

ANALYSIS OF THE ROMANIAN TOURIST MARKET

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Abstract: *The tourism market is a specific market, its finality materializing in obtaining satisfactions from the bearers of demand, as a result of specific activities carried out within the tourism industry and not in the acquisition of material goods. The main characteristic of the tourism phenomenon is the orientation towards consumption in order to satisfy the needs of consumers.[2,8] The tourist demand thus represents the result of the manifestation on the market of some specific needs of the consumers, due to some economic-social and emotional motivations. The manifestation of the needs on the tourist market is transposed in the form of tourist demand. So, the formation of tourist demand is influenced by the motivation of consumers, regarding the tourist activity. Market component, tourist offer has a major role in the manifestation and effective realization of the tourist demand. The last one becomes real and concrete, only insofar as it finds a correspondent in the offer. The offer is therefore, as a premise of the evolution and development of the demand, of its modernization and of its qualitative increase. [1,3]*

Key words: *tourist demand, tourist offer, tourist market, indicators*

INTRODUCTION

The overall economic development of the last decades, which has allowed the increase of the net income per person or per family, has had the effect of increasing the consumption of goods and services, at individual level, including in the case of the tourism sector. Under these conditions, an increasing number of people, belonging to different social categories, have expressed their intention to consume tourist products and services, thus generating an intensification of tourist traffic. [15,16]

The development of the tourist activity and its evolution at national and international level are under the incidence of a set of factors, of complex nature, different in structure and role, which show influence on the tourist phenomenon. [9,11,14] The interconditioning relationships that are established between these factors, as well as the simultaneity of their action in enhancing the final effect, make it difficult to quantify the impact of each category of factors on the evolution of tourism. [4,10,15]

The tourist potential represents the elements of great attractiveness for the Romanian tourist offer, generating a great variety of tourism forms: leisure stay tourism (coastal, mountain, spa tourism), hunting and sport fishing, itinerant tourism with cultural values, professional tourism etc. [7,13]

Romania is characterized by a remarkable tourist potential, with a value recognized both nationally and internationally.

Romanian tourism with all its components (rural tourism, agrotourism, ecotourism, cultural tourism, events, ecumenical, mountain tourism, seaside tourism, etc.) in light of current world and European trends, strives to promote Romania as a major tourist destination. [6,12]

Due to the negative image of our country on the main tourism generating markets, a strategic approach is required focused on increasing the level of professional training of people engaged in tourism activities and correcting the elements related to infrastructure and image.

MATERIALS AND METHODS

Tourism is a booming service activity, as evidence being the multitude of forms of tourism and categories of tourist services. Currently, we are witnessing to a continuous expansion and improvement of the tourist service, as a result of the adaptation of tourism activities to the needs of consumers. In this paper we tried, based on static data, to make a clear x-ray of the Romanian tourism market, to identify the main problems, as well as offering solutions for the Romanian tourism market to enter the European and world tourism market.

RESEARCH RESULTS

Supply analysis. According to the existing definitions in the literature, the tourist offer can be seen either as the multitude of attractions that could be motivating for tourists, causing them to visit certain areas, or as all goods and services offered to consumers in order to meet their tourist needs, manifested in the market.

Table 1

Tourist reception structures with accommodation function

	1990	2000	2010	2015	2016	2017	2018	2019
Total	3213	3121	5222	6821	6946	7905	8453	8402
Hotels	830	812	1233	1522	1530	1577	1616	1608
Hostels	-	2	114	248	266	300	319	323
Apartment hotels	-	-	13	2.3	21	20	20	17
Motels	-	131	151	221	218	222	231	219
Inns	-	2.3	4	3	3	3	4	3
Tourist villas	1551	801	768	643	635	659	695	709
Tourist chalets	226	161	134	196	194	225	231	222
Bungalows	37	27	12	29	30	61	70	69
Holiday villages	-	1	4	7	7	9	10	9
Campgrounds	217	74	51	66	61	57	58	58
Tourist stops	17	3	3	9	9	9	8	8
Tourist houses	-	66	49	61	59	70	73	82
Camps for students and preschoolers	203	172	92	63	58	57	59	55
Tourist pensions	-	201	949	1527	1530	1666	1709	1669
Agrotourism guesthouses	-	400	1354	1918	2028	2556	2821	2800
Accommodation on river and sea vessels	-	5	7	10	10	10	27	24

Source: <http://statistici.insse.ro/shop/> [18]

In Table 1 it is presented, the situation of the tourist reception structures with accommodation function, existing at national level, by categories of accommodation units, in the period 1990-2019.

On the whole of the accommodation units, a significant increase is observed, of 161.50%. The situation is different if we analyze each reception structure, separately. Thus, we meet accommodation units for which there have been increases but also some for which there have been decreases (inns, tourist villas, campsites, tourist stops and student and preschool camps), the causes being determined by both consumer preferences and of the overall evolution of the Romanian economy, which led to the change of ownership of accommodation units.

An analysis of the number of accommodation units, by types of structures, indicates a high share of agritourism guesthouses (35.63%), due to the accentuated development, lately, of rural tourism. On the second place are the hotels, with a share of 22.46%, and on the 3rd place, are the tourist pensions, with 21.24%

The distribution of tourist structures with accommodation function, at national level, by development regions, is different, from one region to another, depending on the degree of attraction specific to each region. Thus, in 2019, (figure 1.) most accommodation

units were concentrated in the Central Region (26.77%), followed by the South-East Region (17.90%) and the North-West Region (13.38%).

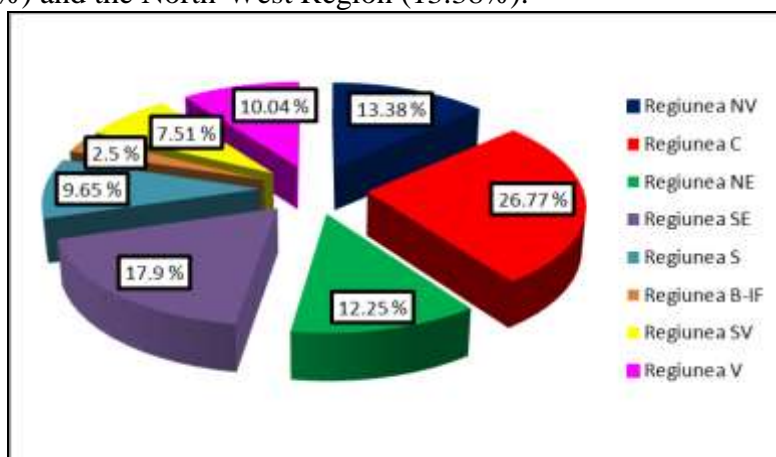


Figure 1. Distribution of tourist reception structures, with accommodation function, by development regions, year 2019

In table 2. we present the situation of the accommodation capacity, existing in the tourist accommodation units, at national level, in the period 2000-2019.

**Table 2
Tourist accommodation capacity, by accommodation structures, at national level, 2000-2019**

	2000	2010	2015	2018	2019
Existing tourist accommodation capacity (number of places)					
Total	280 005	311 698	328 313	343 720	353 835
Hotels	157 760	185 099	188 607	193 280	195 457
Hostels	91	5218	11757	14211	14247
Motels	6059	6126	8331	8902	8886
Inns	836	97	63	63	101
Tourist villas	19734	16822	14473	15255	16555
Tourist chalets	7972	5667	5876	6503	6384
Bungalows	4617	4565	2768	3554	3734
Holiday villages	36	157	557	539	493
Campgrounds	28 857	25 358	15039	8784	8923
Tourist stops	263	2043	1792	1919	2517
Tourist houses	6298	4164	2657	2848	2782
Camps for students and preschoolers	40149	16874	6979	6436	6704
Tourist pensions	3197	18422	32051	34 816	35 823
Agrotourism guesthouses	3544	20208	35 188	48 574	49053
Tourist accommodation capacity in operation (number of places-days)					
Total	50197142	63808286	81872539	87655762	89075891
Hotels	33541653	42551627	49142321	50771353	50967166
Hostels	33060	1273505	2880394	3511238	3465482
Motels	1562466	1826777	2750418	2633717	2720100
Inns	59 475	13140	20 381	36 834	36 173
Tourist villas	2621674	2740132	3129939	3546918	3738166
Tourist chalets	1969476	1449465	1386448	1587103	1508188
Bungalows	212 182	251 738	365 313	404 070	424 529
Holiday villages	14050	38 742	113 196	142 222	109663
Campgrounds	2462042	1024408	1392974	799 138	753 037
Tourist stops	58335	186 354	251 225	373 383	360 368
Tourist houses	356 657	82 686	161 215	175966	230 040
Camps for students and preschoolers	5523365	1764042	1338432	1111848	1167990
Tourist pensions	864 622	5490842	9416908	10413485	10644927
Agrotourism guesthouses	805 618	4891862	9079901	11787897	12498050

Source: <http://statistici.insse.ro/shop/>, [18]

Regarding the existing accommodation capacity, at national level, in 2019, the majority, over 50% (55.24%), is concentrated in the accommodation units, of hotel type, although they do not have the first position in terms of number of units. This is due to the large number of existing rooms in these accommodation units. On the second place are the agritourism guesthouses (13.73%), followed by the tourist pensions (10.12%). The situation remains the same in the case of accommodation capacity in operation.

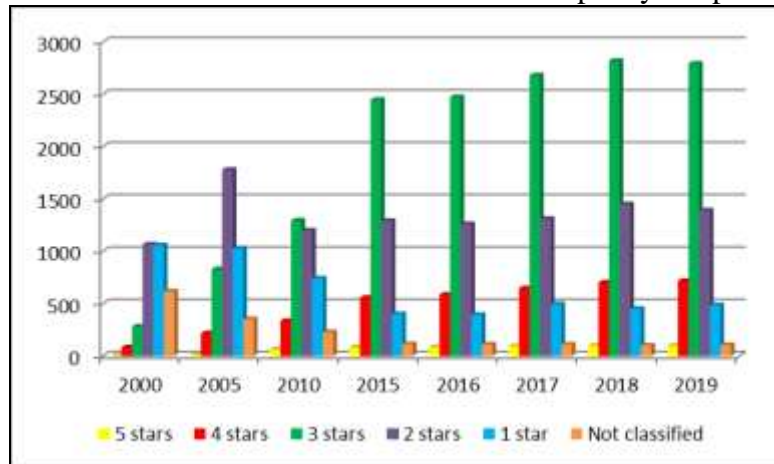


Figure 2. Evolution by comfort categories of accommodation units, at national level,

Analysis by comfort categories of tourist accommodation units, (figure 2), during the analyzed period, it indicates changes in the distribution of tourist accommodation units, on the main comfort categories. Thus, there are increases in the case of accommodation units belonging to higher comfort categories (5 stars - 16.83 times; 4 stars - 8.46 times, 3 stars - 9.84 times and 2 stars - 1.30 times) and decreases in the case of those belonging to the lower comfort categories (1 star - 2.17 times and unqualified units - 5.78 times).

At the level of 2019, 33.27% of the number of accommodation units fell into the comfort category - 3 stars, 16.58% in the comfort category - 2 stars, 8.56%, in the 4 star category and 5.79% in the comfort category - 1 star. In the superior category -5 stars, only 1.20% of the total accommodation units were included, a value approximately identical to that of the accommodation units, unclassified - 1.27%.

Table 3

Situation of accommodation units, at national level, by tourist destinations, 2000-2019

	2000	2005	2010	2015	2016	2017	2018	2019
Total	3121	3900	5222	6821	6946	7905	8453	8402
Spas	400	360	386	479	486	577	594	597
Seaside resorts, excluding the city of Constanta	764	844	1014	686	701	776	766	848
Mountain resorts	702	850	1038	1822	1878	2270	2374	2342
Danube Delta area, including the city of Tulcea	76	121	127	138	136	125	286	254
Bucharest and the county seat cities, exclusively Tulcea	426	641	1063	1450	1433	1472	1545	1535
Other localities and tourist routes	753	1084	1594	2246	2312	2685	2888	2826

Source: <http://statistici.insse.ro/shop/>, [18]

Regarding the distribution of tourist reception structures, with accommodation function, on tourist destinations, increases are indicated for each of the analyzed tourist destinations, but in different proportions. The highest increase was registered in the case of existing accommodation units in urban centers - 260.33%, as a result of the development of urban tourism and events. Then follows the mountain area - 237.89%, due to the increase in the number of tourists who practice winter sports, but also the orientation of mountain resorts and other forms of tourism, and the Danube Delta area - 234.21%, lately this area acquiring a strong tourist value.

In the figure 3, the degree of accommodation capacity utilization is presented, by categories of accommodation units, at national level, in 2019.

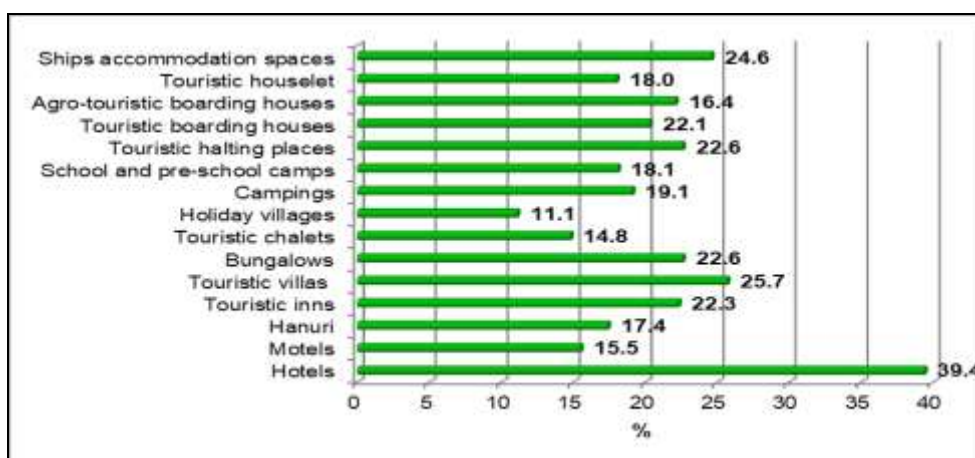


Figure 3. Index of net utilization of decommissioning capacity in operation, by types of accommodation units, at national level, 2019, [17]

The net utilization index of the accommodation capacity indicates the efficiency of the use of the technical material base and of the accommodation units, indicating the percentage of their actual use. It is determined as a ratio between the number of nights spent and the accommodation capacity in operation. In 2019, at national level the highest level of use of accommodation capacity was registered in hotel accommodation units - 39.4%, followed by tourist villas - 25.7% and those of the type of spaces accommodation on river and sea vessels - 24.6%.

Tourism demand analysis. The tourist demand is defined as representing the totality of the persons who manifest, on the tourist market, the desire to move, periodically or temporarily, outside their own residence, the purpose being other than that of performing remunerated activities. During the analyzed period, the arrivals of tourists, in the structures of tourist reception with accommodation function, from Romania, registered a considerable increase of 45.2 times. In the case of Romanian tourists, the increase is 46.9 times, and in the case of foreign tourists the increase is higher than the national average, 31.7 times. Regarding the structure by categories of tourists of arrivals, the preponderance of Romanian tourists is observed. In 2019, out of the total arrivals of tourists, 79.90% were arrivals of Romanian tourists, and the difference of 20.10% arrivals of foreign tourists.

Table 4
Arrivals of tourists in the accommodation structures with accommodation function, by categories of tourists, 2000-2019

		2000	2010	2015	2016	2017	2018	2019
Total	Total	4920129	6072757	9921874	11002522	12143346	12905131	13374943
	Romanian	4053105	4726414	7681896	8521698	9383266	10108509	10691195
	Foreigners	867 024	1346343	2239978	2480824	2760080	2796622	2683748
5 stars	Total	107 167	411 056	657 820	674 124	722 393	736 707	682 896
	Romanian	5646	116 261	204 612	226 150	240 189	273 300	293 537
	Foreigners	101 521	294 795	453 208	447 974	482 204	463 407	389 359
4 stars	Total	177 977	1189947	2650694	3149967	3568928	3809232	3971232
	Romanian	71 356	733 195	1683945	1994890	2296086	2492794	2664576
	Foreigners	106 621	456 752	966 749	1155077	1272842	1316438	1306656
3 stars	Total	782 821	2008409	4015351	4343126	4742589	5159441	5502221
	Romanian	498 116	1606725	3402168	3706279	4032222	4436667	4799370
	Foreigners	284 705	401 684	613 183	636 847	710 367	722 774	702 851
2 stars	Total	2333813	1705832	1610287	1720292	1763512	1705455	1621864
	Romanian	2041047	1559331	1474845	1572142	1598307	1542153	1471982
	Foreigners	292 766	146 501	135 442	148 150	165 205	163 302	149 882
1 star	Total	1038332	360 458	238 729	230 765	268 969	248 315	252 423
	Romanian	963 715	335 551	221 477	206 413	229 736	211 335	221 969
	Foreigners	74 617	24 907	17252	24 352	39 233	36980	30 454

Source: <http://statistici.insse.ro/shop/>, [18]

The analysis of tourist arrivals, on the main structures of tourist reception, with accommodation function, in 2019, at national level, figure 3.6, indicates the highest concentration in hotel type units, 69.3%, followed by accommodation units, of type of tourist pensions, with 9.4% and those of agrotourism type with 9.5%.

In the case of foreign tourists, their preferences went to accommodation units of 4 stars - 48.7%, 3 stars - 26.2%, 5 stars - 14.5%, 2 stars - 5.6% and one star - 1.1%. In the case of accommodation units, with the comfort category of 4 and 5 stars, the values registered in the case of foreign tourists are higher than those registered for the entire tourist activity.

Table 5
Arrivals of tourists in the reception structures with accommodation function, by tourist destinations, 2000-2019

		2000	2005	2010	2015	2016	2017	2018
Total	Total	4920129	5805096	6072757	9921874	11002522	12143346	13374943
	Romanian	4053105	4375185	4726414	7681896	8521698	9383266	10691195
	Foreigners	867 024	1429911	1346343	2239978	2480824	2760080	2683748
Spas	Total	677 495	650 026	568 257	779 325	851 040	945 257	1018721
	Romanian	651 983	613 654	546 068	735 869	804 955	896 515	979 243
	Foreigners	25 512	36 372	22 189	43 456	46 085	48742	39 478
Seaside resorts, excluding the city of Constanta	Total	671 638	713 529	702 566	821 659	977 386	1049970	1111389
	Romanian	638 855	625 347	671 182	792 039	942 987	1016287	1076044
	Foreigners	32 783	88 182	31 384	29620	34 399	33 683	35 345
Mountain resorts	Total	756 380	827 952	814 973	1528583	1748157	2019142	2217110
	Romanian	668 521	715 230	728 320	1356404	1565562	1800140	1997812
	Foreigners	87 859	112 722	86 653	172 179	182 595	219 002	219 298
Danube Delta area, including the city of Tulcea	Total	34 462	76 961	68 414	69 076	73114	100423	165 431
	Romanian	29 868	54 074	54 206	53 384	55 747	76 281	140 077
	Foreigners	4594	22 887	14208	15692	17367	24 142	25 354
Bucharest and the county seat cities, exclusively Tulcea	Total	2237397	2755711	3011688	5088334	5562743	5992403	6178665
	Romanian	1579307	1736126	1964465	3369247	3632115	3860026	4030901
	Foreigners	658 090	1019585	1047223	1719087	1930628	2132377	2147764
Other localities and tourist routes	Total	542 757	780 917	906 859	1634897	1790082	2036151	2213815
	Romanian	484 571	630 754	762 173	1374953	1520332	1734017	1884432
	Foreigners	58 186	150 163	144 686	259 944	269 750	302 134	329 383

Source: <http://statistici.insse.ro/shop/>, [17]

Regarding the structure of tourist arrivals, on the main destinations, in 2019, almost half of them, 47.88% were registered in Bucharest and other county residence cities. In second place are the mountain resorts, with 17.18%, followed by the resorts on the Romanian coast with 8.61%.

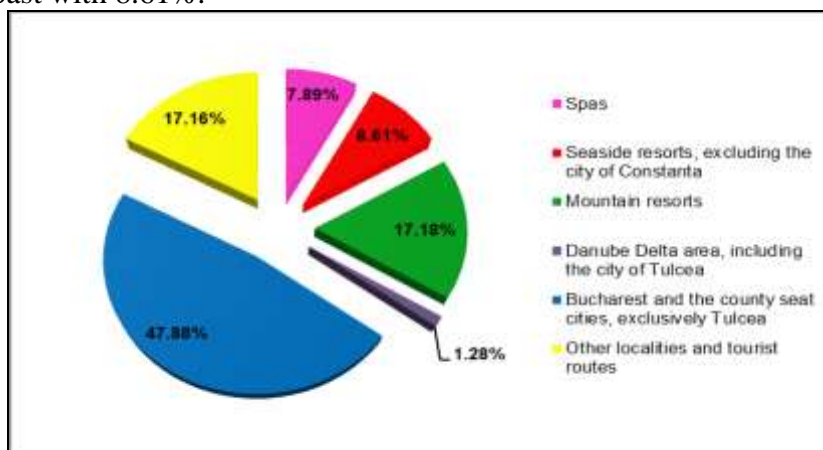


Figure 4. Structure of tourists arrivals in the reception structures with accommodation function, by tourist destinations, 2019, [17]

The second important indicator of the tourist demand, the number of overnight stays, registered, at national level, in the period 2000-2019, in the tourist accommodation units, is presented in figure 5.

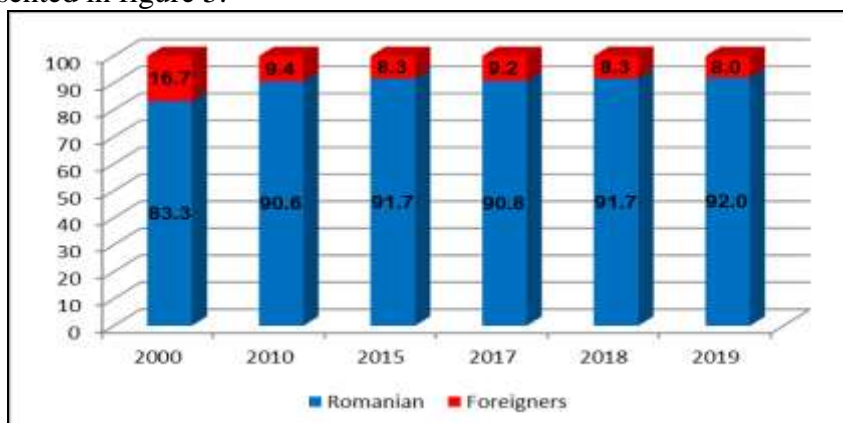


Figure 5. Evolution of overnight stays of tourists in the reception structures with accommodation function, by types of tourists, 2000-2019

During the analyzed period, the number of overnight stays of tourists, in the structures of tourist reception, with accommodation function, increased both in terms of Romanian tourists and foreign tourists. Overall the tourist activity, the number of overnight stays increased by 70.5%. In the case of Romanian tourists, the increase was 59.9%, and in the case of foreign tourists 146.1%.

The average length of stay is determined as a ratio between the number of overnight stays and the number of tourist arrivals and indicates the capacity of the accommodation unit to retain tourists for as long as possible.

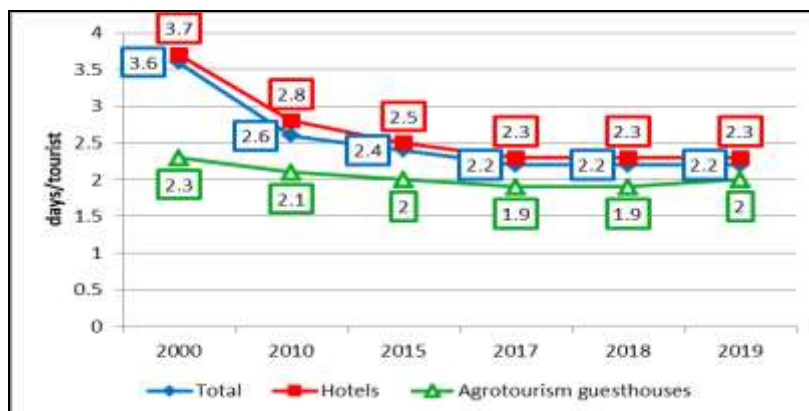


Figure 6. Average length of stay in the accommodation units, by types of tourists

In the period 2000-2019, the values recorded by this indicator show a decreasing trend. Overall the tourist activity, decrease of the average length of stay is 37.8%. In the case of hotels there is a decrease in the average length of stay, 38.8%, and in agritourism guesthouses the decrease is below average, only 13.0%.

The following figure shows the average length of stay, in 2019, in accommodation units, by comfort categories and types of tourists.

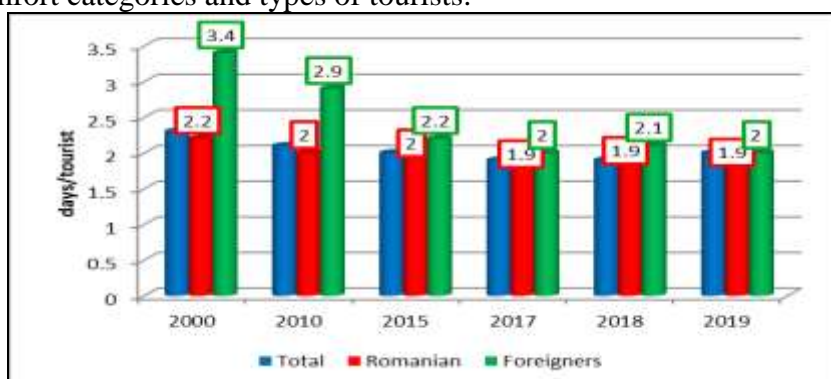


Figure 7. Average length of stay in accommodation units, by comfort categories and types of tourists, 2019

For the entire tourist activity, the highest value of the indicator is registered in the accommodation units, belonging to the comfort category, 2 stars - 3.1 days / tourist, and the lowest, for the accommodation units belonging to the comfort category - 5 stars - 1.81 days / tourist.

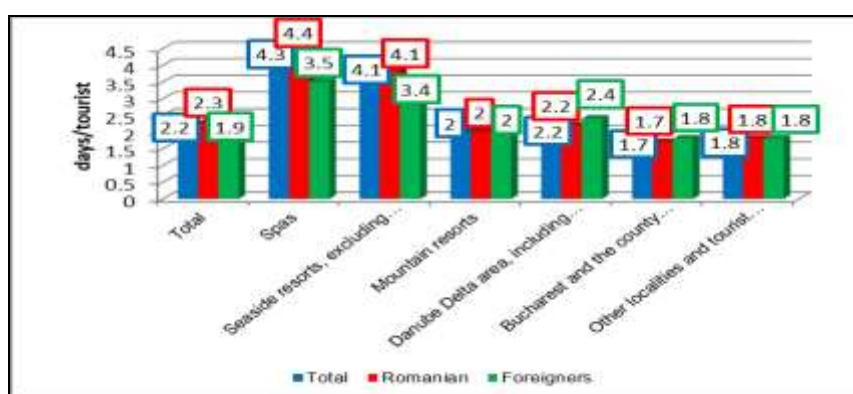


Figure 8. Average length of stay in the accommodation units, on the main tourist destinations and types of tourists, 2018, [17]

The analysis by categories of tourists indicates a situation similar to the general one, but with higher average values, in the case of Romanian tourists (3.1 days/tourist - 2 stars and 2.0 days/tourist - 5 stars) and lower than average, in the case of tourists foreigners (2.2 days/tourist - 2 stars and 1.7 days/tourist - 5 stars).

Regarding the average length of stay on the main tourist destinations, existing in Romania, it is presented figure 8.

The highest values were recorded for spas (total - 4.3 days/tourist, Romanian tourists - 4.4 days/tourist and foreign tourists - 3.5 days/tourist) and resorts on the Romanian coast (total - 4.1 days/tourist, Romanian tourists - 4.1 days/tourist and foreign tourists - 3.4 days/tourist), and the lowest values are recorded in the case of urban centers (total - 1.7 days/tourist; Romanian tourists - 1.7 days/tourist and foreign tourists - 1.8 days/tourist).

CONCLUSIONS

Tourism in Romania must be a priority for the Romanian economy and to be given some importance. It is a sector that can generate additional income, can provide jobs and high income to those who work in this area.

Special attention must also be paid to the tourist potential that our country enjoys. In this sense, the development of agrotourism is necessary, to capitalize on the richness of the traditions and customs of the Romanian villages. Also, the historical tourist resources available to Romania can contribute to the development of tourism, especially by creating tourist units in the surrounding areas. In this sense, we refer to the monasteries in Moldova, the Maramures area, the Danube Delta and the Black Sea coast, areas that can be real points of attraction for tourists.

Tourism is a means of developing rural areas, by expanding the area of specific supply and creating jobs in rural areas other than traditional ones, improving living conditions and increasing the income of the local population.

A major problem of Romanian tourism is the fact that, at certain times of the year, the occupancy rate in accommodation units is quite low, thus registering a increase the number of short-term holidays, this allowing the development of several tourist destinations, and to meet the demand, the opportunity to provide facilities and activities for tourists in all seasons.

Romania's incoming potential for foreign tourists indicates the existence of shortages that, by eliminating them, will ensure a significant increase in the number of foreign tourists who will choose our country as a tourist destination. These directions must cover:

- ❖ improving the global tourist offer of spas, and reviving the image around the Romanian Coast;
- ❖ diversifying the offer of winter tourism, skiing and mountain tourism in general;
- ❖ promoting local and national events proposed to the economic, cultural, sports and political environments and the development of event tourism;
- ❖ capitalization at a higher level of existing resources, some of them unique in Europe: Bran Castle and the legend of Dracula, the Danube Delta, the rural potential of Romania, Transylvania and the role of Prince Charles as tourist ambassador of Romania, the 209 castles, the 1060 kilometers of the Danube river that pass through our territory, with its huge potential.

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