TRENDS AND CHANGES IN TOURIST FLOW IN ROMANIA IN THE PERIOD 2009-2018

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Abstract

The paper analyzed the tourist flow in Romania in order to identify the main trends and changes during the period 2009-2018 using the official empirical data and the specific indicators: tourist arrivals, overnight stays, average length of stay, monthly concentration rate, tourism intensity and residents' travels abroad. Romania has become year by year a more attractive tourist destination as the total arrivals reached 12.9 million in 2018, a double level than in 2009. The market is dominated by the Romanian visitors who accounted for 78% of arrivals. Hotels absorbed 9 million tourists, meaning 70 % of arrivals. More than 86 % foreigners prefer hotels. The overnight stays increased by 60% reaching 23.3 million in 2018, but the general trend is a decreasing one. Of the total overnight stays, 82 % belong to the Romanian tourists and 90 % are recorded in hotels. The length of stay is in general short about 2 days and with a tendency of decline. The most numerous arrivals are concentrated in August and July when the concentration rate is about 14-15 %. The occupancy rate increased, but it reached 22.18 % in 2018, the lowest level among the EU countries. In hotels, the occupancy rate reached 30 %. With 66 tourist/100 inhabitants and 54.13 per km^2, Romania's tourism intensity is among the lowest in the EU. In 2018, the residents registered 21 million travels abroad, by 80 % more than in 2009 and with a tendency to grow. As a final conclusion, Romania's potential in tourism should be much better exploited, the demand/offer ratio should be balanced, tourist destinations should be more intensively promoted and service quality should be improved in order to grow the attractiveness of the country and tourist flow.

Key words: *tourist flow, changes, trends, arrivals, overnight stays, length of stay, concentration rate, tourism intensity*

INTRODUCTION

During the last decades, tourism has become one of the fastest growing economic branches in the world economy with a deep impact on the socio-economic progress [45].
Tourism flows have recorded a fast increase as never before due to people's interest to travel and meet other cultures and civilizations. This was due to the longer free time and vacations, the higher income, and the increased need of the people to explore the culture, history, landscapes and traditions of other countries. Therefore, all these aspects led to a higher tourism demand which obliged offer to adapt to the new requirements and challenges. In consequence, tourism was

facing a sustainable growth of tourism flows and receipts [24, 25, 36].
In 2017, international tourists' arrivals accounted for 1,323 million and generated USD 1,340 billion receipts. Tourism has an important impact on the global economy contributing by 10 % to the GDP and 1/10 jobs, by USD 1.6 trillion to exports [47].
Europe is the top tourist destination in the world, attracting million of tourists every year, accounting for 51.3% of the world international flow [30, 31].
Besides the top visited countries in the EU-28: France, Spain, Italy, United Kingdom, Germany, Austria, Greece, Portugal, Netherlands, Belgium, the Central and Eastern countries of Europe are more and more visited by tourists. Poland, Czechia, Croatia,

Slovenia, Hungary, Slovakia, Romania, Bulgaria have a large variety of interesting attractions and among them it is a high competition in improving service quality and promoting tourist destinations for getting more visitors year by year [33, 35].

Romania is one of the Central Eastern European countries of a high attractiveness grace to its beautiful landscapes, the unique travel experiences that it offers to visitors in the Danube Delta, in the Carpathians Mountains, on the seashore of the Black Sea, the valuable historical and cultural heritage represented by castles, palaces, museums, art galleries, specific architectural treasures, monasteries and churches, medieval cities and fortresses, folk traditions and customs, gastronomy, hospitality and kindness of the people.

The rich and unique treasures such as: the old and beautiful Orthodox churches of North part of Romania (Voronet, Moldovita, Gura Humorului, Sucevita, Moldovita, Arbore etc), the Dacian fortresses in the Orastie Mountains, the medieval city of Sighisoara, the Danube Delta, the Horezu Monastery in Wallachia, the villages with fortified churches of Transilvania, the wooden churches of Maramures etc. are included in the UNESCO world heritage and are tourist destinations for the visitors who desire to meet the civilization and culture in this part of the Central-Eastern Europe.

The Danube Delta, the seashore resorts at the Black Sea, the skiing resorts in the Romanian Carpathians, the rural tourism in the traditions and customs in the villages of Bucovina, Maramures and Banat, the spa and health resorts based on mineral and thermal waters, the caves, the Transfagarasan and Transalpina roads, the glacial lakes, the George Enescu festival in Bucharest, the International Theater Festival in Sibiu, the Transilvania International Movie Festival in Cluj-Napoca, the Golden Deer Festival in Brasov, the Dracula legend, the food and wine festivals are among the most important tourist attractions [1, 8, 16, 44].

On the map of tourist destinations in the Eastern part of Europe, Romania has become more and more important, year by year being visited by more foreign visitors, and also the residents who dominate the internal market have become more and more interested to travel through the country and to discover its large mosaic of treasures.

In this context, the objective of this research was to analyze tourist flows in Romania in order to evaluate the main trends and changes based on the empirical official data and a large number of specific indicators which could offer a comprehensive image of the tourism in the period 2009-2018.

MATERIALS AND METHODS

Data collection

The research is based on the data were collected from the National Institute of Statistics Tempo Online Database for the period 2009-2018.

The following indicators were studied:

(i)Number of tourists visiting Romania, of which Romanians and foreigners,

(ii)Annual change in the number of tourists;

(iii)Trend line in the number of tourists;

(iv)Number of tourists accommodated in hotels,

(v)Number of overnight stays, of which belonging to Romanians and foreign tourists;

(vi) Annual change in the number of overnight stays;

(vii) Trend line in the number of overnight stays; (viii)Number of overnight stays in hotels,

(ix)Average length of stay,

(x)Trend line in average length of stay,

(xi) Tourist arrivals along the year 2018 by month,

(xii)Monthly tourist concentration rate,

(xiii)Occupancy rate of the places in establishments with function for tourist accommodation,

(xiii)Romanians' travels abroad.

Methodological aspects used in this study
Dynamics analysis was analyzed involving:

- Index with fixed basis, $I_{FB(\%)}$, using the formula: $I_{FB(\%)} = (X_n/X_1)100$, where: X_n is the variable level in the year n and X_1, the variable level in the year 1.

- Index with variable basis, $I_{VB(\%)}$, using the formula: $I_{VB(\%)} = (X_n/X_{n-1})100$, where: X_{n-1} is the variable level in the previous year.
Trend line of the variable was established using the Excel facilities.
Average length of stay, ALS, was calculated with the formula: ALS = OS/NT, where: OS = overnight stays and NT = number of tourists.
Monthly concentration rate, $MCC_{(\%)}$, was determined with the formula: $MCC_{(\%)}=$ $(NT_m/NT)100$, where: NT_m = number of tourists per month, NT = number of tourists.
Occupancy rate, $OR_{(\%)}$, was calculated with the formula: $OR_{(\%)} = [OS/(NP*D)]100$, where: OS = overnight stays, NP= number of places (beds), D = 365 days (the supply days).
Tourism intensity, TI, was determined in two variants: (a) in relation to the population, according to the formula: $TI_{(P)}=$ NT/100 inhabitants, where: NT = number of tourists and (b)in relation to the surface, using the formula: $TI_{(S)}=$ NT/S, where: S= surface of Romania, i. e. 238,397 km^2.
Comparison method was used to analyze the level of the studied indicators in various years. The results were graphically illustrated and also tabled and finally commented.

RESULTS AND DISCUSSIONS

Number of tourists visiting Romania has doubled its figure in 2018 compared to 2009, accounting for 12,905,131 visitors, of which 78.3% Romanians and 21.7% foreigners.
The number of the Romanian tourists increased by 107.7% from 4,865,545 in 2009 to 9,383,266 in 2018. This was due to the need of active relaxation, leisure, desire to know the beautiful landscapes in the mountains and at the Black Sea, the cultural and historical heritage in terms of castles, palaces, medieval fortresses, memorial houses, monasteries and churches, monuments, museum and art galleries, folk traditions and gastronomy.
Romania looks to become a more and more attractive destination for foreign tourists as well, because in the analyzed period their number increased by 119.2 % from 1,275,590 in 2009 to 2,796,622 in 2018 (Fig. 1).
The main countries of origin of the foreign visitors are: Germany, Italy, France, United Kingdom, Hungary, Spain, Poland, Austria, but also Israel, USA, and China [41].
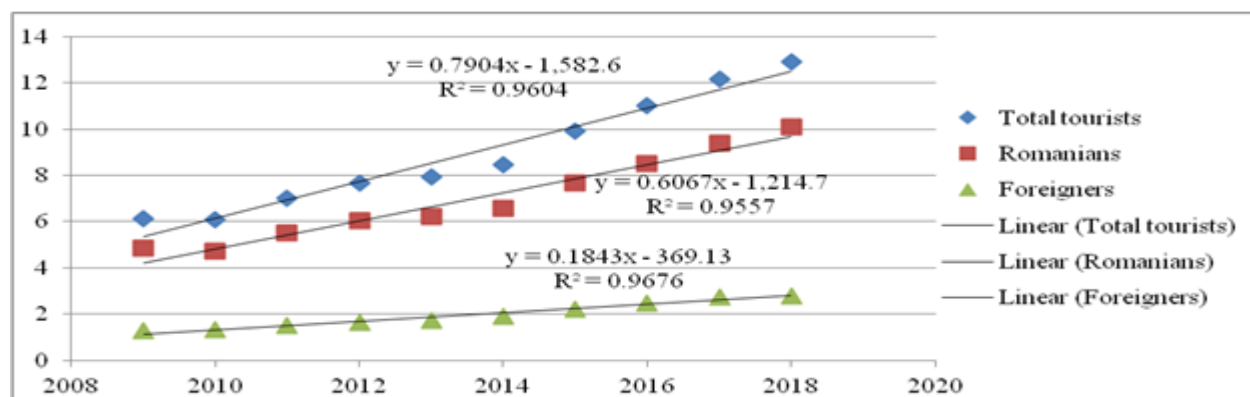

Fig. 1. Dynamics and trend line of the number of tourists visiting Romania, 2009-2018 (Million)
Source: Own design based on [17].

Annual change in tourists' number reflected the different growth rates from a year to another. At the country level, the highest growth rates were registered in 211 versus 2010, +15.78%, and in 2015 versus 2014, + 17.19%. In case of the Romanian tourists, the highest growth rates were recorded also in 2011 versus 2010, +16.68%, and in 2015 versus 2014, +17.25%. In case of the foreign tourists, the highest growth rate accounted for

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+12.65% in 2011 versus 2010 and for +16.99 in 2015 versus 2014 (Table 1).
The higher and higher tourist arrivals in Romania brings the country on 34th position among the tourists destinations [3].
This has determined the growth of the spending on tourism activities and of the receipts in tourism, these two indicators being closely related [4, 43].

Despite its high touristic potential, its natural, human, and cultural and historical resources are not enough and efficiently used in comparison with the top 10 most visited countries in the EU-28 and even with Slovenia, Bulgaria, Hungary and Poland and for this reason the number of arrivals is lower. But, Romania has more visitors than Slovakia, Serbia, Bosni Hertzegovina, Belarus and Rep. of Moldova [15, 33].

Table 1. Annual change in tourists' demand, Romania, 2009-2018 (%)

| | Annual change in: | | |
	Total tourists	Romanian tourists	Foreign tourists
2009	100.00	100.00	100.00
2010	98.88	97.14	105.54
2011	115.78	116.68	112.65
2012	109.31	109.34	109.21
2013	103.33	103.24	103.67
2014	106.58	105.22	111.48
2015	117.19	117.25	116.99
2016	110.89	110.93	110.75
2017	110.36	110.11	111.25
2018	106.27	107.72	101.32

Source: Own calculation based on [16].

The territorial distribution of tourists arrivals is not equal among the regions of development and counties.
The most numerous visitors were noticed in the Central part of Romania, Bucharest- Ilfov area and South Eastern part and Western part of the country [9, 10, 27, 28].
The most agreable and interesting attractions for visitors are considered to be: Transilvania, especially Maramures, Cluj Napoca, Sibiu, Brasov, Mures, Sighisoara, Hunedoara, Alba Iulia [6, 19, 20, 21, 34, 37, 38, 46], Bucharest-Ilfov due to the capital which the most visited city in Romania [14, 32], Bucovina [2, 22] and the Romanian resorts at the Black Sea [18, 39].

The higher flow of tourists in specific areas of Romania has determined the alignment of the offer of tourist services in terms of accommodation capacity (establishments and places) so that the ratio demand/offer to be balanced and the economic efficiency in the travel and tourism sector to be higher. This means a better management and strategic planning in tourism offer using innovation and creativeness in assuring infrastructure in close relationship with tourism demand [5, 7, 11, 12, 13, 26, 29, 42].

Number of tourists accommodated in hotels
Hotels are the main establishments preferred by tourists to accommodate during their stay or travels through Romania and this is available both for Romanians and foreigners.
In 2018, the hotels registered 9,004,486 tourist arrivals, by 98.34% more than in 2009.
The Romanian tourists accommodated in hotels accounted for 6,606,653 persons in 2018, being by 94.17% more than in 2009.
The highest growth rate, more exactly +110.82%, was registered by the foreign tourists who preferred to be accommodated in hotels, whose arrivals reached 2,397,833 in 2018 compared to 1,137,357 in 2009.
Therefore, in 2009, 73.92% of the total number of tourists were accommodated in hotels, and taking into account their origin, 86.16% of nonresidents tourists and 69.93 % of residents tourists preferred the hotels.
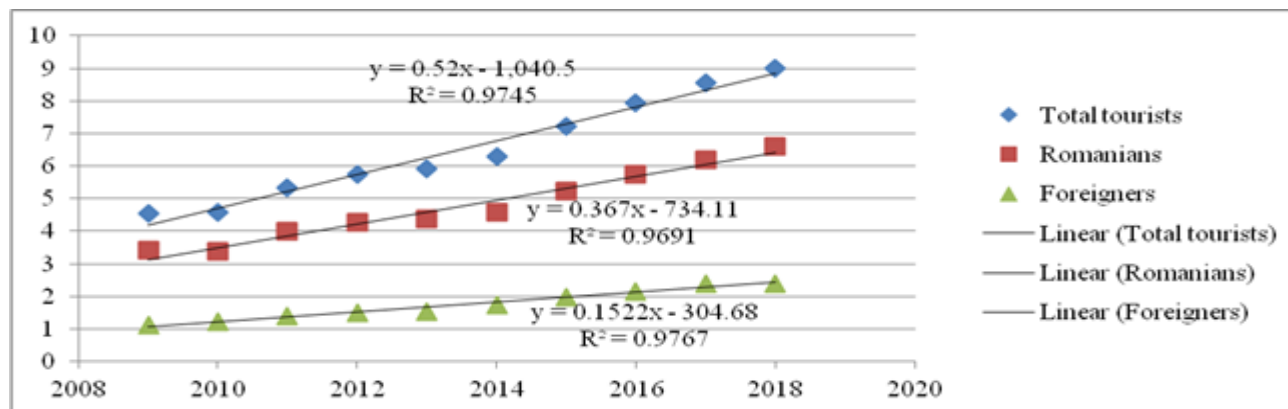

Fig.2. Dynamics and trend line of the number of tourists accommodated in hotels, Romania, 2009-2018 (Million)
Source: Own design based on [17].

The high percentage of hotels among the tourists' preferences for accommodation is justified by the high degree of satisfaction for facilities and service quality compared to other types of establishments [40].

In the analyzed period it was noticed a decline in the preferences for hotel accommodation, so that in 2018 the proportion of tourists accommodated in hotels was as follows: 69.77% of the total number of tourists, 65.35% of the Romanian tourists and 85.74% of the foreign visitors.

However, the foreigners prefer especially hotels probably thinking that the facilities and service quality related to price/room and night could satisfy much better their needs and expectations than other types of establishments with function for visitors' accommodation (Fig.2).

Number of overnight stays registered by the tourists visiting Romania has also increased in the analyzed interval. In 2018, the total number of overnight stays accounted for 28,644,742, being by +65.33% higher than in 2009.

The overnight stays belonging to the residents accounted for 23,315,138 in 2018 being by 59.06% higher than in 2009.

The highest growth rate was recorded by non residents, their overnight stays reached 5,329,604 in 2018 compared to 2,667,666 in 2009 (Fig.3).

The share of the overnight stays belonging to the Romanian tourists in the total overnight stays was 81.39% in the year 2018 and the remaining belonged to the foreign visitors.
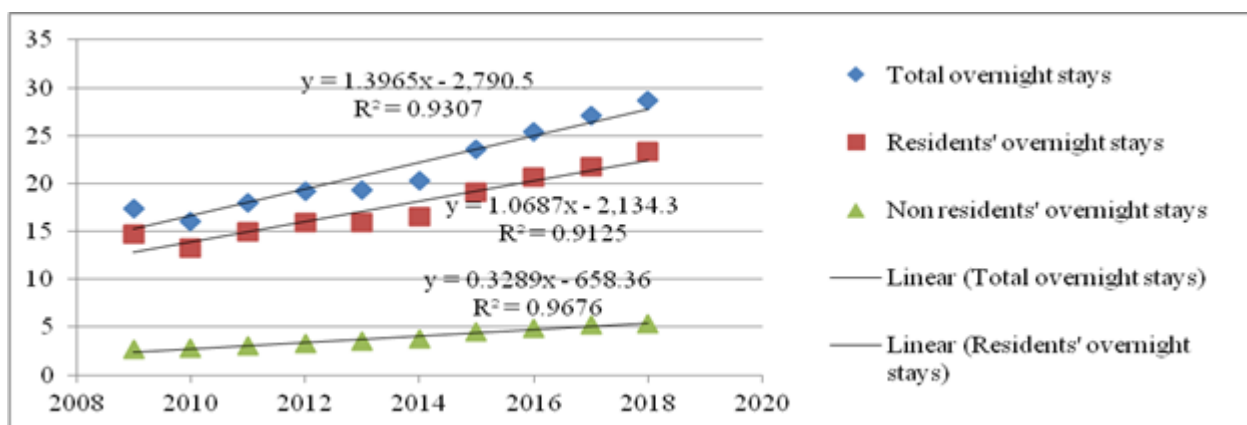

Fig.3. Dynamics and trend line of the overnight stays in establishments with function for tourists' accommodation, Romania, 2009-2018 (Million)
Source: Own design based on [17].

The number of overnights stays per inhabitant in Romania is about 1, the lowest level in EU-28 countries [23].

Annual change in the number of overnight stays varied from a year to another depending on the number of arrivals.

The highest growth rates were registered in the same years like in case of the number of tourists, respectively in 2011 and 2015 compared to the previous years (Table 2).

Number of overnight stays in hotels raised by 53.65% in 2018 accounting from 20,935,932 compared to 13,625,294 in 2009 (Fig.4).

Table 2. Annual change in the number of overnight stays in establishments with function for tourists' accommodation Romania, 2009-2018 (%)

	Annual change in:		
	Total overnight stays	Romanians' overnight stays	Foreigners' overnight stays
2009	100.0	100.0	100.0
2010	92.6	90.6	103.7
2011	112.0	112.2	110.8
2012	106.6	106.4	107.5
2013	101.0	100.1	105.5
2014	104.7	103.9	108.3
2015	115.9	115.3	118.6
2016	108.2	108.2	108.1
2017	106.4	105.7	109.5
2018	195.7	106.9	100.7

Source: Own calculation based on [17].

Fig.4. Dynamics and trend line of the overnight stays in hotels, Romania, 2009-2018 (Million)
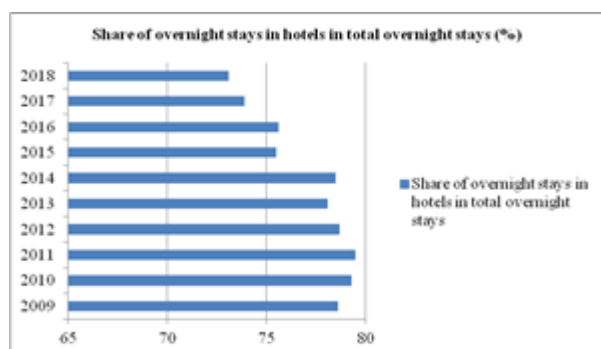Source: Own design based on [17].

Fig. 5. Share of overnight stays in hotels in the total overnight stays, Romania, 2009-2018 (%)
Source: Own design based on [17].

The share of the overnight stays in hotels in the total overnight stays declined from 78.64 % in 2009 to 73.08% in 2018, reflecting the change in tourists' preferences for accommodation during their stay (Fig.5).

Average length of stay registered a decreasing trend in the analyzed period. In 2009, the level of this indicator was 2.82 days, while in 2018, it was 2.22 days, reflecting a decline by -21.28%.

In case of the Romanian tourists, the average length of stay declined by -23.26% from 3.01 days in 2009 to 2.31 days in 2018. In case of the foreign tourists, the duration of stay decreased by only 8.7% from 2.09 days in 2009 to 1.91 days in 2018.

The figures proved that the foreigners registered a lower length of stay compared to the Romanians, but the decline of the average length of stay is smaller (Fig. 6).

Tourist arrivals along the year 2018 reflects the seasonality of tourism. In general, in February, the number of tourists is at the lowest level compared to other months.

The most preferred months for visiting Romania, taking into account the total number of visitors in 2018, were, in the decreasing order: August, July, September, June, October and May. In August 2018, Romania was visited by 1,848,953 tourists whose number is 2.61 times higher than in February.

Fig. 6. Dynamics of the average length of stay, Romania, 2009-2018 (days)
Source: Own design based on [17].

In case of the Romanian tourists, also in August was recorded the highest number of arrivals, accounting for 1,520,457, meaning 82.23% of the total arrivals in this month. The foreigners' arrivals accounted for 328,496 in August, the highest level in their case. The non residents prefer the same months to visit Romania like Romanians but the peak of their arrivals are in the following months in the decreasing order: August, July, June, September, May and October (Fig. 7).
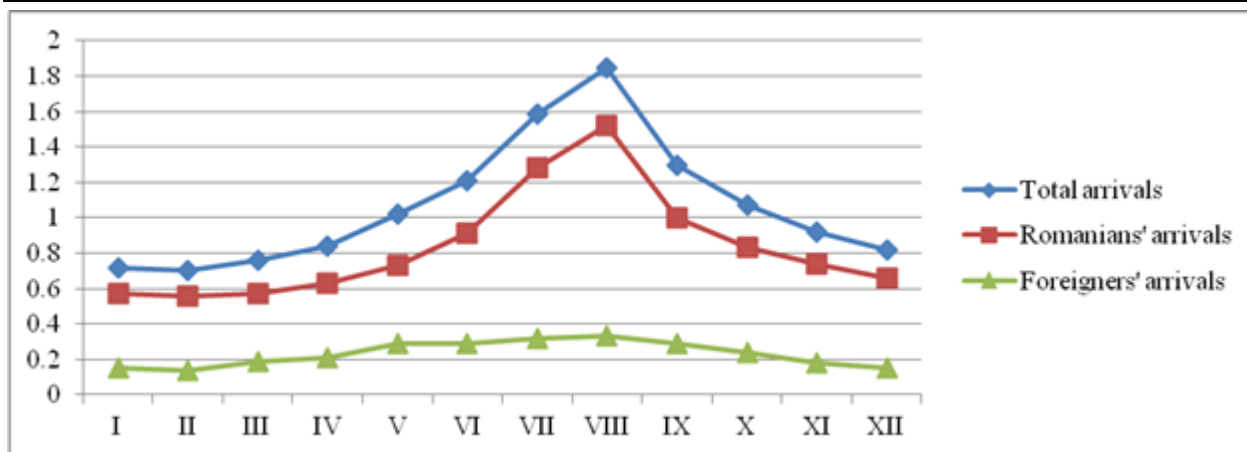
Fig. 7. Dynamics of the tourists' arrivals by month in 2018, Romania, 2009-2018 (Million)
Source: Own design based on [17].

Monthly tourist concentration rate is another indicator reflecting the distribution of tourist arrivals along the year.

Taking into consideration the total arrivals in the year 2018, the concentration rate had the following levels in the months with the highest number of tourists: August 14.3%, July 12.3 %, September 10.1%, June 9.4%, October 8.2% and May 6.5%. The lowest concentration rate was noticed in February, 5.5%.

In case of the Romanian tourists, the highest concentration rate was registered as follows: 15.1 % in August, 12.7 % in July, 10.1 % in September, 9.1 % in June, 8.3 % in October and 7.3 % in May, and the lowest level in February, 5.6%.

In case of the foreign tourists, the highest concentration rate was: 11.8% in August, 11.35 in July, 10.6% in June, 10.5% in September, 10.3 % in May and 8.8% in October (Fig.8).
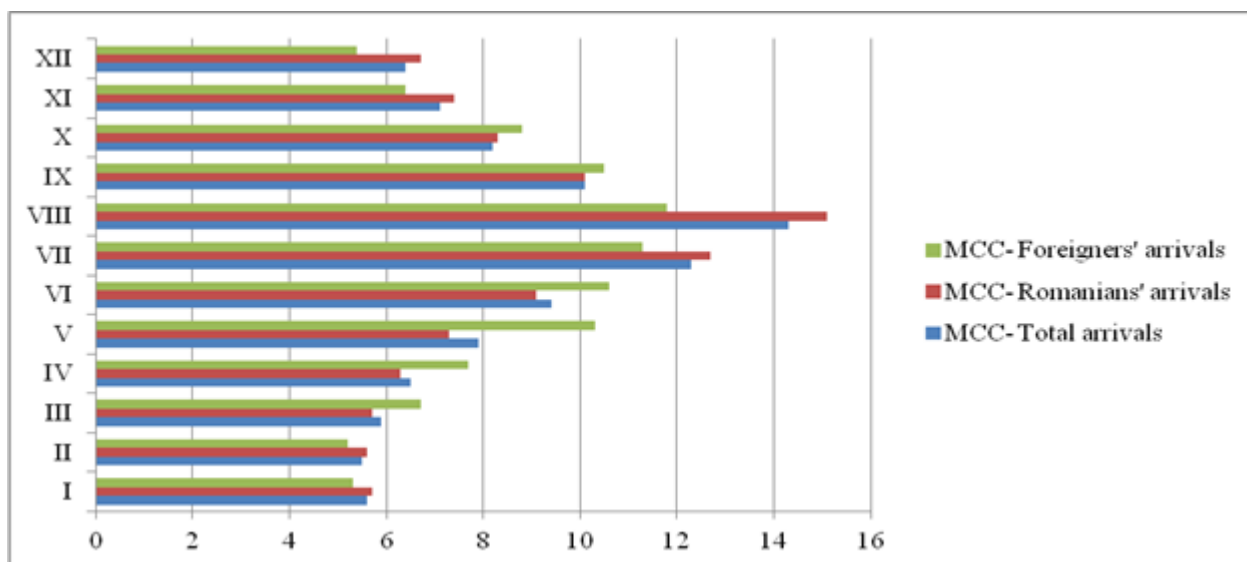

Fig. 8. The monthly concentration rate (MCC) of tourist arrivals in 2018, Romania, 2009-2018 (%)
Source: Own design based on [17].

Occupancy rate in Romania's establishments with function for tourist accommodation is in general low and varies along the year, the peak rates are registered in summers season.

Taking into consideration the whole number of units with function for tourist accommodation, the occupancy rate increased from 15.64 % in 2009 to 22.18% in 2018.

In hotels, the occupancy rate is higher than at the country level and also registered an ascending trend from 20.83% in 2009 to 29.34% in 2018 (Fig.9).
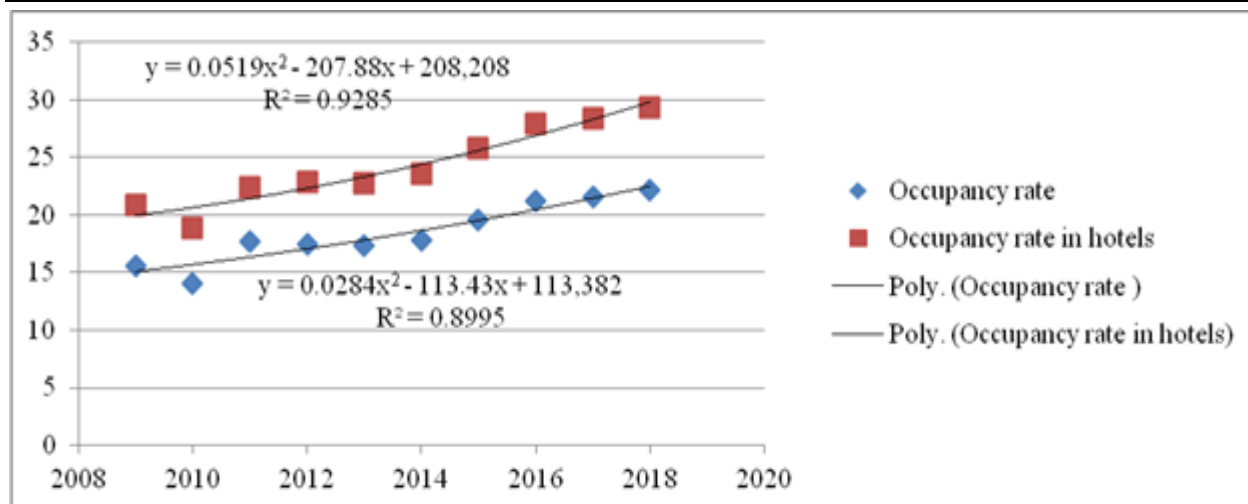
Fig. 9. The occupancy rate in the establishments with function for tourist accommodation, Romania, 2009-2018 (%)
Source: Own design based on [16].

Tourism intensity in Romania increased from 30 tourists per 100 inhabitants in 2009 to 66 tourists in 2018, and per square kilometer, it was also noticed an increase from 25.76 tourists in 2009 to 54.13 tourists in 2018 (Table 3).

Table 3. Tourism intensity (TI), Romania, 2009-2018

	TI/100 inhabitants	TI/km^2
2009	30	25.76
2010	30	25.47
2011	35	29.49
2012	38	32.24
2013	40	33.32
2014	42	35.51
2015	50	41.61
2016	56	46.15
2017	62	50.94
2018	66	54.13

Source: Own calculation based on [17].

Romanians' travels abroad registered a variation from a year to another but the general trend is an increasing one. In 2009, 11,723 thousand persons travelled abroad for tourist purposes, while in 2018 their number reached 21,039 thousand persons, being by 79.4% higher than at the beginning of the studied period.

This justify the desire to extend the knowledge horizon meeting other cultures and civilizations and also an increase of income destined to be spent for tourism abroad (Fig.10).

The most preferred countries by Romanians are Greece, Bulgaria, Turkey, Spain, Italy, France, Hungary.
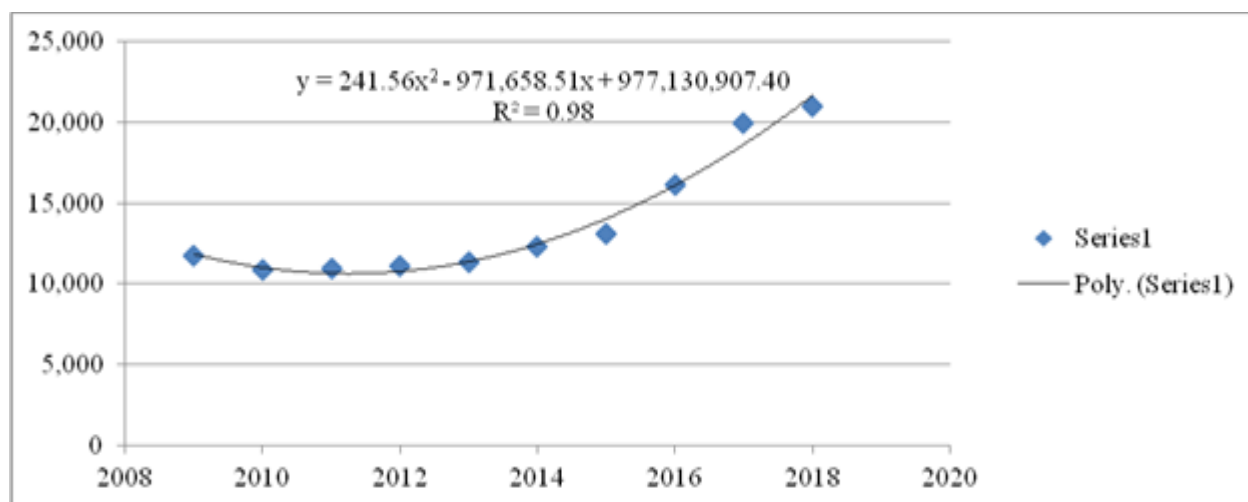

Fig. 10. Dynamics and trend line of the Romanians' travels abroad, 2009-2018 (Thousand)
Source: Own design based on [17].

CONCLUSIONS

The analysis of tourist flow in Romania during the period 2009-2018 has proved that Romania becomes more and more attractive as a tourist destination both for the residents and non-residents.

In 2018, the number of arrivals reached 12.9 million, a double level than in 2009. The Romanian tourists dominate the market with 78.3% and the highest annual change rate was registered in 2011 and 2015. The most visited areas of Romania are Transilvania, Bucharest-Ilfov, Bucovina, The Danube Delta and West part.

In 2018, 9 million tourists, that is 70 % of total arrivals, were accommodated in hotels. About 86% of the foreign tourists preferred hotels as well.

The overnight stays reached 23.3 million in 2018, being by 60 % higher than in 2019. But, while the arrivals trend is an increasing one, in case of overnight stays, it was noticed a declining tendency. Of the total overnight stays, 82 % belong to the Romanian tourists and 90 % are recorded in hotels.

The average length of stay is very short in Romania compared to other countries, and has a decreasing trend.

Tourism is a seasonal activity, as long as the highest concentration rate of arrivals, 14-15 % is in the summer months, mainly in August and July.

The occupancy rate is very small in Romania, 22.18% in 2018, compared to the most visited countries. However, it has the tendency to grow which is a positive aspect. In hotels, the occupancy rate reached 30 %.

Tourism intensity has also a low level, just 66 tourist/100 inhabitants and 54.13 per km^2 compared to other countries.

Romanians are not among the top travellers, but the number of their voyages abroad reached 21 million in 2018 being by 80 % more numerous than in 2009.

Therefore, the analysis led to the conclusion that tourism has been continuing to develop in Romania a fact confirmed by the higher and higher number of resident and non-resident visitors.

But, it was also highlighted that the tourism potential of Romania is not enough valorized, there are still discrepancies between demand and offer, the promotion of tourism need to be intensified, service quality has to be improved in all the types of establishments with function for tourist accommodation to increase the attractiveness of the country and the tourist flow.

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