

## REVIVAL OF TOURISM DEMAND IN THE POST COVID-19 PANDEMIC PERIOD - A STATISTICAL OVERVIEW IN ROMANIA

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### Abstract

*The goal of this study is the analysis of the dynamics of tourist flow (domestic and inbound) in terms of tourist arrivals and overnight stays in Romania after the Covid-19 pandemic, using the statistical data provided by National Institute of Statistics. The methodology involved the calculation of the fixed and variable basis indices and the comparison of the level of each indicator from a year to another. Dynamics of the tourist arrivals and overnight stays involved to establish the trend using polynomial regression functions and determination coefficient. The results showed that the recovery of the tourist flow from its lowest level registered in 2020, the worst year of tourism during the pandemic, needed three years to attain a higher performance than in 2019, a year which was considered the peak in Romania's tourism. In 2023, the number of domestic and foreign tourist arrivals accounted for 13,647.30 thousands, being 2.13 times higher than in 2020, and by 2.03% higher than in 2019. Also, the number of overnight stays reached 29,171.1 thousands, being 2 times higher than in 2020, by 7.8% higher than in 2022, but by 3.05% smaller than in 2019. The experience learnt in the travel and hospitality industry has generated a new resilience strategy to sustain the development of tourism and its contribution to GDP and better satisfy tourists demand.*

**Key words:** : tourism revival, tourist domestic and inbound flow, arrivals, overnight stays, Romania

### INTRODUCTION

Tourism demand is defined as "the total number of persons who travel or desire to travel and use tourist facilities and services at destinations away from their places of residence or work" [5].

Travels are generated by many reasons like: the need for leisure, recreation and spending holidays, visiting relatives and friends, solving various health problems, pilgrimage to well known religious places, business interests and taking part to various scientific, sport and/or cultural events and other purposes.

The incentive to travel is determined by many factors, but essential is the disposable income that a tourist has to spend for a trip.

The stronger the economy of a country, the more income people has to spend on travels! The price of a tourism product is also important in connection to disposable income, as the higher the price, the lower is the amount of money spent, the travel length and leisure time. The exchange rate is another financial factor taken into consideration by tourists in connection to the choice of travel destination.

Tourists' age, gender, education and cultural level, and also their reasons, purposes, experience in traveling, preferences, personality are other factors which determine their travels.

The technological progress achieved in IT tools like computers, internet access, smart

phones, mobile apps, TV travel channels is more and more utilized in making travel arrangements.

The distance to the desired destination, natural attractions and hazards, climate and season are among the geographical and environmental factors which influence tourist demand. In addition, the historical and cultural importance of a destination, its image compared to other destinations, quality of the tourist product, travel facilities and formalities, local policy and security degree should not be ignored in making the decision where to travel [2, 3].

Travel advice and advisories regarding safety and security offered by Ministry of Tourism, Ministry of Foreign Affairs are also important in making the final decision regarding the choice of a tourist destination [4].

The decision to travel needs also to be based on the security status offered by a chosen destination regarding the health risks during outbreaks and natural disasters and also it has to take into account the information about the actions taken by authorities to prevent infection and avoid the spread of the disease.

The recent Covid-19 pandemic proved how important is tourist's perception of the health risk factor during a travel and also on travel behavior.

In case of lack of security and danger to get a disease, tourists should choose a different and safe destination [9].

The Covid-19 pandemic that emerged in the year 2020 produced not only a crisis in the health system, but also in the economic and social life worldwide. The travel restrictions taken to avoid the spread of the virus determined the tourists to stay in their country of origin or in safety places than to travel abroad, which caused drastic changes in tourism demand and offer in travel and hospitality sector almost in all the countries [10].

After the record performance in tourism industry in the year 2019, the pandemic outbreak in 2020 paralyzed tourist flow and revenue because tourists' behavior changed.

After lifting travel bans in the year 2020 and mainly in 2021, the domestic tourism started to recover and in a fewer measure inbound

tourism, but variations were noticed from a country to another and even from a region to another. In general, during the pandemic, the highest losses in tourism industry were carried out in the urban destinations and in inbound tourism [7], and a new orientation has appeared to smaller and rural localities and ecotourism [12, 18, 20, 29, 30].

To develop a resilient development of tourism ecosystems, the authorities have started to apply a new strategic approach, adapted to the local specific conditions [1, 11, 15].

Despite that Romania is not ranked on the top positions as a tourist destination in Europe, it is recognized as a country with a high tourism potential grace to its varied relief from the Black Sea [19] and the Danube river to the peaks of the Carpathians [21], different tourist destinations represented by spa [22], mountain [24] and sea shore resorts [17, 19], the Danube Delta biosphere reservation, historical and cultural heritage places (fortresses, palaces, castles, churches and monasteries) [6], gastronomy and wines to which hospitality and high quality of services offered at convenient prices, all these recommend Romania as a charming and attractive tourism destination [33].

The main accommodation units preferred by tourist are hotels and guest houses (rural and agro-tourist pensions) [23, 28].

Romania's tourism suffered a negative impact in 2020 [32], as the restrictions imposed reduced the tourist flow and income [16, 17]. In that year, tourism contribution to GDP was only 1.88%, compared to 5.74% in 2020 [8].

The recover needs about three years as statistical data showed in 2023. Since 2021, tourist flow and income is increasing slowly, the situation being better and better from a year to another [25, 26, 27, 31].

Tourism contribution to GDP increased to 2.65% in 2021, 3.42% in 2022, and in 2023 attained 4.19% [8].

In this context, the goal of this study is to analyze and quantify two essential indicators of tourist flow: number of arrivals and overnight stays (for domestic and inbound tourism) in the period 2019-2023 and to point out the differences which reflects the recovery of tourism in the last years versus 2020, the

year of the Covid-19 pandemic the worst year for tourism and also compared to 2019 tourism highest performance in Romania.

## MATERIALS AND METHODS

After studying the literature in the field regarding the impact of the pandemic in 2020, the present analysis needed to be based on the collection of statistical data offered by National Institute of Statistics for the period 2019-2023, to enable the authors to make comparisons on how tourist flow (domestic and inbound) in terms of tourist arrivals and overnight stays have evolved from a year to another as a reflection of the recovery in travel and hospitality sector.

The analysis regards both the arrivals and stays as a whole, but also by tourist category: Romanians and foreigners. More than this, the dynamics of these two flow indicators were studied by destination category: spa resorts, seashore resorts without Constanta City, mountain resorts, Bucharest and other main cities, the Danube Delta and Tulcea City and other localities and tourism routes.

Suggestive graphics were designed to help the readers to better understand the evolution of the two indicators in the period 2019-2023.

The year 2020 when the pandemic emerged was considered the reference year to which the data recorded in the next years were

compared. Also, the analysis explains the records compared to the top performance in Romania's tourism in the year 2019, and also in 2023 versus each year in the period 2019 till present. The fixed and variable basis indices were calculated to show in what measure the level of each indicator changed from a year to another. Also, the structural index was useful to determine the weight of tourist arrivals and, respectively, the weight of overnight stays in their total number by destination. The trend lines were analyzed using illustrative graphics where the polynomial equations were displayed as well as the R square. the data processing was achieved using the Excel facilities.

The results were accompanied by suitable comments and at the end of the study, the conclusions highlighted the main ideas resulting from this research.

## RESULTS AND DISCUSSIONS

### Tourist arrivals (domestic and inbound)

The year 2020, when the Covid-19 pandemic emerged, has deeply affected Romania's tourism. Tourist arrivals accounted for 6,398,642 being by 52.16% smaller than in 2019, which was the best year in tourism in Romania and in many other EU countries and even at the world level in terms of international arrivals and revenues.

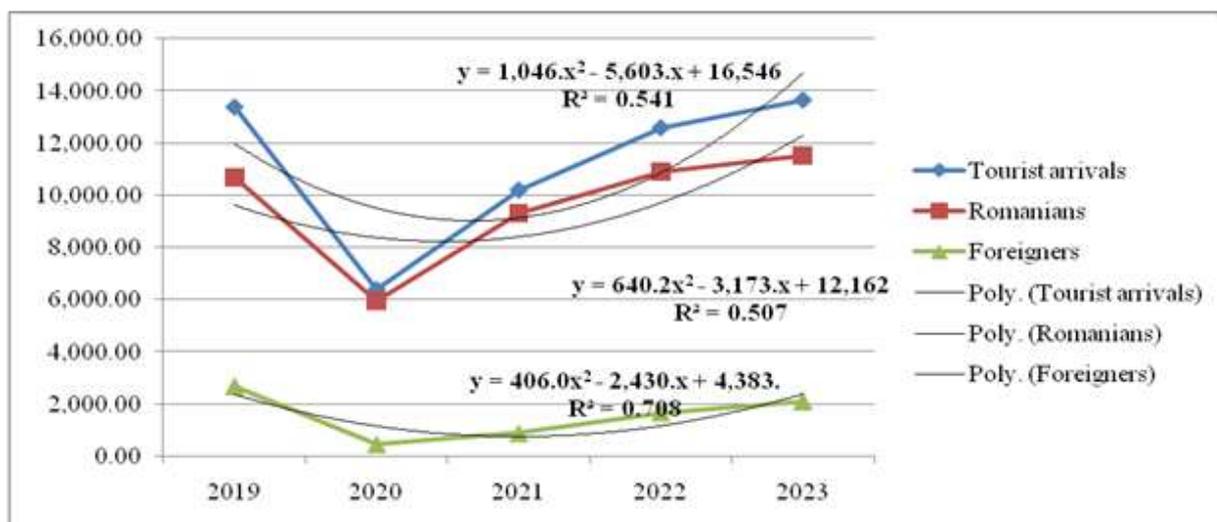


Fig.1. Tourist arrivals, Romania, 2019-2023 (Thousand)

Source: Own design and calculation based on the data from NIS, 2023 [13].

After 2020, when the restrictions imposed by authorities have been more relaxed and then

disappeared, the number of tourist arrivals restarted to grow in Romania and, in 2023, it

reached 13,647.30 thousands, being 2.13 times higher than in 2020 and 2.03% higher than in 2019.

The number of the Romanians' arrivals accounted for 11,546 thousands in 2023, being by 8% higher than in 2019 and by 94.22% higher than in 2020 ( Fig. 1).

The R square value equal to 0.541 reflected that only 54.1% of the variation in tourist arrivals depended on time, and the difference by other factors closely related to the dynamics of restrictions imposed by the health security.

In case of foreign tourists' arrivals, R square showed that 70.8% of the changes of this tourism indicator was determined by time, being linked to a smaller number of tourists.

The share of the Romanians in total tourist arrivals is dominant ranging between 92.91% in the year 2020, 79.94% in 2019 and 84.6% in 2023.

The foreign tourists have still a small weight. In 2020, they represented just 7.09% in total arrivals, compared to 20.06% in 2019. In 2023, foreign tourists accounted only for 15.4% (Fig. 2).

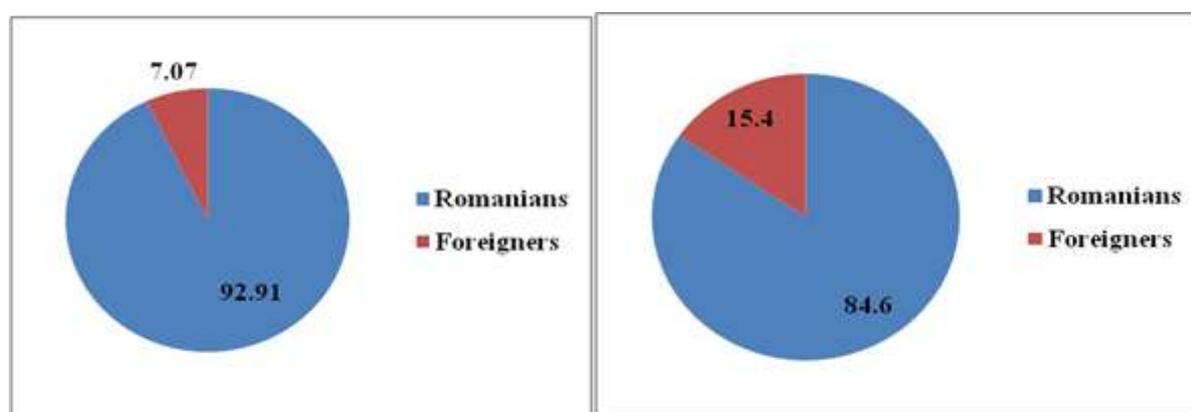


Fig.2. The share of Romanian and foreign tourists in tourist arrivals in 2020 (Left) and 2023 (Right)

Source: Own design and calculation based on NIS data 2023 [13].

### Tourism demand in terms of tourist arrivals in 2023 versus all the previous years before and after the pandemic

Total tourist arrivals in 2023 exceeded the tourist arrivals in all the analyzed years in various percentages. In case of the Romanian tourists, the arrivals in 2023 also were higher than in any other previous year of the studied

interval. But, in case of the foreign tourists, in 2023, their arrivals were higher than in 2020, 2021 and 2022, but by 21.73% smaller versus 2019. The slight growth in the number of foreigners visiting Romania could be explained by increased travel costs which oblige people to select more carefully their holiday destination (Table 1).

Table 1. Comparison regarding the tourist arrivals by tourist category in the period 2019-2023

	Tourist arrivals (Thousands)	Romanians (Thousands)	Foreigners (Thousands)
2023	13,647	11,546	2,101
2022	12,588	10,914	1,674
2021	10,205	9,326	879
2020	6,399	5,945	454
2019	13,375	10,691	2,684
2023/2022 %	108.41	105.79	125.5
2023/2021 %	133.72	123.80	239.02
2023/2020 %	213.26	194.18	462.77
2023/2019 %	102.03	107.99	78.27

Source: Own conception and calculation based on the data provided by NIS Press releases [14].

### Tourist arrivals by destination

After the peak of tourism performance in 2019, and the year 2020 when all the tourist

destinations were affected more or less, starting from 2021, it was noticed a recovery, the number of tourist arrivals restarting to raise.

Versus 2020 level, in 2023 the arrivals reached 1,168.9 thousands (+94.38%) in balneary resorts, 1,564.29 thousands (+72.80%) in seashore resorts, 2,586.17

thousands (+99.6%) in mountain resorts, 6,077.14 (+157.6%) in Bucharest and the main cities, 2,298.78 thousands, being 2.06 times higher in other localities and, finally, the Danube Delta which was visited in 2023 by 334.39 thousands tourists, representing 2.82 times more than in 2020 (Fig. 3).

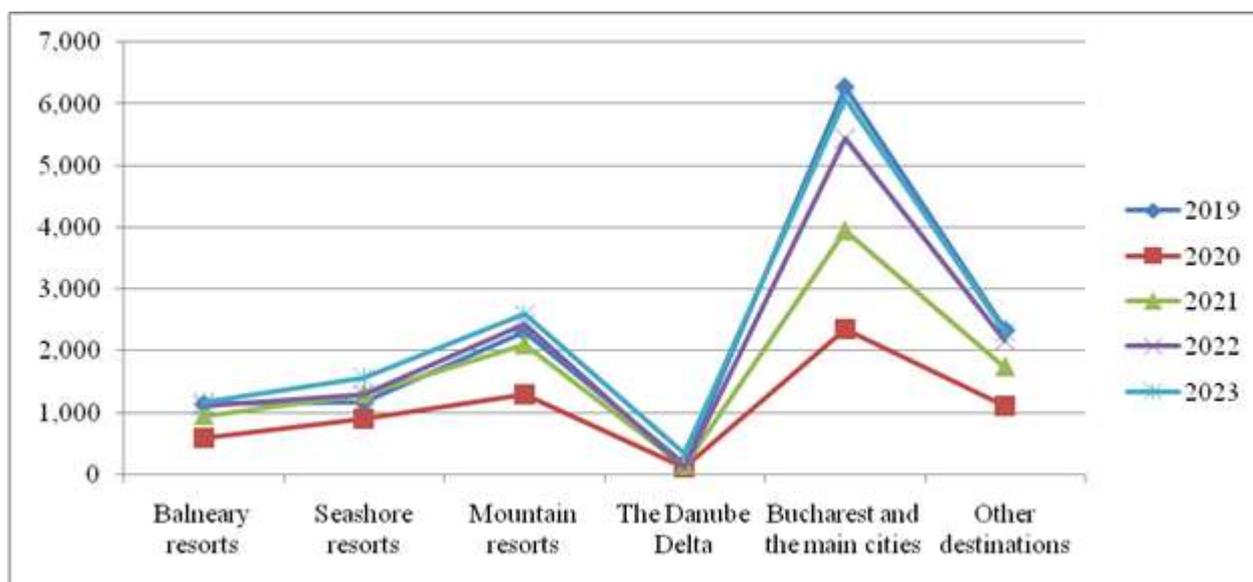


Fig. 3. Tourist arrivals by destination, Romania, 2019-2022 (Thousand)

Source: Own design and calculation based on the data from NIS, 2023 [13].

This graph shows that the capital and the main cities of Romania like Constanta, Brasov, Cluj-Napoca, Sibiu, Iasi, Timisoara etc, attract each year the most numerous visitors. It is normal to be so as any tourist who intend to visit a country go first to the capital where always it could be found a large range of attractions. Then, other destinations could be chosen depending on the preference of each tourist.

On the second position there are the mountain resorts, because Romania's mountains offer a diverse range of landscapes, forests, grasslands, wild flora, caves, volcanic and glacial lakes, many beautiful sparkling river valleys etc. Tourists could enjoy climbing the peaks, hiking, skiing, bungee jumping, visiting the caves or salt mines, gorges, practicing horse riding, biking, bird and wild flora watching, relaxing in the mountain villages and resorts, having a close contact with the local cultural and gastronomic traditions.

The sea shore resorts came on the third position as preference, as the Black Sea coast offers a large variety of beautiful beaches, a warm sea water compared to other seas, opportunities to practice water sports. Also, hotels have tariffs for each one's pocket, in the resorts there are clubs and other places for entertainment, delicious food based on sea fruit and also Romanian traditional dishes, and cultural and historical objectives in the surroundings.

The Danube Delta is visited by the smallest number of tourists, but it is obviously normal as long as it is a trans-boundary biosphere reserve belonging to the UNESCO patrimony. It offers the opportunity to see a wide variety of wildlife, including numerous bird and fish species, and for having an idea about the small villages where traditional fish dishes are served or experiencing a boat cruise on the channels and lagoons.

Balneary resorts offer natural factors which are beneficial for preventing illness and

treating various diseases. The balneary complexes have a large range of modern and indispensable facilities for a wide range of purposes.

The share of the destinations in tourist arrivals reflects tourist preferences. In 2023, Bucharest and the main cities accounts for 44%, followed by mountain resorts with 18%, other destinations 17%, the seashore resorts with 11%, balneary resorts with 8% and finally the Danube Delta with 2%.

The differences in percentage points between the weight of each destination in the year

2023 versus 2020 was the following one: Bucharest and the main cities +7.14 pp, seashore resorts -3.14 pp, the Danube Delta +0.16 pp, other destinations -0.53 pp, balneary resorts -1.39 pp, mountain resorts -2.24 pp. The negative difference reflects the importance of the cities among tourist attractions for the lovers of the attractions in ten urban area and also in the Danube Delta for the explorers of biodiversity.

The distribution of tourist arrivals by the preferred destination is illustrated in Fig. 4.

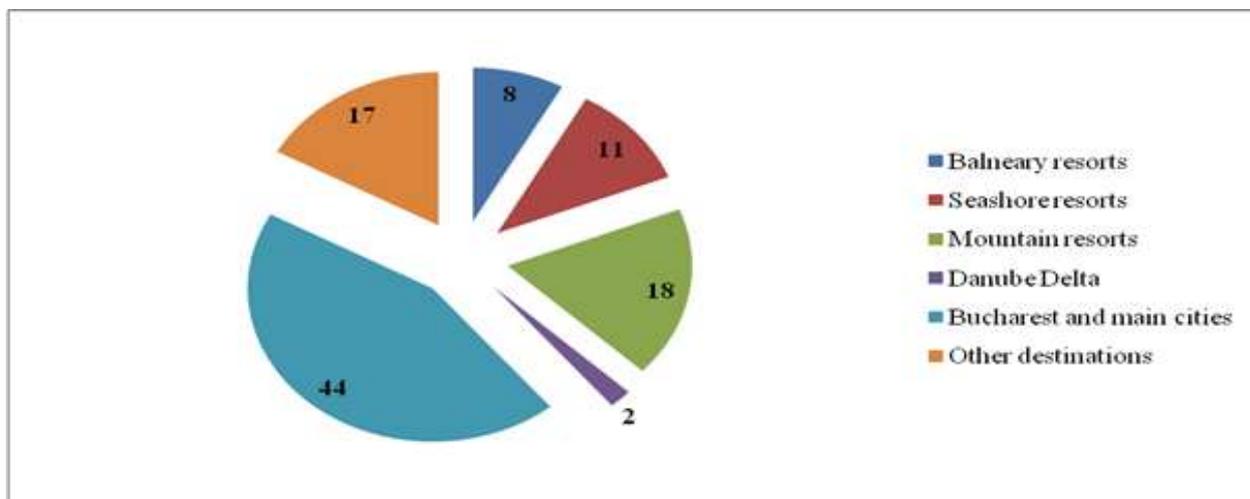


Fig. 4. The distribution of tourist arrivals by the preferred destination in the year 2023 (%)  
 Source: Own design based on own calculations.

### The share of tourist arrivals by destination

The share of tourists by destination is presented in Table 2. As mentioned before, the order of preference of the destinations in Romania is, in the decreasing order: the capital and the main cities, then the mountain resorts, other destinations, seashore resorts, balneary resorts and the Danube Delta.

In the last five years, a slight decline was observed in case on the balneary resorts, but

the share of all the other destinations increased a little. Slight variations have happened from a year to another.

During the pandemic in the year 2020, tourist were more oriented to mountain resorts and seashore resorts, the Danube Delta and balneary resorts, only the urban areas registered a smaller share, as tourists applied for safe and healthier destinations.

Table 2. The share of tourist arrivals by destination in the period 2019-2023 (%)

	Balneary resorts	Seashore resorts	Mountain resorts	The Danube Delta	Bucharest and other cities	Other destinations
2019	8.47	8.62	17.23	1.24	46.92	17.52
2020	9.39	14.14	20.24	1.84	36.86	17.53
2021	9.32	12.84	20.60	1.40	38.72	17.12
2022	8.88	10.27	19.88	0.92	43.29	16.76
2023	8.00	11.00	18.00	2.00	44.00	17.00

Source: Own calculation based on the data from NIS [13].

### Overnight stays (domestic and inbound)

The number of overnight stays registered the lowest level which accounted for 14,579.14 thousand stays in the year 2020.

Since 2021, it started to recover, reaching 27,044.37 thousand stay in 2022, of which

86.45% belonged to the Romanians and 13.55% to the foreign tourists. In 2023, compared to 2019, the stays were by -3.31% less, but compared to 2020, in 2023 there were achieved 2 times more stays ( Fig. 5).

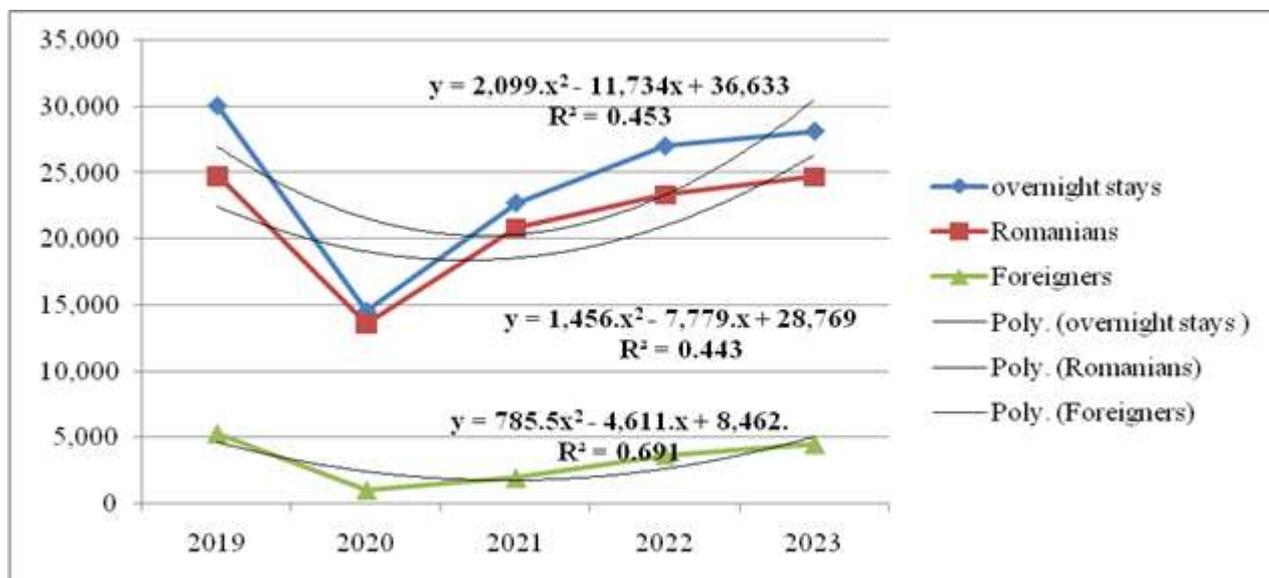


Fig. 5. Number of overnight stays in Romania, 2019-2022 (Thousand)

Source: Own design and calculation based on the data from NIS, 2023 [13].

Analyzing the dynamics of all overnight stays, it could be affirmed that in 2023 the number of stays was higher than in 2020, 2021 and 2022 in various proportions, but by 3.05% lower compared to the year 2019. A similar situation was noticed in case of the overnights

stays belonging to the Romanian tourists. In case of the foreign tourists, the number of stays in 2023 were higher than in 2021 and 2020, but lower than in 2022 and 2019 (Table 3).

Table 3. Comparison regarding the tourist overnight stays by tourist category in the period 2019-2023

	Tourist overnight stays (Thousands)	Romanians (Thousands)	Foreigners (Thousands)
2023	29,171.1	24,706.9	3,364.2
2022	27,044	23,378	3,666
2021	22,748	20,823	1,925
2020	14,579	13,582	997.3
2019	30,086	24,795	5,291
2023/2022 %	107.86	105.68	91.76
2023/2021 %	128.23	118.65	174.76
2023/2020 %	200.00	181.90	337.33
2023/2019 %	96.95	99.64	63.58

Source: Own conception and calculation based on the data provided by NIS Press releases [14].

Therefore, as the number of arrivals was higher and higher but with a higher growth rate than the number of overnight stays in the year 2023 versus 2019 for Romanians and in 2019 and 2022 for the foreign tourists.

The value of the determination coefficient showed that 44.3% of the variation in

overnight stays depended on the time change, therefore, the difference of 55.7% was influenced by other factors, especially by the higher tariffs for the services practiced by accommodation units.

The share of the resident and foreign tourists in total arrivals and total overnight stays is shown in by year in Table 4.

Table 4. Tourist arrivals and overnight stays distribution by Romanian and foreign tourist in the period 2019-2023 (%)

	Tourist arrivals		Overnights stays	
	Romanians	Foreigners	Romanians	Foreigners
2019	79.94	20.06	82.42	17.58
2020	92.91	7.09	93.16	6.84
2021	91.39	8.61	91.54	8.46
2022	86.70	13.30	86.45	13.55
2023	84.60	15.40	94.69	5.31

Source: Own calculation based on NIS data [14].

The results reflect a decline in the share of the Romanians in the total arrivals, but an increase in the arrivals of the foreigners.

Regarding the overnight stays, in 2023 the Romanians reached the highest share accounting for 94.69% in the studied interval, while the share of foreign tourists became very small, only 5.31%, even though their number of arrivals increased.

This aspect reflects that the length of stay has grown in case of the Romanians, while the duration of stay declined in case of the foreign tourists.

## CONCLUSIONS

Before the Covid-19 pandemic, more exactly in 2019, Romania registered the top performance in travel and hospitality industry, when the number of tourist arrivals and overnight stays reached the highest level, accounting for 13.37 million arrivals and over 30.08 million overnight stays.

The year 2020 was an unexpected bad year, the worst for tourism industry as many units were obliged to close or to work at a reduced capacity, resulting either a fail or low revenue. In that year, during the period of relaxed measures taken by the authorities, Romanians saved tourism, being the dominant category of visitors. They decided to discover their own country, with its beautiful landscapes in the mountains or on the seashore, or going to treatment in balneary resorts and in the rural areas, or in the Danube Delta for avoiding the cities.

However, the number of tourist arrivals was by 52.16% lower in 2020 compared to 2019,

and in terms of overnight stays it was by 48.45% smaller.

In 2021, it was noticed a recover in tourism due to the relaxed restrictions starting from March compared to June in 2020. The number of arrivals accounted for over 9.37 million and the number of overnight stays for over 20.83 million.

Tourism entrepreneurs had time to apply an adequate strategy to offer diverse services to satisfy tourists desires and sustain their business.

Year by year the number of Romanians interested to spend their vacations in the country increased their arrivals and of much help have been the "holiday vouchers" offered by the Government which encouraged and sustained both the residents and travel and hospitality industry.

The facilities offered by modern digital communication tools have reduced the time for making the travel arrangements in many cases.

The empirical evidence proved that in the year 2023, the number of tourist arrivals has surpassed the peak level registered in the year 2019 and was more than 2 times higher than the arrivals in 2020, the year of the pandemic.

Also, the number of overnight stays increased but with a smaller growth rate than the arrivals, so that the stays have not yet exceeded the peak registered in 2019.

The final conclusion is that tourism strategy in Romania adapted to the new circumstances has led to good results based on diversification of services and high quality as a priority and also based on large variety of

resources offered by many destinations which could attract more and more tourists.

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