



TOURISM MARKET DEVELOPMENT TRENDS OF BRAȘOV COUNTY

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Abstract In this paper it was analyzed tourism market in Brașov County, being made "a radiography" of its changes in the last 10 years. The analysis covered both the **tourism offer**, respectively the number of tourist accommodation establishments and the number of bed places, detailed on the types of accommodation and their distribution of the main county tourist destinations, and also **tourism demand**, respectively the number of tourists, the number of overnights stays and average length of stay, for Romanian and foreign tourists and on the most popular county tourist destinations. Furthermore, to provide a detailed image of tourism market, the tourism demand analysis was completed with information on the profile of tourists visiting the Brașov County.

Key words:

Brașov, trends, tourism market, tourists, overnights

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Introduction

In the last half century, tourism has experienced a continuous growth, becoming a major economic sector and providing economic and development opportunities worldwide. Thus, many new destinations interested in investing in the tourism sector have been developed, making tourism a key driver of socio-economic progress.

Due to natural and cultural resources and its position, easily accessible from any part of the country, Brașov County is one of the most important and dynamic tourist destinations in Romania, managing to develop a consistent tourism infrastructure, important factor in development and promotion of the destination.

A detailed study of the characteristics and trends in the tourism market, on its main components: the tourism demand (tourist needs and behaviors) and the tourism offer (specific product), it has become necessary for all stakeholders involved in the development of tourist destination in order to make the proper decisions.

1. Trends of the tourism accommodation offer in Brașov County

Located in the central part of the country, in the south-eastern Transylvania, Brașov County is an important tourist center, nationally and internationally

known by rich natural and anthropic resources, a diversified tourism offer and a high level of service quality. Capitalization of tourism resources is achieved through tourism infrastructure. Existence of tourist accommodation units largely determines the volume of tourism activity in a destination.

In 2015, Brașov County had 886 accommodation units and 28.616 bed places, representing 13,0% of the number of units and 8,7% of the number of beds available at national level. In these circumstances, Brașov ranks first place in terms of number of units and second place (after Constanța County) in terms of the number of beds.

Another feature is the wide variety of accommodation units in Brașov County, managing to address to a large typology of tourists.

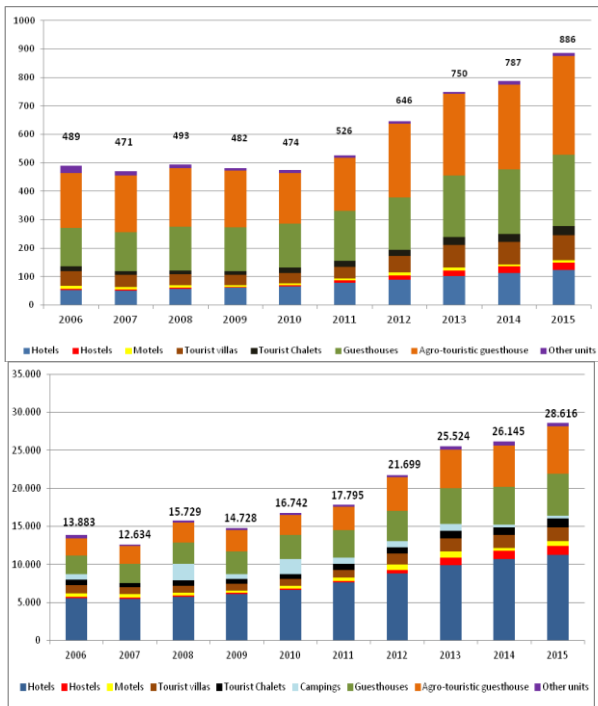


Figure no. 1. The evolution of the number of tourist accommodation establishment and the number of bed places by type, in Braşov County, in the period 2006-2015

Source: National Institute of Statistics, Tempo on-line database (<http://statistici.inse.ro/shop/>)

The total number of tourist accommodation units in Braşov County increased in the last 10 years with 81,2%, from 489 units in 2006 to 886 units in 2015. In the same period, the accommodation capacity increased by 106,1%, from 13.883 to 28.616 accommodation beds. These increases in the tourist accommodation capacity were higher than the national average during the same reference period (+44,8% for the number of units and +14,3% for the number of bed places).

By types of structures, the number of hotels has increased by 136,5%, the number of hostels by 550,0% (being, in fact, the type of accommodation that has experienced the most dynamic development in the period 2006-2015) and the guesthouses and the agritourism guesthouses (cumulative) have registered an increase of 82,0%. The latter had the largest share in the total of structures - more than 67,4%. The recession has left its mark on the evolution of the number of accommodation facilities in Braşov County, the most affected being agritourism guesthouses and tourist villas, whose numbers declined (many of these have been closed) during the years of economic and financial instability (2009-2010), and increased gradually during 2011-2015.

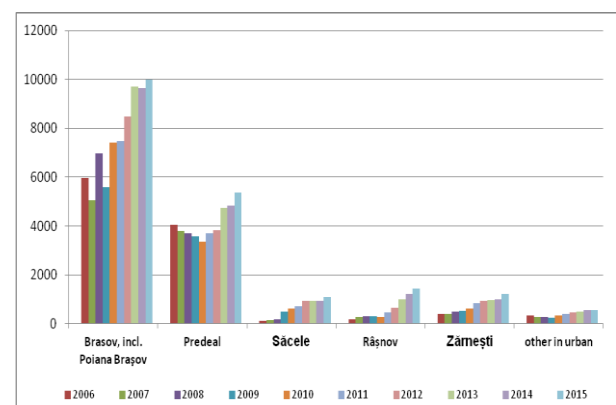
Regarding the structure of accommodation beds, by the type of units, in 2015, for the first time in the last 10 years, the guesthouses and the agritourism guesthouses (cumulative) have exceeded the hotels (41,1% versus 39,1%).

Another interesting aspect is the distribution of the number of accommodation units and the number of accommodation beds on the main tourist destinations (municipalities) in the county.

The analysis of the structure of accommodation capacity in Braşov County highlights that urban areas still holds the majority of the accommodation units, although their share fell slightly from 57,5% in 2006 to 55,6% in 2015.

Among urban localities are remark Braşov city (including Poiana Braşov), which held 21,9% of the accommodation units from the county, and Predeal with 17,0%. Rural area is represented by the Bran-Moieciu-Fundata corridor, a representative tourist destination of Braşov County, which attracted the attention of tourists after 1990, when began developing the accommodation infrastructure. The Bran and Moieciu communes (tourist resorts) have kept their lead position in the period 2006-2015, holding 31,5% of the existing accommodation units at the county level.

Also, regarding the existing accommodation capacity, urban area owns a larger number of accommodation beds than rural area, but it is understandable if we take into account the fact that in this area are included Braşov city and known tourist resorts as Poiana Braşov, Predeal and Râşnov. However, it should be noted that, in terms of number of bed places, the share of rural area has increased significantly between 2006-2015, from 20,4% to 31,3%.



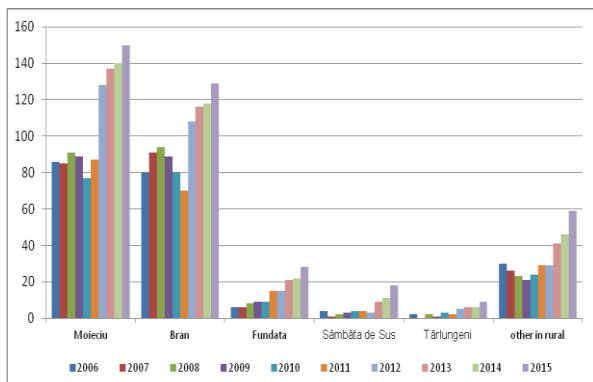


Figure no. 2. The number of accommodation beds in the main urban and rural tourist destinations in Braşov County

Source: National Institute of Statistics, Tempo on-line database (<http://statistici.insse.ro/shop/>)

In the urban area, it is observed a slower growth of already established destinations, as Braşov city (+67,2%) and Predeal resort (+32,8%), and accented growth rates for some less famous destinations, that has made significant investments in tourist attractions and accommodation infrastructure in the recent years: Râşnov (an increase by 7,7 times of the number of beds), Săcele (an increase by 8 times) or Zărneşti (an increase by 3 times).

In the rural area there was a relevant growth in the number of accommodation bed places, in 2015 it was 3,2 times more seats than in 2006. Period 2008-2011 is characterized by the stagnation of the accommodation offer. However, since 2012, it is evident the revival of tourism activity by increasing tourism offer. There is a large concentration of the number of accommodation beds in Bran-Moieciu-Fundata area, notorious for rural tourism and agritourism (24,4% of the total accommodation places in Braşov County and 77,8% of accommodation places from rural area). In addition, other rural destinations are starting slowly to develop accommodation infrastructure (Sămbăta de Sus, Tărlungeni, Măieruş, etc.).

2. Trends of tourist accommodation demand in Braşov County

Tourist circulation expresses actual demand under different aspects and will be analyzed based on three indicators: *tourists' arrivals*, *overnights* and *average length of stay*. In the period 2005-2014 it is observed an increase of the number of tourists arrivals with 93,2%, from 448.147 to 865.689, and the number of overnights with 78,1%, from 1.000.318 to 1.781.818. The year 2009 is the only one in the series that is recorded reductions of the two indicators (-22,4% and -23,0%

respectively), marking the economic crisis on the tourism sector in Braşov.

With a market share of 10,2% from the number of tourist arrivals and 8,8% from the number of overnight stays (2014), Braşov County ranks third nationally after Bucharest and Constanţa County, and also is one of the most dynamic tourist destinations, with increases recorded in the past decade over the national average.

Romanian tourists are the majority, their share increased during the analyzed period from 80,2% to 84,0% and the overnight stays of Romanian tourists increased from 79,4% to 83,5%.

Overall downward trend in the share of foreign tourists, didn't denied their increase recorded since 2009. In fact, in the period 2009-2014 the number of foreign tourists increased by 93,0% and their overnight stays by 81,7%.

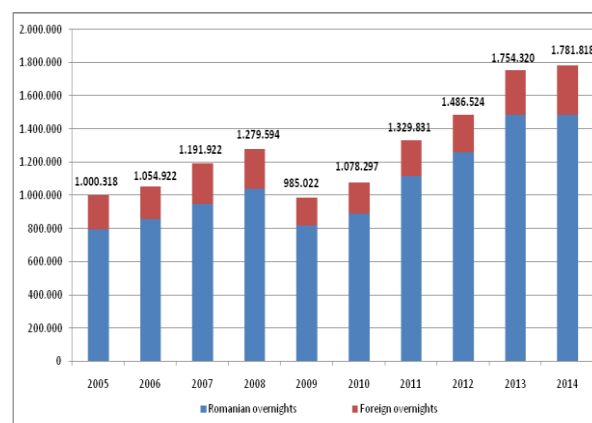
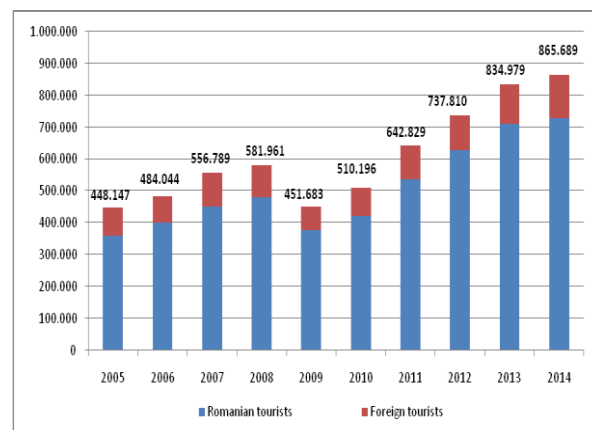


Figure no. 3. Evolution and structure of tourist arrivals and overnight stays in accommodation units in Braşov County

Source: National Institute of Statistics, Tempo on-line database (<http://statistici.insse.ro/shop/>)

In 2013, the largest share of foreign tourists is represented by tourists from Germany (14,6% of total), followed by Israel (9,8%), (6,4%), Italy (5,9%), France (5,8%), Spain (5,5%), USA (5,1%), Great Britain (4,7%), Moldova (4,1%) and Bulgaria (3,8%).¹

The concentration of the tourist attractions in certain areas of the Braşov County is reflected in the distribution of tourist arrivals and overnight stays in the most popular tourist destinations.

The urban areas concentrate most of the tourist flows in Braşov County (79,8% of the tourist arrivals and 79,3% of the overnight stays). However, it is noted an increasing share of rural areas in the analysed period, from 10,2% to 20,2% on arrivals and from 10,2% to 20,7% in the number of overnight stays. Also, during this period, the number of tourists arrivals in rural destinations from the county increased 3,8 times and 3,6 times for their overnight stays.

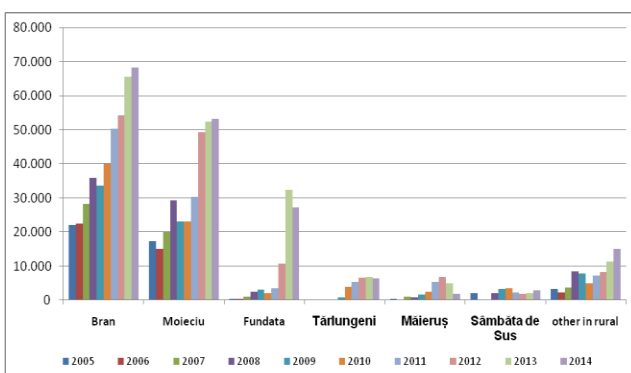
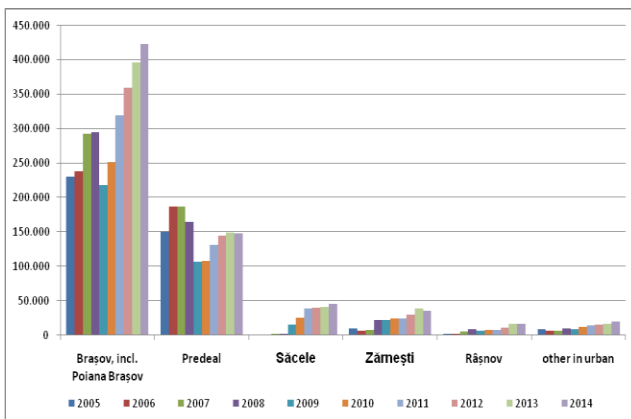


Figure no. 4. The evolution of tourist arrivals in major destinations in urban and rural areas in Braşov County

Source: National Institute of Statistics, Tempo on-line database (<http://statistici.insse.ro/shop/>)

Regarding urban localities, the Braşov city (including Poiana Braşov resort) stands out, with a percentage of over 48,9% of total arrivals in 2014, followed by Predeal resort (17,2%). After 2008-2009,

among other localities in urban areas it is distinguished: Săcele, Râşnov and Zămeşti.

Regarding rural areas, the mostly share of the tourist flows is focused on the Bran-Moieciu-Fundata corridor (85,1% of the total number of tourists arrivals in rural areas in 2014). Most dynamic destination was the Fundata village, who managed to triple the number of accommodated tourists in 2013 compared to 2012, and a 9-fold increase compared to 2011. This relatively new tourist destination manages to attract about half of the number of tourist arrivals registered in other established rural destinations in the county (Moieciu or Bran).

It has highlighted the remarkable increase in the number of accommodated tourists in other villages of the county (Măieruş and Târlungeni), especially in the second part of the period. Trend of tourist flows orientation to other destinations in the county was supported by tourism accommodation infrastructure development, creating other tourism facilities, particularly leisure equipments and the emergence of new business centers/incubators on the outskirts of Braşov. As such, some of the tourists visiting these rural destinations have business travel reasons.

Most of the tourists visiting the tourist destinations from Braşov County prefer to lodging in hotels (over 60% throughout the analyzed period). The guesthouses and agritourist pensions (cumulative) attract 24,6% of all tourist arrivals, but the percentage of those accommodated in these units increased steadily between 2005-2014. It is also noted the increased interest of tourists for youth specific forms of accommodation (number of tourists accommodated in hostels has quadrupled from 2005 to 2014).

Braşov County, an heterogeneous tourist destination, is unable to hold the tourists more than 2 to 2,2 days, average length of stay remained at this level throughout the analysed period. Even if in the Braşov County there are tourist resorts and tourist areas, where tourists might stay more than two days, however this is not reflected in the statistical available data.

It is also noted that there are no great differences between length of stay in urban and rural destinations, and even destinations that had an average of more than 3 days before 2008 (Făgăraş, Săcele and Râşnov), went down to only 2 days towards the end of the period.

3. Visitors profile in Braşov County tourist destination

Following a qualitative marketing research conducted among professionals of tourism in Braşov County, under the project "Intelligent Destination Management for Sustainable Tourism (DIMAST)" was outlined a profile of tourist visiting Braşov County.²

Analyzing the provided answers, it was concluded that the Braşov County is a heterogeneous tourist

destination, with a various forms of tourism, unevenly distributed at the territorial level.

Romanian tourists who spend their winter holidays in Braşov County are generally interested in practice season sports in tourist resorts like Poiana Braşov or Predeal, spending the Christmas holidays in destinations such as Bran-Moieciu, Zărneşti, Viscri, being interested in the traditions and local gastronomy. During summer vacation, tourists are interested in visiting the city of Braşov and its surroundings, or spending holidays in rural areas (Bran - Moieciu, Viscri). An appreciable number of Romanian tourists, especially those from Bucharest and outside the Carpathian arch, visit Braşov County to spend the weekend, preferring the Râşnov - Bran - Moieciu - Fundata area. During the off season, Braşov city is an important destination for business tourism.

The foreign tourists arriving from Western Europe (Austria, Germany, France, Britain, Italy, Spain) are divided into: a) very young tourists, low-income, staying in hostels or campings, interested in nature, but also in cultural attractions, traditions and local customs and b) seniors and adult tourists, who are interested in cultural attractions (museums, castles, fortresses, fortified churches, customs and local traditions, crafts and cultural events, local cuisine). Both, the first and the second category, usually come during the summer season.

Israeli tourists are generally people over 45 years, with middle and high incomes and are interested in visiting places / attractions which they heard from their older compatriots (possibly born in Romania). The main visited tourist attractions are: Poiana Braşov resort, the historic center of Braşov City, the Synagogue of Braşov, Bran castle, Râşnov fortress, etc. They come, especially, in spring and autumn. Tourists from former U.R.S.S. have become regular tourists in Old Style Christmas period in Poiana Braşov and Prahova Valley. They are young and adult tourists (sometimes with children) with above-average incomes, who come to spend the holidays, to practice winter sports and are interested in shopping and entertainment.

An increasingly number of foreign tourists chooses Rupea - Viscri with traditional guesthouses, and there are, also, a lot of tourists who come for the observation of big carnivores in Zarnesti area.

Should not be neglected the large share of one-day visitors (both Romanian and foreigners) who prefer to make a circuit of the historical center of Braşov, to visit Bran castle, etc. The county location on the major tourist routes such as Bucharest-Sibiu or Bucharest - Sighişoara, represent a factor that fosters the development of transit tourism and therefore contribute to increasing the number of day-visitors.

Conclusions

The tourism market from Braşov County is booming. With growth rates of the main tourist indicators higher than the national average, Braşov County has maintained a top position among tourist destinations in Romania.

On the one hand, this trend was driven by the general conditions that have increased the overall national economy after 2009, which led to increased investment in tourism infrastructure, enhanced incomes, and allocating a higher percentage of these for travel, and on the other by changes in the preferences of tourists.

Also, in the analysed period, noteworthy are the financial and promotional efforts of the local government and of the private sector. The investments made by the Braşov County Council in preserving, restoring historical heritage, upgrading communication routes were elements that have sustained the tourism development. Furthermore, it is remarkable the effort made by the Association for Promotion and Development of Tourism in Braşov County (APDT) in promoting the county and to organize cultural and historical events with high impact in attracting Romanian and foreign tourists.

Another trend is that more and more tourists (especially foreign tourists) are seeking exclusive, authentic and personalized experiences, which entailed the development of new products and tourist destinations based on natural and cultural heritage. In these circumstances, although the recognized tourist destinations (Braşov city, Poiana Braşov, Predeal, Bran, Moieciu) maintained the top position, some new developing destinations (Zărneşti, Râşnov Fundata, Săcele) manage to attract an increasing number of tourists, due to investments in rehabilitation of heritage and in tourism infrastructure and through a different market positioning.

6. Acknowledgements

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