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CURRENT NATIONAL AND REGIONAL TRENDS FOR ROMANIAN AGRITOURISM

Adriana MOREA, Roxana VIDICAN, Ioana CRIŞAN

University of Agricultural Sciences and Veterinary Medicine Cluj-Napoca, Faculty of Agriculture, 3-5Manastur Str., 400372 Cluj-Napoca, Romania; Emails: adriana.morea@usamvcluj.ro, roxana.vidican@usamvcluj.ro, ioana.crisan@usamvcluj.ro

Corresponding author: adriana.morea@usamvcluj.ro

Abstract

Agritourism is one of the most suitable options available for farmers to ensure increased income. It can also serve as instrument to revive regional economy and conserve rural societies and landscapes. In Romania, agritourism sector has an overall growing trend between 2016-2018, but is marked by uneven development across regions. Largest number of agritouristic enterprises in Romania are located in counties from Transylvania followed by eastern part of Romania: from Bucovina down to Danube Delta and Black Sea. Proximity to mass touristic attractions creates a high-competition economic climate for agritourism enterprises from counties Sibiu and Brașov. Agritourism growth might be currently available for counties Cluj and Alba. County Satu-Mare has a low existing capacity, but the trend is not steady. Success of agritourism enterprise could be enhanced by increasing training level of the staff in order to overcome competition from other accommodation and leisure providers and establish sustainable strategies for agritourism development.

Key words**:** *farm, accommodation, enterprise, traditional, cuisine, leisure*

INTRODUCTION

Agritourism refers to commercial tourism enterprises on working farms. Most of them follow a family-based business model and provide earning diversification for rural landholders. From current commercial considerations this is one of the most suitable options available for farmers to ensure income increase, besides expanding acreage, intensifying production, specializing crops or livestock, selling land or working off-farm [8]. The concept of agritourism is related to the resilience strategy of a single farm and increased autonomy, which aims to strengthen farm resource base without becoming dependent upon financial and industrial capital [10]. Especially in Europe as well as in North America, agritourism is seen as a policy instrument to revive regional economy and conserve rural societies and landscapes, having both economic and social motivation [8, 9]. Agritourism is not a new phenomenon and is identified as touristic offer since 1960 [2, 3]. Recent revived interest in agritourism entrepreneurship is strongly related to capacity to support the sustainable development of rural communities [4]. A notable trend in agritourism is commodification of traditional cuisine as signifiers of regional identity and constitutes a frequent success strategy used in rural tourism. At the same time in some regions of EU, certain policies come to reinforce the niche of agritourism services trying to prevent it from coming too close to mass activities. It is still seen as complementary activity and although it does not represent a strong competition to hotels, it may be for other types of establishments. Agritourist profile corresponds to young families with children, urban people and groups of people trying to come in touch with rural roots [10]. An agritourist is offered services such as: accommodation, meals and leisure activities which can vary by region and country but is mainly centred on traditional or local culture [1, 5, 12]. Sustainability of this type of tourism requires adequate protection of natural and cultural resources specific to given rural areas [6]. Aim of this study was to identify the current trend for Romania agritourism sector from national to regional level, with emphasis on dynamic within Transylvania where this type of tourism sector has great potential.

MATERIALS AND METHODS

Information was retrieved from three reports edited by National Statistics Institute of Romania: touristic accommodation capacity existing at 31 July 2016, 2017 and 2018 [7]. Data used were:

- number of agritouristic accommodation establishments per 4 macroregions
- accommodation capacity (places/beds) per 4 macroregions
- number of agritouristic accommodation establishments within macroregion 1
- number of rooms in agritouristic accommodation establishments in 12 counties of macroregion 1.

The statistics take into account the agritouristic establishments with a minimum of five places/beds.

Results are presented using geocode standard for nomenclature of territorial units for statistics with corresponding 3 NUTS levels: macroregion, region, county - as adopted by EU (Fig. 1).

Fig. 1. Regions of development from Romania
Source: [11].

Based on data from macroregion I was performed the comparison between counties based on opportunity score. Assessment method proposed here is original and involves obtaining a score for each county by applying a formula.

- opportunity score = $(a+b)/c$, where "a" = trend of 2016-2017, "b" = trend of 2017-2018, "c" - average existing rooms for three years: 1: (<500), 2: 501-1,000, 3: (>1,000)
- a, b are marks on a scale from 1 to 3, where: 1 = low/negative, 2 = average/positive, 3 = high/largest increase.

RESULTS AND DISCUSSIONS

In Romania, nearly all agritourist enterprises are privately owned but there are also some establishments with other forms of property such as state property, foreign-owned or cooperation-based establishments. Some establishments function only seasonal while some are available all year round [7].

Across the four macroregions of Romania, can be distinguished differences in the development of this sector, but with an overall growing trend between 2016-2018. Largest number of agritouristic enterprises are located in macroregion I which corresponds to counties from Transylvania followed by macroregion II which corresponds to eastern part of Romania from Bucovina at its northern part, down to Danube Delta and Black Sea to the south. It can be inferred that geographical location plays a major role for uneven development of Romanian agritourism sector. First important factor of attraction to these regions is constituted by diverse landscape and possibility to enjoy nature and outdoor activities. Secondly, these areas have a long tradition for tourism with many cultural touristic attractions such as castles, fortresses and monasteries. And not at last, many of these areas are unsuitable for large farms and agritourism becomes pivotal for financial stability of the community increasing the motivation of farmers to engage in secondary activities for extra income (Fig.1).

Between 2016-2017 the largest increase for number of agritourism establishments was found in macroregion I but between 2017-2018 the largest increase for number of agritourism establishments was found in macroregion II. A slight decrease can be noticed between 2017-2018 for number of agritourist establishments in macroregion III (Fig. 2).

Dynamic for accommodation capacity expressed as places/bed in agritouristic establishments, shows a positive trend at national level between 2016-2018.

However, the national percentage increase shows a slow-down in the second interval, with an increase below 10% between 2017-2018 (Fig. 3). These may come to indicate the current evolution towards a mature market for this niche sector as well as increased competition.

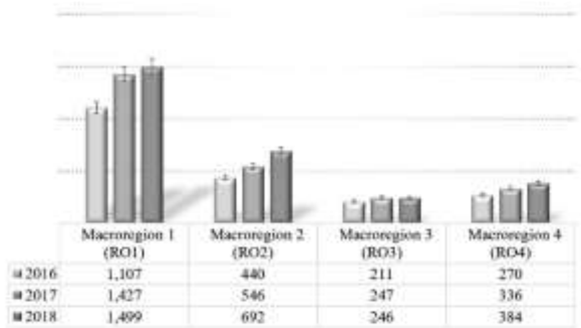

Fig. 2. Evolution of number of agritouristic enterprises for the 4 macroregions from Romania
Source: [7].

At national level in summer of 2016 were available over 30,000 places/bed while by summer of 2018 were over 45,000 places/bed in agritouristic accommodation units across Romania.

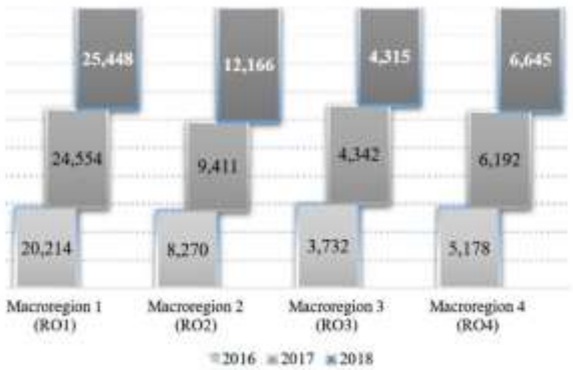

Fig. 3. Evolution of accomodation capacity (number of places/beds) in agritouristic accomodation establishements from Romania
Source: [7].

Expressed as percentage from all types of accommodation units at national level, agritouristic sector experiences a nearly constant expansion rate from one year to another: from 11.37% in 2016 to 12.95% in 2017 and to 13.75% in 2018. This trend, however, is marked by uneven development across regions of Romania following same trend as the number of agritouristic enterprises.

Within macroregion 1, identified as hotspot for Romanian agritourism, where largest proportion of this type of enterprises are located presents some interesting dynamics in last three years.

Firstly can be noted that by far the Center region of development (comprised by six counties: Alba, Brașov, Covasna, Harghita, Mureș and Sibiu) clusters the largest number of agritouristic establishments from macroregion I. However, the North-West region (comprised by six counties: Bihor, Bistrița-Năsăud, Cluj, Maramureș, Satu-Mare, Sălaj) although with less than half of the capacity of Center region, it maintains a positive trend between 2016-2018. Absolute growth for number of agritourist enterprises between 2016-2017 was similar: 159 for North-West region and 161 for Center region (Fig. 4).

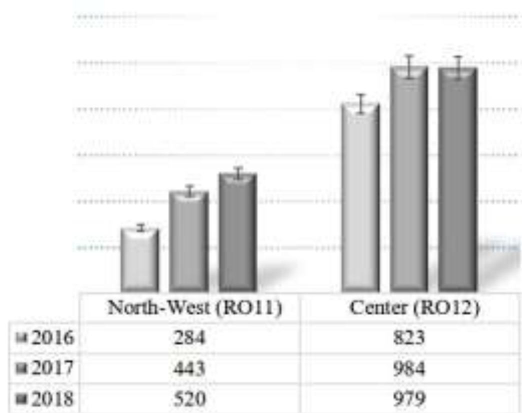

Fig. 4. Evolution of number of agritouristic accomodation establishments within macroregion 1 of development from Romania
Source: [7].

In relative values however, this corresponds to a larger increase for North-West: over 50%, while for Center region an increase of less than 20%. Further, between 2017-2018 the increase slows-down for North-West but remains positive with 17.4% increase, while

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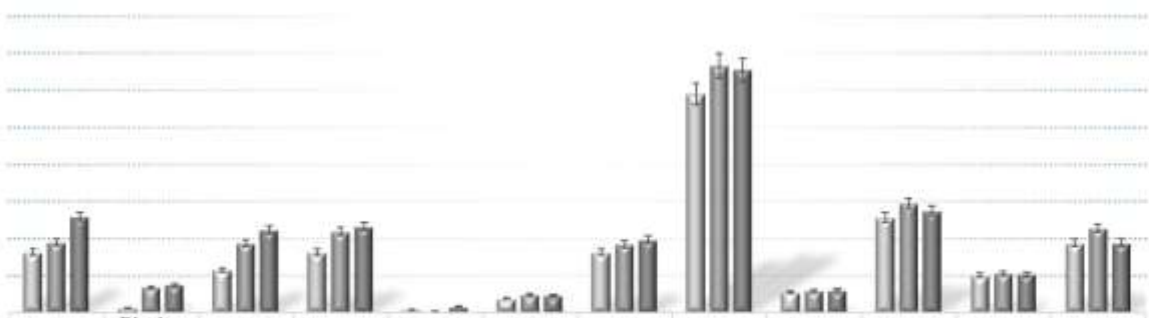
Center region experineces a slight decrease (-0.5%). This trend shows that althought Center region condenses a large number of agritoursitic entreprises it also experinces high competition with many establishments that have a well-consolidated place on the market. This signifies that it might be very difficult for new enterprsises to enter the bussiness in this region and this largely may come to trying to build a strong identity to distinguish them from other operators right from the bigining, by offering distinctive services or better prices. But, this could hinder growth in the immediate period.

For a closer look it is examined the dynamic for number of agritoutsitic establishments across 12 counties from macroregion I (Fig. 5). Data confirms the trend observed at regional level. From North-West region between the studied intervals, only county of Satu-Mare experiences a decrease in number of rooms in agritoursitic establishments between 2016-2017, and only county of Salaj presents a slight decrease beween 2017-2018.



	Bihor (RO111)	Bistrița-Năsăud (RO112)	Cluj (RO113)	Maramureș (RO114)	Satu-Mare (RO115)	Sălaj (RO116)	Alba (RO121)	Brașov (RO122)	Covasna (RO123)	Harghita (RO124)	Mureș (RO125)	Sibiu (RO126)
2016	816	63	579	816	42	196	818	2,951	278	1,286	509	945
2017	948	346	942	1,097	27	246	923	3,330	298	1,474	535	1,142
2018	1,293	378	1,116	1,161	84	240	988	3,274	306	1,379	524	945

Fig. 5. Evolution of number of rooms in agritouristic accomodation establishments from the 12 counties of macroregion 1
Source: [7].

Counties from Center region experience no decrease between 2016-2017 while between 2017-2018, four out of six counties from this region experience a decrease for number of rooms in agritouristic establishments. A steep decrease of rooms is evident for Sibiu county (-17.3%) followed by Harghita county (-6.4%) and to a lesser extent for counties of Mureș (-2.1%) and Brașov (-1.7%). Largest increase for the number of rooms in relative value is evident between 2016-2017 for counties of Bistrița-Năsăud followed by Cluj. Between 2017-2018 largest increase is observed for county of Satu-Mare which in previous year experinced a steep decrease in number of rooms, followed by Bihor with an increase of 36.4%. Several counties are seen to maintain a growing trend for number of rooms between 2016-2018: four counties from North-West region (Bihor, Bistrița-Năsăud, Cluj and Maramureș) and two counties from Center region (Alba and Covasna). The positive trend maintained for number of rooms in these counties in studied intreval, indicates that there is demand and opportinity for opening new establishments in these areas and that market has not reached the saturation point. However it is important to mention that overall increase for number of rooms in macroregion 1 between 2017-2018 is at less than a half (21.7%) from the percentage increase observed between 2016-2017 which does indicate a slow-down of demand.

Following the analysis can be deduced that there are several aspects that have to be considered by farmers interested to open establishments. Firstly, macroregion I and II have great potential due to natural and cultural attractions, but as detailed analysis within macroregion I shows, there is a strong uneven trend across regions and counties. These trends may allow a classification based on risk and opportunity.

In Table 1, can be observed the opportunity score obtained or the 12 counties from macroregion I of development from Romania, in ascending order. On this score scale, the lower the score the higher the efforts the farmers would have to make to ensure success of the enterprise. This means that a farmer has to consider thoroughly many aspects to find and maintain a place on the market.

Although counties from Center region are located in areas attractive to tourists due to numerous historic touristic objectives, it already concentrates a large number of agritouristic enterprises, while decreasing number of rooms for counties of Sibiu and Brașov come to show a high-competition economic climate. This might translate in higher risk for prospective farmers interested to offer agritouristic accommodations.

Table 1. Agritourism current opportunity assessment in counties of macroregion I – Romania

County	Trend *a*	Trend *b*	Capacity *c*	Score $(a+b)/c$
Brașov	2	1	3	1.0
Harghita	2	1	3	1.0
Sibiu	2	1	3	1.0
Maramureș	2	2	3	1.3
Mureș	2	1	2	1.5
Bihor	2	3	3	1.7
Alba	2	2	2	2.0
Cluj	3	2	2	2.5
Sălaj	2	1	1	3.0
Satu-Mare	1	3	1	4.0
Covasna	2	2	2	4.0
Bistrița-Năsăud	3	2	1	5.0

Source: Original.

Services offered by agritourism establishments compete with other types of highly specialized accommodation providers such as hotels, or bed and breakfast etc., precisely due to proximity to historic touristic attractions. This is why proximity to mass touristic objectives may cause the volatile market for agritourism enterprises in these areas which classify as good for opportunity but high for risk. Constant challenges come from the continuous struggle to find best way to constantly increase quality of services but still maintaining low prices, which may place a considerable strain. Additional may be required to concentrate on designing distinctive leisure services to attract customers and distinguish from competition. This can become particularly difficult, if agritourism is operating with less specialized staff without expertise in hospitality business to establish strategies for sustainable success. In these areas, the agritourism requires more investment and long-term strategy.

Counties Bistrița-Năsăud and Covasna maintained a positive trend during the study interval but also showed a slow-down. County Satu-Mare has a low existing capacity but the trend between 2016-2018 is neither steady nor constant.

Place for moderate agritourism growth might currently be available for farmers from counties with average opportunity score such as: Cluj and Alba which experienced no decreasing trend and are neither situating among counties with highest capacity. County of Bihor on the other hand, although also had a positive trend, currently presents a higher accommodation capacity which might indicate an approaching temporary flat point for local agritourism.

Previous authors consider Apuseni Mountains (north-western part of Romanian Carpathians mountain range located in Transylvania) as particularly suitable for agritourism enterprises due to wide range of agritourism activities and because it has a low degree of urbanization, of under 30% [3]. Other authors identify the opportunity for fruit and vegetable farmers from vicinity of eastern Romanian Carpathians – to use agritourism as immediate local short marketing chain for their farm products [13].

CONCLUSIONS

In Romania, agritourism sector has an overall positive growing trend between 2016-2018 but is marked by uneven development across regions.

It can be inferred that geographical location plays major role for uneven development of

Romanian agritourism sector. Hot spots for agritourism are in counties with many natural, cultural, and historical touristic attractions.

Macroregion I comprises the largest number or agritouristic establishments but shows a slow-down between 2017-2018.

Center region experiences high competition, while North-West region shows potential for growth.

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