	18500.5	2221.1	2664.7	1489.9	5397.2	1781.9	1359.2	1647.7	1938.8
2005	18373.0	2290.2	2782.1	1435.8	5139.2	1807.2	1481.3	1601.9	1835.3
2006	18991.7	2362.9	2930.4	1599.1	4853.7	1940.5	1658.0	1640.9	2006.2
2007	20593.4	2549.5	3177.4	1691.9	5294.2	2175.5	2024.5	1673.5	2006.9
2008	20726.0	2536.9	3152.1	1676.8	5317.6	2115.9	2212.9	1730.2	1983.6
2009	17325.4	2098.6	2665.3	1509.6	4423.7	1674.3	1835.8	1441.6	1676.5
2010	16051.1	1884.5	2719.4	1372.6	3734.3	1564.7	1980.4	1290.5	1504.9
2011	17979.4	2083.7	3311.6	1556.4	4050.3	1678.8	2129.6	1486.2	1682.8
\bar{y}	22091.55	2490.78	3309.01	1848.79	6477.21	2198.45	1699.36	1935.84	2132.09
$\bar{\Delta}$	-1265.35	-134.58	-144.28	-108.00	-479.30	-120.33	-42.39	-121.88	-114.59
\bar{R}	-4.23	-4.00	-3.05	-4.19	-5.77	-4.28	-1.65	-4.66	-4.14

Source: www.insse.ro

Some more pronounced decreases can be noticed in the South-East and South-West Oltenia regions. A moderate decrease was recorded in the Bucharest - Ilfov region which generally was located in a favourable position compared to other regions for most indicators analyzed.

Figure 4 is self-evident for the presentation of the evolution of number of overnight stays. Sharp falls until 2002 and maintained insignificant fluctuations between 1000-3000 thousand overnight stays are noteworthy.

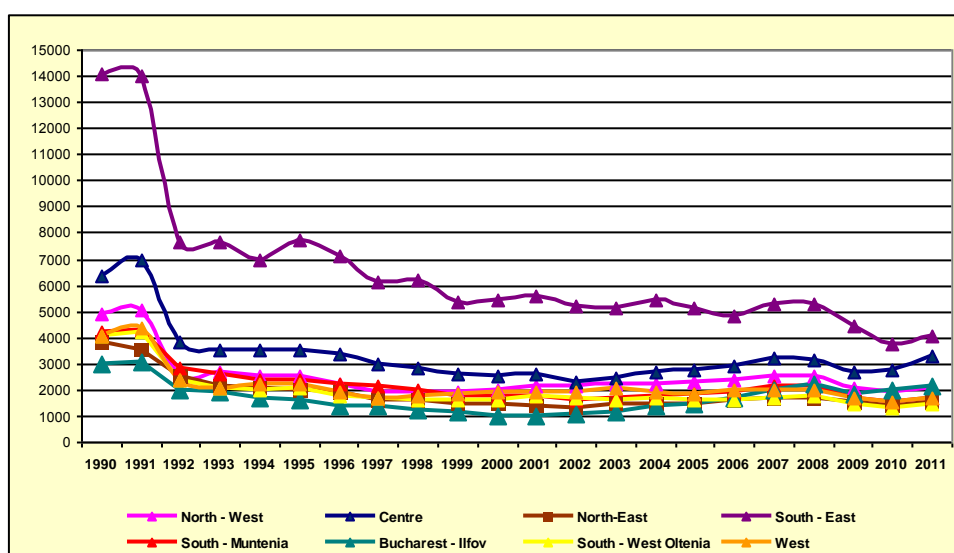


Figure 4 – Evolution of the number of overnight stays for the eight regions of the country and at country level

2.5. Evolution of net use index of capacity of tourists' accommodation

The net use index of capacity of tourists' accommodation expresses the relationship between accommodation capacity in use and its effective use by tourists, for a given period of time. It follows from the calculation, by dividing the total number of overnight stays with the tourists' accommodation capacity in use, for the given period. In table 6 we presented the national and regional evolution of net use index during 1990-2011, according to official data provided by the National Statistics Institute of Romania.

Table 6. – Net use indices of capacity of tourists' accommodation in use (%)

Year	Romania	Region							
		North-West	Centre	North-East	South-East	South - Muntenia	Bucharest - Ilfov	South - West Oltenia	West
1990	57,8	62,5	54,5	61,4	53,8	58,8	72,5	59,8	59,1
1991	49,8	46,1	46,0	46,1	52,9	52,6	60,6	46,2	49,0
1992	46,7	41,9	41,5	43,7	52,3	45,5	58,3	45,8	43,6
1993	43,1	38,1	38,7	40,4	49,6	41,1	57,9	42,0	36,0
1994	43,7	36,3	42,4	37,6	48,4	44,6	52,6	47,8	40,1
1995	45	37,5	41,4	37,7	51,4	49,5	52,5	49,3	38,7
1996	40,7	32,0	38,9	35,9	47,2	45,1	43,5	43,8	33,7
1997	37,7	29,7	34,8	31,7	43	43,2	47,5	39,7	31,9
1998	36,1	28,6	32,0	33,2	44,5	32,6	40,9	39,7	31,5

1999	34,5	29,0	29,3	30,0	41,5	29,5	38,5	41,8	35,4
2000	35,2	29,9	28,0	31,7	44,8	28,9	36,3	42,6	36,3
2001	34,9	31,9	28,2	30,2	42,3	29,2	32,2	44,9	36,9
2002	34,0	32,8	28,8	28,9	38,2	27,1	31,9	45,0	39,1
2003	34,6	35,5	28,5	29,2	37,8	28,7	35,9	44,4	38,7
2004	34,3	33,2	29,4	29,1	39,2	27,7	35,3	44,5	35,9
2005	33,4	32,2	29,5	27,2	37,8	28,1	38,1	40,6	34,7
2006	33,6	32,1	29,5	0,9	36,8	30,5	38,0	38,8	36,3
2007	36,0	34,1	30,3	30,3	41,8	34,0	42,4	40,7	35,6
2008	35,0	32,7	30,0	29,3	42,5	32,8	34,6	41,2	35,1
2009	28,4	27,7	24,8	24,5	34,7	25,3	25,5	34,1	28,9
2010	25,2	23,2	23,3	21,6	29,7	22,7	24,7	30,5	25,3
2011	26,3	23,6	25,7	24,2	28,3	23,3	27,9	31,2	26,5
\bar{y}	37,5	34,1	33,4	32,0	42,7	35,5	42,2	42,5	36,7
$\bar{\Delta}$	-1,5	-1,9	-1,4	-1,8	-1,2	-1,7	-2,1	-1,4	-1,6
\bar{R}	-3,7	-4,5	-3,5	-4,3	-3,0	-4,3	-4,4	-3,1	-3,7

Source: www.insse.ro

It may be noticed that, if in 1990 the net use index of accommodation capacity was 57,8%, in 2011 it registered a half value, namely 26.3%, with almost 1% less than in 2010. Thus, we can say that the average net use index at national level was 37.5%, a level found in the regions analyzed. Below this level we find the index for the North-West, North-East and South - Muntenia, Bucharest Ilfov regions and West at the same level. Higher level we found in the South-East, and South-West Oltenia and Centre.

This value corresponds to a absolute national annual decline of 1.5% and an average rate of 3.7% decrease. The most important decrease recorded for the region Bucharest - Ilfov, namely 4.4%, is corresponding to an annual decline of 2.1 which is also the highest compared with other regions. Below, we present the schematic evolution of net use index of accommodation capacity:

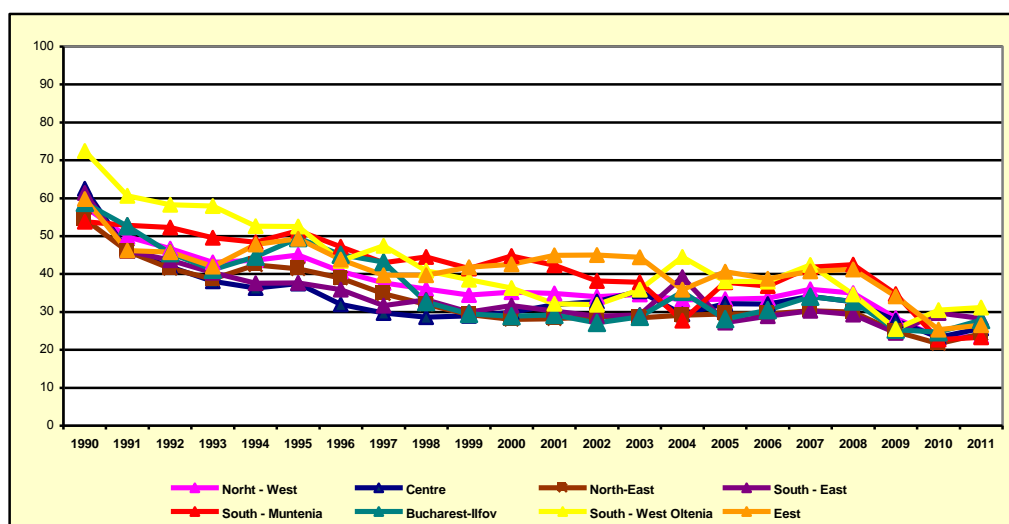


Figure 5 – Evolution of net use indices of capacity of tourists' accommodation in use (%)

Given the circumstances presented in each index separately, we tried also an aggregate analysis, taking into account all indices that allow us to settle the ranks each region holds in the first year of analysis and in the last year,

3. ROMANIAN REGIONS' MULTICRITERIAL RANKING FROM THE ACCOMMODATION CAPACITY PERSPECTIVE

Real final rank of each region was determined beginning with the region with the lowest average rank, indicating a maximum performance (1st rank) to the region with the highest average rank, which indicates the minimum performance (rank „n”).

Table 6 - *Tourists' accommodation capacity and activity in 2011*

Development region	Existing		In use		Arrivals		Overnight stays		Indices of capacity of tourists' accommodation in use		Relative distances to better performances					Medium rank	Final rank
	places	rank	thousands of places-days	rank	thousands	rank	thousands	rank	%	rank	Existing	In use	Arrivals	Overnight stays	Indices of capacity of tourists' accommodation in use		
North - West	28439,00	3	8826,30	3	799,30	4	2083,70	4	62,47	2	7,27	6,52	6,37	6,37	7,73	6,85	5
Centre	45388,00	2	12867,40	2	1435,80	1	3311,60	2	54,45	7	6,48	5,24	3,02	3,02	5,84	4,72	2
North - East	21927,00	6	6423,50	6	696,20	5	1556,40	7	61,35	3	7,58	7,28	7,81	7,81	7,18	7,53	8
South - East	95587,00	1	14336,20	1	1134,80	3	4050,30	1	53,75	8	4,14	4,78	1,00	1,00	3,62	2,91	1
South - Muntenia	24131,00	4	7204,10	5	616,40	7	1678,8	6	58,83	6	7,47	7,04	7,47	7,47	8,00	7,49	7
Bucharest - Ilfov	21086,00	7	7644,10	4	1282,60	2	2129,60	3	72,52	1	7,61	6,90	6,24	6,24	3,97	6,19	3
South-West Oltenia	18274,00	8	4761,20	8	426,90	8	1486,20	8	59,58	4	7,75	7,81	8,00	8,00	1,00	6,51	4
West	23671,00	5	6354,50	7	639,70	6	1682,80	5	59,10	5	7,49	7,31	7,46	7,46	5,18	6,98	6

In accordance with results obtained by the ranking method, one can observe that the South-East region has primacy in accommodation capacity, situation supported by existing accommodation places especially in Constanta County, at the Romanian seaside, otherwise supporting the whole region, This region is closely followed by the central region, sustained by Sibiu, the Europe's cultural capital in 2009, and by highly developed mountain tourism in Brasov County, In third place, we find North-West region with Iasi, Botosani and Vrancea counties as important areas for tourists, and only in 4th place is found Bucharest-Ilfov where Bucharest hardly supports this rank since it is a pole of power terms of accommodation capacity extremely necessary for business tourism segment, Thus, it can be found that a region can be supported by a single county or a small number of counties that put the region on a leading position, but if it benefited from well placed counties in terms of accommodation capacity, they would leave behind the others,

Table 8 - *Tourists' accommodation capacity and activity in 1990*

Development region	Existing		In use		Arrivals		Overnight stays		Indices of capacity of tourists' accommodation in use		Relative distances to better performances					Medium rank	Final rank
	places	rank	thousands of places-days	rank	thousands	rank	thousands	rank	%	rank	Existing	In use	Arrivals	Overnight stays	Indices of capacity of tourists' accommodation in use		
North - West	29102	3	7860,1	3	1505,8	4	4909,9	3	62,47	2	7,24	6,83	5,45	6,81	4,75	6,21	3
Centre	44241	2	11645,4	2	2001,7	2	6341,5	2	54,45	7	6,53	5,63	2,81	5,90	7,74	5,72	2
North - East	24986	7	6233,9	7	1558,7	3	3824,5	7	61,35	3	7,43	7,34	5,16	7,49	5,17	6,52	5
South - East	162799	1	26260,2	1	2343,2	1	14115,6	1	53,75	8	1,00	1,00	1,00	1,00	8,00	2,40	1
South - Muntenia	26900	4	7149,1	4	1368,1	5	4205,8	4	58,83	6	7,34	7,05	6,18	7,25	6,11	6,79	6
Bucharest - Ilfov	12826	8	4163,7	8	1119,5	7	3019,7	8	72,52	1	8,00	8,00	7,50	8,00	1,00	6,50	4
South-West Oltenia	26376	5	6790,3	6	1024,5	8	4045,6	6	59,58	4	7,37	7,17	8,00	7,35	5,83	7,14	8
West	26006	6	6919,5	5	1375,1	6	4089,2	5	59,10	5	7,38	7,13	6,14	7,33	6,01	6,80	7

By calculating regions' ranking in 1990, we found that the hierarchy was not strictly modified along the analyzed period, meaning that first and the second were kept by the same regions, led by the South-East region. The surprise is provided by West and South-West Oltenia regions which have advanced from 7th and 8th places in 1990 to 6th and 4th in 2011, penalizing North-East, North-West and South regions, issues summarized in the table below:

Table 9 - *Changes in Romanian regions' ranking in 2011 compared to 1990*

No.	Development region	Hierarchy		Change of ranks	
		1990	2011		
1	South - East	1	1	-	→
2	Centre	2	2	-	→
3	North-West	3	5	-2	↓
4	Bucharest - Ilfov	4	3	+1	↑
5	North - East	5	8	-3	↓
6	South - Muntenia	6	7	-1	↓
7	West	7	6	+1	↑
8	South - West Oltenia	8	4	+4	↑

4. CONCLUSIONS

Tourism is a sector that can contribute in significant proportion to economic growth and development, in Romania, as in many other countries of the world, if it were supported by investments in infrastructure facilities, It is clearly recognized that the picturesque of various natural areas of Romania, supplemented by real treasures of culture - sometimes of universal interest - are as many motivations for tourism, The influx of tourists and visitors in different

regions is, of course, determined by the attractiveness, value, number and quality of objectives of these areas, by available transport infrastructure, food, accommodation and entertainment and by the level of knowledge and presentation through ingenious advertising. We found within the study conducted that distribution of accommodation capacity in Romania is differentiated by regions and counties inside the region. At the same, it can be observed that, in some cases, even if the share of number of beds in total is reduced, however the net use index has a significant value. Thus, after the application of several statistical methods we have achieved a ranking of the regions by using several criteria. There are regions in the top supported by a single county, which does not seem very easy, which leads us to conclude that those counties could be considered a model for the surrounding areas to develop a whole region. The slow process of privatization combined with the lack of investment in infrastructure during the '90s, as Romania was readjusted to life after communism, resulted in a tourist industry in a growing pain. However, the new-found freedom and a developing middle class determined an increase of travels abroad, encouraged by low prices in Greece and Turkey. Tourism development will be achieved by upgrading infrastructure and tourism services, diversification of tourism supply and development of ecological, spa, cultural and historical tourism. A complementary development of road infrastructure, connected to the national transport network capable of providing access to tourist areas, of social services infrastructure, that would increase living standards in the region, is essential to ensure the country's tourism development. Tourism development must take into account the principle of sustainable development, in order to preserve natural and cultural heritage and to minimize the "human pressure" over environment. Investment in tourism and culture will allow regions to use the benefits of tourism and cultural heritage to enhance competitive advantage in performing sectors, of high cognitive and quality level, both on traditional and emerging markets.

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