

ROMANIA'S TOURISM OFFER AND DEMAND IN THE COVID-19 PANDEMIC OF 2020 AND 2021 COMPARED TO 2019. A STATISTICAL OVERVIEW

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Abstract

The goal of the study is to analyze Romania's tourism in the years of the COVID-19 pandemic, 2020 and 2021, in order to quantify the gaps compared to the highest performance achieved in 2019 and in what measure tourism started to recover. Offer in terms of units with function for tourists' accommodation, their number, structure and evolution, number of places and their dynamics by accommodation type, and demand in terms of arrivals, overnight stays both at national level and in rural tourism, index of net use of accommodation capacity, incoming and outgoing tourism were the main studied indicators using fixed basis and structural indices and comparison method. Compared to 2019, in 2021 the number of accommodation units reached 9,146, being by +8.8% higher and the number of places accounted for 364.5 thousand (+2.2%). In 2020, tourist arrivals represented 47.8% and in 2021 accounted for 69.3% of the 2019 level, and the overnight stays followed a similar situation. The main destinations were the seashore, mountain and spa resorts, Romanian tourists having about 90% share in total arrivals. The pandemic was an incentive for Romanians to "Rediscover Romania" and the holiday vouchers were of much help. In a low measure, mainly in 2021, outgoing tourism to Bulgaria, Greece, Turkey, Maldives, Egypt exceeded the incoming tourism. The year 2021 was better than 2020, as the relaxed measures started earlier than in 2020 and tourism managers adopted flexible offers, personalized packages, last minute, early booking, free cancellation, lower tariffs, bonuses etc. The increasing trend is a hope that in 2022 tourism will have a much better dynamics and there are chances to recover!

Key words: tourism, agro-tourism, trends, Covid-19 pandemic, Romania

INTRODUCTION

Tourism, the key contributor to the world service industry, one of the most dynamic branch of the global economy has been strongly affected by the COVID-19 pandemic [1, 7].

First of all due to the restrictive measures imposed to stop the extend of the disease. This stopped or diminished the tourist flow, which produced important economic losses in tourism business [2]. Human health and normal life have been disturbed. Many people lost their job or passed to "home work",

income per family declined, strange feelings and emotions, depression and the perception of the travel risk determined the people to stay home or to travel close to the house [21, 22].

In the period of more relaxed restrictions, tourism managers adopted new flexible strategies adapted to the new conditions to attract tourists [8, 22].

Decision making under uncertainty, promoting tourist destinations, adopting new technologies, assuring a safe stay and well-being for tourists have been the main problems to which tourism had to respond [23].

The most difficult year was 2020, an atypical year for tourism, after a glorious period of a continuous increase in tourist arrivals, overnight stays and receipts both at the global level and the EU [11, 24].

International arrivals declined by 73% at the world level, and in 2021 even though a 4% surplus of arrivals was registered, they are still by 72% smaller than in 2019 [24].

The year 2021 brought a hope of recovery in Europe and Americas, by +19% and, respectively, +17% compared to 2020. However, a gap of 63% is still present. A good point registered the Central and Eastern European countries where arrivals were by +18% over the 2019 level [24].

As long as people like and need to travel, they are confident in the future recovery of the tourism [4, 5].

Romania was no stranger to problems in tourism mainly in the year 2020 [3], but domestic tourism saved the industry under the slogan "Rediscover Romania" which assured about 48% arrivals in tourist accommodation units of the 2019 level [12].

The main destinations preferred by Romanians proved to remain in the top: the seaside resorts during summer season, mountain resorts and spa tourism units [6, 14, 15, 16, 17, 18].

Also, regarding the location, most of people was oriented to hotels on the seaside where safe conditions were assured, but also to small hotels, villas, chalets and agro-tourist guesthouses, situated in isolated areas suitable for a family or a group of friends [13, 19, 20].

The year 2021 brought the relaxation measures earlier which favoured better tourism and again internal tourism dominated the market with the same desired destinations, but tourism managers have been much better prepared with offers and facilities to stimulate tourist flows [9]. A similar tendency was noticed in other countries like Czechia and Slovakia [25].

In this context, the present study continues the researches started before and aimed to carry out a more comprehensive analysis of the performance in tourism offer and demand in the year 2021 compared to 2020, the two years of the COVID-19 pandemic, and also to

2019 as term of reference, when tourism reached the top performance in its evolution in Romania.

MATERIALS AND METHODS

To set up this paper, the following indicators characterizing tourism offer and demand were taken into consideration:

- number of units with function for tourist accommodation;
- accommodation capacity in terms of the number of places;
- tourist arrivals;
- tourist overnight stays;
- the net utilization capacity index;
- inbound tourism;
- outbound tourism.

The data were analyzed in 2021 compared to the results achieved in the year 2020 and also with the highest performance in Romania's tourism carried out in the year 2019.

For this purpose, the data were collected from Tempo online data base provided by National Institute of Statistics for the period 2019, 2020 and 2021.

The data were processed in their dynamics emphasizing the values of the fixed indices and structural indices, correspondingly interpreting the differences from a year to another and from a month to another.

The performance in tourism was analyzed both at the national level and also regarding rural tourism which was also a preferred alternative by tourists during the pandemic.

The results were graphically illustrated and tabled, depending on the case and specificity of the results and finally they were interpreted pointing out the main trends.

At the end of the paper, the conclusions synthesized the main ideas and identify what it is needed to do in 2022 and the coming years as tourism to recover at least at the level of 2019.

RESULTS AND DISCUSSIONS

Tourism offer

Number of tourist reception units with accommodation functions

In 2021, in Romania's tourism, the number of tourist reception units with accommodation functions increased by 744 units, meaning by +8.85% from 8,402 units in 2019 to 9,146 units (Table 1).

Table 1. Number of tourist units with accommodation function and number of places in Romania's tourism in the period 2019-2021

	2019	2020	2021	2021/2019%	2021/2020%	2020/2019%
No. of units	8,402	8,610	9,146	108.8	106.2	102.4
No. of places	356,562	358,119	364,507	102.2	101.7	100.4

Source: Own calculation based on the data from NIS, 2022 [10].

This increase at national level have to be analyzed in details by type of accommodation units, because there are differences determined by the challenges and restrictions caused by Covid-19 pandemic started since the year 2020.

Hotels, which keep an important part of the accommodation capacity, were facing the biggest problems due to the lower tourist flow during the period of Covid-19 pandemic, especially in 2020 and also in 2021 [20].

The worst year was 2020, as long as there were imposed movement restrictions for the population starting from March till June. Many hotels were obliged to close and the employees remained without job. In the interval 2019 - 2021, there were lost 25 units from the hotels map, remaining available just 1,583 units in 2021, representing 98% of 1,608 units existing in the year 2019.

The reopening of the accommodation units came in delay both for hotels, treatment and spa centers and other accommodation units, at the beginning at a limited capacity. Also, the restaurants had the obligation of creating open terraces and to assure a corresponding distance between tables inside. Severe hygiene regulations were imposed, the units had to assure disinfection materials, and the staff to wear mask etc.

The summer season brought a mouth of fresh air in hotel industry as the months June, July, August and September were favourable for the improvement of the degree of accommodation occupancy and for running the service activities in a relatively normal manner.

The number of hostels increased by 9 units in the analyzed interval, which means by +2.7%, from 323 units in the year 2019 to 332 units in

the year 2021. They look to have the advantage as being a lower cost alternative compared to hotels, as long as booking is per bed in a dormitory and not per room, a cheaper solution for especially for young tourists and for one night.

The number of motels declined by 4 units, remaining just 215 units of this type in the year 2021 compared to 2019.

The change in tourists' preferences for the type of accommodation unit, to be smaller and offer the opportunity to live with the family or small group of friends has favoured the development of tourist villas, their number increasing by 6%. Villas have become an ideal location where a family to have a safe accommodation, so that in 2021 their number reached 752 units, that is by 43 units more than in 2019.

The chalets and inns preserved their number at 222 and, respectively 3 in the analyzed interval.

A part of the bungalows, the holiday villages and the tourist stops as well as the school camps were closed, so that their number declined by 9.7%, 11.2%, 6.4% and, respectively 5.5%.

But, the camping registered a higher number accounting for 67 units in the year 2021, as many tourists used their own car to travel and avoided other transportation means.

Also, the tourist small houses registered a higher number by 40 units, that is by +36.5%, summing 112 units in the year 2021 compared to 2019.

The guesthouses looked to be one of the most preferred location for accommodation due to the reduced number of rooms and a more convenient price per room than in a hotel. The number of tourist guesthouses in the urban

area increased by 76 units (+4.5%), totalling 1,745 units in the year 2021 versus 2019.

A better situation was in case of agro-tourist guest houses, their number facing a "boom" of 660 additional units in the studied interval, so that in 2021 their number accounted for 3,460 units, that is by +23.5% more compared

to 2019. Their advantage for tourists consisted not only in the ideal small accommodation capacity and low price per room, but also for the fact that they could be rented for the whole family or a group of friends and also for offering the opportunity for meals [13, 19]. (Table 2).

Table 2. Structure of units with function for tourists accommodation, structure of accommodation places by type of units and the growth rate of their number in 2021 versus 2019

	Units with function for tourists' accommodation		Places in units with function for tourist accommodation	
	Structure by unit type (%)	Growth rate 2021/2019 %	Structure by unit type (%)	Growth rate 2021/2019 %
Total	9,146 units	-	364,507 places	-
Hotels	17.3	98.4	54.2	99.5
Hostels	3.6	102.7	3.9	103.3
Hotel-apartments	0.2	135.2	0.7	157
Motels	2.3	98.1	2.4	102.0
Inns	0.03	constant	0.02	constant
Tourist villas	8.2	106.0	4.7	103.9
Chalets	2.4	constant	1.7	102.2
Bungalows	5.5	90.3	1.1	104.7
Holiday villages	0.08	88.8	0.1	78.6
Camping	0.7	115.5	2.9	101.1
Tourist stops	0.5	93.6	0.5	63.3
Tourist houses	1.2	135.6	0.8	124.7
Scholar camps	0.6	94.5	1.6	90.5
Tourist guesthouses	19.5	104.5	9.7	100.5
Agro-tourism guesthouses	37.7	123.5	15.3	113.7
Accommodation spaces on fluvial and maritime boats	-	-	-0.2	98.2

Source: Own calculation based on the data from NIS, 2022 [10].

Number of places in the accommodation units with function for tourist reception

The number of places (beds) increased by 2.2% from 356.5 thousand in the year 2019 to 364.5 thousand in the year 2021 (Table 1).

Significant increases were signalled in case of hotels-apartments (+57%), tourist houses (+24.7%), agro-tourism guesthouses (+13.7%), tourist villas (+3.9%), motels (+2%), hostels (+3.3%), and bungalows (+4.7%).

Important reductions in accommodation places were noticed in case of the tourist stops (-36.7%), holiday villages (-21.7%), and scholar camps (-9.5%).

In 2021, the highest share in the total number of places is kept by hotels (54.2%), agro-tourist guesthouses (15.3%), tourist

guesthouses in the urban area (9.7%), tourist villas (4.7%), hostels (3.9%) and camping (2.9%) [13, 19, 20]. (Table 2).

Therefore, the smaller accommodation units like villas, apartments, guesthouses and chalets have become of high attraction for tourists being chosen because they could offer a safe stay and privacy in less crowded locations. Tourists have become more aware that they need a safe stay, and looked to get information about this aspect to know if the personnel wear mask, if there are assured materials for disinfection, if there are game places for children, terraces and tables outside etc.

The year 2020 has intensified digitalization in tourism as tourists used internet and mobile phones for online booking, they accessed

tourist platforms or contacted tourist agencies, and also the suppliers of tourism offers have become flexible and adapted to the customers' requirements providing various types of offers, tourist packages, "last minute" offers, free cancellation, cheaper offers in the period of restrictions, bonuses etc.

Tourism demand

Tourist arrivals

The year 2019 was the peak in Romania's tourism as the country was visited by 13.37 million tourists, of which 20% foreign tourists [11, 15].

The year 2020 was an atypical year for tourism, the worst year as never before in the world tourism but also in Romania. The movement of the people was facing periods of more or less restrictions imposed to stop the spread of the virus and to protect the population [12].

Not only tourism was affected, but also other sectors of activity. Work has been shaped and passed to an adapted form in the pandemic: "home work", but also a part of jobs were lost with a negative impact on family income.

In consequence, the people's reluctance to travel, the decisions to remain at home or to travel in the proximity of the house resulted in

holiday cancellation, in allotting a smaller budget for travel, the increasing preferences for domestic tourism in isolated locations like family guesthouses and small hotels, apartments, villas, all these reflect a new manner of thinking during the pandemic and the change in tourists' behaviour adapted to the new conditions.

However, if inbound tourism suffered a lot during the pandemic in Romania, the domestic tourism "flourished" under the slogan "To rediscover my own country".

Therefore, in the year 2020, the tourism sector was very much affected registering only 6.39 million tourists, representing just 47.8% of the number of visitors in 2019. Internal tourism was dominated by Romanians with a share of 92.9%.

In 2021, as long as the vaccination process started, the people had become more confident to travel. In this year, the number of tourist arrivals increased and reached 9.27 million, being by 44.9% higher than in 2020, but by -30.7% smaller than in 2019. Also, the Romanians represented 90.9% in the total visitors, as just a small part decided to travel abroad (Table 3).

Table 3. Tourist arrivals and overnight stays in Romania's tourism in the period 2019-2021 (Million)

	2019	2020	2021	2021/2019%	2021/2020%	2020/2019%
Tourist arrivals	13.37	6.39	8.69	64.9	135.9	47.8
Overnight stays	30.08	14.58	20.65	68.6	141.6	48.5

Source: Own calculation based on the data from NIS, 2022 [10].

Therefore, we may say that "domestic tourism" saved Romania's tourism during the pandemic both in the year 2020 and in 2021.

Foreign tourists decided not to travel because of the different regulations in their country of origin compared to the ones in Romania at different intervals, the requirements related to the PCR tests at the frontiers, the certificate of vaccination etc. As a result, just a few number of foreign tourists could come to visit Romania.

During the pandemic important changes have appeared in the tourists' preferences for various destinations. One third of the visitors preferred to visit Bucharest and the cities of

residence of the counties. The mountain resorts came on the 2nd position with 1/5 of total arrivals as long as mountains are pleasant of high attraction in any season of the year in summer vacation, in autumn and in winter for skiing and sleighing [6, 14, 18].

The seashore of the Black Sea with its necklace of beautiful resorts came on the 3rd position with over 1.14 million tourists in the year 2021 [14, 16].

Also, the spa resorts received up to 10% of the total tourist arrivals [17] and the Danube Delta and Tulcea City registered the smallest percentage.

Compared to the distribution of tourists by destination in 2019, it is easy to notice the growth of tourist arrivals in the year 2021 in spa, seashore and mountain resorts, in the Danube Delta and other destinations as well. As a reflection of the desire to spend vacations much more in less crowded and safe areas, Bucharest and the cities of residence of the counties registered a reduction in the number of visitors.

Across the years of the pandemic, the monthly distribution of tourist arrivals has followed more or less the usual dynamics in tourism, that is with the highest peak in the summer season in the month of August [12, 20].

The worst situation was in the year 2020, when the limited movement due to the imposed restriction by the authorities affected tourism very much in March and April and even in May, but starting from June when relaxed measures were taken, tourism has recovered in the summer season. But, from September, when the infection rate increased and schools were reopened, tourist arrivals declined again, but in November and December did not reach the lowest level like in March, April and May.

In 2021, the dynamics of tourist arrivals was much better but following in general the "bell" shape characteristic to tourism seasonality with the peak of tourists in August. Also, we have to notice that in 2021, the measures of relaxation were taken by the authorities earlier than in the year 2020. In this way, tourist flow started to grow even from May and continued its ascending trend in the next months till the peak of August. September had a fine weather and this was an incentive for a part of the tourists to spend vacations in this month when usually the tourism managers apply reduced tariffs. December has brought a new chance for stimulating arrivals during Christmas and New Year's Eve especially in the mountain resorts [18].

The tourist arrivals were more consistent from a numerical point of view compared to the year 2020, as long as the people become more confident due to the vaccination which was also imposed to the staff working in the accommodation units and restaurants.

In August 2019, it was registered the highest number of tourist arrivals accounting for 1,869.3 thousand, but in 2020, their number declined to 1,301.4 thousand, representing 70% of the 2019 level. In the year 2021, it was registered 1,729.9 thousand tourists in August, accounting for 92.5% of the level of the year 2019 and being by +32.9% higher than in 2020.

The month of July 2021, also destined to vacations, it was recorded 1,434.3 tourists by +56.3% more than in the same month of 2020 and representing 86.8% of the level in the year 2019.

On the 3rd position is the month of September 2021, when 1,072.5 thousand tourists spent their holidays, by +35% more than in 2020, but being 825 of the 2019 level.

In June 2021, at the beginning of the summer season, 648 thousand tourists opened the touristic season being attracted by the offers at small prices. Their number was by +31.4% higher than in 2020, but it represented just 60% of the arrivals in the same month of 2019 (Figure 1).

The month of May was shadly approached by tourists, due to the restrictions imposed. However, 609.2 thousand tourists were registered in the accommodation units, compared to only 34.5 thousands in May 2020. This means 18 times more arrivals in the year 2021, but only 46.5% of the 2019 level.

The month of October 2021 was generous in fine weather and 648 thousand tourists travelled in this period, by +31.4% more than in 2020, but by 60% less than in 2019.

The month of December 2021 filled the mountain resorts by the ski lovers. The arrivals accounted for 579.3 thousand, being by +69.3% higher than in 2020, but representing only 69.4% of the 2019 level (Figure 1).

Discussing about rural tourism, compared to 1,272.8 thousand arrivals in the agro-tourism guesthouses in the year 2019, in the year 2020, only 755.4 thousand tourists were able to spend vacations and have accommodation in the rural areas. But, in 2021, a recovery was notice, and 1,020.6 thousand arrivals were recorded, being by +35.1% higher than

in 2020, but accounting for only 80.1% of the level of 2019.

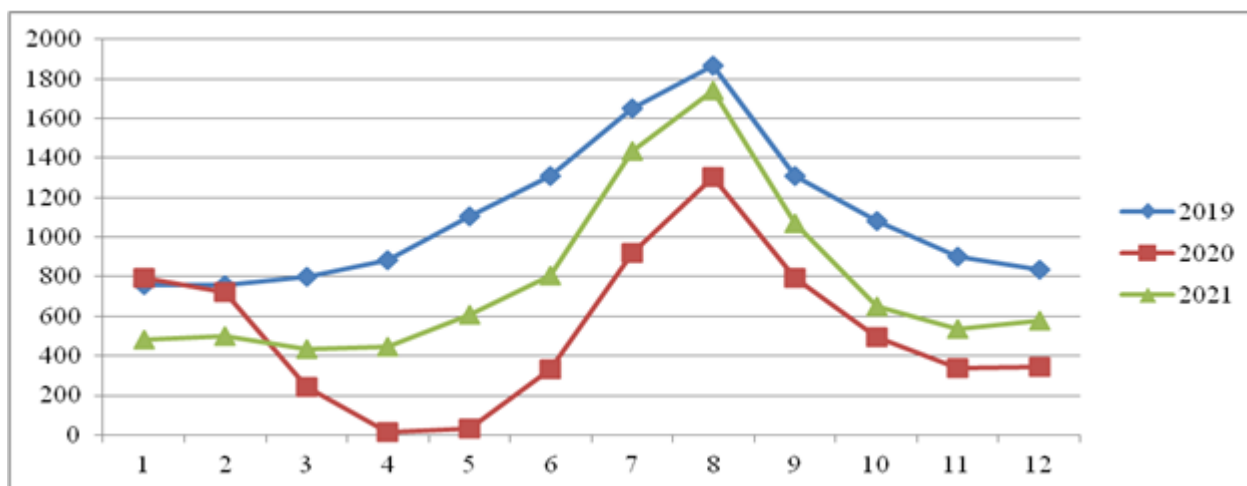


Fig. 1. Tourist arrivals distribution in Romania by month in 2019, 2020 and 2021 (Thousand)
 Source: Own design based on the data from NIS, 2022 [10].

But, compared to 9.5% share of rural tourism in agro-tourist guesthouses in 2019, in the year 2020 the share was 11.8% and in the year 2021 was 11%, reflecting the higher

importance given by tourist during the pandemic to this form of tourism and accommodation type to satisfy much better their needs of safe stay (Figure 2).

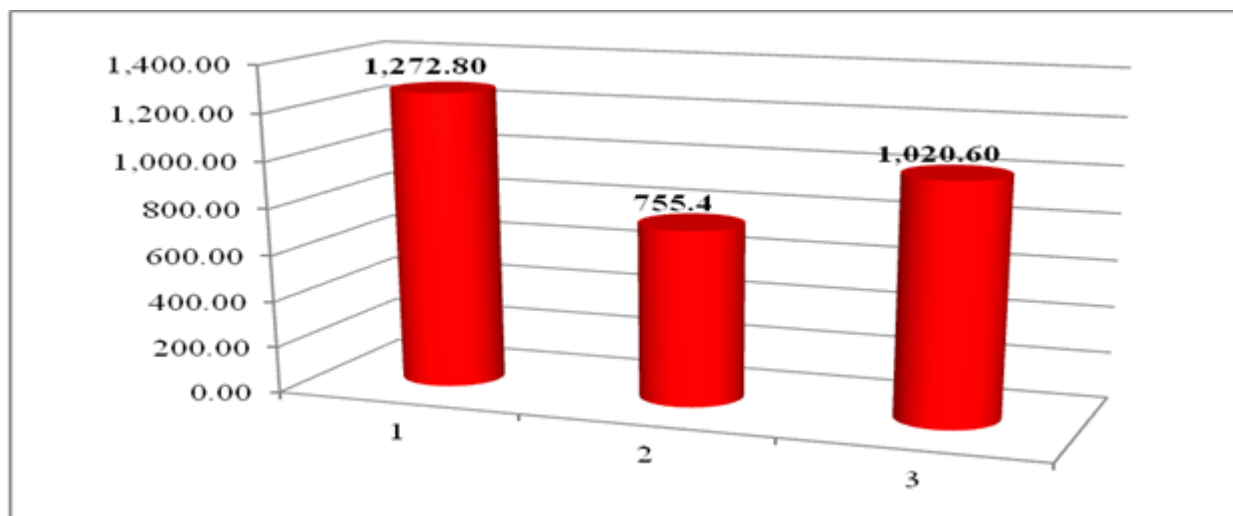


Fig. 2. Tourist arrivals in agro-tourism guesthouses in Romania by month in 2019, 2020 and 2021 (Thousand)
 Source: Own design based on the data from NIS, 2022 [10].
 Note: 1-2019, 2-2020, 3-2021.

Number of overnight stays

In the year 2021, it was recorded 20.65 million overnight stays, being by 41.7% more numerous than in the year 2020, but still by -31.4% less than the highest performance of 30.08 million stays registered in the year 2019 (Table 3).

In close relationship with tourist arrivals, the overnight stays were dominated by Romanian

tourists: 82.4% in 2019, 93.2% in 2020 and 91.1% in 2021.

The number of overnight stays was closely connected to the number of tourist arrivals by category of accommodation units and tourist destination, the seasonality of vacations and the measures imposed by authorities. Therefore, the highest number of stays belonged to the months of summer season in all the three analyzed years (Figure 3).

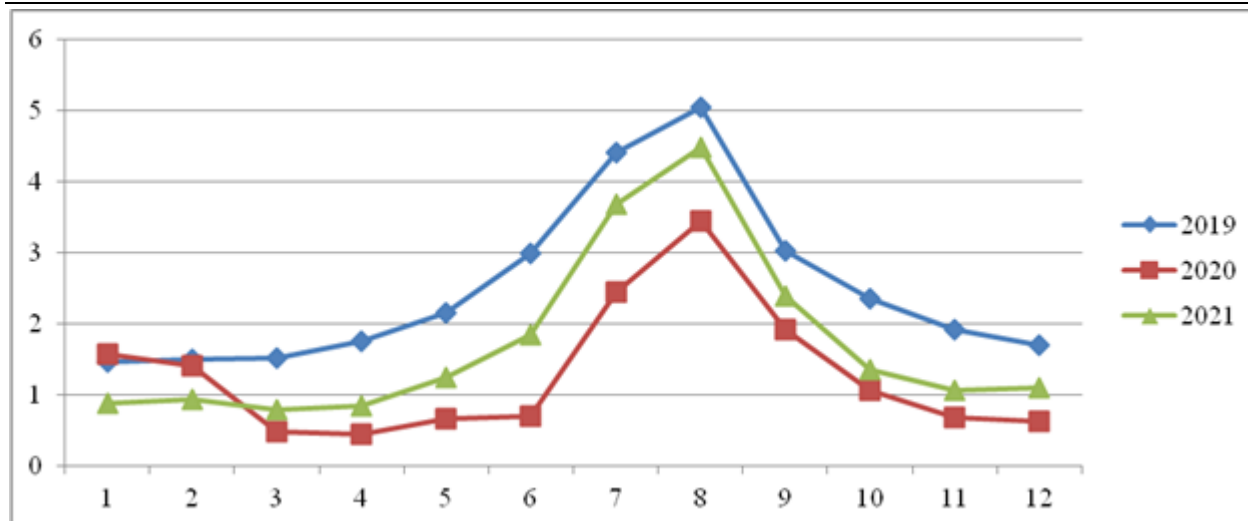


Fig. 3. Overnight stays in tourist accommodation units in Romania by month in 2019, 2020 and 2021 (Million)
 Source: Own design based on the data from NIS, 2022 [10].

The index of net use of accommodation capacity

At the national level in 2019, this index was in average 33.9% but with variations from a type of accommodation unit to another. In 2020, it registered the lowest average

accounting for 22.8%, but in the year 2021, it recovered a little reaching 26.5%.

In rural tourism, the index was much smaller: 20% in 2019, 16.5% in 2020 and 17.3% in 2021 (Figure 4).

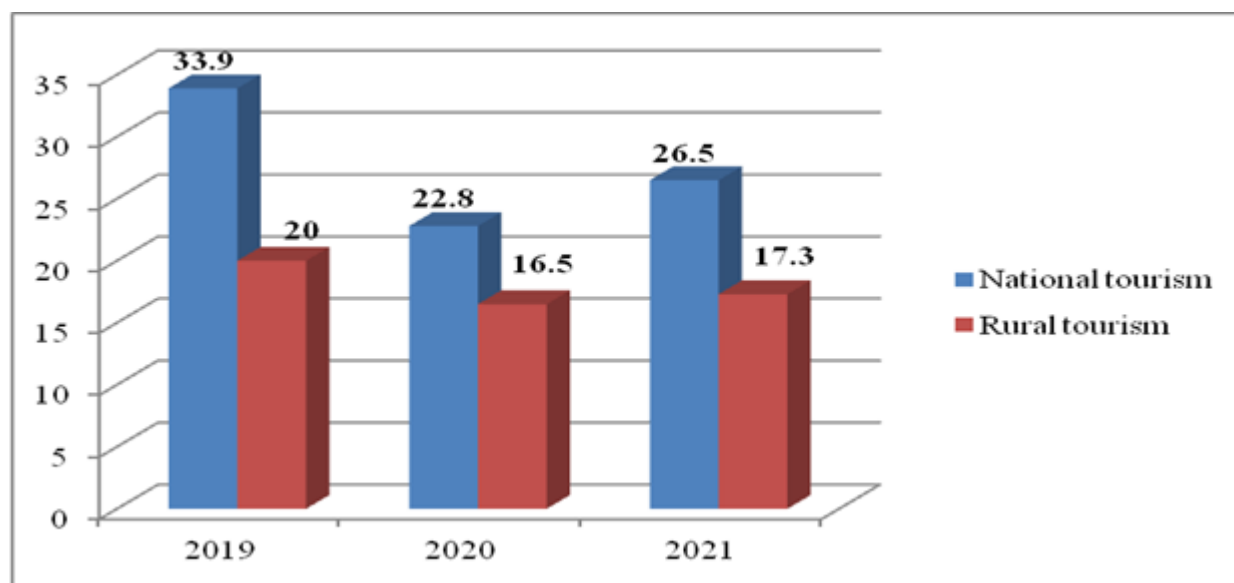


Fig. 4. Dynamics of the index of net use of accommodation capacity, Romanian tourism, 2019, 2020, 2021 (%)
 Source: Own design based on the data from NIS, 2022 [10].

Inbound tourism

The arrivals of foreign tourists registered the peak in the year 2019 when it accounted for 12.81 million persons. In 2020, it was a pale presence of only 5 million, but in 2021 this indicator reached 6.78 million persons registered at the frontiers of Romania. In 2021, foreign arrivals accounted for 52.9% of

the 2019 level, but by 35.1% more than in 2020.

The world football championship and "George Enescu" International Festival of Classic Music have deeply contributed to the increase of incoming tourism.

The most preferred means of transportation was by road with a share in total arrivals of

74.5% in 2019, 82.6% in 2020 and 79.1% in 2021. On the 2nd position came the transportation by plane with the following shares: 22.9% in 2019, 14.5% in 2020 and 17% in 2021 (Fig. 5).

Outbound tourism

In the period of analyzed years, we may say that in 2019, more than 23 million travels were recorded abroad by the Romanians. In the year 2020, the figure was modest, accounting for just 9.5 million travels, but in 2021, outbound tourism reached over 11.64 million travels. The main destinations were Bulgaria, Greece and Turkey for summer

season and in autumn 2020 for exotic countries like Maldive. In 2021, new destinations like Egypt and Dominican Republic were added.

Romanian preferred first of all to travel abroad by road, especially by their own car. In 2019, it was registered 68.4% travels by road, while in 2020 it was recorded the highest performance of 71% and in 2021 of 66.5%.

Also, a part of the Romanians used the aircrafts to travel abroad, and the share of this mean of transportation in the total travels accounted for 30.9% in 2019, 28.3% in 2020 and 33% in 2021 (Fig. 5).

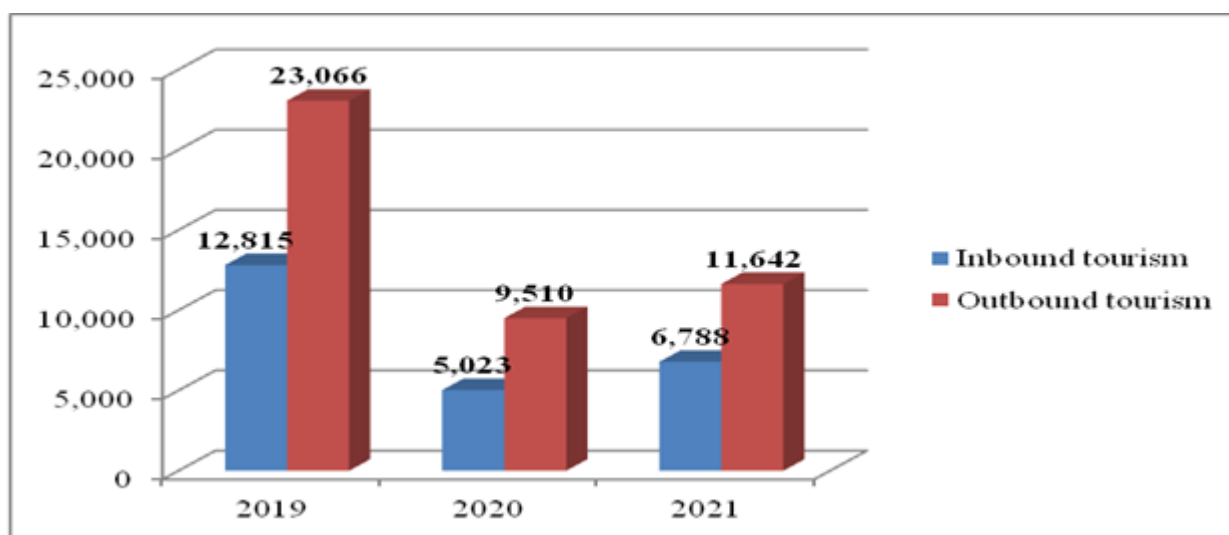


Fig. 5. Inbound and outbound tourism, Romania, 2019, 2020, 2021 (Thousand)

Source: Own design based on the data from NIS, 2022 [10].

CONCLUSIONS

Tourism crisis at the world level and in Romania was determined by the Covid-19 pandemic, the restrictive measures taken by the authorities and the fear of the people to travel.

The year 2020 was an atypical year for tourism which paralyzed the whole industry in terms of tourist flows, utilization of accommodation capacity, employment, salaries, losses in turnover and profitability.

In the period of more relaxed measures, Romanians proved to have the same desire to travel, the most frequent and wisest decision was to spend vacations in the country, to rediscover Romania.

The preference for accommodation were oriented to smaller units, able to assure a safe stay, privacy, and leisure with the family, to spend more time in the middle of nature, far away from the crowded places.

The preference for travels mainly by own car was the most frequent option for Romanians and rarely by plane for external destinations far away from Romania.

The "holiday voucher" have been a real opportunity to spend vacation in the country and helped a lot the managers of tourist units.

The offers of tourism agencies have been adapted to the tourists' needs including facilities like: zero advance, free cancellation of the bookings, "last minute" offers, "early booking" at lower prices, full refund of the paid amount if the Romanians will have no

access to the respective country or the imposition of lockdown on their return in Romania etc.

The Romanian seashore was in top during summer season, week-end tourism was mostly practiced, and the fully opened mountains resorts both in winter 2020 and 2021 have been full of ski lovers and other tourists.

The state aid based on grants offered to tourism and hospitality industry have been of much help to cover a part of losses.

Taking into account that the alert status was cancelled from March 9, 2022, there is a hope that this year tourism industry will recover much better in Romania, even though tariffs have raised and transportation cost as well.

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