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ANALYSIS OF THE TOURISM POTENTIAL WITHIN THE SOUTH-EAST REGION

Development of Sustainable Cultural Tourism in the Black Sea Basin-
CULTOUR-BSB, BSB-117 project



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I. Description of the South-East Region, general presentation

I.1. Geographic position, landforms and climate

The South-East Region is located in the South-East of Romania and covers 35.762 square kilometers, as the second largest Region of Romania. From an administrative point of view, the region comprises of 6 counties: Brăila, Buzău, Constanța, Galați, Tulcea, and Vrancea. The Region is part of Romania's southern frontier with Bulgaria, its eastern frontier with the Republic of Moldova and the Ukraine, as well as the entire Black Sea Coast, while also representing part of the eastern frontier of the European Union.

Graphic 1: Graphic representation of the South-East Region with 6 counties on the administrative map of Romania



The South-East Region comprises of almost all landform. The region is crossed by the Danube River, it includes the Danube Delta and it is bordered to the East by the entire Romanian Black Sea seaside. However, mostly, the plain and the continental climate prevail, with the exception of its western part, with the counties of Vrancea and Buzău occupied by part of the Carpathians and Sub-Carpathians of Curvature (where the highest altitude in the region is Peak Goru - 1785 m). The central part of the Region (counties of Galați and Brăila) is occupied by the Romanian Plain (with altitudes of under 100 meters). The eastern limit of the Romanian Plain is the Danube Meadow, namely the Balta Brăilei, a low-altitude area (10 m), mostly drained (Big Island of Brăila). The Dobrogea Plateau, spanning over the

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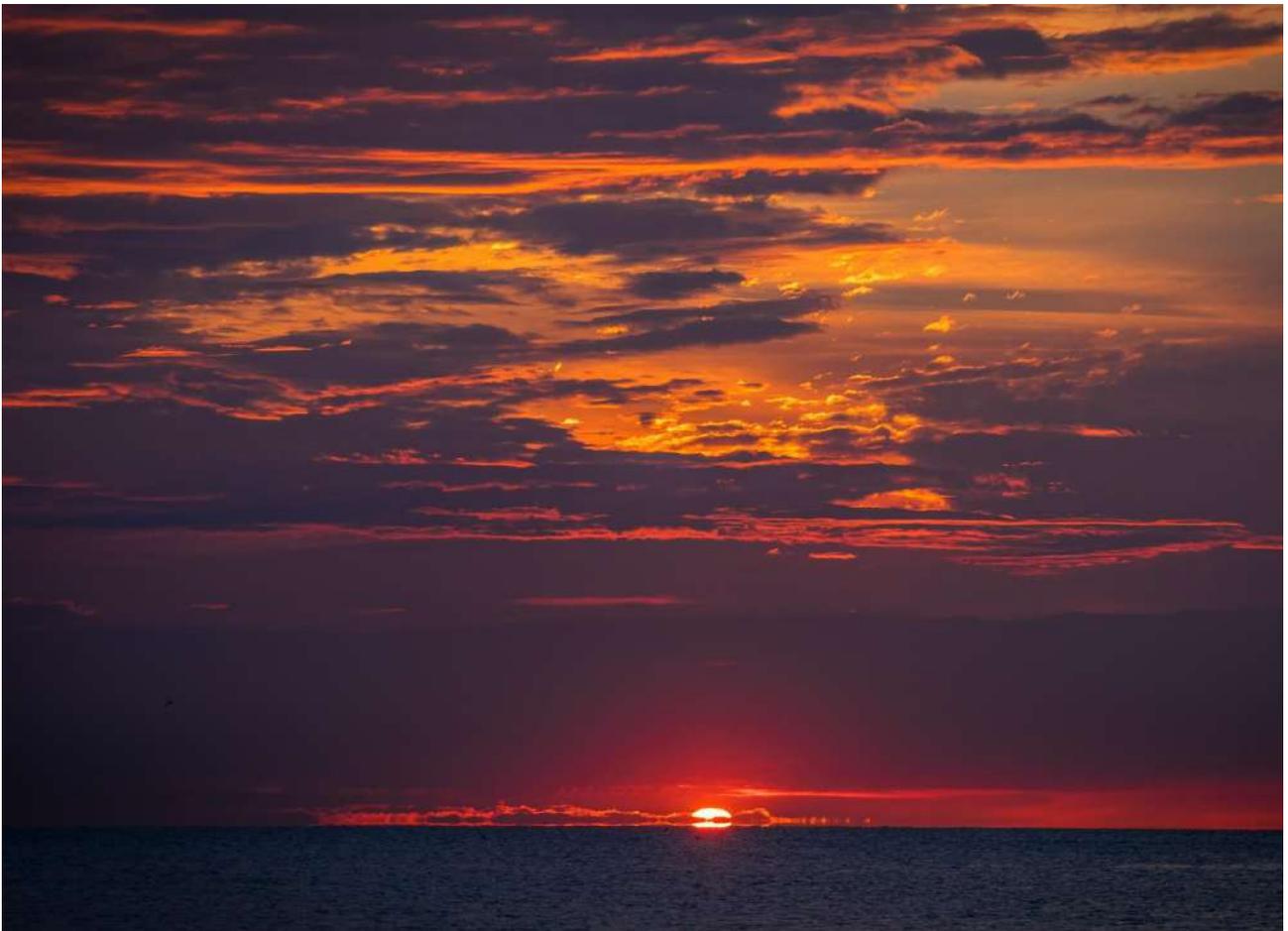
counties of Constanța and Tulcea, in eastern part of the Region is made up of two subunits: The North Dobrogea Massif and the South Dobrogea Plateau. **The seaside area has a low shoreline in the North, where lagoons and firths appear, and a high shoreline with cliffs on the southern side. The Danube Delta was formed at the outpouring of the Danube into the Black Sea, with an area of approximately 580,000 ha.**

Graphic 2: **Graphic presentation of the Southeastern Region's landforms with the 6 counties on the landform map of Romania**



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The climate of the South-Eastern Region has most of the main characteristics of the temperate continental moderate transition climate, with the exception of a few local peculiarities given by certain factors (landforms, the Black Sea, the Danube). Annual average temperatures vary greatly, especially due to the landform. The amount of precipitation is influenced primarily by altitude, but also by continental climate influences coming from the East. **Cold winters in the West and moderate winters in the South are a characteristic of the temperate continental climate. Therefore, in southern Dobrogea, the Danube Delta, and alongside the coastal area of the Danube Delta, the annual average exceeds 11°C (11.2°C Mangalia and Murfatlar). In the mountain area, the average temperature reaches values between 0 and 6°C (2.2°C Penteleu station), reaching just below 0 °C on the highest peaks. Regarding precipitations in the southern area of Dobrogea, on the coast and in the Danube Delta, the amount of precipitation is below 400 mm / year (Sulina 358 mm / year - the smallest average in Romania) and reaches over 1000 mm / year in the mountain area.**



photograph: Sunset by the Black Sea, Constanța

I.2. Population

Out of the entire population of Romania according to domicile held on the 1st of January 2018, of 22,21 million inhabitants (population according to residency only accounts for 19530631 persons), **the South-East Region is inhabited by 2,84 million inhabitants, approximatively 12,8%**, according to data supplied by the National Institute of Statistics. Even if the Region is mainly inhabited by Romanian nationality population (over 90%), on parts of its territory (especially in the Dobrogea area), populations of diverse origins live together, in a historically multicultural environment, such as Roma, Lipovans, Ukrainians, Aromanians, Turks, Tatars, Bulgarians, Greek, Jews, Armenians etc.

Chart 1¹: **Population according to domicile on the 1st of January 2018 in the South-East Region, counties, county seat municipalities, urbanization degree**

Counties/county seat municipalities	Region/ County	County seat municipality	Rural population	Urban Population	%urbanization
Population according to domicile on the 1st of January 2018					
TOTAL Romania	22213553	-	9693472	12520081	56,36
SOUTH-EAST Region	2844235	-	1262713	1581522	55,60
Brăila/Brăila	348981	205602	121894	227087	65,07
Buzău/Buzău	470954	135601	271469	199485	42,36
Constanța/Constanța	768049	314936	235981	532068	69,28
Galați/Galați	628276	303638	269577	358699	57,09
Tulcea/Tulcea	239981	87735	121534	118447	49,36
Vrancea/Focșani	387994	93005	242258	145736	37,56

The South-East Region population is concentrated in 6 counties and 390 territorial administrative units as follows: 11 municipalities, 24 cities and 356 communes (with 1,447 villages). **The South-East Region includes two out of 10 most populated cities in Romania (excluding Bucharest, the capital-city): Constanța, the 5th with 314936 inhabitants and Galați, the 7th, with 303638 inhabitants, population according to domicile on the 1st of January 2018**, according to data provided by the National Institute of Statistics. The most urbanized county of the Region is Constanța county (70% live in urban environments), also the most populous (768049 inhabitants).

¹ Data available on the website of the National Institute of Statistics, Population according to domicile on the 1st of January of the reference year constitutes of the number of persons with Romanian citizenship, holding domicile on the Romanian territory, according to administrative territorial criteria

I.3. Economic status

According to the latest data from the Institute of Statistics, the regional GDP² is 79909.8 million lei, representing 10.44% of the national GDP. **Constanța county accounts for almost half of the Regional GDP, approximately six times higher than the one registered in Tulcea county, but also much higher compared with other counties. Accounting for more than one-third of the active enterprises, Constanța is a leader in the Region.** The unemployment rate in the counties of the Region on the 30th of October 2018 varies from 2,30% in the case of Constanța county (one of the lowest rates at national level) to 7,01% in Buzău county (one of the highest rates at national level).

According to the data provided by the National Institute of Statistics, in the South-East Region, most active enterprises are in the following sectors:

- Wholesale and retail trade; repair of motor vehicles and motorcycles - 21302 enterprises;
- Transportation and storage - 5758 enterprises;
- Manufacturing - 5468 enterprises;
- Construction - 5087 enterprises.

The South-East Region has a diversified industry, having almost every industrial sector represented, such as the petrochemical industry (e.g. Năvodari refinery), metallurgy (Galați and Tulcea), machine manufacturing (Brăila, Buzău, Constanța, Galați-Tecuci counties), building materials industry (ex. CRH Cement Factory in Medgidia), food industry, textile industry (Brăila, Buzău, Focșani), and wood industry (Vrancea and Buzău counties). There are 5 shipyards in the region located in Brăila, Galați, Tulcea, Mangalia, and Constanța. There are also marine drilling platforms existing in the region. The Port of Constanța is the main maritime port of Romania and the largest container port in the Black Sea. Having a strategical location, it can supply Central and Eastern Europe with goods. **The Port of Constanța** is equipped with freight docks and a modern passenger terminal³. **Agriculture, is, also, an important sector**, as the region concentrates a large quota of the arable lands in Romania, but also sustains developed fruit farming and animal husbandry. Also, due to climate and soil conditions within the Region, the counties of Vrancea (e.g. the Dealu Mare area) and Constanța (e.g. the Murfatlar area) are acknowledged for wine production.

I.4. Support infrastructure for tourism - health, education, culture

The public or private sanitary infrastructure in the South-East Region, especially the emergency one (the most relevant to the tourism sector, along with the network of pharmacies), is well represented numerically in the county, in the urban area, with gaps in the rural area (in the aspect of the development of rural tourism). At present, **public investments** (including those co-financed from European Structural Funds) in the health sector **focus on increasing the quality of health infrastructure** (state of hospitals and ambulatory facilities). The division in health that's most relevant to tourism is that

² Regional GDP is the regional equivalent of the Gross Domestic Product, equal to the amount of final uses of goods and services of resident institutional units (final actual consumption, the gross formation of fixed capital) plus exports minus goods and service imports

³ <http://www.adrse.ro/Regiunea/Economia.aspx>

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referring to medical, health, and wellness tourism. Such infrastructure is to be found in the Region, usually, as part of the private sector (usually dentistry, but not exclusively). **Health and wellness sectors are well covered by the sanatoriums found in Constanța county** (most notably the Techirghiol Balneal and Rehabilitation Sanatorium).

The Southeast Region also demonstrates a need to develop the educational infrastructure. In recent years, Romania has been indicating a growing lack of staff, coupled with a crisis of skilled labour. The tourism and hospitality sector has a generally unfavorable context due to labour migration and fragmented vocational education, unaligned to the real needs of the market (due to the educational policies that led to the abolition of vocational schools and trades). It is, therefore, faced with the fluctuation and lack of staff retention due to the seasonal specificity of this field of activity. **Educational and vocational training for the hotel and tourism sector in the region is currently provided mainly through a number of specialized high schools, vocational education institutions and economics and geography faculties** within certain universities. As far as the day-dual vocational education is concerned, for the tourism and food industry profiles, the regional offer is only 732 places in 2019. Specialities are for chef, confectioner, waiter and hotel worker specialities. The highest offer is in Constanța county, but both the local and regional numbers are insufficient to the tourist development phenomenon, combined with labour migration. The University of Ovidius of Constanța and Dunărea de Jos of Galați, are among the most important. **The number of graduate students (including the private university offer) is unsatisfactory to the needs of the qualified labour market, both in quantitative and qualitative terms.**

The cultural infrastructure of the South-East Region is particularly relevant for the development of the tourist potential of the area. In terms of quantity, the most representative cultural operators are the public ones (which can impact tourism through the cultural consumption of specific cultural products - museum visits, theatre performances, opera, dance, movie watching, documentaries in major libraries), meaning museums, theaters, cinemas. The regional data available at the level of 2017 on their quantitative distribution (the number of such institutions by counties) shows that the Region has **12 cinemas, 25 entertainment institutions, 74 museums and public collections and 1147 libraries.** The cultural infrastructure of the region **calls for improvements at the physical level-the actual infrastructure-, with developing new points of interest (concert halls, multifunctional halls), but also in terms of the perspective of working with the public**, including addressing an international audience, with corresponding marketing, the volume and dynamism of events and the usual cultural activity.

I.5. Environment, protected areas

The relevance of an environmental analysis for the purpose of evaluating tourism potential refer to natural environment conditions (air, water quality and protected areas) that are able to improve health or may constitute visiting reasons over determined periods of time. The air quality in urban agglomerations in the South East Region is maintained by the geographical position and influence of the sea and landform. At the same time, coastal areas are known for aerosols.

The South-East Region is the region with the largest area of protected areas in Romania (43.8% out of total protected areas in Romania). It is, as well, the region with the largest area of protected natural areas (32% out of the area of the region). There are 144 nationally protected natural areas including a biosphere reserve, a national park and 3 natural parks as well as 108 sites which are part of the Natura 2000 Community network. Due to the variety of existing geo-climatic conditions, each county has specific features regarding the habitats and species of flora and fauna⁴.



photograph: Habitat within the Danube Delta, Tulcea county

⁴ Agency for the regional development- South -http://www.adrse.ro/Regiunea/Arij_protejate.aspx

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The Danube Delta Biosphere Reserve, the most important touristic attraction of this kind, has a total area of about **580,000 hectares** and includes the Danube Delta itself, but also the Razim-Sinoe Lake Complex, the Maritime Danube from Cotul Pisicii, including the Somova-Parcheş Flooding Area, Sărățuri-Murighiol Lake and the sea area between the coastline and the 20 m isobaths. The Reserve spreads over 3 county administrative areas: Tulcea (87,73%), Constanța (12,23%) and Galați (0,14%). **The Danube Delta is the third largest in Europe and the 22nd world-wide.** It grows yearly by 40 square meters. Out of the entire surface of the Danube Delta, only 10% is dry land. Over 3000 square kilometers consist of natural water and terrestrial ecosystems that are bound for ecological reconstruction.

In the Danube Delta, 30 habitats are under European protection, out of which 8 are rigorously protected, some of which are only found in Romania. Since the year 1990, the Danube Delta and the other adjacent units have been declared a Biosphere Reserve under the UNESCO Program "Man and Biosphere". Also during that period, the Danube Delta has been recognized as a wetland of international importance, particularly as it is a habitat for waterfowl under the Ramsar Convention. An area of 340,000 acres, the Danube Delta has been recognized as part of the universal natural heritage within the UNESCO Convention for the protection of the universal cultural and natural heritage.



photograph: Landscape in the Danube Delta, Tulcea county

I.6. Transport, mobility, accessibility

From a touristic perspective, the Region's international accessibility, but also the local one, within the Region, is relevant for the evaluation of its touristic development potential and subsequent needs. Regarding road access to the Region, access can be made using the three pan-European transport corridors that transit through the region (4,7 and 9), but also by using the European roads E60, E85, E87 and E675. Most of the international entries in the Region, especially from neighboring Bulgaria, are made via roads (according to the National Institute of Statistics data, in 2017, 63% of the total international arrivals in Romania were made by road). The A2 Motorway, also known as the Motorway of the Sun, links the Black Sea coast of Constanța to Bucharest and allows easy access from the capital or other areas for which Bucharest is a transport hub to the country's second largest tourist market. **Except for the A2 motorway and a series of express roads, road accessibility in the Region is hampered by the absence of competitive road infrastructure, with a low public road density per 100 km, in comparison to other areas of Romania.** Only 4385 km of the region's roads are upgraded, out of a total of 10971, which affects interurban time distances when using road vehicles, with values under 60 kilometers per hour.

Rail accessibility is weak both on a national and international level. The exception is the Bucharest - Constanța route, where structural funds were invested in infrastructure, ensuring a travel time of 2 hours. Tulcea, the gateway to the Danube Delta, is not directly linked to the capital, therefore, it takes 5 hours by train to travel from Bucharest to Tulcea. Only one-third of the railways are electrified. The railway is an unpopular choice for international access. The lack of railway infrastructure competitiveness compared with other types of transport makes that only 2% of those entering Romania do so using the train (according to the National Institute of Statistics, 2017).

Maritime accessibility in the Region, from a touristic perspective, is possible, mainly due to the presence of the Port of Constanța. In 2019, the National Company for the Administration of Maritime Ports of Constanța forecasts 21 ship arrivals of 7 ships with maximum 6 stops / each (out of which only 2 arrivals are sea cruise stops, the rest are river-cruises stops). Arrivals decreased significantly, due to the European geopolitical context (the migration crisis). **Ships scheduled at Constanța Port in 2019 are mostly low-capacity ships for senior tourism, as low arrivals are attributable to off season reduced tourist attractiveness, excessive ship-docking costs, and/or poor marketing on the cruise customer segment.** From this perspective, sea accessibility is low. Also, interior ports are also partly used for tourism purposes, like Brăila, Tulcea and others. Within the cruising season (April to November), 129 cruise-ships sail through Tulcea, 21 through Sulina, 7 through Hârșova, 10 through Cernavodă, 26 through Fetești, 11 through the commune of Sfântu Gheorghe and 6 through the city of Brăila.

Flight accessibility in the region is not representative. According to the National Statistics Institute⁵, **the situation of the international and domestic passenger transport of the airports in the first two quarters of 2018 reveals modest passenger traffic on the two public airports in the Region.** However, Romania's most important aviation hub, Bucharest is well-connected by road and railway with the main

⁵Data processed from the document „Passenger and freight airport transport”, http://www.insse.ro/cms/sites/default/files/field/publicatii/transportul_aeroportuar_de_pasageri_si_marfuri_in_sem1_2018.pdf, pages 35-36

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destination of Constanța, diminishing the possibilities of developing the local Airport for flights other than charters. Flight accessibility remains an important issue in terms of tourism development, keeping the growth trend observed in recent years. Airport arrivals doubled in the last year (2017 as compared to 2016, according to the National Statistics Institute), thus increasing the growth trend compared to the previous year (2016 compared to 2015 -/+ 47%). The availability of direct flights to the capital is an important factor which alters the number of arrivals to this destination.

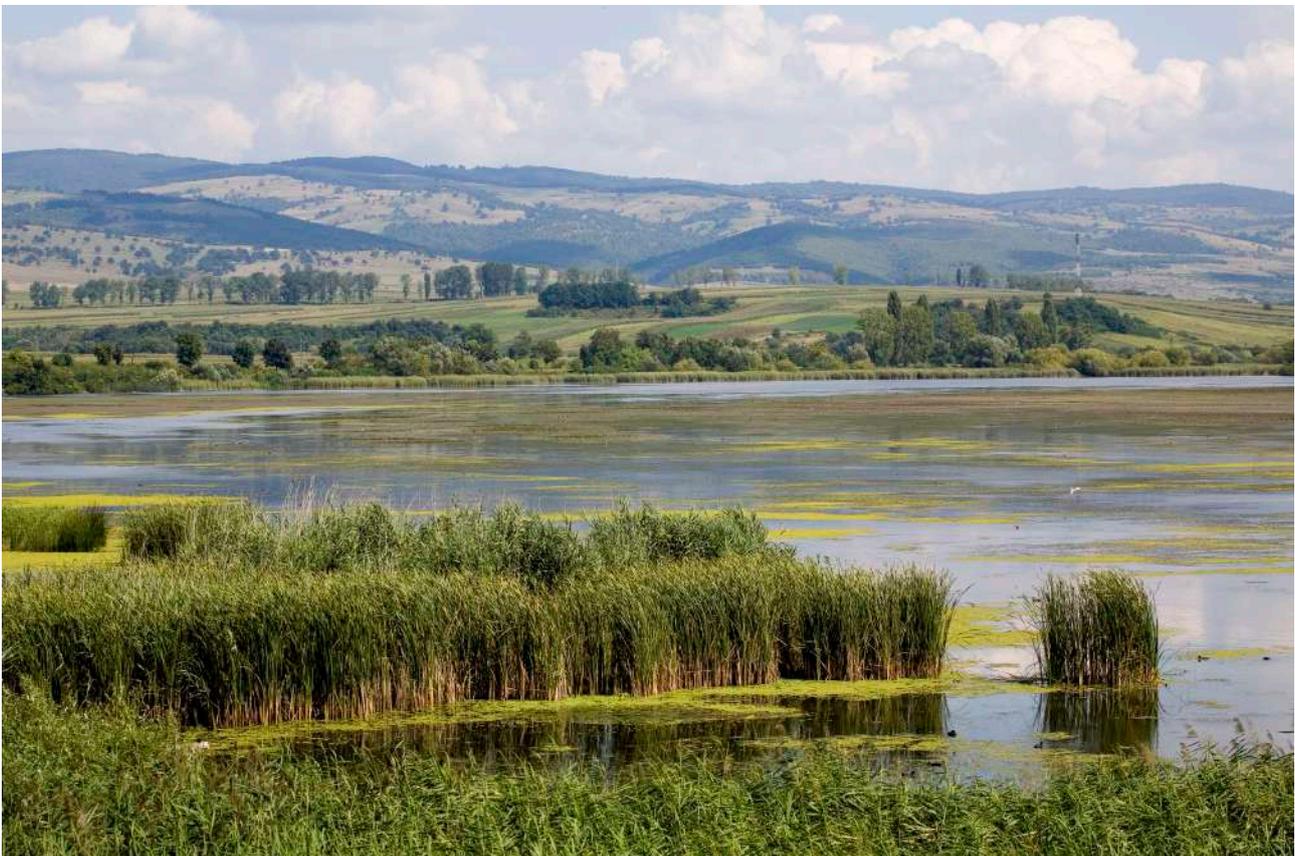
Graphic 3: Graphic presentation of Pan-European Transport Corridors passing through the Region



I.7. Tourism resources

Besides tourist attractions suited for visiting, the concept of tourism resource also includes natural or man-made elements that can be used directly in tourism activities as an "input material", generating different forms of tourism (mineral springs and mud favor spa tourism; wind, snow, water bodies generate sports tourism; different types of bio-climate and ozone air - climate tourism; mountain farming - agri-tourism; villages - rural tourism etc.) The concept of *tourism resource* has emerged over the last few decades, when tourism turned into a real industry and based its existence on the exploitation and capitalization of resources, just like any economic activity. Through its content, specificity and value, any tourism resource can become, in time and space, an important attractor for the tourism market.

Natural tourist resources of Brăila county are those typical for lowland areas and the Danube Meadow, with the Natural Park Balta Mică a Brăilei, the Big Island of Brăila and the Lacu Sărat spa-climatic resort (an old blocked route of the Danube, its course being covered with therapeutic mud) among the most significant. **From an anthropogenic view, the city of Brăila holds the most relevant resources of the county.** Situated at the crossroads of three historical regions (Wallachia, Moldova and Dobrogea), Brăila naturally developed into a powerful Danube river port. In 1877, Brăila was Romania's second most important city and attracted a prosperous society around it. This society left behind a valuable cultural and architectonic heritage (The Palace of Agriculture, the Violattos Mill, the Anghel Saligny Silos, Memorial Houses, the Historic Center), until Romania's transition to the communist regime. **Most of these buildings are inadequately maintained and largely untapped for tourism purposes.** Existing museums and locally generated cultural products (festivals etc.) meet local needs, but show limited or niche international tourist prospects.



photograph: the Danube Meadow, Brăila



photograph: the Anghel Saligny Silos, Brăila



photograph: the Violattos Mill, Brăila

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Buzău county is representative of the region's natural tourism potential, due to the diversity of the landforms and the presence of the mountainous areas (Buzău Mountains, Siriu Massifs, Monteoru, Horse Hill) and hills. It hosts 15 nature reserves and monuments, protected areas of national interest, 47 caves, lakes and waterfalls. One of the most famous spa resorts, Sărata-Monteoru, is in Buzău county, easily accessible from the capital. The county benefits from the presence of therapeutic waters, mineral and thermal springs. **An important natural tourism resource are the Muddy Volcanoes, a unique phenomenon in the European Union. From the anthropic point of view, the most important resources of Buzău county include religious buildings** (with more than 60 wooden churches, partly historic monuments, valuable in terms of history, painting and ritual objects), **museums and local collections, memorial houses and cultural events** of local and national importance. **One of the relevant and specific resources of the Buzău area is the Dealu Mare Vineyard, which allows the development of wine and gastronomic tourism, benefitting from the increasing quality and reputation of the wine and wine cellars in the Region.**



photograph: the Dealu Mare Vineyard, Buzău



photograph: Buzău Mountains, Buzău

Constanța county is one of the counties with the greatest tourism potential in Romania due to the abundance and variety of tourism resources. The most relevant natural resources that support the natural, leisure and wellness tourism are unmistakably the Black Sea coast, as the county gathers all the important seaside resorts, Lake Techirghiol with its famous mud known for therapeutic qualities, recreational lakes (used for practising water sports), but also the Gorge of Dobrogea (Geological Gorge Massif). From a cultural and anthropogenic perspective, the resources of Constanța county are notable, as one third of all the Region's historical monuments of national and universal value are to be found in this county, from the vestiges of the Greek colonial cities (Tomis, Histria), Roman castles, Tropaeum Traiani from Adamclisi, the Hamangia pottery, to the heritage of Constanța and its world-class buildings, such as the Constanța Casino (Art Nouveau) and many others. The other renowned wine vineyards of the Region are found in Constanța county, such as Murfatlar, Ostrov, etc. The county and city of Constanța gather in a limited territory (the peninsula, in case of the city) religious buildings belonging to all cults. The local cultural life proves a high degree of multiculturality, in a climate of tolerance specific to Dobrogea and perhaps unique in the Balkans. The Neversea Festival, an electronic music festival that annually attracts over 200,000 people from several states, is organized in Constanța during the summer.

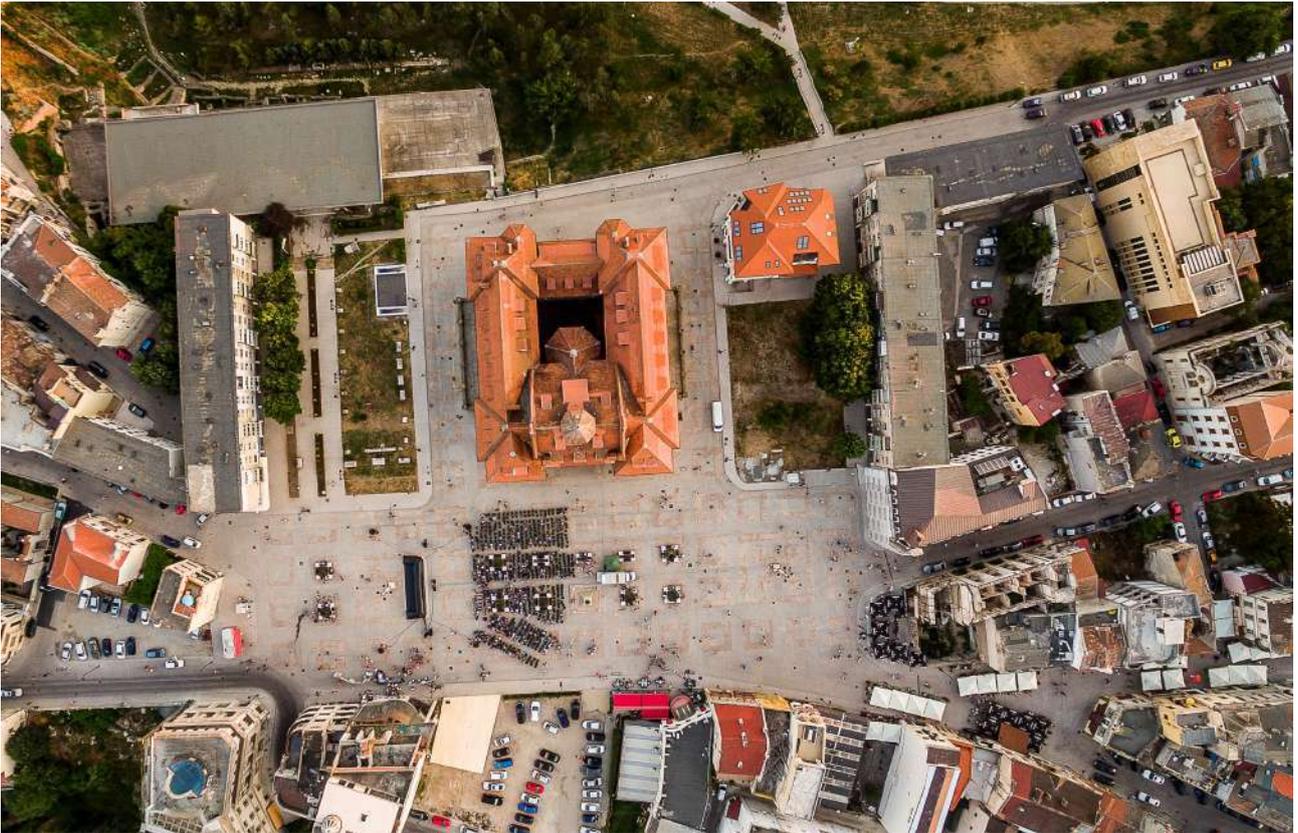


photograph: Mamaia, Constanța



photograph: Neversea Festival, Constanța

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photograph: Ovidiu Square, the Peninsula, Constanța



photograph: Tomis Touristic Port, the Peninsula, Constanța

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Galați county doesn't have a tradition in tourism, but it has plenty of tourism resources that can meet the local recreational needs or can be connected to cultural and natural tours in the Region. Relevant natural resources are linked to the presence of the Danube, cliffs and lakes in the area, and the Hanu Conachi Sand Dunes Natural Reserve. Anthropogenic resources include the museum infrastructure of urban centers, a Palaeontological Reserve and a number of vineyards.



photograph: Galați, panoramic view at sunset

The tourism potential of Tulcea county is primarily linked to natural resources and, in particular, to the presence of the Danube Delta Biosphere, unique at the European level and part of the UNESCO Heritage, but also to the presence of Măcin Mountains, the oldest mountain chain in Romania. Related offers can be built on anthropogenic resources such as the citadels of Enisala, Halmyris, Orgame, the vineyards in the area, the museum infrastructure in Tulcea (museums), the built heritage in Tulcea, Sfântu Gheorghe and Sulina, the rural architectural landscape in the Delta, cultural and sporting events with an international and national perspective.

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photograph: Danube Delta, Tulcea county



photograph: Enisala citadel, Tulcea county

Vrancea county has a variety of tourism resources. Natural resources are also diverse, consisting of a large number of parks and natural reserves that highlight the landscape, landforms, geological formations, waterfalls and mountain peaks. A unique touristic objective is the Natural Fire Reserve from Andreășu de Jos, where emanations of gas can be observed flaming to the surface (30 cm high flames). Anthropogenic resources in Vrancea include the **Mausoleums built after the First World War** (Mărăști, Mărășești, Heroes, Soveja), several places of worship, historical monuments, memorial houses and museums. At the same time, the county is recognized for viticulture, **by virtue of Panciu, Odobești and Cotești vineyards.**



photograph: Vrancea Mountains, Vrancea county



photograph: Vineyard, Vrancea county

I.8. Facilities

I.8.a. Tourism infrastructure

Of the 7905 tourist hospitality facilities that were registered in Romania in 2017, 1208 (15.28%) were located in the South-East Region and 838 in Constanța county (10.6% of the national total). **Regarding hotels in Romania, the South-East Region holds approximately 26% of the total national (409 hotels out of 1577 across the country, in 2017), out of which only Constanța county contributes with 20.54% to the national total (324 hotels).** Since its entry into the European Union, Romania has increased its accommodation day-capacity by 53,4% (from 2007 to 2017, 11 years later), from 57,13 million to 87,65 million day-places (indicator used by the National Institute of Statistics to measure accommodation day-capacity). **However, the South-East Region has evolved scarcely in terms of accommodation day capacity in this 11 year timespan** (12,67 million day-places in 2007, 14,11 million in 2017), thus dropping in terms of quota out of the national capacity from 22,19% to 16,09%. Constanța county held, at the end of 2018, the largest ratio of all accommodation capacity (number of places) out of all the counties in the Region, representing **11,91% of the national capacity**, while the next county (Buzău) held only 1,4%. The remainder counties have not reached the 1% threshold.



photograph: Hotel infrastructure, Mamaia, Constanța

Several Tourist Information and Promotion Centers are established within in the Region, however their **structure and organizational scheme** (most of them are departments within public local authorities), as well as **their poor financing, do not allow them to be competitive, as little digital instruments are put at use, while the absence of Destination Management Organizations** contribute to the Region's **uncompetitive tourism marketing**.

I.8.b. Leisure facilities

The South East Region contains many types of recreational facilities, but not enough to highlight the potential of tourism at the regional level. Constanța county offers the most diverse facilities, which mainly support leisure tourism (beaches, amusement and aquatic parks, pubs and nightlife) with complimentary offers (sports tourism - usually water sports, equitation), cultural and ecumenical tourism, balneary tourism (see Techirghiol Sanatorium etc.). **The facilities in Tulcea county focus on the local specificity**, marked by the presence of the Danube Delta, usually for eco-tourism, rural tourism and for practicing sport fishing and water sports.



photograph: Danube Delta, Tulcea county



photograph: Vineyard in Vrancea

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Buzău county has facilities for spas, sports (rafting and cycling), hunting, gastronomy, cultural and hiking tourism. Vrancea has facilities such as **wine-tasting cellars**, photo safari and bird-watching areas, cycling routes, horseback riding, mountain biking etc. **Counties without a tourism tradition such as Brăila or Galați have recreational facilities for the local population**, such as parks, promenade areas, sport fishing areas, relaxation facilities.



photograph: winery, Buzău county

I.9. Touristic routes

The touristic routes offer of the South-East Region is rich and diverse, highlighting the cultural and natural resources and touristic facilities of its territories. Typically, promoted touristic routes are county routes, inter-county routes, sometimes mono-themed and targeting more than of type of tourism on one single route. Several cross-border routes (historical - the Roman Castra, cultural - Cap Kaliacra, Balcic- Bulgaria) are also promoted.

Brăila county offers a vast array of terrain trails for hiking, camping, fishing, species observation, cycling and waterways (including canoeing). Galați county proposes an offer of river routes (trips on the Danube). Buzău county offers a multitude of mountain trails (scenery, camping, adventure tourism), cycling, but also cultural trails such as the Road of Wineries, the Road of Ambra.



photograph: wild horses in the Danube Meadow area

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Constanța proposes coastline routes, cultural (archaeological-historical territory, city), ecumenical, natural and speleological trails, while in Tulcea county, along with thematic routes for scenery, camping, hiking, cycling or equestrian routes, navigable and terrestrial routes in the Danube Delta are promoted. Vrancea offers mountain and cultural trails (ecumenical, historical, gastronomic).



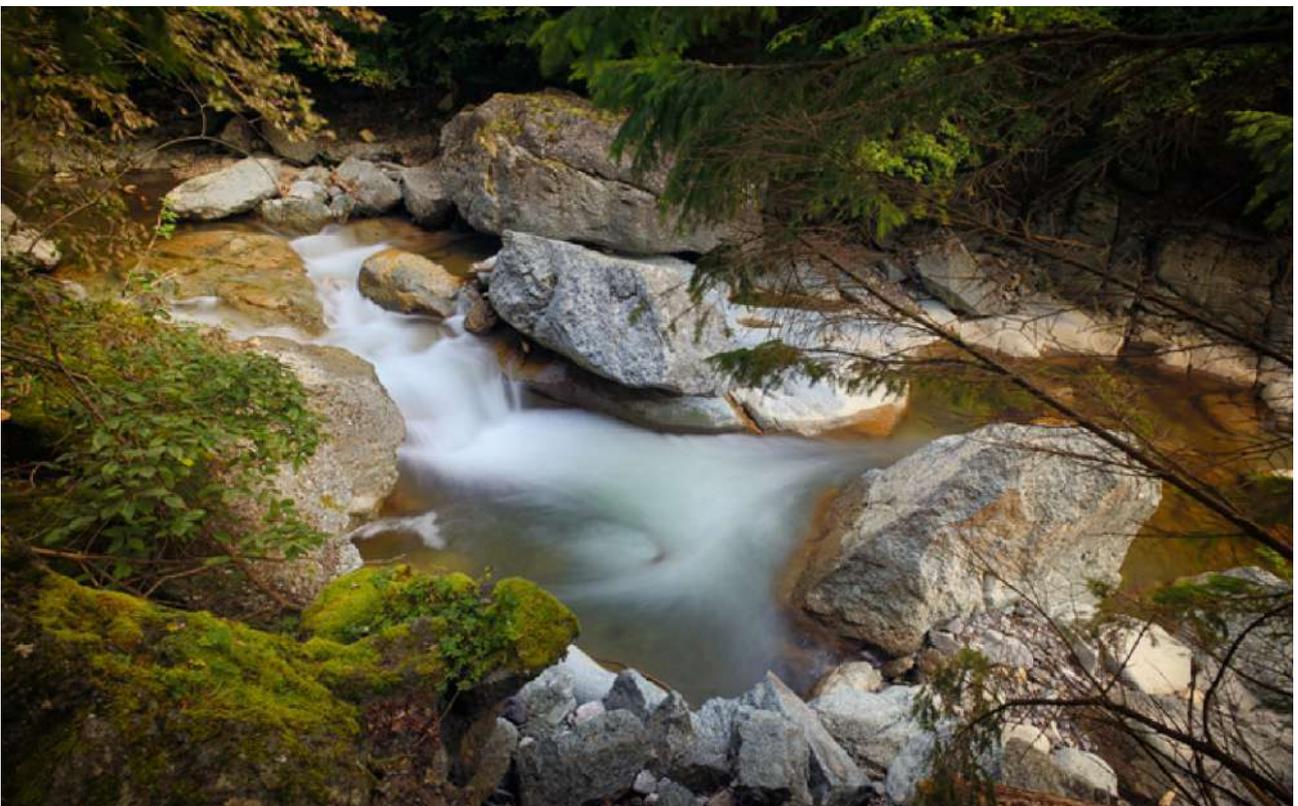
photograph: Rasova Winery, Constanța



photograph: Citadel of Enisala at sunset, Tulcea county



photograph: Histria Citadel, Constanța county



photograph: Putna waterfall, Vrancea county

II. Current state of tourism in the South East Region

II.1. Domestic and international touristic interest

In 2017, 1.5 million Romanians arrived in the South-East Region and approximately 115 thousand foreign tourists. Although the Region attracts approx. 16% of Romanian tourists, foreign tourists are scarcely represented, only 4% at a national level, not being an attractive area for them despite the presence of the Danube Delta and the Romanian seaside. There is a trend of growth of 39% compared to 2007 (11 years ago) in domestic tourism, while international tourism decreased by 11%. On a regional level, **Constanța county concentrates 77% of domestic arrivals and 54% of international ones, while the Black Sea coast is the main destination of the Region.**

Chart 2: Romanian and foreign tourist arrivals in accommodation structures in the South-East Region, 2007 vs. 2017⁶

Teritory	Domestic arrivals 2007	Domestic arrivals 2017	Evolution Domestic arrivals 2007 vs. 2017 %	International arrivals 2007	International arrivals 2017	Evolution International arrivals 2007 vs. 2017 %
Total	5420968	9383266	73,09	1550957	2760080	77,96
South-East Region	1101791	1527784	38,66	129267	114931	-11,09
Brăila	54647	73759	34,97	7308	6572	-10,07
Buzău	59527	84638	42,18	5057	6614	30,79
Constanța	842945	1173084	39,16	83259	62458	-24,98
Galați	55300	85033	53,77	10469	13186	25,95
Tulcea	53630	76284	42,24	20445	24146	18,10
Vrancea	35742	34986	-2,12	2729	1955	-28,36

Romanian tourists spent an average of 3,44 nights in the South-East Region in 2017, one third over the national average of 2.32 nights due to its tourist specificity, determined by leisure and seaside tourism. However, since the adhesion to the European Union, there is a decreasing trend for both indicators due to both changes in tourism consumption behavior and competition with other tourism markets. The highest average stay in 2017 is registered in Constanța county (3.85), and the lowest in Galați county (1.50). As for international tourism, the highest average stay is recorded in Brăila (4.48) and Constanța (3.36), and the lowest in Buzău (2.01%) and Vrancea (1.94 %).

⁶ source: Data made available by the National Institute of Statistics via its online database, accessed in April 2019

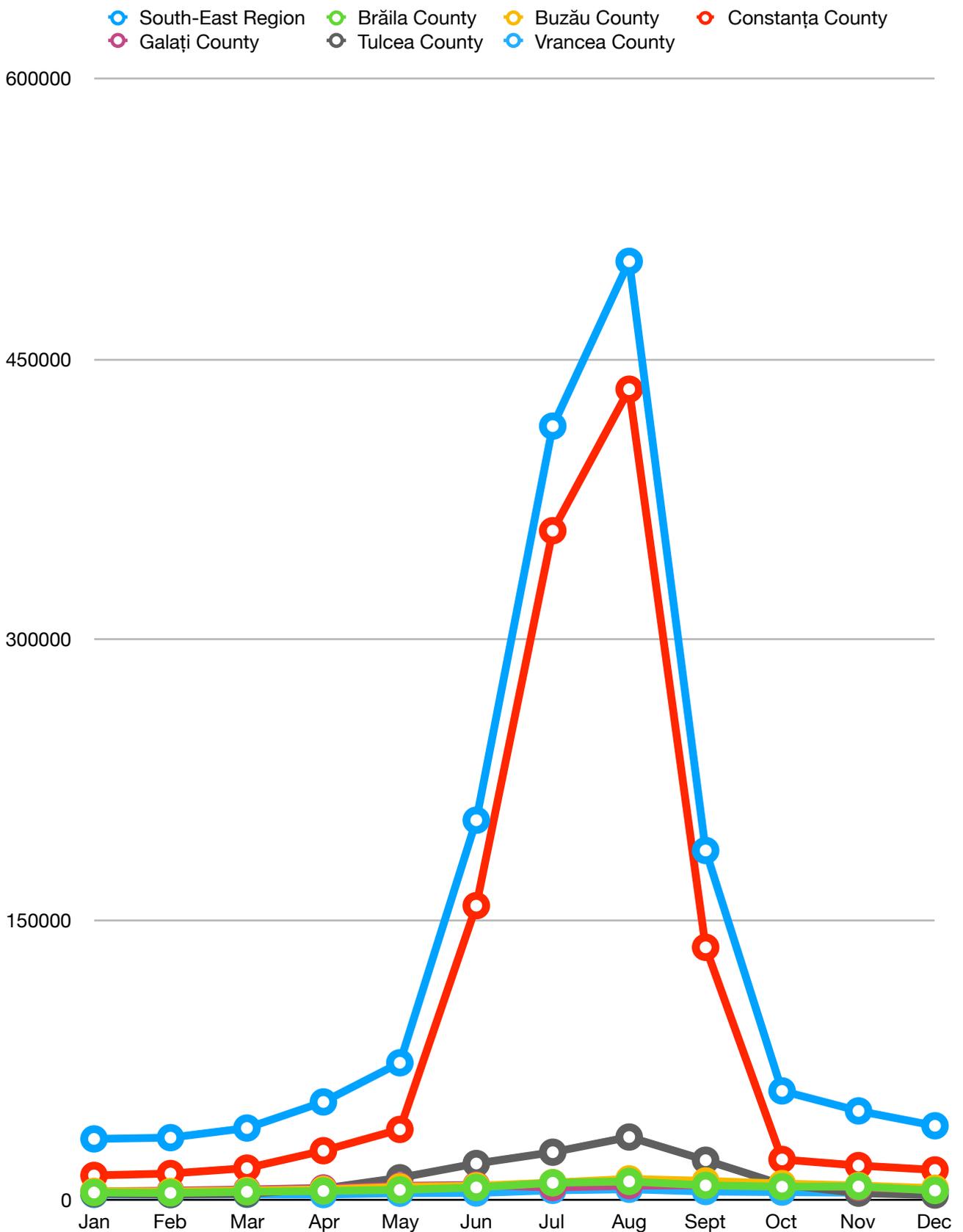


photograph: Danube Delta, Tulcea county

The South-East region depends touristically, on an acute seasonality, especially in Constanța county. 90% of arrivals are between May and September, during the summer season. Tourism arrivals in the other counties (except Tulcea) show a much more balanced distribution, given the specificity of tourist traffic (usually business tourism, trips or other forms of more constant tourism). As for international tourism, seasonality is less acute.

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Graphic 4: **Domestic tourism seasonality in 2018 in the South-East Region⁷**



⁷ s source: processed data made available by the National Institute of Statistics via its online database, Tempo Online, accessed in April 2019



photograph: Neversea Festival, Constanța

II.2. Economic activity in tourism in the county seat municipalities in the South-East Region

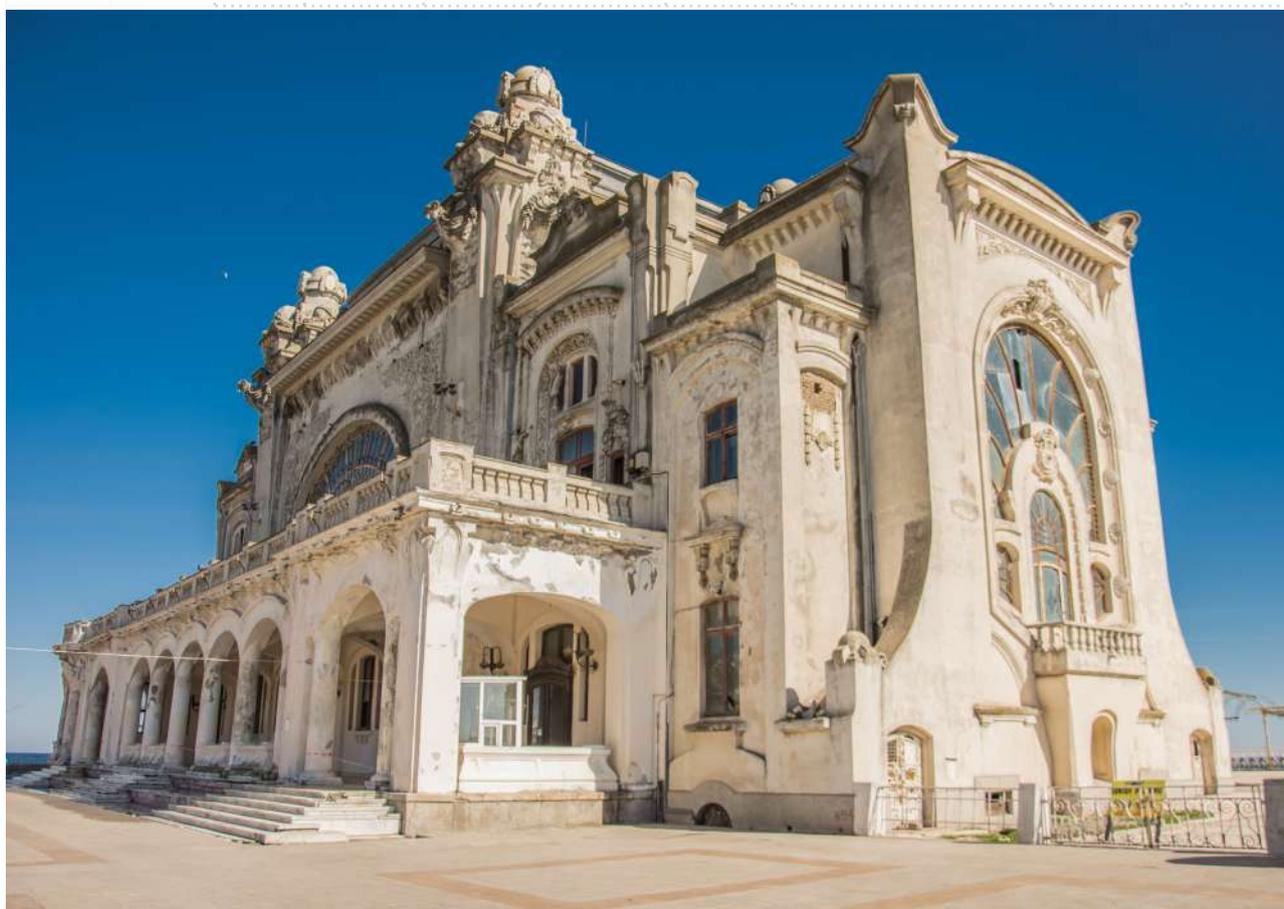
Regarding the **tourism economy**, the analysis of the data provided by the National Trade Register Office, shows that the hospitality industry in Bucharest generates larger revenues (1.350 billion euros) than all the other private tourism sector in top 10 cities in Romania. However, **the flagship destination of the South-East Region, Constanța, accounts for the second largest hospitality market in Romania**, earning 188 million euros of tourism revenue and having the highest rate of profitability. Constanța is also the second largest employer in the industry (7,229 employees).

The economic analysis of the tourism sector in the county seat cities (mainly manifested at the level of hotels and catering enterprises) that are naturally, tourism attraction centers from an economic perspective, shows that the Municipality of Constanța has the largest tourist market in the Region, in terms of volume and number of employees, reaching a cumulated turnover in the Horeca field (in 2017), of 860 million lei, more than all of the other county seats combined. The focus on tourism or specialization becomes obvious in the case of Constanța, by analyzing indicators such as revenue in tourism per capita, average revenue and profit in tourism enterprises or ratio of population employed by the tourism sector, registering higher values than the other county seats in the Region. The only other city with a more pronounced focus on tourism is Tulcea, with indicators at half the values registered for Constanța. All of the other municipalities lack strong tourism sectors.

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Chart 3^B: Economic activity in tourism in the county seat municipalities in the South-East Region, 2017⁹

City	No. of inhabitants	No. of enterprises	Average income (lei)	Average net profit (lei)	Average no. of employees	% of population employed in tourism	Average income in tourism per inhabitant (lei/inhabitant)	Average revenue in tourism per enterprise (lei/enterprise)	Average net profit in tourism per enterprise (lei/enterprise)	Average profit rate (%)
Brăila	205602	199	104156201	11929186	1239	0,60	507	523398	59946	11,45
Buzău	133645	103	87035915	12200477	902	0,67	651	845009	118451	14,02
Constanța	314936	825	860688832	138056953	7329	2,33	2733	1043259	167342	16,04
Galați	303638	331	174640309	18016080	2120	0,70	575	527614	54429	10,32
Tulcea	87735	130	106842408	17292520	979	1,12	1218	821865	133019	16,19
Focșani	93005	116	60658898	8428574	567	0,61	652	522922	72660	13,90



photograph: Constanța Casino

⁸ Data available on the website of the National Institute of Statistics, Population according to domicile on the 1st of January of the reference year constitutes of the number of persons with Romanian citizenship, holding domicile on the Romanian territory, according to administrative territorial criteria

⁹ National Trade Registry Office, yearly submitted data 2017

III. The tourism potential of the South-East Region, development perspectives

III.1. SWOT Analysis

Strengths

- Presence (Constanța, Galați etc.) and proximity to major urban centers, especially to Bucharest: the most important tourist center at the national level;
- Accessibility (diversity-railway and road network, Constanța airport);
- The presence of numerous secondary residences in the seaside area;
- Rich cultural and immaterial cultural heritage;
- Diverse and unique natural heritage;
- Heritage items are known and promoted nationally and internationally;
- Cultural events recognized nationally and internationally;
- The presence of the university and vocational training centers with a tourism curriculum;
- The resilience of the regional tourism sector during the economic crisis.

Weaknesses

- The lack of a regional touristic brand and the lack of common tourism offers;
- Lack of strategy or collaboration mechanisms for joint tourism promotion of the region's heritage;
- Lack of funds for renovation and protection of cultural and natural heritage;
- Poor capitalization of cultural tourism, ecotourism and health tourism;
- Unbalanced tourist attendance when comparing Constanța to the other counties of the region, but also common problems in all the counties in the region related to seasonality, poor local income per tourist or low average stay;
- Secondary road network of poor quality and lack of touristic road signs;
- Lack of accommodation and food structures near natural or cultural heritage sites;
- Lack of skilled and unskilled labour;
- Depopulation of rural areas;
- Poorly developed cruise tourism (lack of well-appointed tourist ports and navigability issues);
- Large differences in tourist equipment, social features and tourist traditions, the level and quality of the workforce between the sub-regions of the seaside, Delta and the "plains, hills and mountain areas" of the region plus the precariousness of the transport system inside the region and inter-regional;
- Absence of an DMO as a coordination structure of the tourism activity at a regional level that will focus the communication policy of tourist products specific to the regions.

Opportunities

- The possibility to develop a unique regional ecotourism destination in Romania including mountain areas, the Danube Delta, the seaside or the Danube;
- Possibility of theme collaboration between counties, creating common or complementary products regarding cultural tourism, ecotourism, health tourism and cruise tourism;
- A market for rural tourism/relaxation in nature, form of tourism in development;
- European funds to improve navigability on the Danube and to modernize port infrastructures;

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- Creation of tourism products with a high degree of specificity based on local natural heritage and anthropic heritage, such as the creation of local brands (bio-products, products based on specific local resources etc.);
- Interest in implementing a modern infrastructure development policy including for IoT and 5G. Introducing digital entertainment: holograms, robots, VRs (digitization funding in the new 2021-2028 funding exercise).

Threats

- The geopolitical situation in Ukraine, but also in the whole Black Sea basin;
- Competition with well-known and better-known historical and archaeological sites from other regions of Romania (Transylvania, Moldova);
- Decreasing the number of vacation vouchers;
- Isolation and exclusion of tourist circuits of cultural heritage due to poor accessibility;
- Unsustainable development of rural areas through the creation of large and non-specific accommodation structures in the area and by opting for a model of urban development at the expense of rural tourism and the authenticity of the area;
- Taking a tourist stance without creating products that combine traditions and local heritage and innovation. The outcome leads to false tourist promise or non-touch of target customers;
- Labour migration and poor staff training;
- The blockage of EU cooperation on the Danube Rhine aisle.

III.2. Conclusion

The South-East Region has a variety of natural, cultural and health/wellness attractions, which have the potential to become tourism experiences of national and international interest. Analyzing the data from the Tourism and Travel Competitiveness Index (WTTC) and the areas in which Romania has a comparative advantage and potential for development compared to other competing countries, corroborated with the current trends in tourism development and "visiting experiences", it follows that **Romania and the Region are internationally competitive in terms of cultural heritage, cultural and historical tourism (together with gastronomy), ecotourism and rural tourism (nature and adventure), wellness and health tourism and MICE tourism.** On a domestic perspective, sea, sun, sand and city-break products remain competitive, too. **The resources for creating competitive forms of tourism, on a national and international level, are present in the South East Region.** However, in order to achieve its potential for tourism development, **the Region faces the following challenges:**

- **Tourist destinations are underdeveloped and difficult to access.** The access roads to tourist destinations and sites are inadequate, the railway transport system is uncompetitive, there are limited opportunities for cycling, information regarding available transport services for tourists lacks, while information boards and tourist signs are inadequate.
- **The tourist offer is not developed enough in comparison to the international competition.** Despite the presence of a large number of significant tourist attractions, these are not marketed properly, and the possibilities of spending money are limited. This can be largely caused by limited entrepreneurial support and poor private sector funding for co-operation, innovation, upgrading and creating new activities and offers to provide spending opportunities. The South-East Region and the country as a whole are still behind the rest of Europe in terms of tourism development. Accelerating the "catch-up" process through innovative solutions and new models of offering and consuming travel experiences will be particularly important.
- **Experiences and services at a regional level are noncompetitive.** The current spending opportunities existing in the region, are usually, non-competitive. There are a number of reasons for this, among which the most important are poor development and management of tourist attractions, including their insufficient commercialization and preservation. Less than 20% of cultural heritage monuments are in good or average maintenance status, their correct restoration and preservation being a priority. Tourists can benefit from better development and management of tourism products (a better digital presence, multi-language guided tours, digital tours, documentaries, cafes, souvenir shops and tour packages for destinations in the proximity of the place in Romania where they arrived). The European Commission estimates that less than 20% of high school and college graduates choose to work in the tourism sector in Romania. However, as it has been noticed, many of those qualified for the tourism sector prefer to find a job abroad. Migration is valid for both highly qualified and low-skilled people. Employment in the tourism sector in Romania is rather unattractive, largely due to low wages, lack of career development opportunities and unstable working conditions due to the high seasonality in the tourism sector.
- **Weak marketing and destination management.** In the absence of competitive tourism management and marketing organization, such as Destination Management Organizations, it is very difficult to place and promote the region on a cross-border and international level.



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Common borders. Common solutions.