

THE IMPACT OF THE COVID-19 CRISIS ON ROMANIAN TOURISM

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Abstract

The paper presents the evaluation of the impact of the COVID-19 health crisis on tourism in Romania with a focus on the market effects and the impact on tourism operators. The onset of the COVID-19 health crisis in March 2020 led to restrictions on the movement of people, which led to behavioral changes in accommodation as well as in the behavior of tourists (tourism consumers). The objective of this paper is to analyse the changes in the hospitality industry sector, highlighting the changes in the behavior of tourism consumers.

Key Words: *tourism, health crisis COVID-19, HoReCa*

JEL classification: *H12, Z30, Z32*

Introduction

The SARS-CoV-2 virus is a major public health emergency all over the world, representing a major health, economic and social shock (Fotiadis, et al., 2021). This health crisis has been accompanied by a number of negative effects on the economy in general and tourism in particular.

The closure of borders and travel restrictions to European countries have reduced the mobility of people, by all means - by air, land or rail - and therefore the negative effects for these areas were immediately felt, resulting in dysfunctions of international transport, supply (Butu et al., 2020) and international trade of tourism services.

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Due to local, regional or national quarantine measures, imposed social distancing rules and travel restrictions, hospitality industry companies were the first to feel the impact of the crisis (Organisation for Economic Co-operation and Development - OECD, 2020). That is why their representatives have made urgent requests for help from governments.

In general, the tourism industry is the first to be impacted by the negative effects in the event of a global crisis (Uğur & Akbıyık, 2020). This time, facing exceptional circumstances, the tourism industry has reached a point of interruption of normal activity that was never seen before.

Hospitality industry was one of the most affected economic sectors in the world both due to the restrictions imposed during the COVID-19 pandemic (Baum et al., 2020), but also the reluctance of consumers to travel (Song & Choi, 2020). However, the offers of the agencies were adapted to the changing demand, so that the accommodation units came with packages adequate to the sanitary crisis, with measures of distancing and sanitation.

In Romania, the shock wave affected all areas of activity. Unlike the economic crises so far, which were characterized only by declining consumption, while production remained constant, we are currently facing a health crisis, which is characterized by declining consumption, because people are scared and have rethought their savings strategy.

In July 2020, Romania registered the largest decrease in the arrivals of foreign tourists from the European Union, according to Eurostat data. The statistical data indicate a decline of almost 90% of the nights spent by foreigners in accommodation units compared to the same month in 2019.

The aim of this paper was to research how tourists feel about the current crisis and what will be the long-term impact COVID-19 on them, in order to develop and substantiate methods and tools that could be applied to refresh the market.

Methods of Research

For the evaluation of the opinions of tourism consumers from Romania, a survey was conducted. A number of 798 questionnaires were filled out by the respondents.

The study of consumer preferences is very important, aiming to identify their views on the influence of the COVID-19 health crisis and their behavior in terms of internal travel, accommodation and meals.

The questions were grouped into three sections, as follows:

- respondent profile: gender, age, income level;
- consumption behavior:
 - "who consumes?",
 - "Where does the consumption take place?",
 - "When is it consumed?",
 - "What is consumed?",
 - "How much is consumed?";
- public mentality (needs, motivations, desires, expectations).

In order to establish the research objectives, the following working hypotheses were formulated:

- identifying the number of consumers;
- identification of the average frequency of consumption;
- identifying the average consumption per year;
- identification of the place of purchase;
- identifying consumers' preferences regarding locations, accommodation and meals;
- ranking the criteria for choosing accommodation, dining services, choosing places to spend stays / holidays, paying for services
- the influence of the health crisis on consumption habits.

The quantitative survey was used as a method of gathering information, and the investigation technique, structured in the form of a questionnaire, was used as an investigation technique. Because we cannot interview all members of a community or all buyers of travel services, a sample that is considered representative was created.

The quota sampling method was used as a sampling method, which consists in respecting the principle of representativeness of the sample with respect to the total researched community. Representativeness is pursued through independent criteria: gender, age and income. The justification for using the quota method lies in the assumption that if the sample is representative of the population surveyed in terms of the criteria considered in the sampling, it will also be representative in terms of other characteristics such as habits, behaviors, attitudes and so on. Thus, the research results can be

extrapolated to the entire researched population. The total population is the population of Bucharest and the surrounding areas. For an accepted error of +/- 3% we calculated the sample size was 798 people.

The questionnaire included 17 closed questions. Once developed, the questionnaire was pre-tested on fifteen people to gather feedback on understanding the questions and thus improve the quality of the research.

Each interview lasted, on average, ten minutes. The questions refer to information on the socio-demographic characteristics of the respondents, the so-called questions to identify the population in the sample, questions on the purchasing model, consumer needs and preferences for tourist services, their choice criteria, their frequency of purchase.

The variables used in the study of the tourist market are:

- dependent variables: consumer preferences,
- independent variables: gender, age, income.

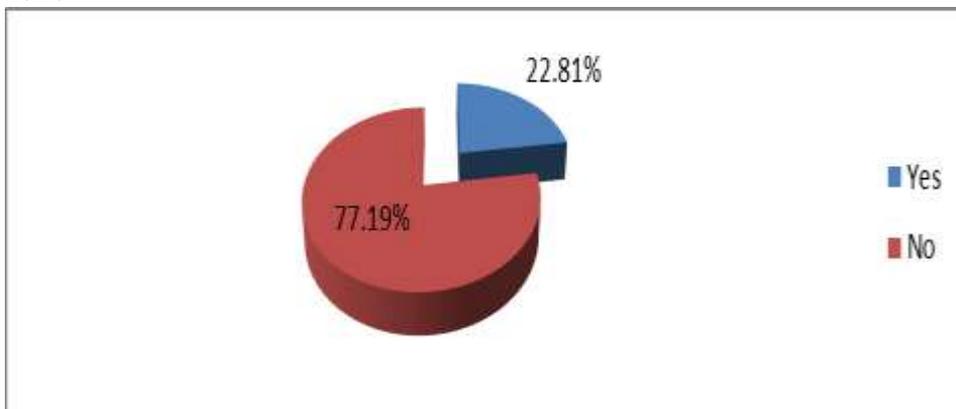
The respondents were all of Romanian nationality. Of the 798 people interviewed, most are women, respectively 74%. By age groups, the highest share was represented by people aged 36-65, totaling 588 people (73.68%) of the total number of respondents, which is natural, given that this age segment coincides with the active employment period.

The sample included all categories of professional status from student to retiree. A number of 585 people (73.31%) of the interviewed subjects are active people (employees and entrepreneurs). Over 87% (700 people) of those surveyed live in the urban area. Given the purchase prices of tourism services, they are purchased in proportion of 86% of people with a family income higher than 3,000 lei / month (aprox. 600 Eur), and families are generally formed (over 69% of those interviewed) from 2 adults and 1-2 children.

Results and Discussion

Out of the total number of respondents, 77.19% frequently use tourism services, the remaining 22.81% occasionally or very rarely, either for health reasons or because they do not have the necessary financial means to pay for accommodation, meals, transport services (Figure 1).

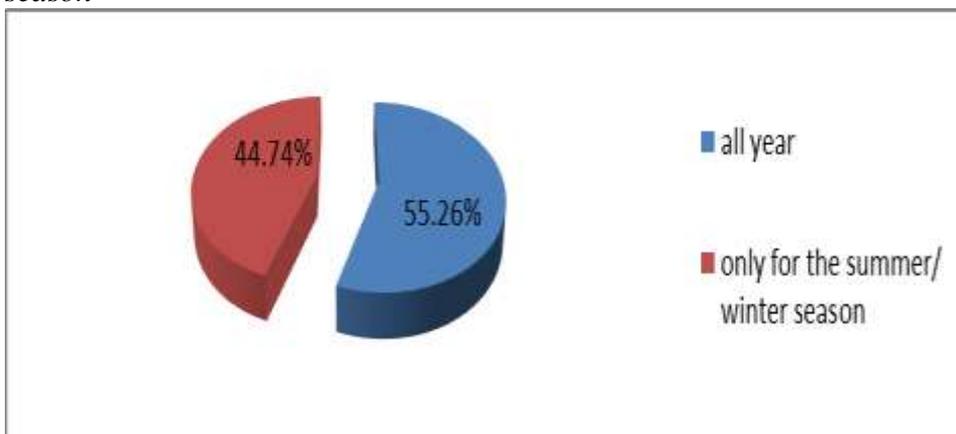
Figure 1: *Frequency of consumption of tourist services in Romania during 2020*



Source: *Survey data*

A significant part (55.26%) of those surveyed consume tourist services all year round, regardless of price or season, while 44.74% consume these products only in season.

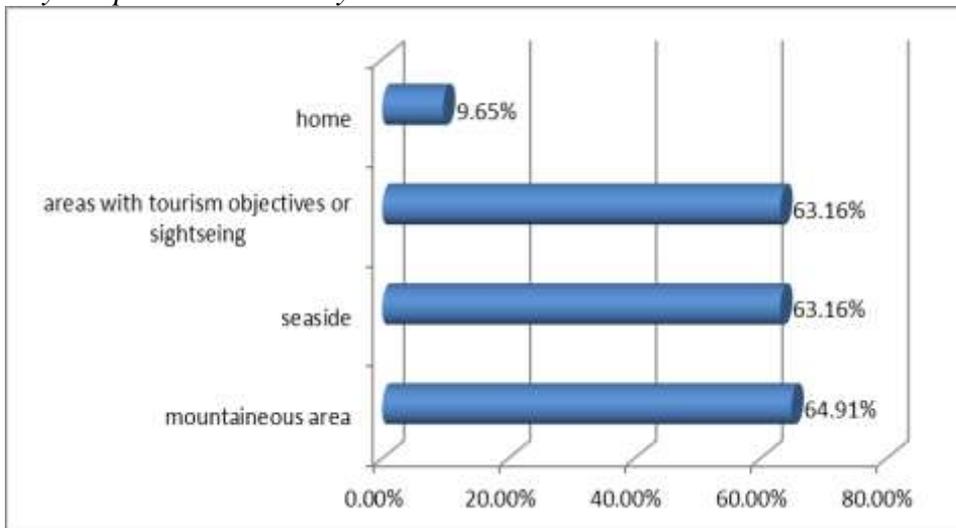
Figure 2: *Frequency of consumption of tourist services depending on the season*



Source: *Survey data*

As shown in Figure 3, a number of 518 people (64.91%) prefer to stay or spend their holidays at the seaside. A share of 63.16% (504 people) stay or spend their holidays in the mountains and / or in areas with interesting landscapes or go sightseeing or have cultural objectives. However, there are also 77 people (9.65%) who stay or spend their holidays at home.

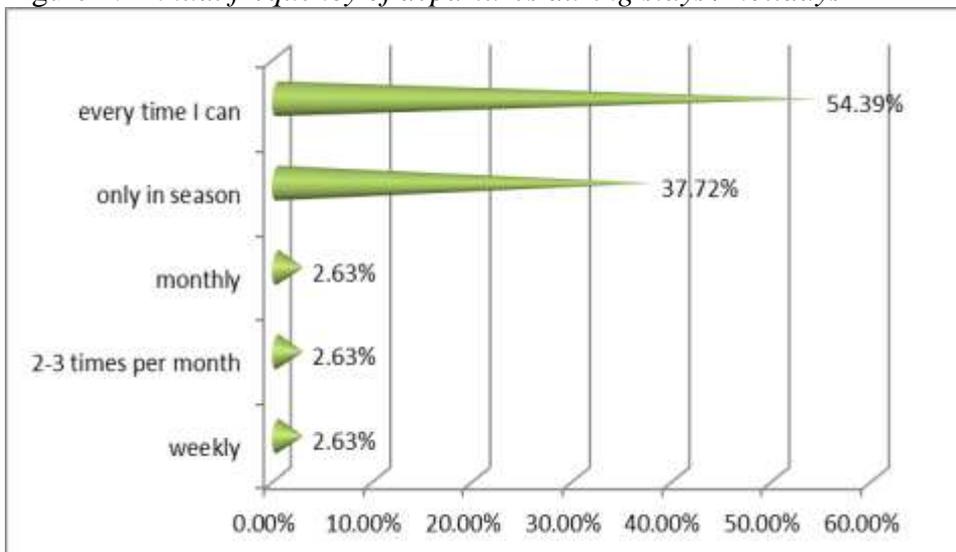
Figure 3: *Tourism consumers' preferences regarding the area where they stay or spend their holidays*



Source: *Survey data*

Most of the interviewees (over 69%) do not have a favorite place to stay or spend their holidays, the choices being spontaneous for 54% (434 people). A number of 301 people, respectively 37.72% go on a holiday only in the summer or winter season (Figure 4).

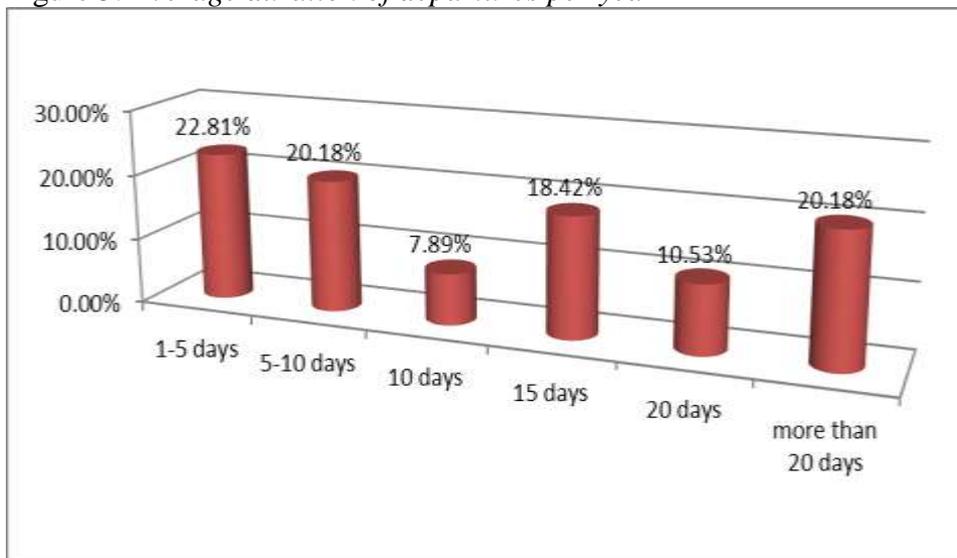
Figure 4: *Annual frequency of departures during stays / holidays*



Source: *Survey data*

The average duration of a stay / vacation is 1-5 days for 182 people (22.81%), 5-10 days for 161 respondents (20.18%), 15 days for 147 people (18.42%) and for the remaining 161 people (20.18%) it is over 20 days a year (Figure 5).

Figure 5: Average duration of departures per year



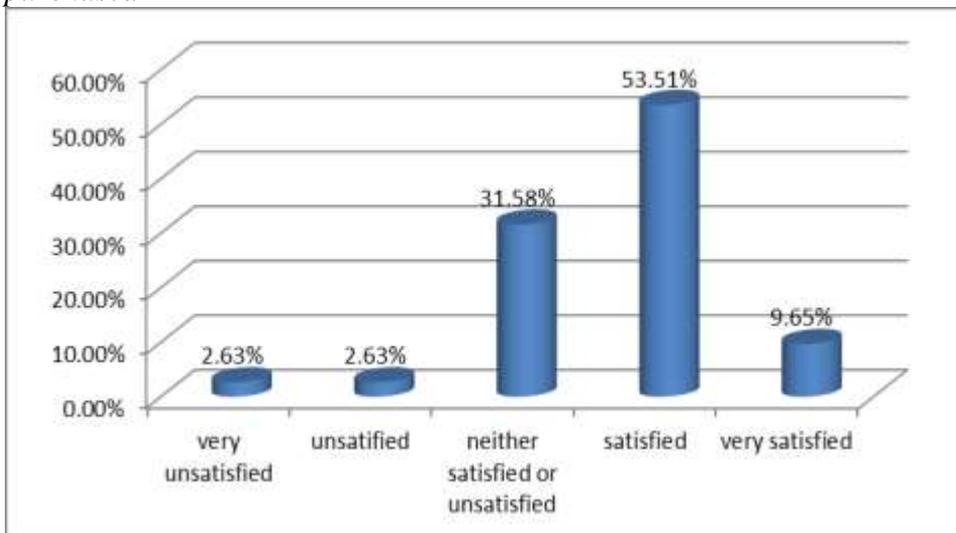
Source: Survey data

In Romania there are several types of tourism, of which for this paper we have focused on rural tourism and agrotourism. Rural tourism has a heterogeneous reception structure that is not represented by households but by holiday villages, bungalows or villas, all of which are grouped around common areas for meals, tourist stops, camps for rural activities, creative camps, sports entertainment and finally, leisure.

Agrotourism in Romania represents a chance especially for the locals who, taking into account the crisis in the agricultural sector, are willing to try a new activity using the infrastructure they already have in order to increase the profitability (Marin & Godja, 2017).

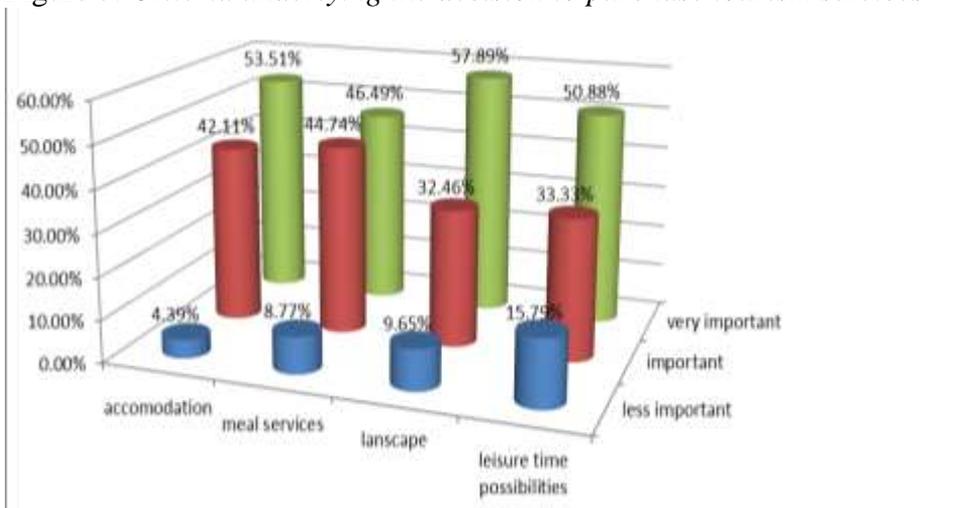
Agrotourism has emerged as a solution to increase the number of Romanian and foreign tourists in recent years. Romania has various accommodation spaces, from those of small size (cottages for 2-3 people) to those that can accommodate over 100 people (hotels).

Figure 6: Degree of satisfaction with the domestic tourism services purchased



Source: Survey data

Figure 7: Criteria underlying the decision to purchase tourism services

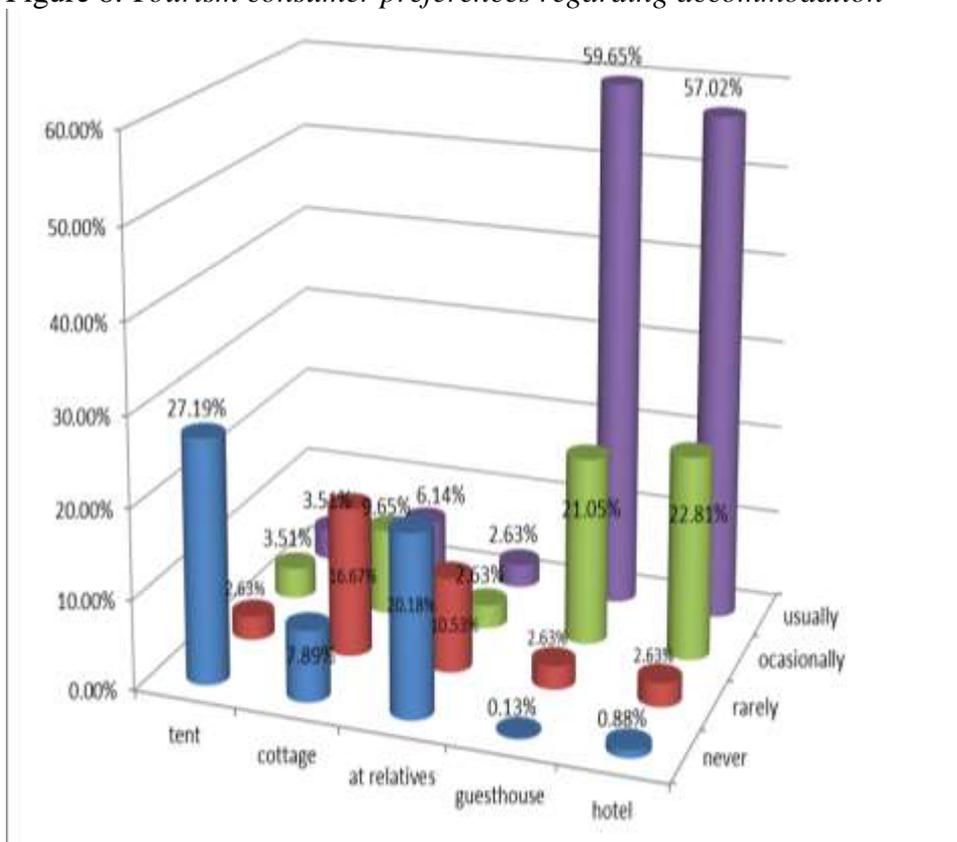


Source: Survey data

Most of these rural tourism units offer a package of services that include accommodation and meals. These include the types of meals such as half board or full board, while other offer a number of additional services such as: washing machine, sports fields, sports equipment rental and others. The degree of satisfaction regarding the purchased domestic tourism services is

over 63%, the consumers having their own selection criteria: accommodation, meal services, landscape, leisure opportunities (Figure 6 and Figure 7).

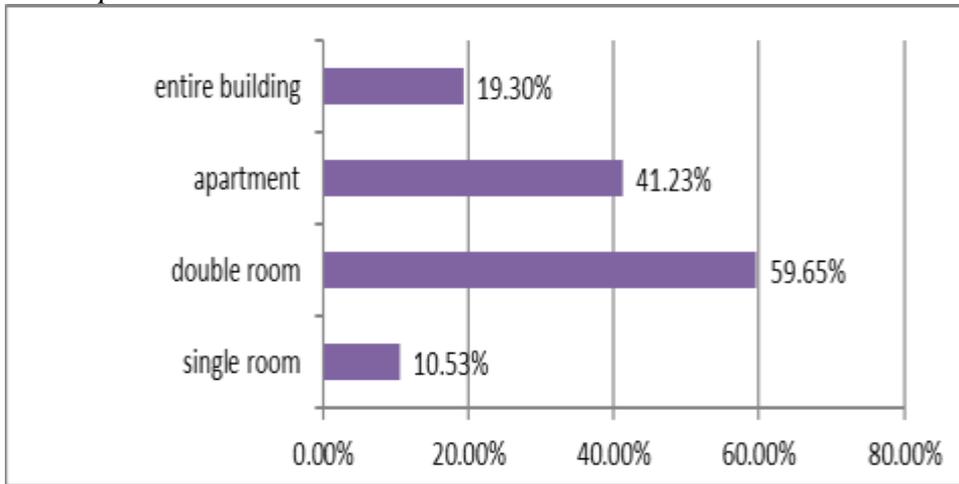
Figure 8: *Tourism consumer preferences regarding accommodation*



Source: *Survey data*

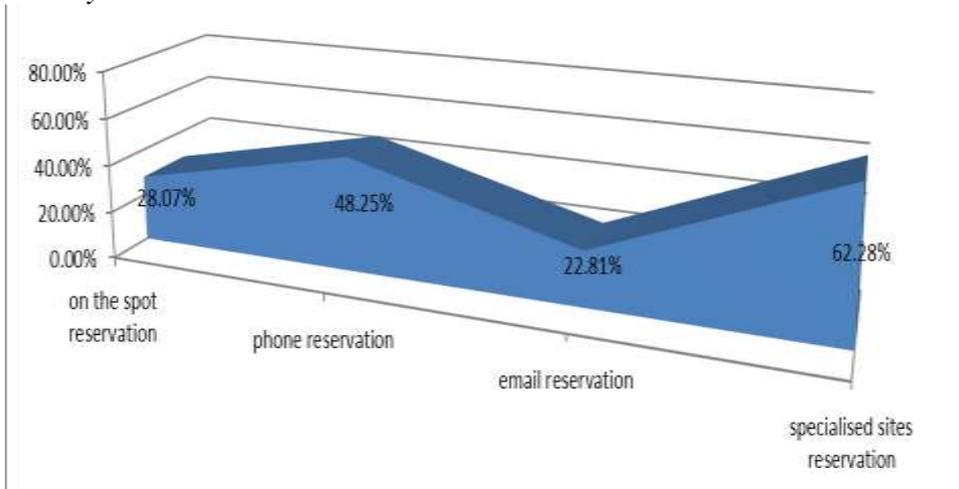
Romanian tourists prefer hotel accommodation in double rooms or apartments. Large families or those traveling in groups prefer accommodation in villas / boarding houses (Figure 9).

Figure 9: Accommodation preferences of tourism consumers in hotels / villas / pensions



Source: Survey data

Figure 10: Tourism consumers' preferences regarding how to book a holiday

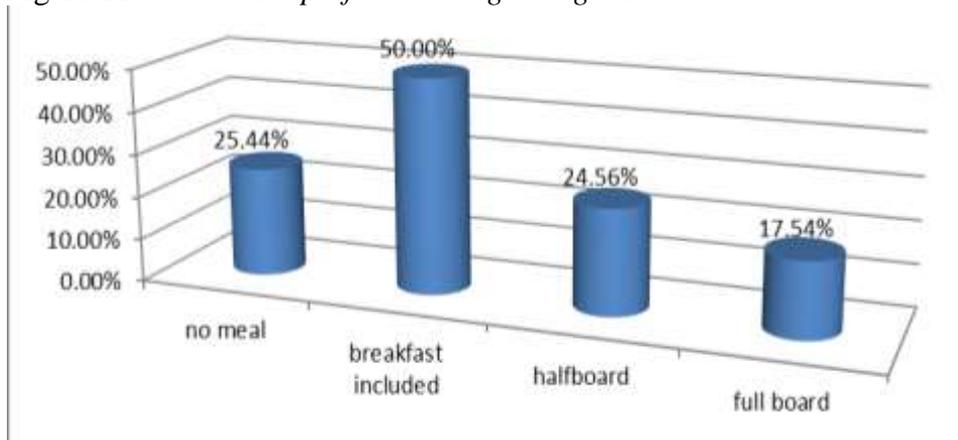


Source: Survey data

Even before the COVID-19 health crisis, Romanian tourists preferred to purchase tourism services by phone / e-mail reservation or specialized sites. Few (28%) are those who stay / go on vacations without prior reservation, preferring to make on-the-spot reservations. A number of 693 people among those surveyed (86.84%) considering that the purchase of tourism services by reservation with the prior selection of conditions would be their

option in the future because they would not have unpleasant surprises at the destination (Figure 10).

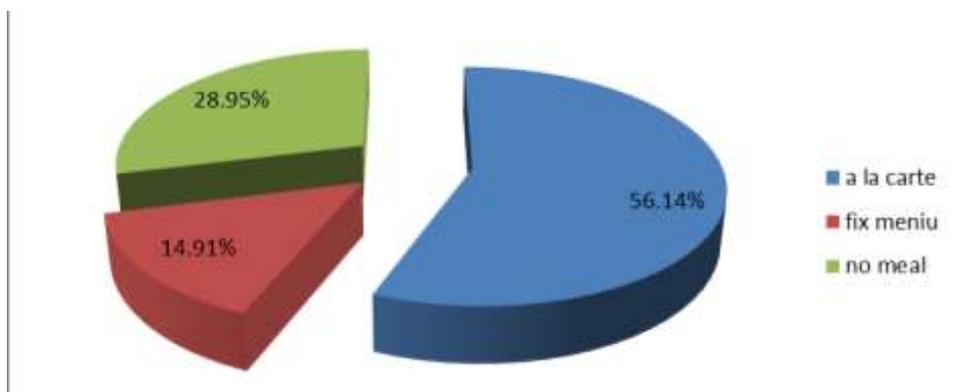
Figure 11: Consumers preferences regarding meals services



Source: Survey data

Given that most Romanian tourists stay / go on vacations to have as good time as possible and to relax, most of those interviewed prefer accommodation services only with breakfast included. Families with young children or the elderly prefer accommodation with half board or full board (Figure 11).

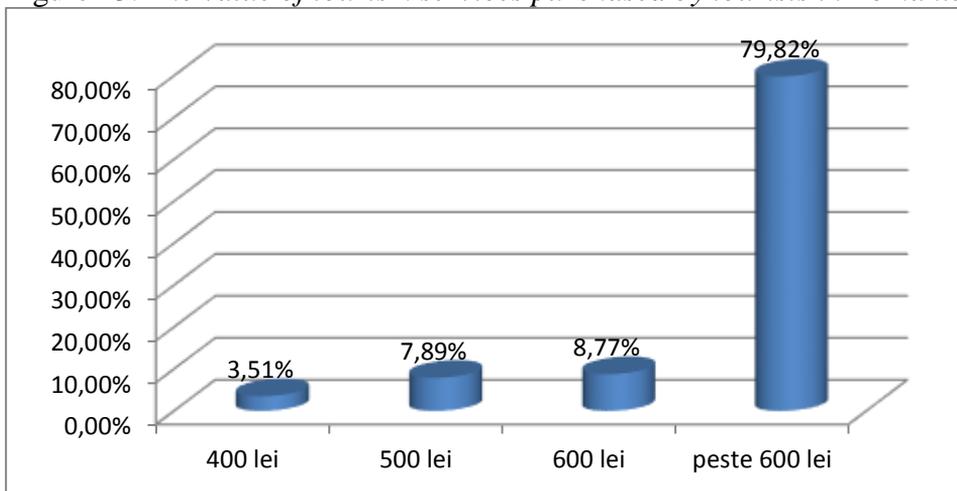
Figure 12: Tourism consumer preferences regarding the selection of meal services



Source: Survey data

A number of 448 people (56.14%) prefer a la carte dining services, 119 people (14.91%) prefer a fixed menu, the remaining 231 people (28.95%) purchasing accommodation services without meals in order to be able to make trips and hikes (Figure 12).

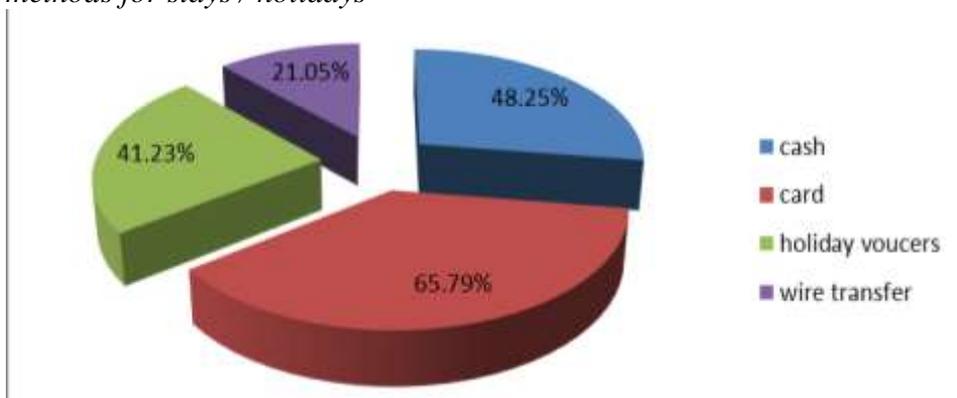
Figure 13: *The value of tourism services purchased by tourists in Romania*



Source: *Survey data*

Taking into account the length of stays, the selected conditions and the prices for accommodation and meals, the interviewees estimated that the amounts paid were over 600 lei / stay / vacation (for 80% of them), while for 3.51% the amounts paid were only 400 lei (Figure 13).

Figure 14: *Tourism consumers' preferences regarding the payment methods for stays / holidays*



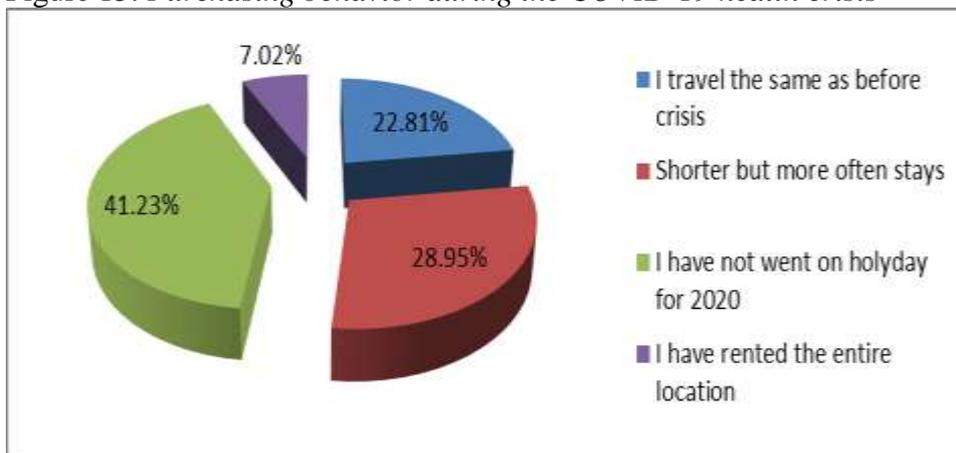
Source: *Survey data*

Less than half (48%) of the respondents use cash to pay for accommodation and meals purchased in Romania, the rest using electronic means of payment. The explanation is given by the fact that many people over 65 do not have a bank card or do not trust that banks pay for these services on time (Figure 14).

A number of 329 people (41.23%) of those surveyed did not go anywhere in 2020, 231 people (28.95%) had shorter but more frequent stays, they prefer round trips on the same day or with a maximum of 1 night's accommodation (Figure 15).

There are also people who left after the state of emergency with the same frequency as before the onset of the health crisis (182 people representing 22.81%). In addition to these, a niche business has emerged that addresses those leaving with extended family or a group of friends and acres have refocused by renting the entire location for a longer period of time (Figure 15).

Figure 15: *Purchasing behavior during the COVID-19 health crisis*

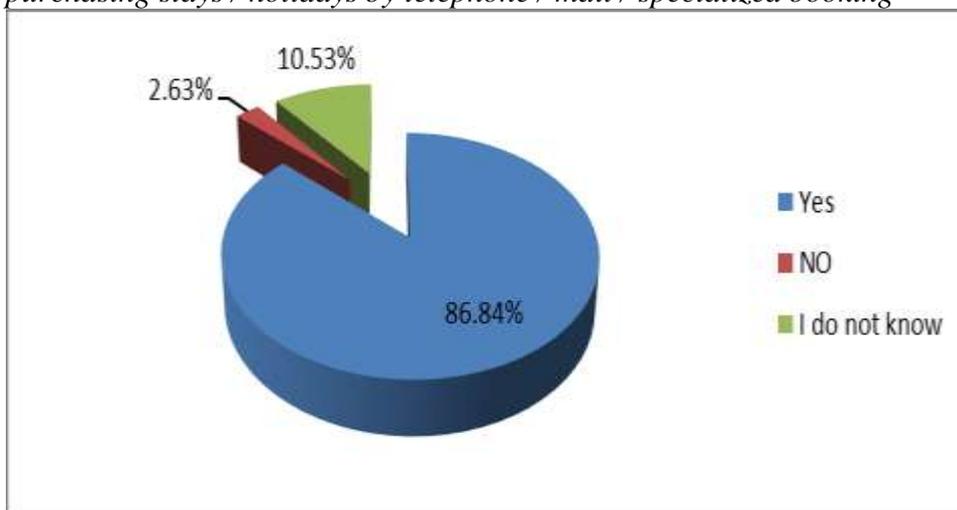


Source: *Survey data*

The health crisis has brought or extended certain habits or preferences of Romanian tourism consumers. These include the ways of purchasing tourism services. If until 25-30 years ago people went on vacation / stayed without too much information about the location where they arrived, nowadays, the development of the internet has led to an explosion of information about accommodation conditions, dining conditions, recreation possibilities, so that decisions to leave for a particular destination

are made in an informed manner. Reservations made by electronic means offer tourists the certainty of accommodation obtained, in the conditions selected by them and at the prices desired by them, and the certainty of occupancy of the rooms to hoteliers or owners of tourist / agritourism pensions. As shown in Figure 16, the vast majority of respondents (86.86%) will continue to purchase domestic tourism services via email / Facebook / specialized platforms, which are more convenient, even after the end of the health crisis.

Figure 16: *Purchasing behavior during the COVID-19 health crisis*
Tourism consumers' preferences regarding the continuation of the ways of purchasing stays / holidays by telephone / mail / specialized booking



Source: *Survey data*

Of course, this could take any form of tourism, such as leisure, cultural, professional, or rural tourism. Rural tourism embraces all tourist activities carried out in rural areas, with the aim of capitalizing on the natural and human potential of villages (Marin & Rodino, 2020).

Conclusions

The tourism consumers who answered this survey are generally women, aged between 36-49 years, employed, with a family income of over 4,500 lei (almost 1000 Eur) / month, with families with 1-2 children. Out of the total number of interviewees, most of them frequently consume tourism services, all year round, whenever they have the opportunity to leave,

regardless of whether their stay / vacation is at the seaside / in the mountains or in areas with interesting landscapes or tourist objectives.

Romanians are satisfied with local tourism services, the average duration of departures varying between 5-20 days a year. Accommodation and meals are very important, especially for families with children and people over 65. Consumer preference is directed to accommodation at the hotel / tourist or agrotourism pension with breakfast or half board included. About three quarters of those surveyed make reservations online and pay using electronic means of payment.

The category of opportunities arising from the health crisis also includes the rapid relocation of many activities online, including the sale of tourism services, which in the long run create a niche sector for those who have identified change in time.

The pandemic situation, through its limitations, whether they are sanitary, geographical or economic, rewrites the way business is done globally, all those involved in the tourism business being severely affected.

Tourism is an essential sector that needs to be protected during this crisis. It can provide potential for development of rural economy and the much-needed recreation for people. It is a concern and also a requirement of most HoReCa organizations in Europe, not just Romanian ones. In fact, the European Commission is working to create a framework through which they can access aid from European funds, in order to overcome this crisis.

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