ASPECTS REGARDING THE EVOLUTION OF THE TOURIST ACTIVITY AT A REGIONAL LEVEL IN ROMANIA, POLAND AND SLOVAKIA

Professor PhD. Cristian Valentin HAPENCIUC
Assistant PhD. Student Adrian Liviu SCUTARIU
Ştefan cel Mare University of Suceava, Romania
expresedinte@gmail.com
livius@seap.usv.ro

Abstract:
This article aims at highlighting the general tendencies that manifest in the field of tourism, at regional level in Romania, in comparison with Slovakia and Poland during the period after 2002. The first part presents several general landmarks at E.U. level, and then the analysis will focus on the three countries mentioned. Thus, one will follow through some indicators, among which: the number of accommodation places, the number of overnight stays, and the intensity of tourism. The available data permit one to observe the evolution of tourism in the three countries at a regional level for the last years. The study reveals several conclusion among which the fact that Romania is situated third after Poland and Slovakia as tourist activity, the latter having a larger intensity of this activity, as well as the fact that there are large discrepancies between regions from the point of view of tourist activity.

Key words: tourist activity, tourism intensity, overnight stays, regional, Romania, Poland, Slovakia

JEL Classification: L 83

1. INTRODUCTION

This research focuses on making a comparison, at regional level, between the evolution of tourism in Romania, a country which adhered to the E.U. in 2007 and two of the countries which adhered in 2004, Poland and Slovakia; in this manner one analyzes the manifested tendencies and the registered experiences, and if these are similar in Romania in the post-adhesion years.

The reason why one has chosen Poland and Slovakia, is the fact that this two countries, like Romania, had a rather similar past (former communist countries located in the influence zone of the U.S.S.R.), and for that matter, having a similar route if not identical after 1990, also having at least the same objectives, although for Romania, the road to creating and consolidating a market economy was even longer.

One will engage in a short general analysis of tourism in these three countries, in the E.U. context, underlying the general tendencies of tourism in the E.U. member states in the recent period, emphasizing the tendencies which manifest themselves at regional level in Romania, Poland and Slovakia.

2. CONSIDERATIONS REGARDING THE TOURISM OF ROMANIA, POLAND AND SLOVAKIA IN THE E.U. CONTEXT

Tourism is an important element of the third sector, and has a more and more important role in the economy of a country, constituting as a factor on which the economic growth is based. The last half of century has registered a growth in the third sector, which has diversified the activities, becoming preponderant in the developed countries.

The services which constitute tourism are varied and are derived from the primordial ones: of information, placement of tourist travels, accommodation, selling of food products, treatments, leisure and entertainment. The development of tourist activity has as an effect the boosting of those economy branches, suppliers for tourism and of other fields necessary to consolidating the tourist product (constructions, food, transportation etc.) as well as those connected, like commerce.

The demand for tourist services is split between business tourism and recreational tourism. Both forms can have fluctuations in time, according to the available budget.

Europe remains one of the world's major tourist destinations, and 6 of the U.E. member states are among the top 10 destination of tourist operators (1). Thus, it is absolutely normal that the tourist industry has an important role from an economic and labor market point of view, and also from a social and an environmental perspective.

Along with its economical and employment potential, tourism can have a significant role in the development of regions. The infrastructure can contribute to the local development, and the jobs in tourism can counteract the effects of the industrial or rural decline. Durable tourism presupposes the conservation of the natural and cultural heritage, as well as keeping the biodiversity.

The general tendency of tourism was of rapid development in the last part of the past century, and between 2001 and 2003 as a consequence of the economic regression, terrorist risks, epidemics and natural disasters, the demand has decreased. After this period low-cost companies have flourished and tourism has known a revival.

The largest number of overnight stays, according to the data available in 2009, is registered in Italy, followed by Spain, Germany and France. Poland registers a number of overnight stays significantly larger in comparison to Romania, and Slovakia ranks after Romania (figure 1).

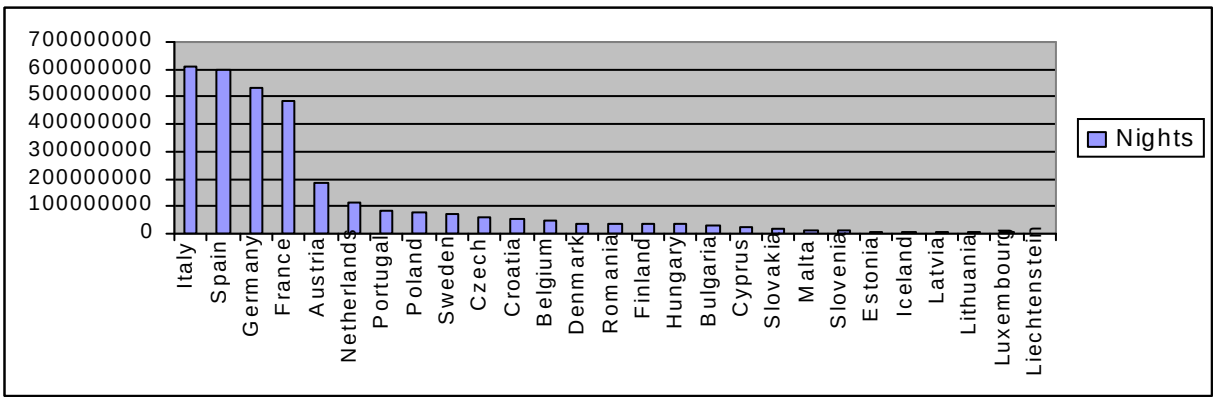

Figure 1. Total nights spent in collective tourist accommodation establishments, hotels and similar establishments, 2009

Source: Eurostat

It can be said that the first four countries constitute tourist destinations par excellence; having superior worth values in comparison to the other E.U. member countries.

Because of the different surfaces of the countries, one can say that is relevant to underline the values of the tourism intensity indicator. Figure.2 stresses the intensity of tourism which means the number of overnight stays of tourists related to the population of a country. Thus, one can notice the relative intensity of tourist activities in the E.U. countries. This is preponderant in Malta, Cyprus, and Austria which occupy the first places in the E.U. countries ranking. Regarding Slovakia, Poland and Romania, they are situated on lower places, the latter occupying the last place in the ranking.

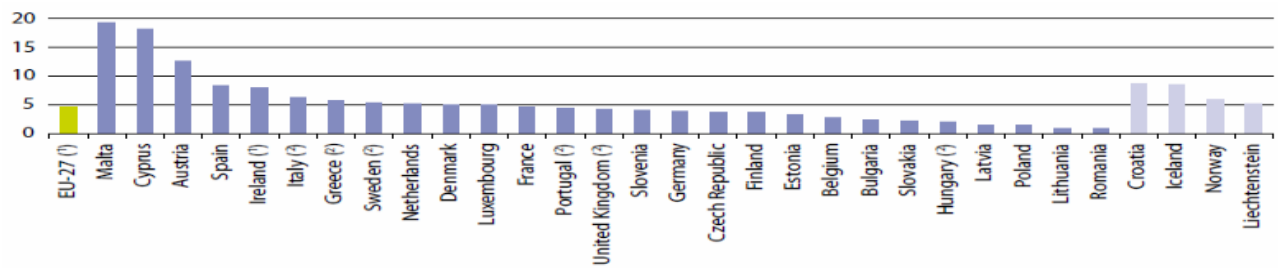

Figure. 2. Tourism intensity, 2008

(ratio of nights spent by residents and non-residents in hotels and similar establishments and other collective accommodation establishments per inhabitant)

Source: Europe in figures - Eurostat Yearbook 2010, Eurostat, Luxembourg: Office for Official Publications of the European Communities, 2010, p.393.

For completing the analysis, it is also interesting to follow the evolution of income and international expenditures occasioned by tourism.

In its dynamic, the point value of income and international expenditure of tourism reveals a growth, at the E.U. 27 level, and as well as in the case of most member states. Romania lies behind Poland and even Slovakia, regarding the receipts, registering decreases concerning the income. This is probably due to a diminishing in the foreign tourists' interest for Romania, because of a low promotion and of disequilibrium in the quality/price value. As opposed to Romania, Slovakia and Poland register substantial increases in income from international tourism. As value for tourist expenditure, Poland has the biggest tourist expenses made by citizens outside the country, in comparison with the other two countries.

Table 1. Tourism receipts and expenditure from personal travel

	Receipts				Expenditure			
	(EUR million)			Relative to GDP,	(EUR million)			Relative to GDP,
	2005	2006	2007	2007 (%)	2005	2006	2007	2007 (%)
EU-27 (1)	51 644	56 643	59 366	0.48	66 150	67 028	73 166	0.59
Belgium	6 506	6 658	6 330	1.89	10 330	10 551	10 728	3.20
Bulgaria	1 735	1 832	2 027	7.02	295	325	302	1.04
Czech Republic	2 892	3 465	3 675	2.89	1 566	1 805	2 217	1.74
Denmark	3 281	3 428	3 490	1.54	4 207	4 507	4 837	2.14
Germany	:	:	:	:	:	:	:	:
Estonia	599	629	572	3.74	213	287	308	2.02
Ireland	3 813	:	4 312	2.26	:	:	6 321	3.32
Greece	10 082	10 439	10 339	4.53	1 429	1 308	1 425	0.62
Spain	:	:	:	:	:	:	:	:
France	30 838	32 368	34 995	1.85	19 763	18 223	20 413	1.08
Italy	22 679	23 825	24 280	1.57	11 652	11 895	12 710	0.82
Cyprus	1 779	1 776	1 810	11.55	736	751	1 048	6.69
Latvia	190	270	343	1.62	345	451	564	2.67
Lithuania	594	604	579	2.04	455	510	717	2.52
Luxembourg	1 871	1 767	1 732	4.76	2 184	2 282	2 382	6.54
Hungary	2 684	2 766	2 792	2.75	1 621	1 292	1 595	1.57
Malta	:	:	:	:	:	:	:	:
Netherlands	5 639	6 149	6 564	1.15	9 847	10 256	10 519	1.85
Austria	:	:	:	:	:	:	:	:
Poland	4 008	4 618	6 160	1.98	2 555	3 545	3 109	1.00
Portugal	5 557	5 998	6 649	4.07	1 565	1 727	1 807	1.11
Romania	432	382	329	0.27	229	294	331	0.27
Slovenia	1 392	1 493	1 739	5.04	520	596	618	1.79
Slovakia	:	:	1 250	2.28	:	:	963	1.76
Finland	1 049	1 072	1 231	0.68	1 651	1 765	2 058	1.15
Sweden	:	:	:	:	5 827	6 268	6 995	2.11
United Kingdom	18 320	19 500	20 301	0.99	40 778	42 708	44 878	2.20
Croatia	5 458	5 876	6 345	14.82	337	355	450	1.05
United States	78 599	81 660	83 729	0.82	58 646	60 982	58 876	0.57

Source: Europe in figures - Eurostat Yearbook 2010, Eurostat, Luxembourg: Office for Official Publications of the European Communities, 2010, p.395

The intensity of tourism and the income from tourism, expressed as a percentage of the GDP, bring information regarding the relative importance of tourism in an economy. The intensity can be measured in the light of the number of nights spent by tourists in relation with the population of the host country.

Because of the different size of these countries, the overnights/inhabitant indicator is relevant, so Slovakia has 1,89, Poland has 1,44 and Romania has only 0,8 under the E.U. 27 average of 4,7 overnight stays. Regarding the share of tourist income in the GDP, Slovakia and Poland have 2,28%, respectively 1,98%, while Romania has only 0,27%. It can be said that tourism has a relatively reduced share in the economy of the three countries.

One will present several particularities referring to the tourist activity in the three countries.

Romania is an emergent market of tourism, as a country of origin, and as a destination. The tourist offer had an ascending trend in the last few years. For example, during 2000-2006, the number of hotels increased with approximately 8,5% per year, while the number of accommodation places increased with only 2,1% per year, so if the medium size of an unit was of 79 places in 2000, in 2006 this was of 55 places (2). One thus remarks the tendency towards medium and small units of accommodation. What is more, the number of overnight stays has increased with approximately 1,2% annually, and international tourism has increased with 7,1% annually (3). The main origin countries of tourist are Germany, Italy and France, approximately totaling a third of the total number of foreign tourists overnight stays. The main destinations for Romanian tourists are Italy, Greece and Spain, these being the object of almost half of the total of travels abroad of at least 4 days. Regarding the scales of tourism, one can see that the incomes are smaller than and the expenditures occasioned by tourism.

Poland is also an emergent market for tourism. The period of 2000-2006 registers an annual increase of the number of hotels (8%), as well as the number of accommodation places (6,8%). The medium number of accommodation places/unit has decreased from 83 in 2000, to 77 in 2006 (4). The number of overnight stays registered by foreign tourists has increased with an annual average of 7,4%. The main origin countries of tourists are Germany, The United Kingdom and the U.S.A., all these totaling over half of the total number of foreign tourists overnight stays. The main destinations for Polish tourists are Germany, Italy and the United Kingdom, these being the object of over 40% of the total of travels abroad of at least 4 days. The comparison between the income and the expenditures occasioned by tourism reveal a positive balance, of over 10 million Euros in 2006.

Slovakia is in its turn, an emergent market for tourism, both as origin country as well as destination. During 2000-2006, the number of hotels increased with approximately 8% per year, while the number of accommodation places increased with only 4,8% per year, thus if the medium size of a unit was of 75 places in 2000, in 2006 this was of 63 accommodation places (5). Non-residents represent almost half of the tourist numbers, registering annual increases of approximately 5% (6). The main origin countries of tourists are the Czech Republic, Germany and Poland, these totaling 60% of the total number of foreign tourists overnight stays. The primary destinations for the Slovakian tourists are Greece, the Czech Republic and Italy, these being the object of over a third of the total of travels abroad of at least 4 days. The comparison of income and expenditures occasioned by tourism reveal a positive balance, of 368 million Euros in 2006.

3. OVERVIEW ON THE TOURIST ACTIVITY AT REGIONAL LEVEL IN ROMANIA, SLOVAKIA AND POLAND

After one has seen where the three countries lie in the E.U. frame in respect to their tourist activity, one will further direct one's attention to the regional tourist activity.

The regional development policies and plans of the last years take more and more into consideration the tourist sector, as a strategic sector for ensuring a durable and dynamic economic growth of some regions which have an important tourist potential. This is why one considers important the observation of the tourist phenomenon at regional level.

In order to capture the evolution and the state of tourism at regional level, one will follow several significant indicators. One can signal the fact that Eurostat does not offer one a wide range of indicators for tourism at a regional level.

The values one has selected for underlining the evolution are from 2003 (the year before of the adhesion of Poland and Slovakia to the E.U.) and 2008 (the second year of Romania's membership to the E.U.).

One of the most important indicators is the number of accommodation places. From the point of view of the evolution, between 2003 and 2008, no spectacular mutations took place. The most numerous accommodation places can be found in the South-East region of Romania, PL-42 and PL-63 from Poland – seaside regions. PL-21, SK-03, SK-04 and PL-51 regions follow, also having consistent accommodation capacities due to mountain tourism.

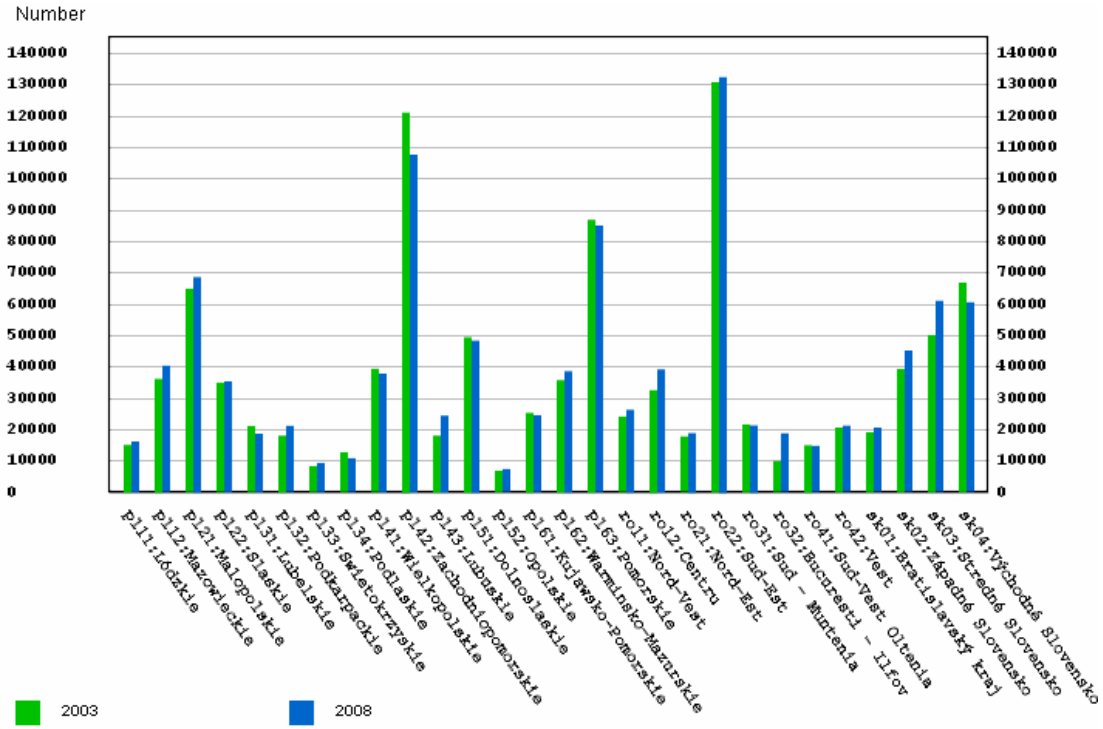

Figure 3. Number of places in collective accommodation units in regions NUTS 2 of Poland, Romania and Slovakia, in 2003 and 2008

Source: Eurostat

Maybe, the most important indicator for measuring tourist activity is that which measures the number of overnight stays. Its importance unfolds also from the fact that it is in direct co-relation with tourism cashing. From figure.4, we can notice that the most overnight stays were registered in PL-42, PL-21, PL-63, PL-51, Ro-22 South-East and PL-12 regions. It is to be remarked that a characteristic of Poland, also available in the case of overnight stays, is the existence of large discrepancies between regions. The regions SK 02, 03, 04 of Slovakia manage to have a larger number of overnight stays than in the regions of Romania, except the South-East region. But, if one were to compare the South East region with PL-42 and PL-63, regions similar to

Poland with seaside areas, one will see that the former registers a smaller number of overnight stays.

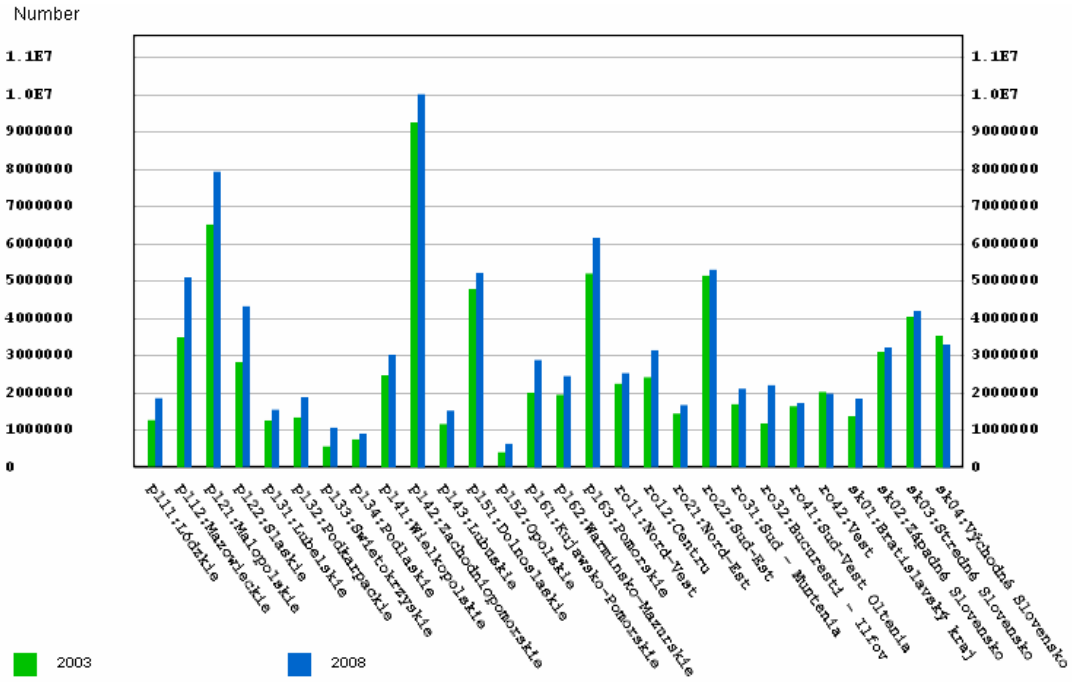

Figure 4. The total of overnight stays in collective units of accommodation in the NUT2 regions of Poland, Romania and Slovakia in 2003 and 2008

Source: Eurostat

As it has been observed in figure.4, the general tendency was that of growth of the number of overnight stays during the period of 2003-2008. Nevertheless, this growth has not manifested itself uniformly, but it has been characterized through heterogeneity.

As a rule, the intensity of tourism better indicates the place of tourism in the economy, rather than the number of overnight stays. This indicator is calculated by reporting the total number of overnight stays with the number of inhabitants and expresses the relative importance of tourism for a region. In comparison with the overnight stays graphic, the following one is a bit different, but the general tendencies remain. Thus, PL-42 which registers a value of over 5000 overnight stays at 1000 inhabitants is followed at a great distance by the SK-01, SK-03, PL-63, PL-21, SK-04 and RO-22 South-East regions. The general observation is that from the point of view of tourism intensity, Slovakia has high values in all the regions, while Poland has such values in approximately half of the regions, and Romania has relatively low values in all regions, except those in the South-East.

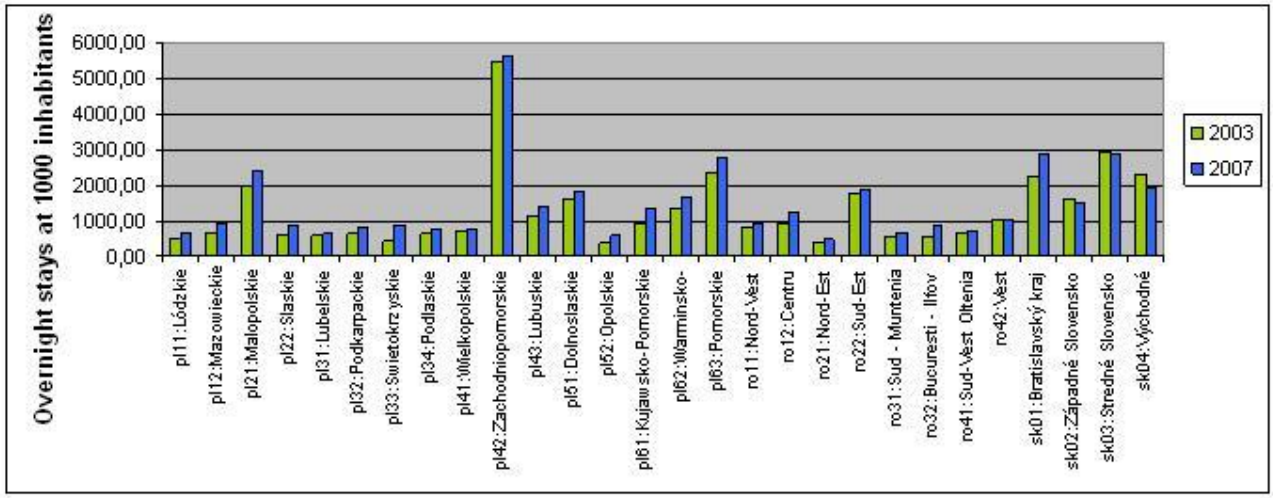

Figure 5. The Intensity of Tourism in Poland, Romania and Slovakia, at a regional level in 2003 and 2007

Source: Eurostat

Slovakia is situated ahead Romania regarding the number of accommodations (except the South-East region of Romania), and in Poland, there are great differences from this perspective. The same situation has been observed at the number of overnight stays. From the point of view of the intensity of tourism, the values registered in Slovakia and in several regions from Poland are superior to those in Romania.

So, from the point of view of the tourist activity, it can be observed that Slovakia and certain regions from Poland clearly have superior values in comparison with Romania, and although there are growth tendencies, many of the differences still continue to exist in relative terms.

Also, there are significant differences among regions, especially in Romania and Poland, regarding the tourist activity.

4. CONCLUSIONS

From the short analysis undergone with the help of the available indicators, it can be observed that tourism in Romania is behind the other two countries with which we have made the comparison.

As a synthesis of the analyzed data, it can be said that the tourist activity in Romania still occupies a rather modest place, many of the values being one of the lowest at European level. The registered growths are rather small, failing to change the general configuration in relative terms.

In the second part of the paper, one compares Romania to Poland and Slovakia in terms of tourist activity. Before making this analysis one has presented the place Romania, Poland and Slovakia occupy in the tourist tableau of the E.U. None of the three countries are tourist zones par excellence, but there are growth tendencies regarding the tourist activity, and the last two register superior values in comparison to our country. The observation of the tourist activity in the three countries, takes place at regional level.

In regional terms, Slovakia is ahead of Romania regarding the number of overnight stays (except the South-East part of Romania), and in Poland, there are very big interregional differences from this perspective. As far as the intensity of tourism goes, the values registered in Slovakia and in several regions of Poland are similar to those in Romania. It is surprising though, that Slovakia draws more income from tourism than Romania, being a country with a smaller surface, but having a much larger intensity of tourism activity.

So, from the perspective of the tourist activity, it can be observed that Slovakia and several regions of Poland have superior values in comparison with Romania, and even with the existence of growth tendencies, many of the differences continue to exist in relative terms.

In order for the tourist activity to contribute to a well positioned economic growth, among other things, a comprehensive identification of the local resources is required, and starting from this the selection of the priority tourist areas meant to undergo development processes. For capitalizing at European level, the tourist objectives of secure value, financial means for their protection must be provided.

In order to stimulate the tourist activity in Romania, the authorities and the economic agents could create strategies, which may include a wider offer regarding the tourist amusement, with the scope of increasing the medium length of the tourists' stay in the region, with implications in the growth of the number of overnight stays and the collected income.

ENDNOTES

(1) Europe in Figures, Eurostat Yearbook 2010, p.385
(2) European Commission, *Tourism Statistics, 2008 Edition*, p.88
(3) *Idem.*
(4) European Commission, *Tourism Statistics, 2008 Edition*, p.84
(5) European Commission, *Tourism Statistics, 2008 Edition*, p.92
(6) *Idem.*

BIBLIOGRAPHY

1. Avrămescu Tiberiu Cristian, (2006) - *Turismul şi dezvoltarea regională durabilă*, Revista Română de Economie, Anul XVI, Vol. 22, Nr. 1
2. Constantin Daniela Luminita, (2000) - *Turismul şi strategia de dezvoltare regională durabilă: efecte şi costuri*, în *Revista Română de Statistică*, nr. 8 – 9
3. Jones Calvin, Munday Max, Roberts Annette, (2003) – *Regional tourism satellite accounts: a useful policy tool?*, „Urban Studies", vol. 40, nr. 13
4. Minciu R., (2005) - *Economia turismului, ediţia a III-a revizuită şi adăugită,* Editura Uranus, Bucureşti
5. Neacşu N., Baron P., Snak O., (2006) - *Economia turismului*, Editura Pro Universitaria, Bucureşti
6. Postelnicu Gheorghe, (1997) – *Introducere în teoria şi practica turismului*, Editura Dacia, Cluj-Napoca
7. Scutariu Adrian Liviu, Hapenciuc Cristian Valentin, (2008) - *The tourism in view of regional development in the North-East region of Romania*, The Annals of the "Ştefan cel Mare" University Suceava. Fascicle of The Faculty of Economics and Public Administration, anul 8, nr. 8, pp. 36-43
8. *** * *** *Anuarul Statistic al României,* Institutul Naţional de Statistică, Bucureşti, 2002, 2003, 2004, 2005, 2006, 2007, 2008
9. *** * *** European Commission, *Europe in figures - Eurostat Yearbook 2010*, Eurostat, Luxembourg: Office for Official Publications of the European Communities, 2010
10. *** * *** European Commission, *Key figures on Europe. 2009 edition*, Eurostat, Luxembourg: Office for Official Publications of the European Communities, 2008
11. *** * *** European Commission, *Europe in figures - Eurostat Yearbook 2008*, Eurostat, Luxembourg: Office for Official Publications of the European Communities, 2008
12. *** * *** European Commission, *Tourism statistics – 2007 edition*, Eurostat, Luxembourg: Office for Official Publications of the European Communities, 2007

13. European Commission, *Tourism statistics – 2007 edition*, Eurostat, Luxembourg: Office for Official Publications of the European Communities, 2008
14. *** * *** European Commission, *Panorama on tourism – 2008 edition*, Eurostat, Luxembourg: Office for Official Publications of the European Communities, 2008
15. *** * *** European Commission, *Eurostat regional yearbook 2008,* Luxembourg: Office for Official Publications of the European Communities, 2008
16. *** * *** *Statistici teritoriale 2008,* Institutul Naţional de Statistică, Bucureşti, 2008
17. ** * * Programul Operational Regional 2007-2013*, Ministerul Dezvoltării, Lucrărilor Publice şi Locuinţelor
18. http://ec.europa.eu/eurostat
19. www.insse.ro
20. www.unwto.org