THE ROMANIAN HOTEL INDUSTRY. AN ANALYSIS BASED ON REAL FACTS

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Abstract
Romanian Tourism has undergone considerable changes in the transition to the market economy. These changes, together with the inappropriate solutions adopted by the authorities, led to an unsatisfactory performance of the Romanian tourism, significant differences coming up between what the resort ministry communicates and promotes and the actual state of the Romanian tourism and hotel industry. This situation has also been maintained by poor and erroneous reporting of data by hoteliers regarding the hotels managed to the resort ministry but also by the poor processing of information received by the ministry of resort / NAT, leading to a database of erroneous information regarding the Romanian tourism and hotel industry supply. These data are practically useless for any interested parties, and moreover for those intending to use the facts especially for opening a new business in the hospitality industry. This paper aims at presenting a much closer to reality statistical summary of the hotel industry, bringing into the limelight the accommodation units that operate without classification certificates and which are not fully taken into account by the NIS.

Key words: *Hotel industry; Ministry of Tourism/National Authority for Tourism; Mismatch; Statistics, Tourism.*

JEL Classification: *L83*

INTRODUCTION

Beginning with 1970, the Romanian tourism industry, and especially the hotel industry, experienced a fast growth, supported by governmental investments and promotion. This development has resulted mainly in the construction of large hotels in major tourist destinations: the Black Sea seaside, Prahova Valley, Poiana Braşov mountain resort, some renowned spa resorts and large cities. (Pop et al., 2007, pp.8-9) Due to the major investments made in the hospitality industry from 1970 to 1985, the number of hotels increased by 42.3%.

However, the pace of hotel construction and openings decreased after 1980. From 1985 until 1990 hotels continued to record a slight increase by 5.9%. During the same time-span, the hotels built in 1970 were in need of major renovations, but for the Romanian authorities the numerical increase was more important.

By the end of 1990, a recovery was registered, as interest in the hotel industry reappeared due to the start of privatization, but also due to direct investments in new accommodation establishments. However, the number of hotels remained relatively constant.

Between 2000 and 2005 it was trendy to invest in accommodation establishments. Some old establishments were modernized and new ones were built. The number of hotels increased by 22.9% (RSY *apud* Pop et al., 2007, pp.72-73).

After the immediate decline that followed the Revolution, concerning the number of hotels in Romania, overall in the last 23 years, the hotel industry has been constantly developing.

RESEARCH METHODOLOGY

Two types of methods laid the foundation of the research methodology:

- Secondary data analysis by treating various facts and figures, guides, almanacs, brochures and tourist post cards, specialized websites, comparisons, analogies and syntheses, and even by contacting hotels and travel agencies; in order to determine the present status of the hotels (new, renovated/ not renovated), an analysis of the images found on each hotel's website or on specialized websites, together with contacting hotels and/ or travel agencies has been done;
- Induction and deduction, which are interrelated and have contributed significantly to the interpretation of the current state of the hotel industry, taking into consideration the situation presented by the MT/ NAT and different situations resulted from the research conducted.

RESEARCH PURPOSES

This paper aims at presenting the results of a detailed investigation of the real quantitative situation of the hotel industry in Romania, by analyzing hotels overall, which are new, which have undergone renovations, which have been left to deteriorate, analyzed by tourist destinations (county residencies, seaside resorts, spa resorts, mountain resorts), hotels which have been closed and the presence of international hotel chains on the Romanian market, respectively the appearance and development of local chains.

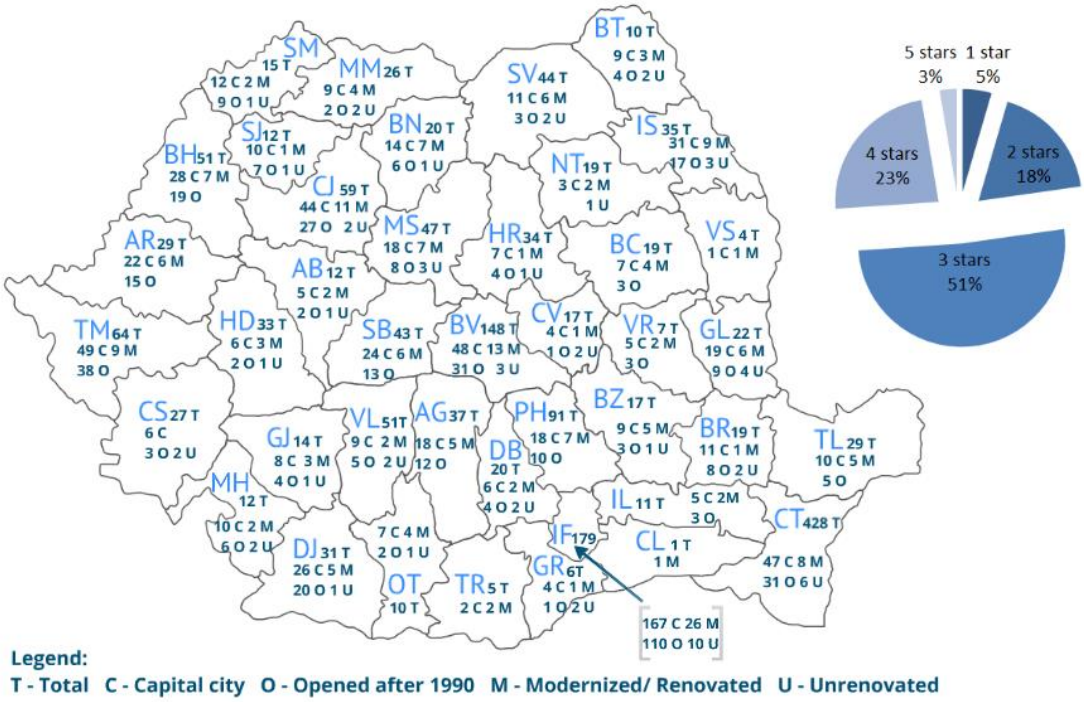


Figure 1 - The Situation of Hotels and their Distribution by Classification in Counties and County Residencies

By analyzing the Database of the MT/NAT, published biannually, regarding the official list of all authorized accommodation units in Romania, one could easily spot a large number of missing hotels. The database used as reference is the one published in December 2012 (4) taking into consideration that at the time when the research was completed, the most recent list had not yet been made available (the resort ministry published it only the 24th of August 2013). The research began from this point, trying to find out how many hotels the MT/NAT has omitted and also to perform a distribution of hotels classification by destinations. There are two possible explanations regarding the identified missing hotels: either the hotels undergo a reauthorization process, or – regrettably in most cases – they have been omitted because of neglecting, pure ignorance or incompetency. This paper aims to determine the total offer existent on the local hotel market, numbers that we consider that the resort ministry should be able to provide (including in the official database not only some, but all of the accommodation units that were fined for operating without a valid classification certificate, but which initially had one, as well as the accommodation units that have been identified and/ or fined for unauthorized operation) because the real market supply consists of all of these units. We consider that these units are likely to cause a great damage to the image of the Romanian accommodation offer, as tourists also stay in unclassified units and have a degraded experience due to services rendered of a questionable quality level. The fact that by the summer of 2013 the classification system was based on a simple affidavit regarding the services provided, has contributed to the lack of interest of the providers to increase quality. Moreover, the so many changes that took place in order to somehow update and improve the classification system (Lupu, 2010, pp.5-12) did not show any beneficial effects.

Regarding the significant differences in the number of bed-places offered by the accommodation units that operate with classification certificates and those that do not, we consider highly relevant the figures presented by the National Foundation of Young Managers in Romania presented for the case of pensions. Officially, the database of 2012 (4) listed 4,911 pensions (tourist, rural, urban and agritourist), including chalets and villas (these are assimilated to the pension category because, according to NFYM, it is considered that tourists do not sense significant differences between them), while on the real market around 8,000 pensions have been identified as "potentially active". Those pensions listed in the database provide about 25% of the bed places in the classified accommodation units. Considering those operating without certificates, the figures easily reach 40%. (NFYM, 2012)

By querying the database one can identify various errors such as: accommodation units registered as hotels, but which are in fact pensions (Dana Hotel and Ursuleţul Hotel, Predeal), hotels which have been closed down (Cristian Hotel, Cluj-Napoca, YourHotels Orlando, Venus) and operating hotels – some even affiliated to an international hotel chain – but which have been omitted from the database used as a reference, and had also been omitted from the previous versions of the database (Confort Hotel 3* and Ramada Hotel 4*, Cluj-Napoca, Medieval Hotel 5*, Alba Iulia) (12).

HOTELS IN COUNTY RESIDENCIES

We began by studying the situation of the hotels by counties and in county residencies. The research conducted shows that in Romania there are 1,751 hotels (compared to 1,384 reported by NIS to *Tempo Online* for 2012, the year used by us as reference) of which 750 are located in county residencies. This means that a significant percentage of 43% of the hotels, almost half of the hotels in Romania, are situated in county residencies.

The situation is the following (for each hotel category, new, renovated, not renovated, we present their number and the percentage they hold in the total number of hotels in that county):

- Most hotels are located in the counties Constanţa (428), Ilfov, including Bucharest (179) and Braşov (148), followed at a considerable difference by Prahova (91) and only then by the remaining counties;
- Bucharest gathers 22% of the total hotels in county residencies, followed by Timişoara with 7%, Braşov, Constanţa and Cluj-Napoca each with 6%;
- Most new hotels are situated in Bucharest (110/66%) followed by Timişoara (38/78%), Braşov and Constanţa on par (31/66%);
- Most renovated hotels are again in Bucharest (26/16%) and Braşov (13/27%), followed by Cluj-Napoca (11/25%);
- Most not renovated hotels can be found in Bucharest (10/6%), Constanţa (6/13%) and Galaţi (4/21%). However, the situation of these unlucky hotels seems to be better in county residencies, compared to spa or seaside resorts.

As one may notice in Figure 1, 3* hotels prevail in county residencies with 51%, followed by 4* hotels with 23% and 2* with 18%. We can see an imbalance in the classification structure: while 4* hotels represent nearly a quarter of the total hotels, 1* hotels represent only 5%. Bucharest has 10 hotels rated at 5*, followed by Cluj-Napoca with 3 and Braşov, Galaţi, Oradea, Sibiu, Bistriţa with 1 hotel; last but not least, we have to mention the Elysee 5-star hotel in Săcălaz village near Timişoara. Other important county residencies, such as Constanţa and Tulcea, have no hotel rated 5*. There must be mentioned that the national interest resorts Mamaia and Poiana Braşov, and not only, are managed by the municipalities of Constanţa, respectively Braşov, being in fact neighborhoods of the cities; of course, they have been treated separately, as tourist resorts.

Bucharest gathers 33% of the 4* hotels, followed at a significant difference by Timişoara with 9%, Cluj-Napoca with 7% and Constanţa with 6%. The other 19 county residencies gather 22% of the 4* hotels and 12 county residencies hold no such hotel.

Most 2 and 3* hotels can be found in Bucharest, with 18%, followed by Braşov with 8%, Timişoara with 7%, Cluj-Napoca and Constanţa with 6%, each. The other 28 county residencies total 27% of 3* hotels. Regarding the 2* hotels, the situation is similar to that of 3*, the top 5 places being held by the same county residencies. The situation of the 1* hotels is rather good, less than half of the county residencies have such hotels left.

HOTELS IN SEASIDE RESORTS

Since the seaside resorts are of major importance for Romanian tourism, Constanţa County gathering the highest number of hotels (428), we continued to analyze their situation.

The situation in seaside resorts is as follows (for each hotel category, new, renovated, not renovated, we present their number and the percentage held in the total number of hotels per seaside resort):

- Seaside resorts total 374 hotels (excluding capital city Constanţa), which means that 21% of the total hotels in Romania are situated in this destination;
- Most hotels can be found in Mamaia (91/24% - of all hotels on the sea coast), followed by Eforie Nord (80/21%) and at a significant distance by Neptun-Olimp (43/12%);
- One can find most new hotels in Eforie Nord (22/41%) followed by Mamaia (26/29%) and Costineşti (15/63%);
- The concentration of renovated hotels seems to be consistent with the ranking of most hotels situated in seaside resorts: Mamaia is on the first place (53/58%), followed by Eforie Nord (33/41%) and at a significant distance by Neptun-Olimp (18/42%);
- One encounters a poor situation of hotels in Neptun-Olimp, with the highest number of not renovated hotels (22/51%), followed

by Eforie Nord (14/42%). In Neptun-Olimp and Saturn, more than half of the hotels have not undergone renovations. One ought to take into consideration that Eforie Nord, Neptune and Saturn are part of the resorts chosen by the MT/NAT to be promoted at international level!

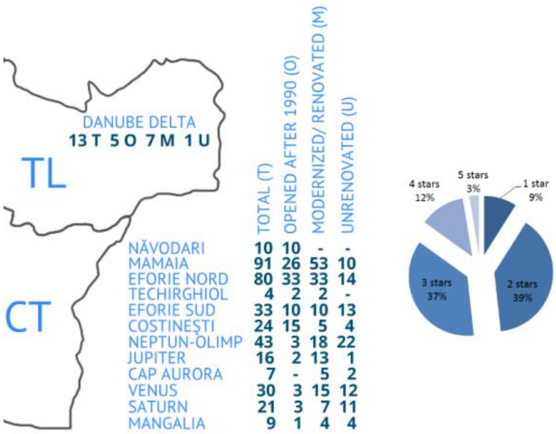


Figure 2 - The Situation of the Hotels and Distribution by Classification in Seaside Resorts

Neither the quantitative, nor the qualitative situation of the hotel industry in the seaside resorts is good, as 39% of the hotels are rated at 2*. These are followed by 3* hotels with 37%. However, 1* hotels represent only 9% of the total hotels on the sea coast, but three times more than the 5* hotels!

Of the 11 seaside resorts analyzed, only 3 have 5* hotels: Mamaia, Saturn and Năvodari, which gather 9 hotels rated at 5* from a total of 344 hotels.

Concerning the 4* hotels, Mamaia gathers 51% of them, followed at a significant distance by Neptun-Olimp and Venus with 12% each.

Although it may seem incredible for a seaside coast that pretends to compete with the Bulgarian one, Eforie Nord, promoted at international level, gathers the most 2 and 3* hotels, with 20% and 29%. Neptun-Olimp total 20% of the 2* hotels, followed by Mamaia with 17%, which also concentrates 29% of the 3* hotels. Moreover, Eforie Nord hosts the most 1* hotels, meaning 12% of the hotels situated in the seaside resorts.

Regarding the Danube Delta, it hosts a total of 13 hotels, of which 5 are new, 7 have undergone renovations and only 1 is not renovated. The level of services provided is satisfactory, a number of 7 hotels being of 4*, 5 of 3* and only 1 of 2*.

HOTELS IN SPA RESORTS

Romania is home to one-third of the thermal and mineral water supply of Europe. (Pop et al., 2007, p.5) MT/NAT, through the "Romania – Explore the Carpathian Garden" campaign, promotes 34 spa resorts at international level (8).

Interestingly, except for the spa resorts situated on the seaside, there are 29 spa resorts promoted worldwide, of which only 18 are considered to be of national importance, while the other 10 are of local interest and one (Sângeorgiu de Mureş) is not a certified tourist resort, according to the official list published in December 2012 (9).

Further, we analyzed the situation of the hotels situated in 29 spa resorts promoted at international level and an additional number of 9 spa resorts, of local or national interest, a total of 38 spa resorts, according to Figures 3 and 4 (for each hotel category, new, renovated, not renovated, we present their number and the percentage held in the total number of hotels in the specific spa resort):

- The 29 spa resorts promoted worldwide total 167 hotels, of which most hotels can be found in Băile Felix (15), Olăneşti (14), Herculane (13) and Vatra Dornei (12), all of them being considered of national interest;

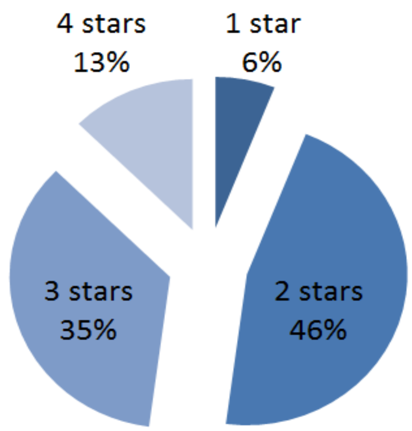


Figure 3 - Concentration of Hotels' Classification in Spa Resorts

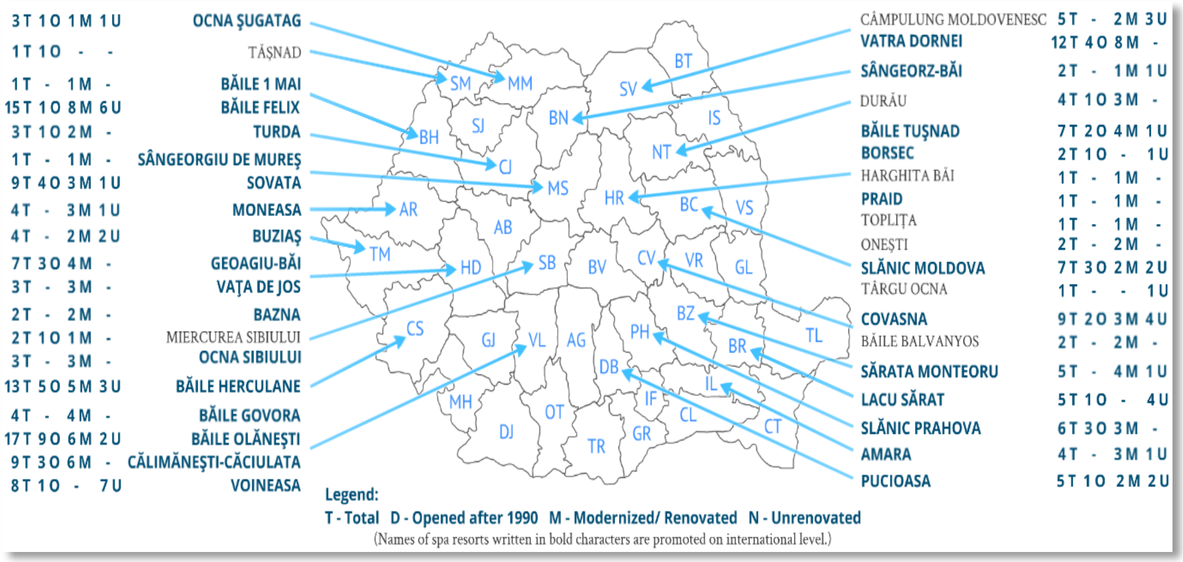


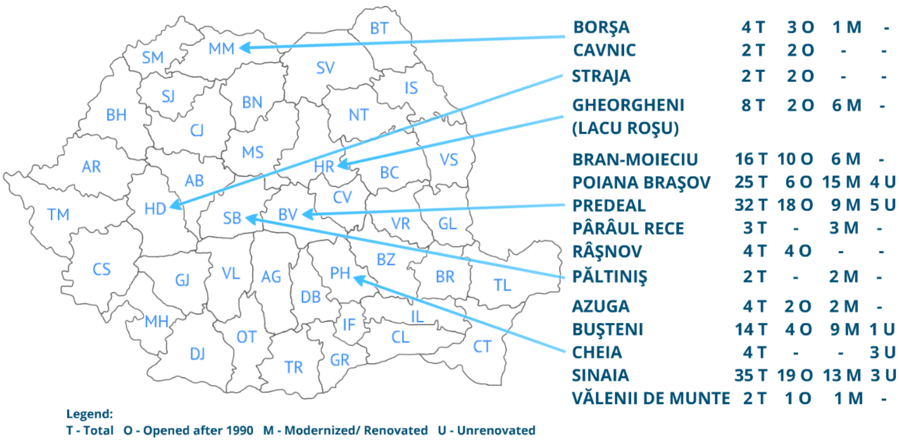
Figure 4 - The Situation of Hotels in Spa Resorts

- A percentage of 27% of the spa resorts each concentrate less than 3% of the total hotels situated in this destination;
- Most new hotels are located in Băile Olăneşti (7/41%), followed by Băile Herculane (5/38%) and Vatra Dornei and Sovata, tight (4/44%). Since 1990, no new hotel has been opened in 18 spa resorts, of which 12 are internationally promoted!
- A better situation of the hotels can be found in Vatra Dornei and Băile Felix, each with 8 renovated hotels, followed by Călimăneşti-Căciulata (6) and Băile Olăneşti and Herculane, each with 5 renovated hotels;
- The poorest situation is in Voineasa, with 7 out of 8 hotels not renovated, Lacu Sărat with 4 out of 5 and Sângeorz-Băi and Borsec with 1 out of 2.

The quality of the services provided in the 29 spa resorts is not very good. Most hotels are rated 2*, representing 46% of the total, followed by 3* hotels with 35%. Moreover, 1* hotels represent 6% of the total, but there is not any 5* hotel there!

Of the 29 spa resorts promoted worldwide, only half of them have 4* hotels. Interestingly, Vaţa de Jos and Ocna Sibiului resorts are promoted on international level, but are considered by the MT/NAT to be of local interest.

Băile Felix resort has the highest number of 2* hotels (10%), followed by Covasna with 8%, Băile Herculane, Vatra Dornei, Sovata and Lacu Sărat, each with 6%. The other 21 spa resorts gather 41% of the 2* hotels. Regarding the 3* hotels, most of them are situated in Băile Olăneşti (15%), followed by Băile Herculane (12%) and Călimăneşti-Căciulata (8%).



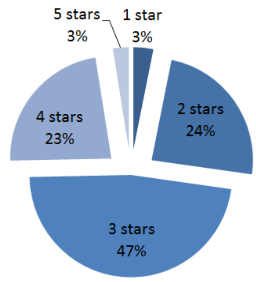


Figure 6 - Concentration of the Hotels by Classification in Mountain Resorts

Figure 5 - The Situation of the Hotels in Mountain Resorts

HOTELS IN MOUNTAIN RESORTS

Of the 15 mountain resorts analyzed, 9 are considered to be of national interest (Poiana Braşov, Predeal, Râşnov, Sinaia, Lupeni-Straja, Azuga, Buşteni, Vălenii de Munte and Gura Humorului) and 6of local interest (Bran-Moieciu, Pârâul Rece, Lacu Roşu, Borşa, Vişeu de Sus and Cheia).

The situation of hotels in mountain resorts, analyzed to date, is as follows (for each hotel category, new, renovated, not renovated, we present their number and the percentage held in the total number of hotels in that mountain resort):

- Sinaia gathers most of the hotels (21%), followed by Predeal (19%) and Poiana Braşov (15%). The remaining 11 resorts gather less than 3% of the hotels, the accommodation supply consisting mostly of villas, hostels and lodges;
- Most new hotels are located in Sinaia (19/54%) and Predeal (18/56%), followed by Bran-Moieciu (10/63%) and only then by Poiana Braşov (6/24%);
- In Poiana Braşov there are 15 renovated hotels (60%), Sinaia (13/54%), Predeal and Buşteni, each with 9 renovated hotels (28%). In Poiana Braşov, Gheorgheni and Buşteni, more than half of the hotels have been renovated after the Revolution;
- The resorts gather less than 3% of the hotels, the accommodation supply consisting mostly of villas, hostels and lodges;
- A better situation of hotels can be found in Poiana Braşov with 15 renovated hotels (22%), Sinaia (13/19%), Predeal and Buşteni, each with 9 renovated hotels (13%). In Poiana Braşov, Gheorgheni and Buşteni, more than half of the hotels have been renovated after the Revolution.

Regarding the quality of the services provided, 47% of hotels are rated 3*, followed by 2* with 24% and 4* with 23%, most of the 2 and 3* hotels being situated in Sinaia, Predeal, Buşteni and Poiana Braşov resorts. On the other hand, 5* hotels can only be found in 4 mountain resorts: Poiana Braşov, Azuga, Predeal and Sinaia, resorts that also have 4* hotel

HOTELS THAT HAVE BEEN CLOSED DOWN

Regarding the capitalization of the closed accommodation facilities, we point out that there are 28 closed hotels, of which 7 are situated in Bucharest. A number of 16 hotels are included on the 2010 Historical Monuments List (10), 12 of them being considered representative for the local cultural heritage and 4 of them of national and universal value alike (Baron Kendeffy Hotel in Sântămăria-Orlea, Hunedoara county, Dacia Hotel, formerly named 9 Mai in Satu Mare, Decebal Hotel, formely bamed Ferdinand in Băile Herculane and Minerul Hotel, formerly named Sf. Ştefan in Baia Mare). Therefore, these hotels could be successfully capitalized, taking the example of some famous hotels, such as Ritz in Paris (1898) and London (1906), the Peninsula (1905) and Waldorf - Astoria (1931) in New York etc. The reinsertion on the tourist market of these valuable closed hotels would bring multiple benefits to the local community and hotel industry through economic contributions, increased accommodation capacity, and last but not least, through the added-value to the destination, by proving the destination's tradition in the hospitality industry (developed here in the same period with the emerging hotel industry in the USA) and which can be associated with the luxury of the past. Such historical buildings can be harnessed to their full potential only by reinsertion in tourism heritage and by playing their original objective, just as legislation recommends.

Hotel Cişmigiu from Bucureşti, which was recently renovated and reopened, being thus reintroduced into the tourist circuit, represents a successful example in this respect that one should follow. But, unfortunately, in Romania prevail examples that should not be followed; for example the Continental hotel from Cluj-Napoca (the renowned New York of the interwar period), a genuine local trademark, which presently faces an advanced stage of degradation, which represents a real threat to its existence.The International Hotel Chains on the Romanian Market.

The interest of international hotel brands to enter the Romanian market has had an increasing trend over the last 23 years. Well-known brands such as Ramada, Hilton, Golden Tulip, Accor, Best Western, were among the first who dared to enter the Romanian market. (Pop et al., 2007, p.118).

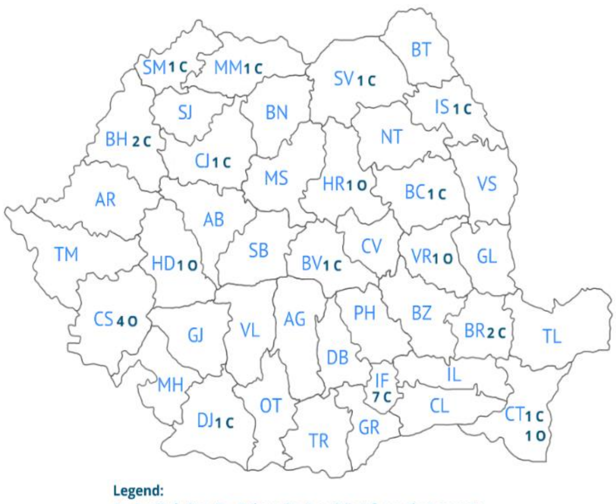


Figure 7 - The Situation of the Closed-Down Hotels

Today on the Romanian market, 17 international hotel groups and chains are present, with one or more brands: Accor Hotels (6 hotels, with the brands Ibis, Novotel and Pullman), Best Western (11 hotels), Danubius Hotels (3 hotels), Europa Group Hotels (1 hotel, with the brand Europa Royale), Golden Tulip Hotels, Inns & Resorts (5 hotels, with the brand Golden Tulip), Hilton Hotels & Resorts (6 hotels, with the brands Double Tree, Hampton and Hilton), Hunguest Hotels Hungary (1 hotel, with the brand Hunguest Hotels), IHG – InterContinental Hotels Group (2 hotels, with the brands Crowne Plaza Hotels & Resorts and Intercontinental), K+K Hotels Group (1 hotel), Marriott International (1 hotel, with the brand JW Marriott), Minotel (1 hotel), NH Hoteles (2 hotels), Rezidor Hotel Group (1 hotel, with the brand Radisson Blu), Select Hotels Group (1 hotel, with the brand Select Hotels Collection), Vienna International Hotels & Resorts (1 hotel, with the brand Vienna) and Wyndham Worldwide (11 hotels, with the brands Howard Johnson and Ramada); there are a total of 54 internationally affiliated hotels; (according to MDRT, Unităţi clasificate, decembrie 2012 and based on the websites of the international hotel groups and chains (11)).

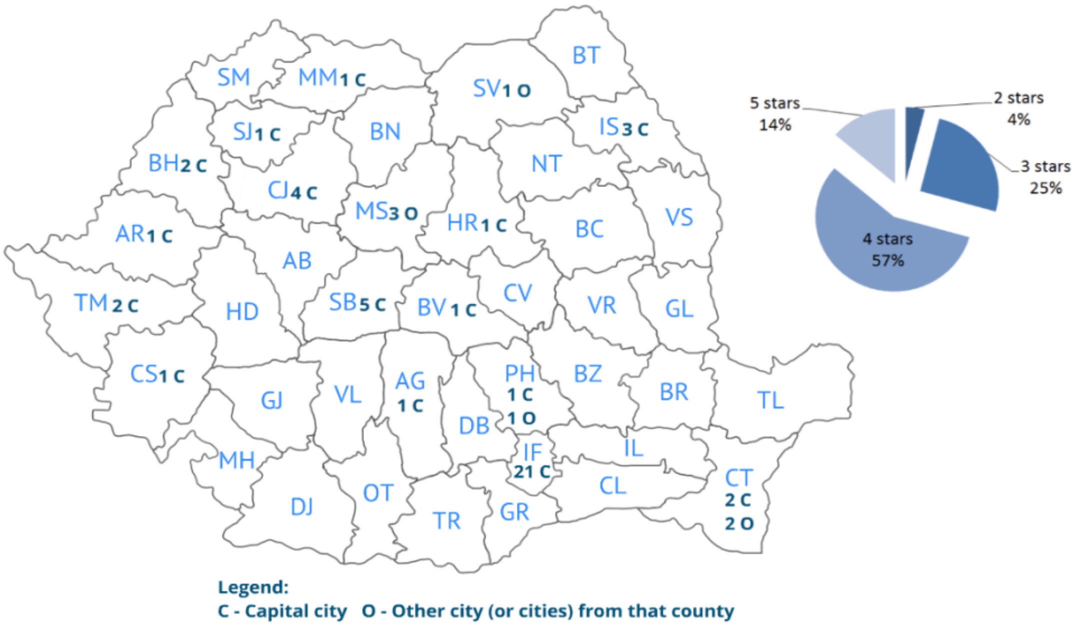


Figure 8 - The Situation of the International Hotel Chains and Their Concentration on the Romanian Market

International chains are present in Romania in 17 counties. Most international hotel chains can be found in Bucharest, with 21 hotels. Next on the list comes the city of Sibiu, at a considerable distance, with 5 internationally affiliated hotels. The other 15 counties have 1 or 2 international hotels, except for Constanţa county that has 1 Best Western and Accor in the capital city and 1 Best Western and Golden Tulip in Mamaia. As it can be seen, the presence of international hotel chains on the Romanian seaside is very poor.

Regarding the quality of the services provided, 57% of hotels are rated 4*, 24% of hotels have 3* and 13% are of 5*.

CONCLUSIONS

An overview of distribution of new hotels, renovated and not renovated on tourist destinations is presented as follows:

- Most hotels of the total, new and renovated are situated in county residencies;
- These are followed as total number by seaside resorts;
- And the same two first places in the ranking also hold most renovated hotels;
- Regarding not renovated hotels, most numerous are located on the seaside.

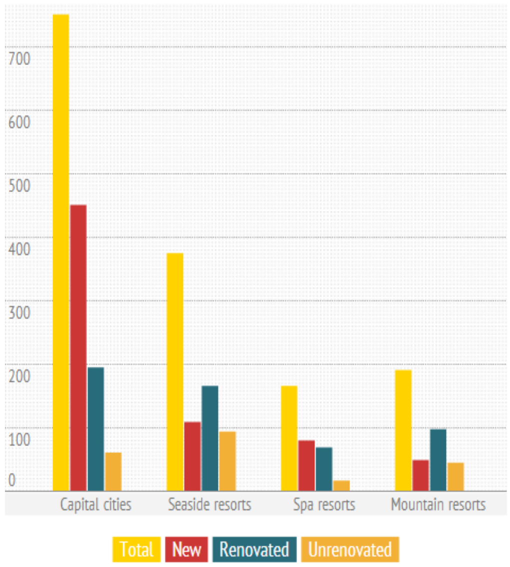


Figure 9 - The Distribution of New, Renovated and Not Renovated Hotels per Tourist Destinations

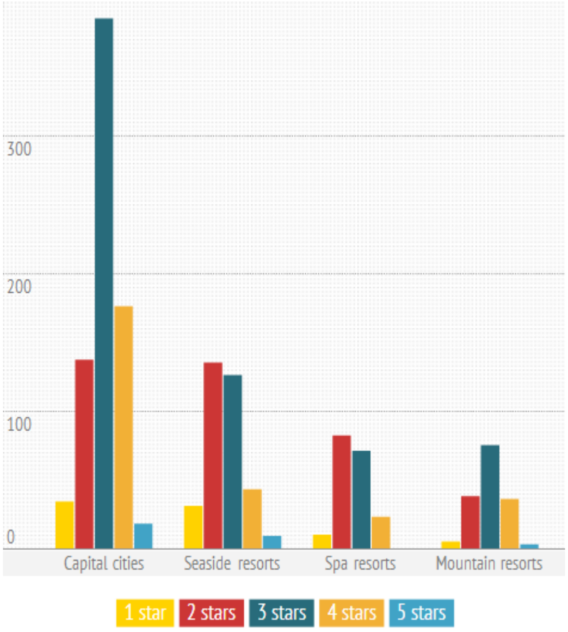


Figure 10 - The Distribution of New, Renovated and Not Renovated Hotels per Tourist Destinations by Level of Classification

The thorough analysis conducted reveals that, in quantitative terms, the situation of the Romanian hotel industry is much better than the one shown by the data provided by the MT/NAT. The figures resulted from the analysis, as compared with the data provided by NAT and reported to the database of the NIS, are as follows:

- 750 hotels situated in county residencies, which means 191 hotels omitted by NIS, which means 159 hotels omitted by NAT;
- 374 hotels in seaside resorts (excluding capital city Constanţa), 100 hotels omitted by NIS, which means 118 hotels omitted by NAT;
- 13 hotels in the Danube Delta, 6 hotels omitted by NIS;
- 190 hotels in the spa resorts analyzed, 35 hotels omitted by NIS;
- 165 hotels in mountain resorts, 40 hotels omitted by NIS, differences from the data provided by NIS continue to come up given that the research is ongoing and there are still regions that have not been fully covered (some mountain and spa resorts, other localities and tourist routes).

Given the fact that we mainly analyzed internationally promoted resorts, destinations for mass tourism and we have not looked over small cities and regions that are not interesting for mass tourism, but we added them to calculations, resulted a total of 1,751 hotels, with 366 more hotels than in the official database of the MT/NAT. Omitted hotels are both from those built in the 1970s and especially after the year 2010.

The purpose of this research paper is essential for highlighting the importance of a more proper approach to tourism and hotel industry. A more thorough and responsible analysis done by the authorities, with a view to adopting optimal solutions, would create a more stable framework for improving and developing the Romanian tourism and hotel industries. Thus, Romania's international competitiveness could increase significantly.

In terms of quality:

- One may notice that there prevail 2 and 3* hotels in all 4 types of tourist destinations;
- However, they are followed by hotels ranked 4*;
- 5* hotels are the fewest, also not present at all in spa resorts, and their number is always exceeded by 1* hotels.

We remind the importance of presenting the hotel market/ accommodation supply in general as close to reality as possible, as accommodation services represent the component with the greatest share in the manner how visitors perceive a destination; tourists seem to be more interested in the quality of the services provided, than in the quality and attractiveness of the destination itself (Tăchiciu, 2009, pp.26-34).

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