

THE ACCOMMODATION INFRASTRUCTURE IN THE REPUBLIC OF MOLDOVA STATISTICAL APPROACH

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Abstract: *The tourist reception establishments' activity from Republic of Moldova through specific indicators of accommodation activity has been analysed. For an objective overview concerning accommodation supply the capacity is analysed depending on the number of rooms and seats. Their dynamics and territorial distribution give the opportunity to appreciate both the republic's possibilities for accommodation and the polarizing centres of tourist flows. The varying distribution of accommodation capacities by administrative-territorial units it is closely developed in concordance to the existing tourism potential, tourism-related activities (tourism services), business development etc. In this regard, Chisinau municipality is the main tourist center of the country; here are concentrated 50.6% of the accommodation rooms and 33.3% of accommodation places from the Republic of Moldova.*

Keywords: *accommodation structure, classification, accommodation capacity, the Occupation Index, overnight stays, non-resident tourists*

Accommodation facilities are a cornerstone of the tourism material resources which is itself dependent on the development of tourist activity. There is a continuing correlation between: size, structure and grouping of accommodation material base with the intensity, direction, and the emergence of new forms of tourism, all adapted to the existing tourism potential.

The Republic of Moldova specialized structures of central public administration are influencing by normative documents and regulatory acts, the development of hotel industry (1, 2, 3, 4, 5, 6).

Overall, in terms of accommodation facilities base from the Republic of Moldova, there are two large groups (according to statistical evidence of the accommodation units): the first group of accommodation units; hotel-type which includes hotels, motels, agro-tourist boarding houses, hostels for visitors etc. and the second group; includes recovery structures (sanatoria), holiday villages, holiday camps for children.

According to current legislation, the next accommodation units are not considered tourist accommodation:

- accommodation establishments used exclusively by the owners or renters for a period longer than one year, regardless of classification;
- secondary houses of population used for tourism purposes exclusively by their owners;
- dormitories, boarding schools during school year;
- hospital units (except sanatoriums and other similar spaces practicing tourist activities);
- bedroom wagons;
- barracks and dormitories for workers, elderly dormitories and orphanages.

Tourist accommodation units do not include the type of "Rooms for rent in family houses" regardless of the number of bed-places available.

Hotel-type accommodation units - are currently about half of units number (Figure 1). However, in the last 10 years their number has evolved from 69 units in 2004 to 129 in 2014. Trends in hotel-type accommodation indicate a stable increase in the proportion of these units in relation to specialized ones. That situation is determined on the one hand by the accelerated growth of private investments, including foreign investments within real estate, on the other hand, there is a continuous degradation of accommodation structures in public ownership, especially those in rural areas (holiday camps and recreation centres).

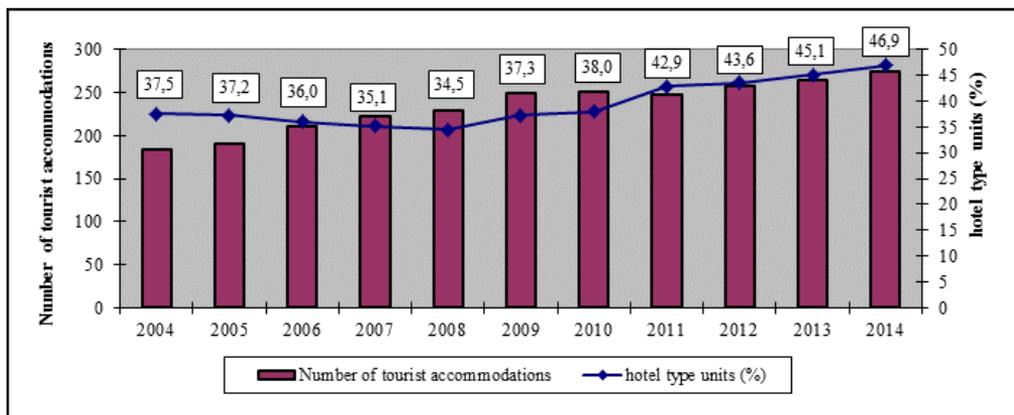


Fig. 1: The evolution of the tourist reception establishments from the Republic of Moldova, in the period 2004-2014 (7)

In 2014, Moldova had 275 tourist accommodation units, and between the years 2008 - 2014 their number had risen successively. At the same time, in the last year; presented to the base year, tourism units increased by 25, which is a relatively slow increase - of 10% (table 1).

Table 1: The dynamics of reception units (tourist function) by types of structures, in the period 2008-2014 (7)

Types accommodation units-tourist function	2008	2009	2010	2011	2012	2013	2014	Changes 2014/2008	
								Δ	%
Total	229	249	250	247	257	264	275	46	20,1
hotels and motels	62	72	75	85	87	94	100	38	61,3
agro-tourism boarding houses	11	15	13	15	19	19	24	13	118,2
hostels for visitors	6	6	7	6	6	6	5	-1	-16,7
recovery structures	6	6	6	7	7	7	7	1	16,7
holiday villages	62	71	72	63	62	63	63	1	1,6
holiday camps for children	82	79	77	71	76	75	76	-6	-7,3

The dynamics of units examined on each type during the period 2010 - 2014 presents a series of changes. The largest absolute increases were registered in tourist agro-tourist houses; 13 units, which represent an increase by 118.2%, hotels and motels; with 38 units, or 61.3% and recovery units; 1 unit (16.7%). A relative decline is observed in hostels for visitors and holiday villages with 1 item each or 16.7% and holiday camps for children; 6 units (7.3%).

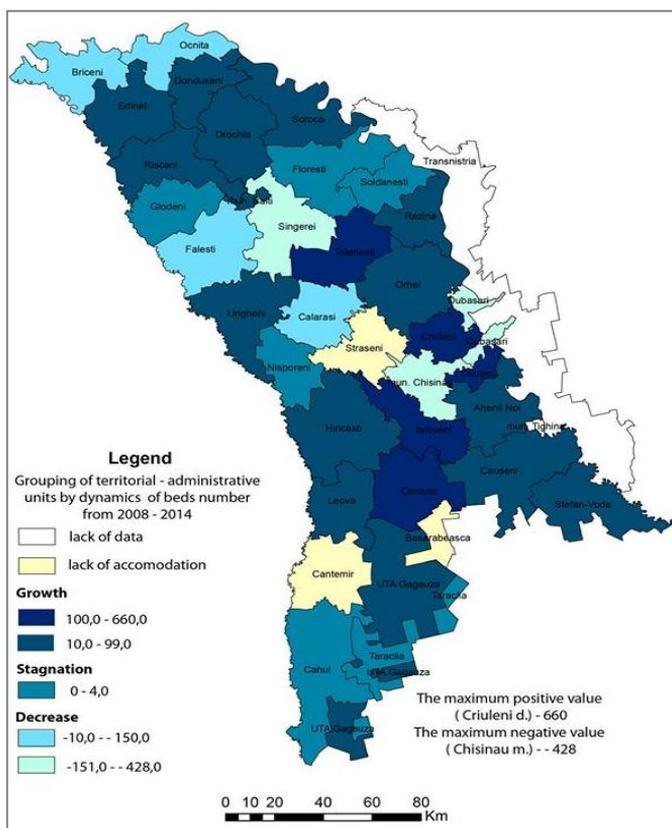


Fig. 2: The dynamics of beds at the administrative-territorial units in the Republic of Moldova, during the years 2008-2014 (7)

Territorially within the 2008-2014 years, there were changes in the accommodation capacity by number of rooms and seats. Thus, among the administrative units those have experienced some increase in the number of rooms: Ialoveni; 87 rooms, Criuleni; 85 rooms, Chişinău; 54 rooms, Ungheni; 53 rooms, Orhei; 36 rooms, Anenii-Noi; 24 rooms, Bălţi mun.; 21 rooms. According the number of beds stands out especially: Criuleni; 660 places, Ialoveni; 176 places, Cimişlia; 128 places and Telenesti; 100 places.

In 2014 in the 275 tourism accommodation structures there were concentrated 8529 rooms and 28 548 places. Distribution of accommodation capacities indicates that hotel-type units focus only 37.7% of the number of rooms and 21.5% of the places. Among specialized accommodation, the largest capacities are concentrated in holiday camps - 30.5% of the total accommodation rooms and 56.6% of the total number of beds (Fig 3; Fig. 4).

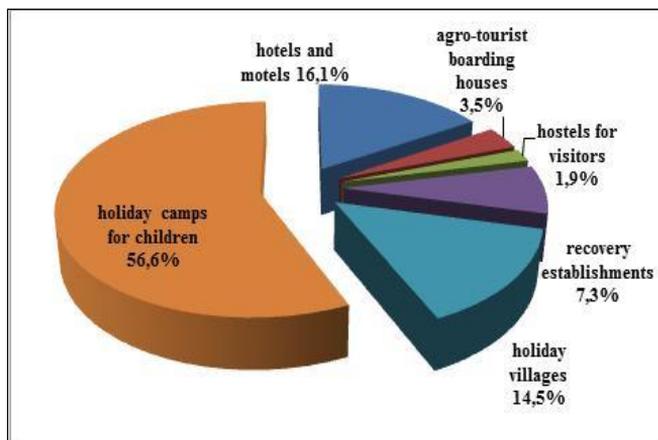


Fig. 3: Distribution of places by type of accommodation structures in the Republic of Moldova, 2014 (7)

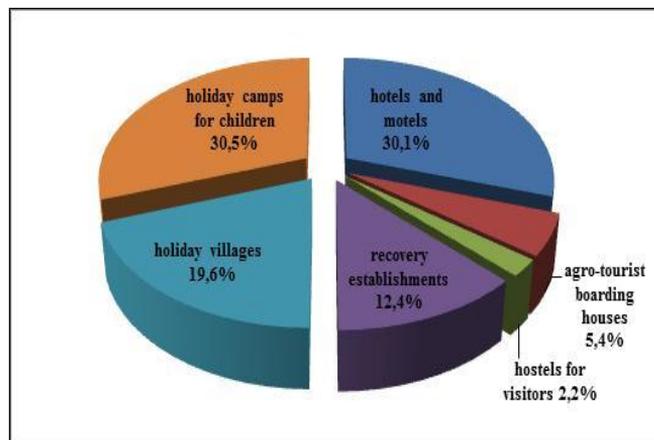


Fig.. 4: Distribution of rooms by type accommodation structures in the Republic of Moldova, 2014 (7)

In territorial aspect, the percentage of administrative which concentrates the highest values of the rooms number: Chişinău (50.6%), Dubăsari (6.2%), Orhei (5.8%), Cahul (4.9%), Călăraşi (3.8%), Bălţi (3.6%), Criuleni (2.6%) etc. The same administrative units share the highest values rates concerning the number of places: Chişinău (33.3%), Orhei (7.1%), Dubăsari (6.0%), Criuleni (5.6%), Ungheni (3.8%), Cahul (3.4%), Ialoveni (3.0%).

In this connection, Chisinau is the main tourist center of the country, which together with the periphery area has a valuable tourism potential, both as infrastructure and as tourist attractions. The most valuable sights of the country are located at 10-60 km distance from Chisinau (Milestii Mici, Cricova, Vadul lui Vodă, Orheiul - Vechi). Is notable the fact the Dubasari and Criuleni rayons are located on the banks of the Dniester River, being active tourist areas, especially in summer, having many summer camps and holiday villages. Moreover Cahul and Calarasi rayons are the main balneology zones of the country, there are sanatoriums Codru and Nufărul Alb. In the Republic of Moldova, according to the legislation, all accommodation establishments are required to pass classification procedure. However, up to now, this procedure is initiated only on hotel companies (table 2).

Table 2: Hotels and similar structures by comfort categories (7)

The hotel category	2010	2011	2012	2013	2014
Hotels and similar structures	95	106	112	119	129
Classified	47	53	61	69	78
4-5 *	14	21	24	25	26
3 *	22	21	26	32	35
2 *	9	9	9	10	12
1 *	2	2	2	2	5
Unclassified	48	53	51	50	51

In 2014, of 129 hotel-type accommodation structures, only 78 units or 60.5% were classified, of which category; 4-5* (33,3%), 3* – 44,9%, 2* – 15,4%, 1*– 6,4%.

The presence on hotel market the tourist accommodation establishments classified creates risks background to consumers of both of the local as especially foreign ones. In the same context for market service providers, there is an unfair competition from these companies, thus creating obstacles to market development including hotel as a whole and for tourists flow attraction. For these reasons, it is noted that the hotel units, compared to other types of accommodation structures registered low indicators of tourism occupancy rate.

The accommodation capacity-utilization indicators of in use are reflected in the comparative aspect for the periods 2005-2009 and 2010-2014. Therefore, it can be appreciated that through the country the Coefficient was decreasing for all types of reception. Whether in average the decreasing rate

constituted -10.1% then the lowest values were recorded on Recovery Units (-8.6), and Holiday Camps for children (-16.1%). This can be explained due to the increase in tariffs for accommodation and recovery units, but at the same time abroad orientation of local tourists, lack of comfort and the number decrease of children received on holiday camps (Fig.5).

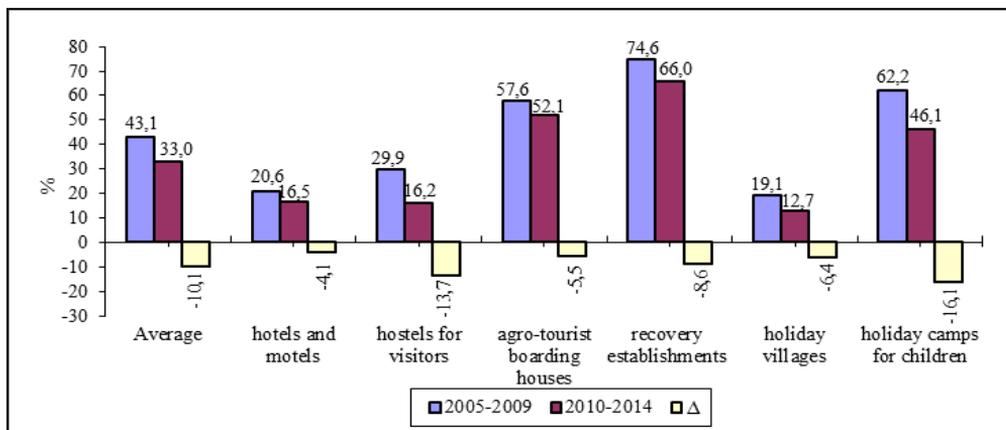


Fig. 5: Comparative evolution of the occupation index in establishments of tourist reception - the Republic of Moldova (7)

Analysis of data regarding foreign tourists accommodated in establishments of tourist reception, entails the need to elucidate the main features at a series of specific indicators of accommodation activity.

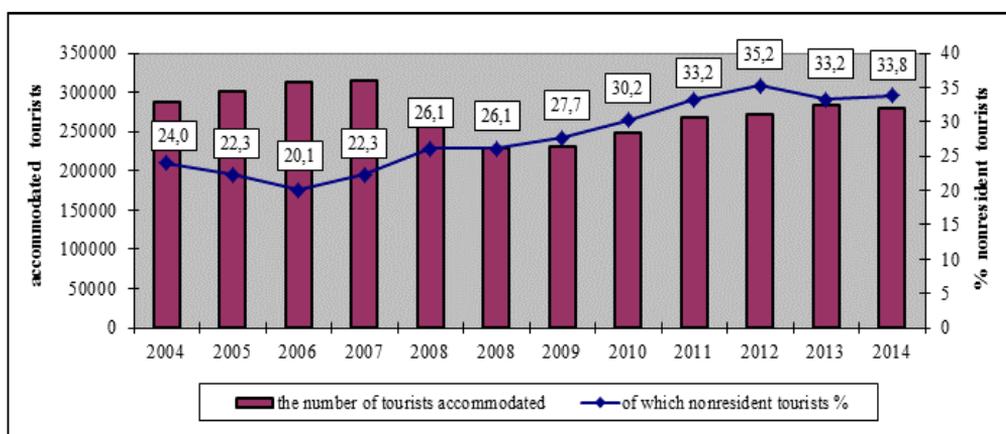


Fig. 6: The evolution of the number of tourists stays in establishments of tourist reception in the Republic of Moldova, 2004-2014 (7)

During period 2004 - 2014 in the Republic of Moldova were accommodated over 3.3 million residents and non-residents tourists, with an

average of 275 300 tourists per year. Maximum values were reached between the years 2005-2007 by 12.0% more, compared to the average for the entire period. From the total number of accommodated tourists, the share of foreigners has averaged 28.0%, with a trend of slow growth (0.9-1.0%) annually (Fig. 6).

Analyzing the data shown in Fig.7-8., follows that the in terms of the influence of seasonality, hotel services demand dynamics both for local tourists and foreigners, has varying aspect, with larger requests in the second and third quarters (especially) in the majority accommodation structures.

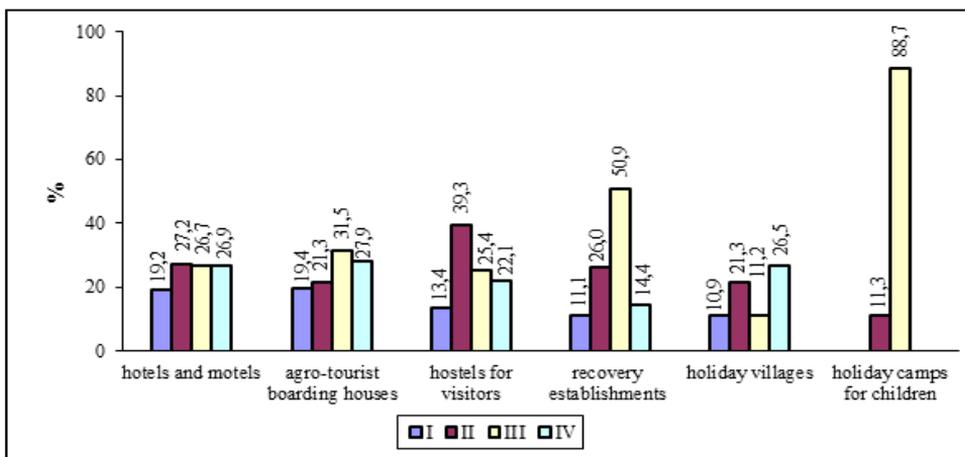


Fig. 7: The distribution of overnight stays of local tourists in reception units in the Republic of Moldova, by trimesters during 2004-2014 (7)

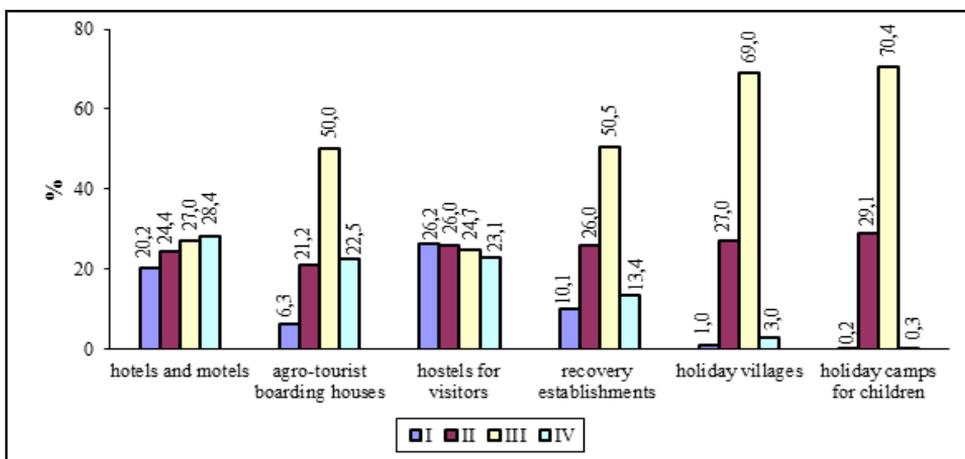


Fig. 8: The distribution of overnight stays of foreign tourists in reception units in the Republic of Moldova, by trimesters during 2004-2014 (7)

At the same time, the demand for accommodation services can be assessed by the ratio of number of nights spent by foreign tourists to the resident tourists for different types of units. Thus, on average 100 nights spent by

resident tourists account for just 20 overnight stays of foreign tourists. By types of units, there is a preference of non-resident tourists for hotel units in which the number of overnight stays is approximately 3 times higher than those of residents (Fig.9).

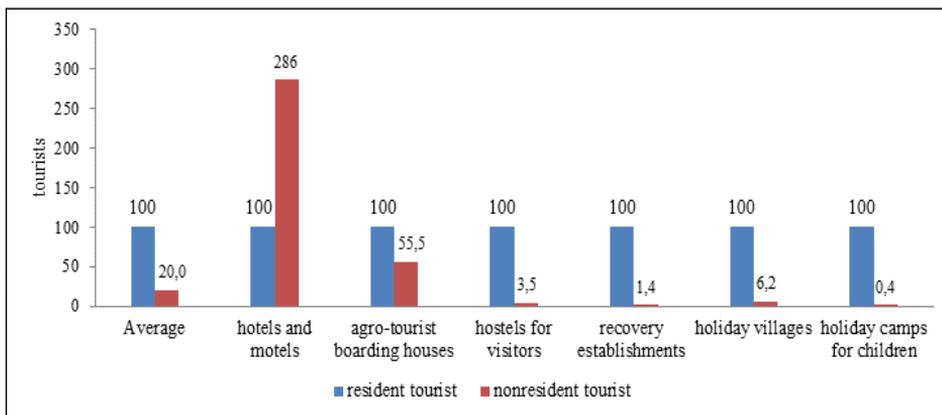


Fig. 9: The number of nights spent by foreign tourists to 100 nights spent by local tourists in establishments of tourist reception in the Republic of Moldova during 2004-2014 (7)

According to the average length of stay, (for the last three years of statistical evidence: 2012-2014), has been observed that on average to a resident tourist is assigned 3 times more overnights than a non-resident tourist. The value of this indicator varies depending on the accommodation facilities, which connects to expectations and opportunities both categories of tourists to accommodation services. Thus, a foreign tourist spends more time than local tourists in hotels and motels (0.5 nights) and agro-tourist boarding houses (0.3 nights), also attends almost equally with resident tourists holiday camps (Fig.10).

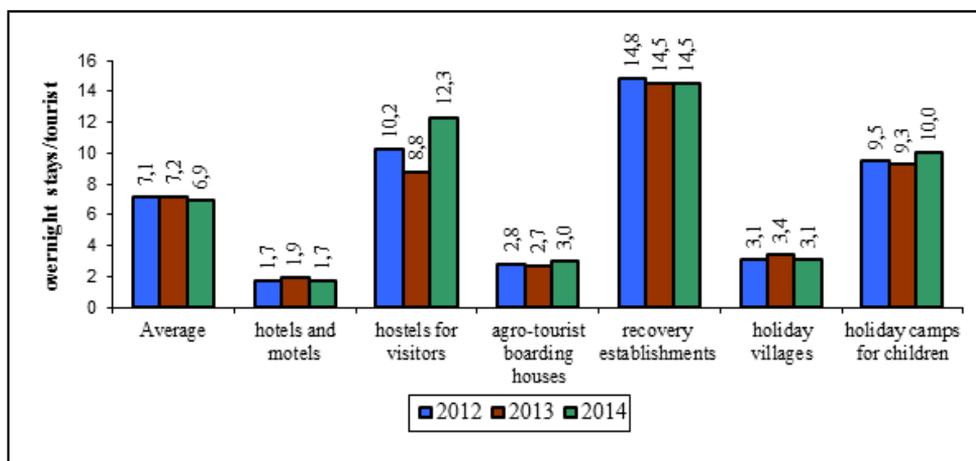


Fig. 10: The average length of stay of resident tourists in establishments of tourist reception in the Republic of Moldova, 2012-2014 (7)

Among the accommodation units in which the average length of stay of non-residents tourists is smaller than resident tourists are dormitories for visitors (-9.1 nights) and holiday villages (0.7 nights). This can be explained, in the first case by a small network of such units' type with a limited level of comfort, in the second case accommodation services, including additional to these structures are at very high prices, comparable to seaside resorts in other European countries.

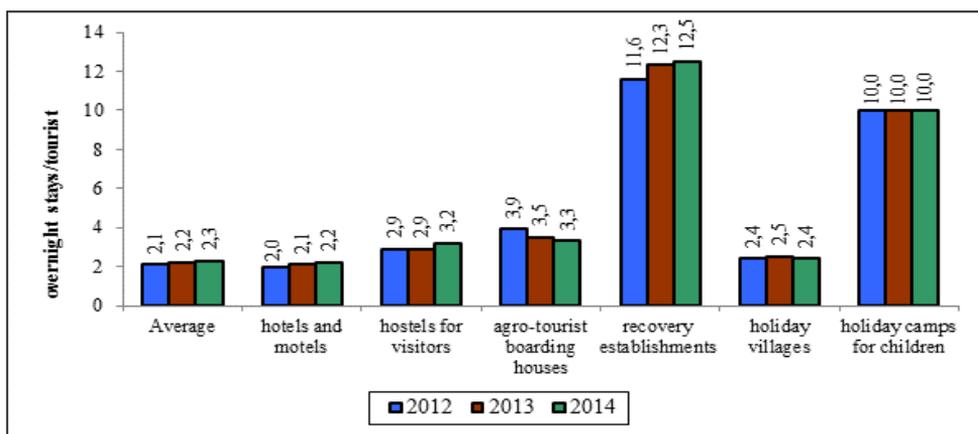


Fig. 11: The average length of residents tourists stay in the Republic of Moldova, 2012-2014 (7)

Although the number of nights stays by resident tourists in recovery units (sanatorium) has been increasing in the last three years by an average of 12.1 overnight stays / tourist, however this digit reaches a difference of 2 nights to the average of the residents (Fig.11). At the same time, for the 3 years of statistical evidence, there is a correlation between reduced average lengths of resident tourists' overnights with an increase of these indices for non-resident tourists.

Conclusions

- In the Republic of Moldova hotel-type accommodation establishments, currently constitute about half of the units. However, they concentrated only 37.7% of the number of rooms and 21.5% of number of beds.
- Accommodation capacities by rooms' number and beds number are concentrated mostly in the same administrative units: Chisinau, Dubasari, Orhei, Calarasi Cahul and Balti, Criuleni etc.
- Hotel services demand dynamics for tourists both local and foreign, has shown that most requests for accommodation services were recorded in second and third quarters (especially) in the majority of tourist accommodation structures.

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