Tourist Flows in Romania. Evolution and Perspectives

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ABSTRACT
The research focuses on a detailed analysis of the tourist flows in Romania, both inbound and outbound, trying also to identify the major internal and external factors that have determined the specificity of their evolution over the last decade. The study uses the latest data provided by National Institute of Statistics in Romania regarding the number of Romanian and foreign tourists arriving in the main tourist regions of the country, the nationality of foreign tourists, as well as the number of Romanian tourists participating in foreign tourist activities organized by travel agencies, and their destination. The most important conclusion regards the favorable evolution of the arrivals of foreign tourists, which was generated by the unfavorable economic and political conjunctions of the states near Romania (Turkey, Greece) in recent years and also by foreign tourism promotion, which have conducted the tourist flows to our country. In the near future the main actors in Romanian tourism will have to capitalize on this favorable evolution, which at present does not rely on an improvement in the Romanian tourist services.

1. Introduction
In any research field, the notion of "flow" implies a certain evolution and quantity. In tourism, the flow concept refers to the numerical evolution of tourists, depending on the location and tourist destinations. The tourist motivation determines the bi-directional nature of the tourist flows, meaning that tourists can return to their home on other tourist routes, depending on their personal interest, as opposed to other scientific fields, where the flows are rather unidirectional, direct responsible for the qualitative mutations. Thus, the tourist flow can be defined as the direction of the quantified movement of the tourists from the outbound region to the inbound one. The tourist flows can be convergent/inbound (towards any tourist destination), diverging/outbound (from the localities without tourist potential) and in both directions (at the tourist centers) (Ielenicz, M.&Comănescu, L. ,2013).

In the entire world, tourist flows have a double direction, between the outbound regions and inbound ones and include three types of flows (Muntele, I.& Iațu, C, 2006):

- people flows;
- capital flows;
- information flows.

For developing countries, inbound tourist flows can have a major impact on their national economies. It can be manifested on multiple plans: socio-economic, cultural, political, and the influence differs from one region to another depending on the level of development and the importance given by decision-makers (figure 1). Thus, the economic impact of tourism can be direct or indirect (Turcu, D., Weisz, J., 2008).

The direct economic impact of tourism is reflected by:

- the contribution of tourism to the increase of G.D.P. due to the increase of the incomes from tourism (made by the direct providers - accommodation units, public catering, leisure, carriers, and tourism agencies) as a result of the increase of the production;
- the contribution of international tourism to the rebalancing of the commercial balance of payments as a result of the increase of foreign exchange earnings from the sale of foreign currency tourism services, domestic export;
- the contribution of tourist activities to the valorisation of the natural and anthropic tourism potential (natural environment, climate, curative qualities of mineral springs, art monuments, historical vestiges, folk tradition, etc.);
- the contribution to the economic growth of the regions in which tourism develops (favoring the development of specific and transport infrastructure, capitalizing on tourism resources, the demographic component, etc.).
The indirect economic impact of tourism refers to the fact that its development involves the development of other fields of the economy.

The social impact of tourism refers to:
- its contribution to the creation of new jobs and the emergence of new occupations (tourism entertainer), which have the effect of reducing the unemployment rate;
- contribution to the regeneration and improvement of the mental and physical capacities of the population, with favorable consequences on productivity.

The cultural-educational impact regards the fact that visiting a region widens the tourist's cultural horizon on geography, history, art, literature, natural sciences, etc. Also, the contact of tourists with regions where the level of culture and civilization is more advanced than in the regions they come from can be a positive stimulus for them.

The political impact is also important, as tourism is considered a "messenger of peace" and helps to promote a better understanding among nations belonging to different cultures.

In conclusion, the contribution of tourism activities to socio-economic development is different from one region to another, depending on its level of development and the policy promoted towards it. All types of impacts analyzed above can act simultaneously or not in tourist regions, playing a decisive role for the tourism phenomenon and the regional economy.

2. Objectives and Methodology

The main part of this study is focused on data collection and database constitution whose main source of information was Tempo-Online Database offered by National Institute of Statistics of Romania. The second phase of the research was data analysis using quantitative methods and techniques, such as statistical ones, to illustrate through tabular and graphical representations the results obtained by observation and synthetic methods.

The research objectives, which have been achieved during the phases of collecting and interpreting the data on the tourist flows in Romania during the last decade, were:
analysing the evolution of tourists’ arrivals in the accommodation units by destinations, by types of tourists (romanians/foreigners) and achieve the hierarchy of the internal tourist destinations depending on the size of the inbound tourist flows;

analysing the evolution of tourists’ arrivals by types of accommodation, comfort and types of tourists;

the analysis of the evolution of the Romanian tourists participating in the external tourism activities organized by the travel agencies, by destinations;

reflecting the dynamics of the number of Romanian tourists who used the services of a travel agency for holidays within national boundaries by types of destinations and forms of tourism, according to National Institute Of Statistics in Romania.

This research, according to its objectives, should provide a clear overview of the trends in the evolution of tourist flows in Romania over the last ten years, the only shortcomings being the considerable increase of tourism on its own, whereby more and more tourists organize their own holidays, using online booking platforms and their own means of transport to destination. We also have to take into consideration the doubtful fairness of the tourists’ registration upon arrival by the staff of the accommodation units and the subsequent reporting to the relevant institutions (County Statistical Offices and National Institute Of Statistics).

3. Results And Discussion

Romania has a touristic potential of great complexity and value. The geographic position offers Romania three natural defining components for its landscape and landscape structure, which outlines the country’s tourism potential: the Carpathian Mountains, the Danube River and the Danube Delta, the Black Sea with the seaside strip. The tourist transit function was generated by its location, Romania ensuring the connection between the Central, Northern and Eastern European countries with those in the southern continent and the Middle East. Accession to E.U. in 2007 and the possibility to travel much easier, both for Romanian citizens to other EU member states, as well as for the citizens of Western and Central Europe to Romania, was meant to increase the inbound and outbound tourist flows in Romania during the last decade.

The analysis of the inbound tourist flows shows that in 2016, the number of arrivals in the accommodation units in Romania was 11002522 people, the largest share being recorded by Romanian tourists (77.4%), while foreign tourists had only 22.6% (figure 2). Regarding the structure of arrivals by types of accommodation units, most tourists, both Romanians and foreigners preferred in 2016, hotels (72%), followed by guesthouses (9.2% of arrivals), agritourism guesthouses (7.3% of arrivals), tourist villas with 2.9%, hostels with 2.8% of arrivals, only 2.4% of tourists arriving in Romania preferring motels (figure 3).

Figure 2. The Inbound Tourist Flows In Romania During 2006-2016

Source: INS Romania, Tempo-Online Database
Figure 3. The Inbound Tourist Flows In Romania During 2006-2016, by Types of Accommodation Units

Source: INS Romania, Tempo-Online Database
The majority of the tourists, especially the Romanians, preferred in 2016, the 3 stars accommodation units (43.4% of the Romanian tourists), while the foreign tourists (46.5%) mostly stayed at 4-star hotels (figure 4).

The hierarchy of destinations chosen by both Romanian and foreign tourists, according to the size of the inbound tourist flows, shows that in Romania the business and transit tourism are still preferred, most of the arrivals, especially for foreign tourists (42.6% of Romanian tourists, 77.8% of foreign tourists) being in Bucharest and other county-capital cities (figure 5).

The analysis of the evolution of arrivals in Romania during 2006-2016 allowed us to identify the following major conclusions, with an important role in shaping the trends of the inbound tourist flows in the near future:

Figure 4. The Inbound Tourist Flows In Romania During 2006-2016, by Types of Tourists And Comfort Of the Accommodation Units

- the number of tourists has recorded over the last decade a considerable leap (+77%), from about 6.21 million in 2006 to about 11 million in 2016, the foreign tourists flows being higher (+79.7%) than the Romanians (+76.2%). Unfortunately, although the number of foreign tourists increased considerably, even more than the Romanian ones, the Romanian/foreign weight in the total arrivals was almost identical (77.5% Romanians and 22.5% foreigners in 2016);
- the 3, 4 and 5 stars accommodation units, registered a significant increase in the number of arrivals in 2016 compared to 2006 (+119% at 3 stars, +370% at 4 stars +179% to 5 stars), in contrast to the 2-star units (-25.2%), the latter being the most booked in Romania in 2006 (37% of the total arrivals in 2006);
- the dynamics of the arrivals in the most representative tourist regions of Romania shows that the highest increase was recorded by the mountain resorts (+98% in 2016 compared to 2006), followed by the category "other localities and tourist routes" (+96.7%) and Bucharest and County Capital Cities (+86%). These are followed by the notorious Romanian tourist regions, which have registered increases of less than 50% (Black Sea resorts, excluding Constanta City with 42%, the Danube Delta&Tulcea City with +40%, the spa resorts with +21.4%);
- the dynamics of foreign tourists' arrivals in the Romanian regions mentioned above shows that the largest increase was recorded by Danube Delta&Tulcea City (+100% in 2016 compared to 2006), followed by Bucharest&County Capital Cities (+89.2%), mountain resorts (+80%), other localities and tourist routes (+68.7%) and spa resorts (+25%). Black Sea resorts without Constanta City are no longer in the top of foreign tourists' preferences, being the only Romanian tourist region that has recorded a significant decrease of foreign tourists arrivals (-50% in 2016 compared to 2006).

The favorable evolution of arrivals in Romanian accommodation units in the last decade for foreign tourists is based primarily on the aggressive tourism promotion of the country to foreign events. Thus, Romania participated, on average, at 68 annual international fairs and exhibitions in Europe, Middle East, North America and Japan.
On these occasions, more than 225 Romanian tourist companies were present, exhibited and negotiated international tourism contracts, thus contributing to the more active presentation of the Romanian tourism potential, attracting a significant number of tourists. More than 3.9 million visitors were present at the stands of Romania at these fairs and international exhibitions (Manole et al., 2016). Also, the inclusion of Romania for a limited period in the Euro Travel Guide and the catalogs of the German tour operators Dertour, Neckermann and Tui, which show the structure of the Romanian resorts, their history, rural tourism, gastronomy, wines and hotels information was a factor of favorability. For example, the EuroTravel Guide is distributed in over 40 countries, being read by over five million people and is published in three international languages (English, French and German) and has an attractive graphical presentation. At the same time, the higher number of tourists, predominantly Romanians, was also determined by the creation and implementation of special programs for the development of national tourism. Thus, since 2009, a series of national programs have started, which generated, either the development of tourism services and some types of tourism (The National Program for the Development of Superski Mountain Tourism in the Carpathians, the Program “Vacations in the Rural Environment (“Romania- Country of Wine”, “Danube Cruise”), or attracting low-income tourists (“The Seaside for All”), or increasing the quality of hotel services (National Program for the Quality of Hotel Services and Launch Of Brand “Q”).

Last but not least, we must admit that this significant increase of the inbound tourist flows generated by these national programs in order to develop the national tourism, as well as the aggressive tourism promotion, were amplified by a series of political events (terrorist attacks, political tensions between countries) and economic (frequent strikes of transport companies, increase in accommodation rates) with a negative impact on tourism in countries situated close to Romania, such as Turkey and Greece, well known for exceptional seaside tourism. Thus, some of the Russian tourists who were frequently traveling to these Mediterranean countries, reconsidered their options, taking into account Romania, a much cheaper destination.

The outbound tourist flows are much more difficult to quantify and forecast due to the behavior of tourists in recent years who prefer to organize their holidays on their own, using on-line booking sites for both accommodation and air transport. In these conditions, the number of Romanian tourists practicing tourism organized by a travel agency, outside the borders of the country, gives us a true, but unfortunately incomplete picture.
Figure 6. The Romanian Tourists Who Traveled Abroad Using a Travel Agency During 2008-2016

Source: INS Romania, Tempo-Online Database

Figure 7. The Romanian Tourists Who Traveled Abroad Using a Travel Agency During 2008-2016, By Destinations

Source: INS Romania, Tempo-Online Database
During 2008-2016, the number of Romanian tourists who used a travel agency to spend their holidays abroad registered a sinuous trend, marked by the European economic crisis from the beginning of the period, which also affected Romania in 2010. The effect on Romanian international tourist flows was a decrease by 50% in 2008-2010 (figure 6), due to the significant decrease in revenues, the increase of the latter, influencing also the ascendant evolution of the number of Romanian tourists, who spent their holidays abroad during 2012-2016 (+155%).

In the last years, 2012-2016, we are witnessing a downward trend again, followed by a slight increase in the number of Romanian tourists who have purchased a holiday outside Romania through a travel agency, the main reason being the preference for personal transport to foreign destinations close to Romania or on-line bookings made by tourists directly on airline sites or accommodation units, without paying any fees to travel agencies.

Regarding the countries where the Romanian tourists spent their holidays, we noticed (figure 7) that neighboring countries, Bulgaria, Greece and Turkey, as well as Spain, attract the most Romanian tourists in the summer season in the Black Sea and Mediterranean seaside resorts, Central and Western European countries with a valuable cultural tourism potential (Italy, France, Great Britain, Germany), or those with famous skiing resorts superior to national ones (Austria, Switzerland).

The flows to the states on other continents were lower and the trend was descending. Thus, most Romanians preferred North African countries, Egypt, Tunisia before the terrorist attacks (2008-2010). Since 2012, the flows are mainly directed to USA, Canada, Brazil, Argentina, Israel or Thailand.

4. Conclusions

The favorable evolution of tourist flows in Romania in the last decade, both inbound and outbound, concerning the considerable increase of the arrivals of both Romanian and foreign tourists, will continue in the short term, being generated by the increase of the wages in public sector, some of the employees also receiving vacation vouchers for accommodation units from Romania. However, the arrivals of foreign tourists, although rising in recent years, will continue to have the main motivation transit and business opportunities, Bucharest and the other county capital cities being the most demanded destinations by foreign tourists in the coming years.

Regarding the classical tourist destinations of Romania (Black Sea coast, Danube Delta, mountain resorts, spa resorts), these will remain attractive mainly for Romanian tourists at weekends, whose financial possibilities do not allow them another holiday outside the country. Foreign tourists will continue to avoid spending their summer/winter vacation in Romania due to poor transport infrastructure and the insufficient number of the hotels which offer quality services, according to the comfort displayed, and their high tariffs. These are the reasons for which, from 2018, the third largest German tour operator Dertour, has withdrawn Romania from its own catalogs of tourism promotion. Previously, in 2012, Tui also dropped out of its own catalogs tourist destinations from Romania, followed by Neckermann in 2015, both German tour operators mentioning the same issues as Dertour.

An increase in the near future will also be recorded by the outbound tourist flows, other than the ones which involve the services of travel agencies, the factors that will determine this evolution being the modernization of the behavior of the consumers of tourist services, better informed due to the abundance of the international booking websites (booking.com, tripadvisor.com, airbnb.com), travel blogs, cheap airfares and discounts offered by low-cost airlines, and the possibility of buying online tickets without paying travel agents extra fees.

References

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