

COMPARATIVE ANALYSIS OF THE TOURIST ACTIVITY AT THE LEVEL OF SOUTH-WEST OLTENIA REGION

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Abstract:

The goal of this paper was to conduct a thorough analysis on the tourist activity at the level of South-West Oltenia Region. Thus, the instruments used to fulfill this task were the indicators of the tourist activity, such as: the number of arrivals, number of guest nights, number of tourist accommodations or the number of bedplaces/days. I used for this analysis broader intervals of time: 1990-2000 and 2000-2014 – in order to better observe the variations of each of these indicators. Moreover, I also wanted to sketch out the strategy for the development of tourism in this region and so I pointed out the central objective as well as the priorities that are to be addressed so that the implementation of the general strategy could be effective.

Keywords: tourist activity, number of arrivals, number of overnight stays, strategy, objective

1. Analysis of tourism indicators at the level of South-West Oltenia Region

As it concerns the number of tourist arrivals at the establishments of tourist reception at the level of counties belonging to the region of S-W Oltenia between 2000-2013, we can notice that the whole period was characterized by variations especially after 2008 when because of the economic crisis the tourist activity contracted. Hence, we can divide the interval into two periods, considering the year 2008 as the landmark in the characterization of both periods.

So, if in 2000 there were reported circa 327.108 arrivals, in 2008, the number had gone up to 429.370 (+102.262 arrivals). It must be specified that between 2000 and 2008, the number of arrivals increased gradually year by year and only in 2003 there was

a slight drop below the value reported in 2000. As I was saying above, after 2000 the number of arrivals at the establishments of tourist reception in the region of S-W Oltenia saw decreases for 3 consecutive years, and it was only in 2011 that the activity started to improve (426.845 arrivals). The years 2012 and 2013 brought increasing values, the highest value of the interval being reached in 2013 (460.026 arrivals), which means an increase by almost 133.000 more arrivals than in 2000 (+40%).

If we divide the number of tourist arrivals within the tourist establishments by counties at the level of the region, we can see that the highest values are registered in Vâlcea County, with almost 211.053 arrivals in 2013, that is, 46% of the total arrivals. The other counties had the following contribution for the same year: Dolj (85.847 arrivals,

circa 18,66%), Gorj (75.125 arrivals, circa 16,33%), Mehedinți (52.323 arrivals, circa 11,37%) and Olt (35.678 arrivals, circa 7,75%). Also, it must be mentioned that the values recorded in 2013 in these counties are the highest ones too within the interval. Thus, by comparing 2013 to 2000, in each county, the increase in the number of arrivals at the tourist establishments is very solid.

Of course, the other counties may as well see an improvement in the figure of tourist arrivals only if they succeed in promoting tourism much better, if they amend their services and modernize their leisure facilities bringing them to an European standard. The health spas (Băile Olănești, Băile Govora, Călimănești, Căciulata, Săcelu, Bala, Schela Cladovei, Gura Văii) in the region of S-W Oltenia are a “gold mine” for tourism in this area and by capitalizing on their potential this would

make these locations be flooded with tourists.

Their balneal profile could be transformed into the brand of Oltenia region. In order to take steps in this direction, the image is one thing that needs improvement because the brand is in people’s mind a positive image of the particular product, service or area, constructed based on the information and expectancies associated.

In this respect, these destination spas need highest standards of quality, starting from hotels’ leisure facilities and finishing with services offered. Any minus points in terms of product quality means implicitly a bad image and consequently a prejudice to the brand. The psychological impact is crucial in this image game, because the negative elements jeopardize or reduce quality and if they are not eliminated they themselves undermine the idea of brand and the value of the tourist product.

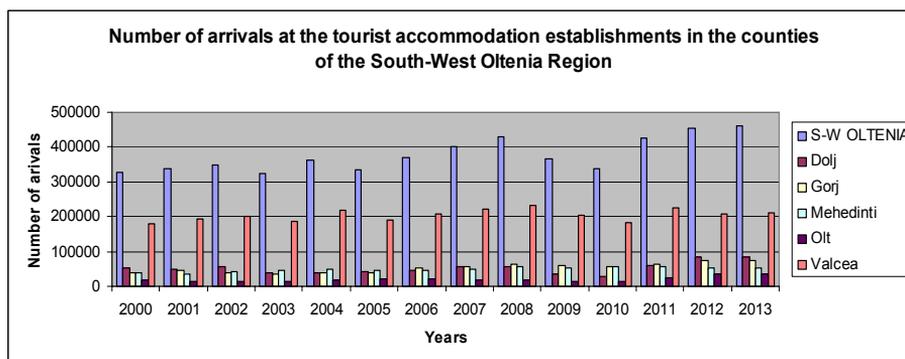


Figure 1.
Source: INS

Taking into account the number of overnight stays in the establishments of tourist reception at the level of S-W Oltenia between 2000 and 2013, just like in the case of arrivals we have two periods. Between 2000 and 2008, the number of overnight stays increased at a slow but relatively constant pace. If in 2000, there were reported around

1.591.205 overnight stays, at the end of 2008, their number had increased to 1.730.168 (+138.963 overnight stays). In the second part of the interval, their number started to go down, the values registered being below the value reported in 2000. The lowest value was registered in 2010 (1.290.263 overnight stays), a drop by almost 440.000 overnight stays (- 25,42%) compared to 2008.

By dividing the number of overnight stays by counties and comparing the values registered in 2013 to the ones of the year 2000, we can see that there were some major differences for some of these counties. Hence, if in 2000, there were 84.072 overnight stays in Dolj County, by the end of 2013, their number had reached

161.538, almost double. At the level of Gorj county, from 85.980 overnight stays in 2000 to 171.171 guest nights in 2013 (+99%); in Olt, from 31.807 in 2000 to 67.810 in 2013 (+113%). The only drops were reported in the counties of Mehedin \square i (-0,1%) and Vâlcea (-17,43%).

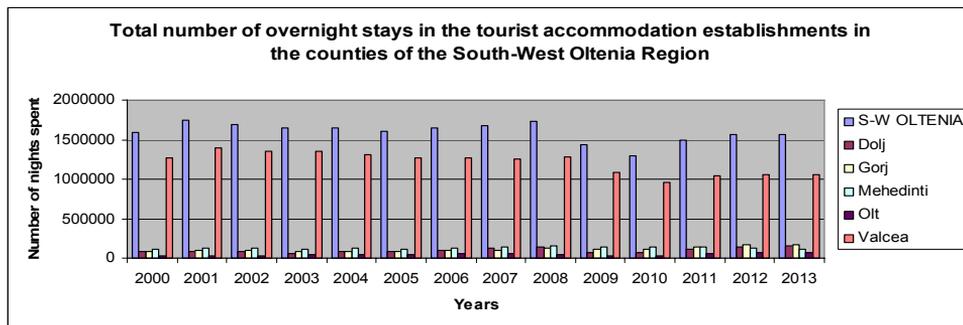


Figure 2.
Source: INS

Now, taking a close look at the number of bedplaces in correlation with the number of working days of the tourist establishments in the region of S-W Oltenia, over the last two decades we can notice a sinuous evolution between 1990-2013. From the diagram below we can see how their number registered a decline in the 90's, from 5.905.985 bedplaces/days in 1990 to 3.736.220 in 2000 (-2.169.765). Only with 2005, their number started to increase constantly and in 2013 there were reported 5.796.621 bedplaces/days, by upwards

2.000.000 bedplaces/days in comparison with 2000, but below the maximal value from 1990, by almost 110.000 bedplaces/days less.

At the level of the counties from the region of S-W Oltenia, the number of bedplaces/days increased in Dolj county (+274.777 bedplaces/days) and Gorj county (+97.879 bedplaces/days), dropping in the other counties, that is, Vâlcea (-310.970 bedplaces/days), Olt (-103.903 bedplaces/days) and Mehedin \square i(-67.147 bedplaces/days).

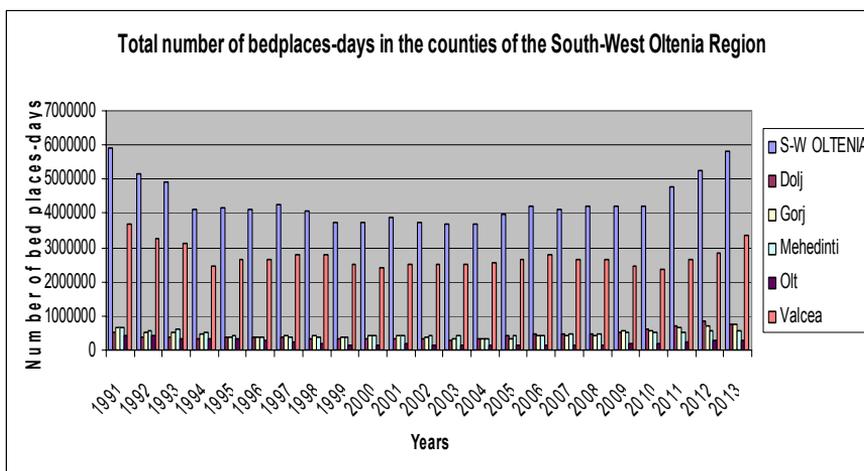


Figure 3.

Source: INS

Further, let's turn our attention to the number of tourist accommodation establishments in the region of S-W Oltenia, from 1990 (263 tourist establishments) and up to the level of the year 2014. As it can be noticed from the diagram below, its evolution started

to go upwards beginning with 2003 (183 establishments of tourist accommodation).

In 2014 their number had reached 436 (+253 tourist establishments compared to the year 2003).



Figure 4.

Source: INS

Another useful comparison within this analysis refers to the evolution of the number of tourist establishments at the level of the 8 regions of development. If we take into consideration the share of tourist establishments at the level of S-W Oltenia in the total number of accommodation establishments at national level (6130 units), in 2014 it accounted for 7,11% (436 tourist establishments). The share of the other regions had the following structure: N-W

Region (11%, with 676 units), Center Region (28,46%, with 1745 units), N-E Region (12,15%, with 745 units), S-E Region (17,96%, with 1101 units), South-Muntenia Region (10,7%, with 656 units), București-Ilfov Region (2,82%, with 173 units) and last but not least West Region (9,75%, with 598 units). Thus, S-W Oltenia region ranks seventh out of the eight development regions in terms of the number of tourist accommodation establishments.

As a result, in my opinion, the number of tourist establishments at the level of S-W Oltenia region should be increased given that the tourist potential is very high but insufficiently capitalized

on and the figures show that the number of arrivals at the tourist accommodation establishments has increased over the last years.

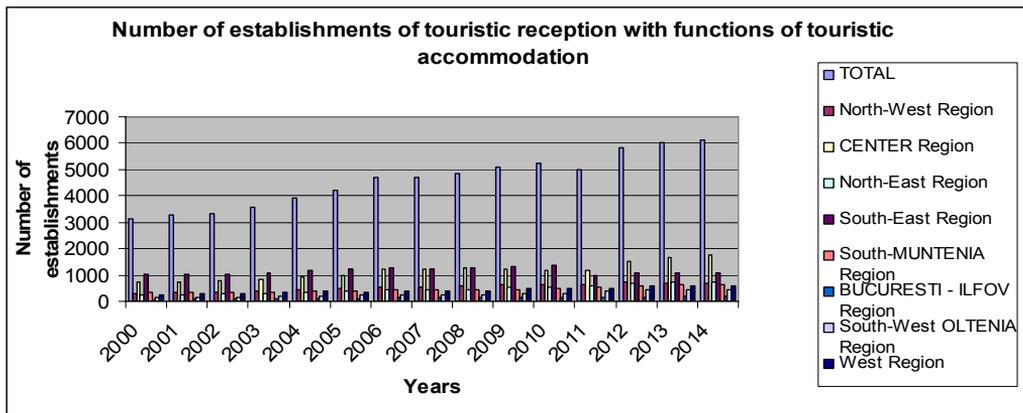


Figure 5.
Source: INS

2. Strategy for the development of tourism in the region of South-West Oltenia

Based on the analysis carried out so far at the level of S-W Oltenia region, we can say that figures show that tourism can become one of the key factors in the process of relaunching the local economy, given that this region has a high tourist potential which is adequate for different forms of tourism. In accordance with the main objective of the National Strategy in the field of tourism, that is, an increase in tourism revenues and in the contribution to the GDP by stimulating the diversity and quality of the touristic offer, the aim is to achieve a harmonious and integrated development of all forms of tourism.

Tourism can be considered a priority for the development program of the region given the existing resources as well as the necessity of achieving economic and social cohesion in the region by expanding the number of areas and resources that will be capitalized on at the level of the whole

region through an integration-based approach.

The formulation of a development strategy for the regional tourism on the short, medium and long term includes vision, objectives, priorities and measures.

The platform for the development of tourism in the Region of S-W Oltenia is given by the concept of sustainable development, a principle lying at the root of the entire economic and social growth aimed at by all national development strategies.

This concept involves ensuring an optimum balance between the economic growth and the conservation/reconstruction of the natural framework whose purpose is to guarantee a harmonious development capable of satisfying both current needs as well as future needs and whose final goal is to harmonize short-term benefits with long-term benefits at the level of community and social indicators.

For the next 20 to 30 years tourism will be the key element of the local development, an essential factor for both bettering the living standard of the

population in the region and a magnet for investments.

The mission of the strategy for the development of tourism in the region of S-W Oltenia resides in its complete transformation into a competitive tourist destination on international scale, in accordance with its tourist resources.

The strategy for the development of tourism within S-W Oltenia region takes into account the existing opportunities and threats.

Capitalizing on the opportunities is the launch pad for the increase in the tourist activity in the area while the prevention of threats ensures the better functioning of the implementation process.

The strategy for the development of tourism is centered on a series of priority domains for which the strategic goals and actions have been formulated.

The purpose of this strategy is to¹:

- build solid arguments so that the local political decision-makers (presidents of County Councils, mayors, directors of decentralized institutions), that is, the parliamentarians of the county, either implement actions included in the strategy or take actions regarding the required legislative changes;

- capitalize on the riches generated by an authentic natural and cultural legacy;

- develop a market tourist industry, original and profitable with a low impact on the environment;

- increase the number of jobs and the level of professionalism in the tourism industry;

- promote the interest for the public-private partnership and for the voluntary actions of the civil society with respect to the development and promotion of tourism in the region of S-W Oltenia;

- establish clear guidelines for tourism in the next 20 years;

- represent the interests of a large segment of citizens, businessmen, associations and foundations etc. which are involved directly or indirectly in the regional development of tourism.

3. Central objective and priority goals

Central objective

The central objective is to increase the contribution of tourism to the sustainable development of the S-W Oltenia region through measures of integrated promotion, an improved tourist offer based on the high valorization of the natural and cultural potential as well as on a higher accommodation capacity and increased hospitality.

Priority goals

- increase in the contribution of tourism to the region's GDP to 7% by 2016 and 10% by 2020, given that in 2010 the turnover in the hospitality industry of the region accounted for only 5,47% at national level;

- increase in the number of arrivals of foreign tourists in the region by 10% by 2016 and by 20% by 2020, against 6,5% in 2011;

- increase in the number of tourist arrivals (domestic and foreign) in the region of S-W Oltenia, from around 6% of the total national arrivals (reference value in 2011 – 426.845 tourists, of which 399.309 Romanians and 27.536 foreigners), to 8% in 2016 and 12% in 2020;

- increase in the number of tourist overnight stays in the region of S-W Oltenia, from 8,26% in 2011, to 10% in 2016 and 13% in 2020;

- increase in the average length of stay in the region to at least 7 days by 2014 and 9 days by 2020;

- increase in the occupancy rate index, from 29,7 % in 2011 to 35% for the 2015-2020 period;

¹ Studiu turism, ADR S-V Oltenia, 2013

- increase in the revenues earned by the local communities from ecotourism by at least 7% annually by 2020;

- by 2020, 2% of the revenues earned from tourism at the level of ecotourist destinations shall be used to preserve nature;

- increase in the average length of stay to at least 5-7 for the foreign ecotourists and to at least 3-4 days for the Romanian ecotourists between 2015 and 2020;

4. Conclusions

The analysis of the tourist flow at the level of S-W Oltenia Region has revealed that the tourism in this area can be a major factor for the economic growth since the tourist potential is still insufficiently capitalized on. The statistical data show that the tourist activity in the region has grown over the last 10 years and has almost doubled compared to 20 years ago.

In conclusion, the development of this region under all economic aspects depends on the implementation of a development strategy for tourism correlated with the S-W Oltenia Regional Development Plan for 2014-2020.

The action ways regarding the harmonious development of S-W Oltenia Region could be the following:

- a diversified, integrated and competitive touristic offer by fostering

local, regional, national and international investments that will lead to the increase in the volume of activity and the flow of tourists;

- stimulation of the development of a quality touristic offer, which means an increase in revenues and in tourism's contribution to the GDP and in the population's net income as well as the increase in the absorption level of labor force;

- creation of conditions necessary to integrate tourism in the tendencies of national and European development;

- promoting through tourism the Region of S-W Oltenia;

- economic development of the S-W Oltenia region by developing the tourist sector;

- improving the standard of living in the region by developing the local and regional tourism;

- creation of new jobs;
- improving life conditions through the diversification of tourist services, amending the quality of the environment, embellishing cities or offering new opportunities for leisure and rest for both tourists and the people living in Oltenia.

Without an effective implementation neither strategy will produce the wanted results.

The efficiency of the strategy resides in the correlation of the established goals with the environment and the available resources.

Acknowledgement

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