

# HOTEL AND TOURISM DEVELOPMENT IN TRANSYLVANIA WITH IMPLICATIONS FOR TOURISM PLANNING

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## ABSTRACT

Transylvania is seen as the most authentic and colorful historical region of Romania, with rich and diverse tourism offer, nonetheless remains little known for international tourists. The main purpose of this study is to analyze the changes taking place in the Transylvanian tourism and hotel industry in the years following the regime change. The analysis of spatial and temporal disparities of different accommodation types and tourist arrivals was conducted. The results offer a great territorial view of Transylvania's tourism. As an exploratory work, the study aims to investigate the opportunities of the tourism supply and offer possible solutions for tourism planning.

**Key Words:** hotel development, Transylvanian tourism, temporal and spatial disparities, tourism planning

## INTRODUCTION

Transylvania is seen as the most authentic and colorful historical region of Romania, its tourism offer being characterized with richness and diversity, considering both attractions and services. The first 'visitors' recognizing its value were the Romans, who exploited Transylvania's thermal waters for medicinal and recreational purposes, building famous thermal baths, like Ad Aqua Herculi Sacras – Ad Mediam and Thermae Dodonae. Until the Second World War tourism development was constant. During the 1954 - 1960 period came an overall decline (Ciangă, 2006). The regime change in 1989 brought new perspectives and also new challenges for the Transylvanian hotel industry and tourism development (Light – Dumbrăveanu, 1999). The main purpose of this study is to analyze the changes taking place in the Transylvanian tourism and hotel industry since the regime change.

Transylvania (*Ardeal* in Romanian) is Romania's most developed territory, with Central-Europe orientation, since the World War I and Treaty of Trianon (Probáld, 2007), occupies 42% of the county's territory and gives home for 35% of the inhabitants. Hereinafter the tourism development of Transylvania will be discussed divided into three regions: North-West, Center and West. These are development regions defined by Law No 151/1998 and modified by Law No 315/2004. The North-West region involves 6 counties: Bihor, Cluj, Satu-Mare, Maramureş, Sălaj and Bistriţa-Năsăud, offering diverse and picturesque landscapes, healing thermal waters, exciting mountain hiking tracks, cultural centers for urban tourism and traditional villages for rural tourism. The Center region involves another 6 counties: Alba, Sibiu, Braşov, Covasna, Harghita and Mureş, relying on mountain tourism, rural tourism and cultural tourism. West region has 4 counties: Caraş-Severin, Timiş, Arad and Hunedoara, which offer unique karstic relief, nature parks and many possibilities for mountain sports and ecotourism.

## PRIMARY TOURIST FACILITIES

### The Accommodation Base

The available database for tourism geography, especially sources published by the Romanian National Institute of Statistics (further referred to as RNIS), offer reliably information about commercial accommodation since 1990, and provide for spatial and temporal comparison. For better understanding data is presented in regional and county level.

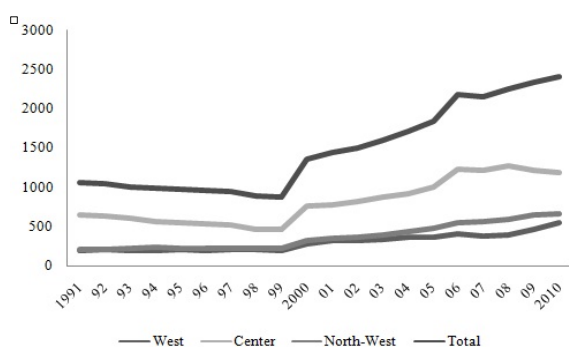
In 2010 Transylvania had a total of 2 400 tourist accommodation units (45,9 % of the country's total units), with a functioning capacity of 25 720 589 places/day. The most numerous accommodation types are agro-tourist boarding houses (35%), pensions located in urban areas (26%) and hotels (18%). The least prevalent are hunting lodges, apartment hotels, inns and vacation villages, with only a few units (see Table 1). Center development region is not only the region with the most accommodation units, but also the most densely supplied one: 3,4 units / 100 km<sup>2</sup>.

**Table 1**  
**Accommodation Unit Types in Transylvanian Regions in 2010**

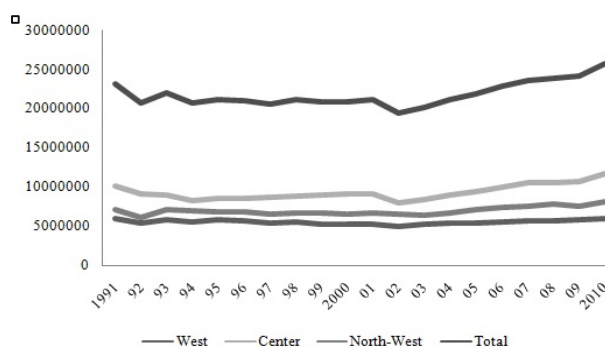
Accommodation Type	Development Region			Total
	Center	North-West	West	
Hotel	172	139	122	<b>433</b>
Youth hotel	7	2	4	<b>13</b>
Hostel	9	8	5	<b>22</b>
Apartment hotel	-	2	1	<b>3</b>
Motel	28	21	17	<b>66</b>
Pension	320	100	213	<b>633</b>
Inn	-	-	2	<b>2</b>
Villa	77	49	44	<b>170</b>
Touristic Chalet	43	21	12	<b>76</b>
Hunting lodge	4	0	0	<b>4</b>
Bungalow	8	27	12	<b>47</b>
Camping	7	8	3	<b>18</b>
Agro-tourist Boarding House	487	266	93	<b>846</b>
School and pre-school Camp	17	11	12	<b>40</b>
Vacation Village	2	0	0	<b>2</b>
Touristic Halting Place	3	3	8	<b>14</b>
Houselet Type Unit	4	1	6	<b>11</b>
<b>Total</b>	<b>1188</b>	<b>658</b>	<b>554</b>	<b>2400</b>

Source: RNIS, 2011

Figure 1 shows the evolution of unit numbers between 1991 and 2010. The tourist accommodation units have undergone serious typological transformations in the last 22 years. The dominance of hotels and motels was put to an end by pensions. While straight after the regime change, in the early '90s, Romania had an accommodation capacity of more than 360 000 places, in 2000 this indicator showed a 20% decline. This decline was caused throughout the country by the redraw of classical and unable to modernize accommodation types from tourism flow, such as villas and chalets. After the new millennium, the accommodation capacity increased continuously and new types of accommodation units appeared, such as youth hotels, hostels, apartment hotels and vacation villages. The most significant increase in unit numbers occurred in the year 2000 (54% growth to 1999) and in 2006 (18% growth to 2005), before Romania joined the European Union.



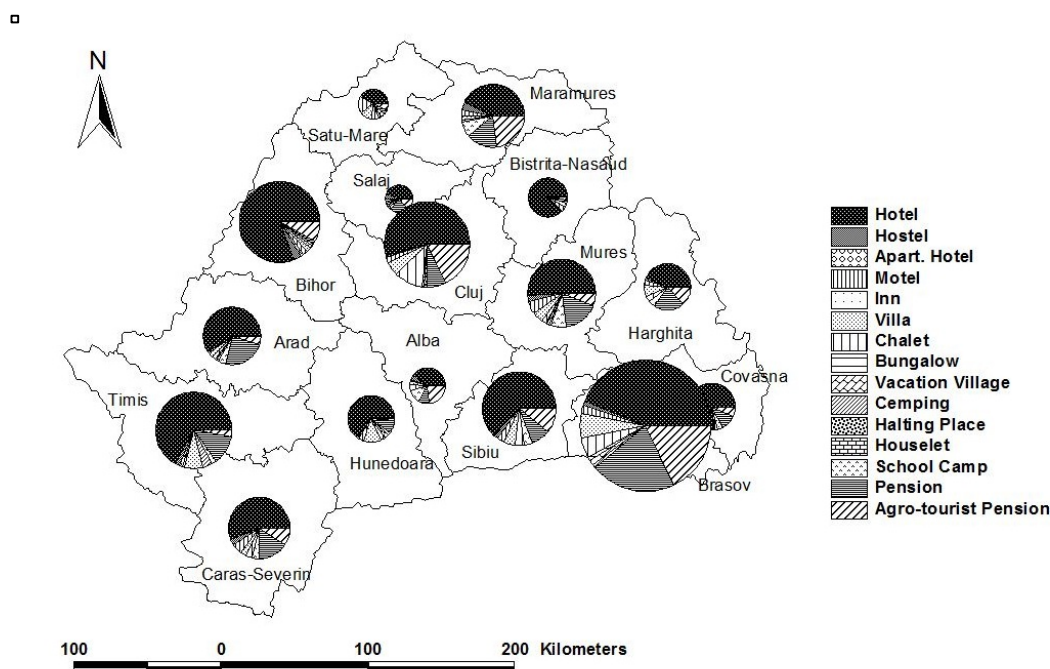
**Figure 1 Evolution of Unit Numbers Between 1991 - 2010 (Source: RNIS, 2011)**



**Figure 1 Evolution of Functioning Capacity Between 1991 - 2010 (Source: RNIS, 2011)**

Beyond the number of units, the available capacity of those units is the base of tourism geographic analysis, since they display more differentiated the tourism supply and its spatial aspects (Michalkó, 2007). The evolution of tourism capacity between 1991 and 2010 (see Figure 2) shows a different path then the evolution of unit numbers. While in the second part of the '90s unit numbers decreased, the capacity was quite constant. The most significant difference, however, took part between the years 2001 and 2002, when the functioning tourist accommodation capacity of Transylvania dropped with 8%, to a number of 19 409 650 places/day, the lowest

capacity in the studied interval. This tendency was characteristic for the whole country, with a 2,2% decrease in the same period. The cause of this subsidence is believed to be the consequence of physical and moral depreciation of traditional units, like villas and chalets, which were the specific units of health tourism and mountain resorts (Ciangă, 2006), preferred by the domestic tourists of the Communist regime (Light – Andone, 1996). After 2002 the capacity began to grow, reaching the total functioning capacity of 25 720 589 places/day in 2010.



**Figure 2 The Spatial Distribution of Accommodation Capacities by Main Unit Types in 2010 (Source: RNIS, 2011)**

Hotels offer the most places/day in Transylvania, followed by agro-tourist pensions and pensions (Figure 3). These three accommodation types hold the 81,7 % of the Region’s total functioning capacity in 2010. The county with the biggest capacity is Braşov (Center region), followed by Cluj and Bihor (North-West region) (see Table 2). On settlement level the top of the list is led by two municipalities and one commune: Braşov City (Braşov County, 278 048 inhabitants), followed by Sanmartin (Bihor County, 8 villages, 7996 inhabitants) and Timişoara City (Timiş County, 311 586 inhabitants). Table 2 also includes the first three of the settlements with the biggest hotel capacity. These are the same as in the case of the previous list.

**Table 2 Counties and Settlements with the Highest Accommodation Capacity in 2010**

List	Total Capacity/County	Capacity/Settlement	Hotel Capacity/Settlement
1.	Braşov (5 341 618)	Braşov City (2 226 917)	Braşov City (1 481 571)
2.	Cluj (2 588 925)	Sanmartin (1 500 535)	Sanmartin (1 312 958)
3.	Bihor (2 354 654)	Timişoara City (1 400 855)	Timişoara City (1 058 689)

Source: RNIS, 2011

Unfortunately the RNIS does not publish regional data on tourist accommodation units by category of comfort. However, there is a possibility of analyzing the regional dispersal of hotels by category of comfort, by using data supplied by the Ministry of Regional Development and Tourism (MRDT). Thus in May 2011 there were 477 hotels in Transylvania, 46% in Center region, 29% in North-West region and 25% in West region. Transylvania offers mainly hotels with moderate comfort, 54% of the hotel offer are 3 star hotels (see Figure 4). High comfort and experience is offered by 4 star hotels, which represent 16% of the total units. There are only a few 5 star hotels, specifically a number of 8 units, with a total capacity of 1255 places/day.

The average utilization of tourist accommodation units in Transylvania in 2010 was 23,9%. The outstanding counties were: Covasna 40,5% (Center region), Bihar 35,9 (North-West region) and Satu-Mare 34,6% (North-West region). On the opposite pole were Maramureş 14,1% (North-West region), Alba 15,8% (Center region) and Cluj 16,2% (North-West region). The utilization rate is usually better in August and September and lowest in January and March.

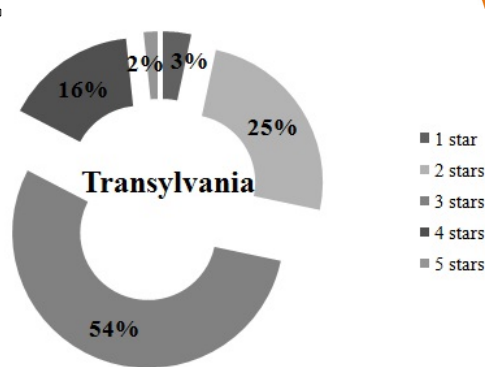
**The Spatial and Temporal Aspects of Tourist Arrivals**

Due to its geographic position, geopolitical situation and natural and built attractions, Transylvania was in the attention of foreign travelers in each historical era. The historical region borders two major historical regions of Romania (Moldavia and Wallachia) and three European countries (Ukraine, Hungary and Serbia). Consequently is the gate for Europeans entering Romania (especially by road and rail) or heading to other Balkan destinations and is the transit area of Balkan people travelling to Central and Western Europe (Murphy, 1992). Before the regime change foreigners represented only 13,5% of the total tourist arrivals of Romania, with visitors mainly from the former Eastern Bloc Countries (Hall, 1992), with high proportion of Polish, Bulgarians, Slovaks and Czechs. After the regime change there was a frequent presence of both businessman and politicians interested in the change that took place in Romania, members of the Romanian Diaspora anxious to see their native country again and also traders, mostly Turkish and Bulgarian (Cocean, 1993). There has been an increase in visitors from neighboring countries for various reasons, particularly Hungarians, Ukrainians and Serbians. In the years following the regime change VFR tourism strengthened in Transylvania (Light – Andone, 1996).

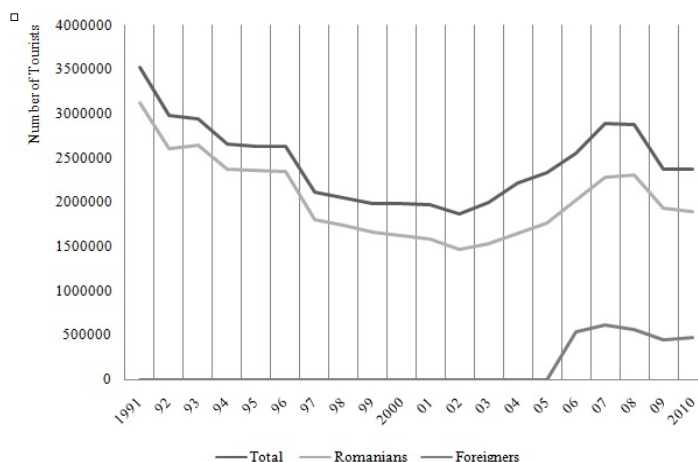
With only a few years after the regime change tourist arrivals in Transylvania began to drop significantly, stabilizing only in the last years of the ‘90s (Figure 5). The decrease of tourist numbers was the consequence of market economy transition difficulties (uncompetitive tourist products, obsolete hotel equipment, transport and telecommunications infrastructure, underdeveloped financial services, serious environmental damage etc.), like in the case of many former socialist countries (Probáld, 2007 and Hall, 1992). Starting with 2003 the tourist flow was in continuous accession, with 13,1 % increase in 2007, when Sibiu was the Cultural Capital of Europe, and interrupted by the effects of the global economic crisis in 2008. Since 2009 it seems to stabilize, around 2,37 million tourists/year.

The main international and domestic tourism indicators of 2010 are summarized in Table 3. 19,7% of Transylvania’s visitors are foreigners, who prefer Center region to the other two regions, and spend 483 677 overnight stays here. The average length of stay is 2,1 days in case of international tourists and 2,7 days in case of the domestic tourist.

In 2010 the first 10 most visited settlements of the historic region were the following : Braşov City (251 188 arrivals), Cluj-Napoca City (184441), Timişoara City (176912), Sibiu City (155244), Predeal (108022), Arad City (107587), Sanmartin (94813), Oradea City (71388), Sovata (66409) and finally Târgu-Mureş City (56529). The presence of the county capitals in the first ten most visited settlements is not a surprise; they do have a rich tourism offer, many auxiliary services and are a perfect starting point for the surrounding tourist attractions. However the presence of Braşov City on the first place is surprising, taking into consideration that the city does not have a regional airport. Between the first ten there are also two health tourism



**Figure 3 The Distribution of Transylvanian Hotels by Category of Comfort (Source: MRDT, 2011)**



**Figure 4 Evolution of Tourist Arrivals in Transylvania Between 1991 - 2010 (Source: RNIS, 2011)**



resorts (Sanmartin in Bihor county – known for its thermal waters, and Sovata in Mureş county – known for its heliothermic salt lake) and a mountain resort (Predeal in Braşov county – known for its best ski resort in Romania).

**Table 3**  
**Tourist Arrivals and Overnight Stays in Transylvania in 2010**

Tourists	North-West	Center	West	Transylvania
	Development Region			
<b>Tourist arrivals</b>				
Foreigners	124683	228067	116359	<b>469109</b>
Romanians	578155	898820	426442	<b>1903417</b>
<b>Total</b>	<b>702838</b>	<b>1126887</b>	<b>542801</b>	<b>2372526</b>
<b>Overnight stays</b>				
Foreigners	257411	483677	250238	<b>991326</b>
Romanians	1627132	2235704	1254705	<b>5117541</b>
<b>Total</b>	<b>1884543</b>	<b>2719381</b>	<b>1504943</b>	<b>6108867</b>

Source: RNIS, 2011

### Hospitality Industry

In Romania there are five types of hospitality units which serve the dining and entertainment needs of tourists. These are the following (defined by Law No 636/2008): Restaurant (classic, specific, bistro, brasserie, summer garden), Bar (day/night, café, disco, buffet), Fast Food (self-service, pizzeria, snack-bar), Sweet-shop and Bakery. In 2010 the total number of hospitality units in Transylvania was 2165 units (43,8% of Romania's units), with a total capacity of 200 476 seats. 30% of the hospitality units are found in Cluj county, followed by Braşov county (15%), the other counties having 5% each or less (Table 4).

**Table 4**  
**Hospitality Units in Transylvanian Counties in 2010**

County	Units	Seats	Population	Population per one unit
Alba	56	5371	373134	6663
Arad	112	7590	455477	4067
Bihor	117	14399	592957	5068
Bistriţa-Năsăud	42	6679	317316	7555
<b>Braşov</b>	<b>319</b>	<b>31517</b>	<b>598208</b>	<b>1875</b>
<b>Caraş-Severin</b>	<b>133</b>	<b>12781</b>	<b>322060</b>	<b>2422</b>
<b>Cluj</b>	<b>650</b>	<b>41799</b>	<b>692339</b>	<b>1065</b>
Covasna	55	6142	222481	4045
Harghita	72	6191	325127	4516
Hunedoara	90	8124	463102	5146
Maramureş	117	12568	511093	4368
Mureş	112	12715	580672	5185
Sălaj	17	1646	241417	14201
Satu-Mare	38	4706	364597	9595
Sibiu	101	14234	424796	4206
Timiş	134	14014	678795	5066

Source: MDRT, 2011

The absolute number of hospitality units alone does not indicate their utilization for tourism purposes, because the local people represent a significant part of the demand. For this reason, the territorial characteristics of hospitality's role in tourism can be analyzed with the help of an indicator, obtained from the number of locals per one catering unit (Michalkó, 2007). The best values were obtained by the following counties: Cluj (1065), Braşov (1875) and Caraş-Severin (2422), where the tourist flow is also high. Sălaj county was the only one with more than 10 000 people per one hospitality unit.

## TOURISM'S ROLE IN THE LOCAL ECONOMY

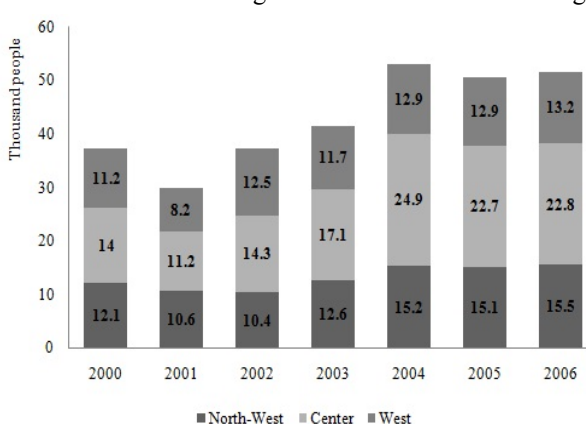
In Transylvania's economic development, tourism plays an important role, especially in the rural districts, where tourism generates an alternative source of income, in many cases being a realistic alternative for agricultural activity (Alt, 2006). At the same time tourism is a major human resources engaging industry, having the capability to solve employment problems. Furthermore offers countless opportunities for investors.

In the case of contribution of tourism operators to regional GDP, in the absence of complete set of data, this indicator is limited to Hotel and Hospitality industry. In 2005 tourism contributed to: the North-West region's GDP with 4,8% (607,1 million Lei in current prices per inhabitant), 7,46% in Center region (1011 million) and 3,25% in West region (487 million Lei). These values are much higher than the Romanian average of 1,76%.

Taking into consideration the characteristics of the activity (pensions often function as private of familial enterprise), it is likely that the employment index is more meaningful for the analysis, than the information about recorded employees. Between 2000 and 2006 (see Figure 6) an increasing trend outlines, which was characteristic for the whole country.

In recent years, tourism investments targeted tourist infrastructure and differentiation of the tourism supply. The investments in Hotel and

Hospitality industry are shown in Table 5. It is visible that gross investments in the Hotel and Hospitality industry showed a growing trend, with a radical increase in the Center region between 2001 and 2002 (251 %), and with a radical growth in North-West region (103 %), 2 years later. On country level, in 2006, these three regions were situated on the third (West) fourth (Center) and fifth (North-West) places.



**Figure 5 Evolution of Employment in Hotels and Restaurants Between 2000 - 2006 (Source: Regional Statistical Yearbook, 2007)**

**Table 5  
The Gross Investment Trends from 2000 to 2006 (Million Lei in current prices)**

Region	2000	2001	2002	2003	2004	2005	2006
Romania	266	493	827	869	1249	1555	1936
North-West	17	22	54	58	118	113	202
Center	53	41	144	136	194	237	234
West	16	32	65	81	104	180	237

Source: Regional Statistical Yearbook, 2007

## CONCLUSIONS

Transylvania's hotel and tourism industry evolved in the last decade, after the difficulties of the '90s, the new millennia, and especially the accession to the European Union in 2007, brought new possibilities, foreign investment, more international tourists, higher comfort of the tourist accommodation units, diversified services and attractions. Tourism is a more and more important sector in the territory's economy. Although there are differences in tourism supply on county level, the historical region of Transylvania outstands as a tourism destination. The specific segments of the tourism supply are: health and wellness tourism (resorts like Băile Felix, Sovata, Băile Herculane, Băile Tușnad etc.), aro-tourism (Sâncraii microregion in Cluj country, Rimetea and surroundings in Alba county, villages of Maramureș etc.), mountain tourism (winter sports – Predeal, Poiana Brașov, Cavnic, Băișoara; hiking – Mountains of Transylvania, Rodnei Mountains, Harghita Mountains etc.; climbing – Piatra Craiului, Cheile Turzii and Cheile Bicalului gorges), cultural and urban tourism (especially county capitals like Cluj-Napoca, Brașov, Sibiu, Oradea, Timișoara; medieval cities like Sighișoara). From the total of 9 UNESCO World Heritage Sites in Romania, 4 are located in Transylvania, these are: Villages and Fortified Churches of Transylvania, Dacian Fortresses of the Orastie Mountains, Historic Center of Sighișoara and Wooden Churches of Maramureș. The title of European Capital of Culture of Sibiu in 2007 significantly boosted Transylvania's tourism (Talpas - Pál, 2011) and proved that there is much more in

Transylvania then the myth of Dracula. There is tourism potential in the following segments as well: business tourism (with importance in Cluj-Napoca, Braşov and Sibiu cities, and growing interest in Timişoara and Târgu-Mureş due to their busy international airports), wine tourism (Timiş, Alba and Satu-Mare counties), religious tourism (like Şumuleu international pilgrim place), festival tourism (Peninsula Festival in Târgu-Mureş, TIFF Film Festival in Cluj-Napoca and many different cultural events) and last but not least ecotourism (especially in National Parks).

In Romania the National Development Plan ensures accentuated attention on tourism development and trusts the Regional Development Agencies with the duty to develop the Regional Development Plans and Tourism Policy (Raţiu et.al. 2010). In Transylvania's development regions, during 2007 - 2013, these policies are focused on three priority axes: conservation of natural and built heritage (protection and restoration); development, diversification and promotion of attractions, sites and products; growth and modernization of tourist infrastructure and quality enhancement. Findings indicate that hotel development is going in the right direction; the offer is diversified and spatially relatively well-divided, with some outstanding settlements. Taking into consideration the importance of health and wellness tourism, stress should be put on the development and quality enhancement of wellness hotels and facilities and the creation of aqua parks is to be supported. Furthermore Transylvania already has diversified tourism products, so tourism planning could seek uniqueness and promote niche products that are capable to stand for the touristic value of the region. Also the cooperation of state and private sector is to be supported and facilitated. The high potential of Transylvania is unexploited due to lack of regional tourism brand promotion, lack of staff qualifications, uneasy accessibility and low safety measures. This article finds the above mentioned suggestions to be crucial for the development of the competitive tourism destination of Transylvania.

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