

2nd

**International
Scientific
Conference**

**1-3 June, 2017
Vrnjačka Banja, Serbia**

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**TOURISM
IN FUNCTION OF DEVELOPMENT
OF THE REPUBLIC OF SERBIA**

**Tourism product as a factor of competitiveness of
the Serbian economy and experiences of other countries**



**THEMATIC
PROCEEDINGS
II**



**UNIVERSITY OF KRAGUJEVAC
FACULTY OF HOTEL MANAGEMENT
AND TOURISM IN VRNJAČKA BANJA**



TERTIALIZATION OF A TRANSITIONAL ECONOMY - AN OVERVIEW OF ROMANIAN TOURISM DURING 2005-2015

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Abstract

Tourism is a quite important economic activity in Romania, with a major impact in valuing the inland potential which is yet unexploited enough. Tourism has become an attribute of the modern societies, and the evolution of lifestyle has changed radically the perception on this activity. The development of tourism has direct influences on the national economy by increasing tourism share in GDP, creating jobs, but also by developing sectors contributing to tourism. The main aim of this study is the overview of the evolution of the Romanian tourism by analyzing some determinant touristic indicators in the period 2005-2015. Among the considered indicators are the number of arrivals and of overnights in the tourism structures with accommodation functions, the number of tourism structures and their accommodation capacity, separately for foreign and Romanian visitors, as well as for different tourism destinations. The conclusions after carrying out the analysis are that the Romanian tourism is competitive and it has important effects in assuring sustainable economic development for the inland economy.

Key words: *tourism, touristic destinations, activity, accommodation, overnight stays.*

JEL: *L83, Q26, Q56*

Introduction

Analyzing the influence and evolution of the Romanian tourism during a 10-year-long period of time, from 2005 to 2015, represents a topic with a

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high implication on the transformation of the inland economy. For Romanian economy, tourism has become an important activity in valuing the inland economic potential which could trigger an important economic development if it is properly valued and explained. In the process of achieving a well and high competitive market economy, tourism is now seen as a factor with a high economic potential, which could mobilize important resources in the economy, taking into account the fact that it is a branch in a continuous transformation and innovation.

As it was already stated in the previous studies (Gogonea et al., 2017; Butnaru & Nita, 2016, Andrei et al., 2014, Andrei & Ungureanu, 2014), Romanian tourism has registered a major tendency in valuing its internal potential of growing and it could be counted among the sustainable economic branches in Romania.

Tourism is an economic sector with a multiplier effect on several other sectors, however, it is not insensitive to the current difficult situation experienced not only by the Romanian economy but throughout the world economy. The strategic importance of tourism for the economy is given by its contribution in creating Gross Domestic Product (GDP). Compared to the direct competitors, the Romanian tourism is not very successful (Moraru, 2012). As (Minciu, 2000) argues, tourism is not only one creator of GDP, but has an important contribution to value added (Minciu, 2000).

In this study, by using an analysis of the statistical data published by the National Institute of Statistics, it is tried to highlight the main aspects of the evolution of the tourism in Romania during the 2005-2015 period, especially from the point of view of the type of tourism (as much as allowed by the quoted data).

The analysis of the impact and the evolution of tourism in a transitional economy as Romania is a topic of interest in literature. Numerous studies (Buiga et al., 2017; Anghelache et al., 2017; Strat et al., 2016; Manole et al., 2016), having as major topics and results the evolution of tourism is now intersecting with collateral research subjects as the study of the effects of the global crisis on the Romanian tourism (Iftime & Podina, 2013, Costea, 2009; Stănciulescu & Micu, 2009), considerations on the development of sustainable forms of tourism (Mazilu & Popescu, 2010, Rotariu, 2008, Boghean, 2007; Nistoreanu, 2007); the touristic activity in different destinations (Moraru, 2012, Cristureanu & Bobirca, 2006, Harja, 2009). In carrying out this study and performing a quick investigation in

the field, it was remarked that there are plenty of studies in literature dealing with statistics of different forms of the tourism in Romania during 2005-2015, with some results and conclusions similar to those of the present work (Chiriac, 2009). As regarding the literature, the last decade, especially, recorded the publishing of different studies referring to different elements of the tourism phenomena, the way of organization and functioning of the tourism activities.

Romanian tourism in terms of statistical indicators

One of the benefits of tourism is the reduction of unemployment by creating new jobs. Many countries have turned tourism into a key industry for the areas where there were no other industries and where the local communities had no income sources allowing them a decent way of living (Moraru, 2012).

For a comparative and complex analysis of the Romania tourism during 2005-2015, several representative statistical datasets was used taking into account the indicators useful to characterize the tourism activity for the eight regions. In this case, we consider the following: the population employed in tourism, the GDP in tourism, the existing tourism accommodation capacity, the tourism accommodation capacity in use; the index of net use of accommodation capacity in use by category of comfort, the number of arrivals (tourists stay), and the number of tourism accommodation units (total) (INS, 2017).

As (Stănciulescu & Micu, 2009) remarks, the most important features of the labor-intensive tourism jobs consist of living high and training complex, direct worker-client relationship, marked seasonality and use of model work on a part-time basis.

In Romania, the tourism sector is facing a shortage of qualified and trained personnel. This negatively influences the overall performance of tourism services. Employment in tourism industries is characterized by varying seasonal and regional demand for jobs, which is dictated by the respective peak activities.

Table 1: *The employment, by main activity of tourism, 2005-2015*

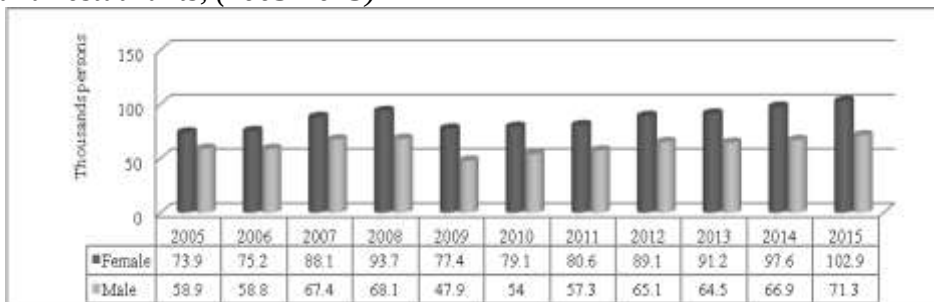
	2005	2007	2009	2011	2013	2014	2015
Totals	8390.4	8725.9	8410.7	8365.5	8530.6	8431.7	8340.6
Female	3965.3	4081.7	3964	3977.3	4005.8	3953.3	3847.8
Male	4425.1	4644.2	4446.7	4388.2	4524.8	4478.4	4492.8
Hotels and restaurants	132.8	155.5	125.3	137.9	155.7	164.5	174.2
Female	73.9	88.1	77.4	80.6	91.2	97.6	102.9
Male	58.9	67.4	47.9	57.3	64.5	66.9	71.3
Share %	1.6	1.8	1.5	1.6	1.8	2.0	2.1
Share %	1.9	2.2	2.0	2.0	2.3	2.5	2.7
Share %	1.3	1.5	1.1	1.3	1.4	1.5	1.6

Source: *author's based on (INS, 2017)*

Tourism is a field affected by seasonality specific to this sector, but creating jobs, as reflected in Table 1, where one can see that in 2015 there were 174,200 employed persons in Romanian tourism, with more than 41,400 persons than in 2005 and more than 9,700 persons in 2014 (INS, 2017). Showing a positive trend, we can say that tourism remains a sector that can absorb, even in crisis situations, people unemployed from other sectors.

As could be remarked from Table 1 and Fig.1, the tourism industries account for 2.1% of people employed in the services sector. In absolute terms, Romania had the highest employment in tourism industries in the 2015 (174,200 employed persons) (INS, 2017).

Figure 1: *The evolution of civil economically active population in Hotels and restaurants, (2005-2015)*



Source: *Author's own calculations based on (INS, 2017)*

The tourism industry is a major employer of women (Table 1, Figure 1). Compared with the total non-financial business economy, where 46.13 %

of people employed are female, the labour force of the tourism industries includes more female workers (59.07%) than male workers.

Statistical data on Romanian international tourism

Considering that the tourism product is the result of work performed by different operators, tourism involves many components with stimulating and training effects, both of production of tourism industry and other industries in the economy participating directly or indirectly to the economic growth process. In this context we consider the identification of tourism elements (tourism indicators) present in the Romanian tourism industry, activity in the economy and the need to develop strategies and policies of the institutions of decision (Cioban, 2015).

For further analysis, we discuss the existing accommodation capacity representing the number of tourist accommodations listed in the last reception, approval and classification act of the establishment of tourists' reception with functions of tourists' accommodation, excluding additional beds that can be installed if necessary.

The most important component of the technical and material basis of tourism is the network of accommodation units, because it responds to a fundamental need of tourism: the rest, spending the night (Mazilu, 2008). Romania benefits from a quite extensive hospitality network (Cristureanu & Bobirca, 2006). The accommodation sector is now all but fully privatized, with 6,821 accommodation units in 2015, representing a growth of 61.4% compared to 2005. Of the 6,821 establishments, 91.80% are private property and only 1.52% entirely owned by the State.

In the analyzed period, 2005-2015, the number of accommodation units in resorts experienced a growth trend, i.e. from 4,226 units in 2005 to 6,821 accommodation units in 2015. Since the average growth index is greater than 100%, we consider that the number of accommodation units in Romania is progressing due to the economic context of Romania and the European Union (Eurostat, 2017; INS, 2017).

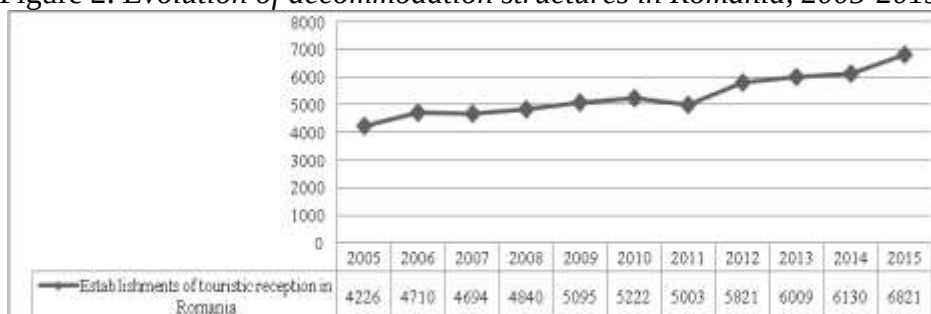
Table 2: *Evolution of accommodation structures in Romanian, 2005-2015*

Year	Absolute indicators			Relative indicators				Annual average			
	Level indicators	Absolute changes		Index dynamics		Growth rate		$\bar{Y}$	Δ	$\bar{I}$	$\bar{R}$
	Establishments of touristic reception in Romania	$\Delta_{i/1}$	$\Delta_{i/i-1}$	$I_{i/1}$	$I_{i/i-1}$	$R_{i/1}$	$R_{i/i-1}$				
2005	4226	0				0		5324.6	259.5	1.05	0.05
2006	4710	484	484	1.11	1.11	0.11	0.11				
2007	4694	468	-16	1.11	1.00	0.11	0.00				
2008	4840	614	146	1.15	1.03	0.15	0.03				
2009	5095	869	255	1.21	1.05	0.21	0.05				
2010	5222	996	127	1.24	1.02	0.24	0.02				
2011	5003	777	-219	1.18	0.96	0.18	-0.04				
2012	5821	1595	818	1.38	1.16	0.38	0.16				
2013	6009	1783	188	1.42	1.03	0.42	0.03				
2014	6130	1904	121	1.45	1.02	0.45	0.02				
2015	6821	2595	691	1.61	1.11	0.61	0.11				
Totals	58571										

Source: Author's own calculations based on (INS, 2017)

The dynamics of change in the accommodation structures in Romania are steadily increasing, when in 2015 they register a maximum of 161% compared to 2005 (year in with the minimum value recorded - 4, 226 accommodation units).

Figure 2: *Evolution of accommodation structures in Romania, 2005-2015*



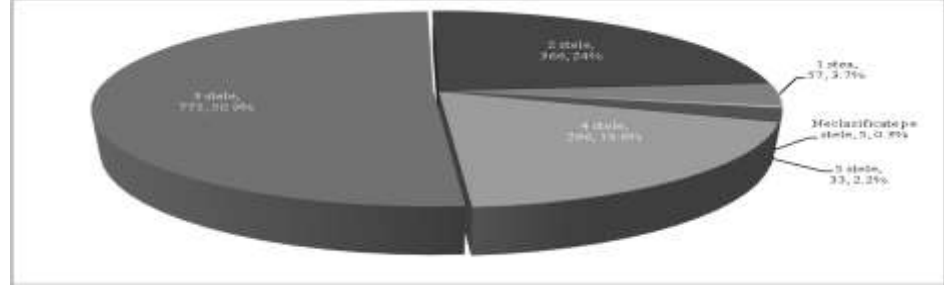
Source: Author's own calculations based on: (INS, 2017)

According to (INS, 2017), as far as the accommodation offer in Romania in 2015 is concerned, by type of units, it can be noticed that the largest

share is held by tourist and agro tourist pensions (50.5%), followed by hotels with a share of about 22.3% (1,522 units).

Significant share of hotels can be explained by the fact that these accommodation units have a complex profile, a slightly higher level of comfort than other accommodation facilities and offer their clients a much wider range of services. The total number of hotels was 1,522 in 2015, out of which: 33 were five-star hotels, 286 four-star hotels, 775 three-star hotels, 366 two-star hotels and 57 – one-star hotels. 69.71% of the hotel stock is at the upper end of the market, namely, they are three- and four-stars hotels (INS, 2017).

Figure 3: *Share of the Hotels in Romania by the level of comfort in 2015*



Source: *Author's own calculations based on (INS, 2017)*

The situation is different if we analyze the number of beds. Thus, during 2005-2015, there is an alternation of increases and decreases at a capacity of 283,194 beds in 2005 to 328,313 in 2015. The existing tourist accommodation capacity available in Romania, on the overall, had a relatively continuous upward trend from year to year, with some exceptions.

Table 3: *Evolution of existing touristic accommodation capacity in Romanian, 2005-2015*

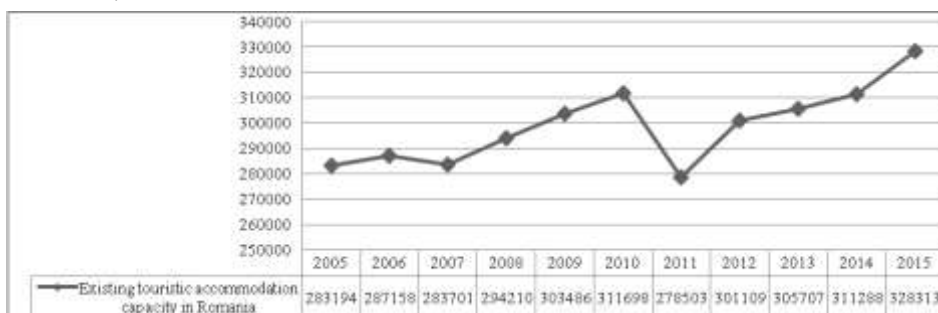
Year	Absolute indicators			Relative indicators				Annual average			
	Level indicators	Absolute changes		Index dynamics		Growth rate		$\bar{Y}$	Δ	$\bar{I}$	$\bar{R}$
	Existing touristic accommodation capacity in Romania	$\Delta_{i/1}$	$\Delta_{i/i-1}$	$I_{i/1}$	$I_{i/i-1}$	$R_{i/1}$	$R_{i/i-1}$				
2005	283,194	0				0		298,942.5	4,511.9	1.01	0.01
2006	287,158	3,964	3,964	1.01	1.01	0.01	0.01				
2007	283,701	507	-3,457	1.00	0.99	0.00	-0.01				
2008	294,210	11,016	10,509	1.04	1.04	0.04	0.04				

2009	303,486	20,292	9,276	1.07	1.03	0.07	0.03				
2010	311,698	28,504	8,212	1.10	1.03	0.10	0.03				
2011	278,503	-4691	-33,195	0.98	0.89	-0.02	-0.11				
2012	301,109	17,915	22,606	1.06	1.08	0.06	0.08				
2013	305,707	22,513	4,598	1.08	1.02	0.08	0.02				
2014	311,288	28,094	5,581	1.10	1.02	0.10	0.02				
2015	328,313	45,119	17,025	1.16	1.05	0.16	0.05				
Totals	3,288,367										

Source: *Author's own calculations based on (INS, 2017)*

Regarding the dynamics of the changes in accommodation in Romania during 2005-2015, it can be argued that there were some fluctuations, with the recorded maximum of 116% in 2015 compared to 2004, and the minimum value is noted in the year 2011, i.e. 98%, as compared to 2005. During the period 2005-2015, tourist accommodation capacity in Romania has been on a yearly average of 298,942.5 places, an increase of 4,511.9 positive environmental places, thus representing an annual progress relative of 1%. Even if after integration into the European Union the number of accommodation has increased steadily until 2010 (311.698 beds), in the following year there is a significant decrease in their number reaching a lower even than in the 2005 (base year analysis) (Eurostat, 2017).

Figure 4: *Evolution of existing touristic accommodation capacity in Romania, 2005-2015*



Source: *Author's own calculations based on (INS, 2017)*

The analysis of the indicators shows that in 2011 the existing tourism accommodation capacity decreased by 11%, compared to 2010; namely, from 311,698 seats to 278,503 (INS, 2017).

As it is argued in literature (Oroian & Ghereș, 2013; Neacus et al., 2006), the tourist accommodation capacity in operation is the number of

accommodation places available to tourists by accommodation units, taking into account the number of days the units are opened during the period considered. Excluded places in rooms or units temporarily closed due to the lack of tourists, for repair or other reasons. The tourist accommodation capacity in operation registered an upward trend after 2005. It can be appreciated that the evolution of tourist accommodation capacity in operation during 2005-2015 (thousands of places-days) is steadily increasing, registering a maximum of 141% in 2015 compared to 2005, and the minimum value was in 2005. During the period 2005-2015, the tourist accommodation capacity in operation in Romania recorded an annual average of 66,531,617.9 places-days, a positive average increase of 2,689,370.1 places-days, which represents a progress annually relative to 4% (INS, 2017).

Table 4: *Evolution of touristic accommodation capacity in function in Romania, 2005-2015*

Year	Absolute indicators			Relative indicators				Annual average			
	Level indicators	Absolute changes		Index dynamics		Growth rate		$\bar{Y}$	Δ	$\bar{I}$	$\bar{R}$
	Touristic accommodation capacity in function in Romania	$\Delta_{i/1}$	$\Delta_{i/i-1}$	$I_{i/1}$	$I_{i/i-1}$	$R_{i/1}$	$R_{i/i-1}$				
2005	54,978,838	0				0		66,531,179	2,689,370.1	1.04	0.04
2006	56,499,904	1,521,066	1,521,066	1.03	1.03	0.03	0.03				
2007	57,137,649	2,158,811	637,745	1.04	1.01	0.04	0.01				
2008	59,187,968	4,209,130	2,050,319	1.08	1.04	0.08	0.04				
2009	61,104,435	6,125,597	1,916,467	1.11	1.03	0.11	0.03				
2010	63,808,286	8,829,448	2,703,851	1.16	1.04	0.16	0.04				
2011	68,417,259	1,343,842 1	4,608,973	1.24	1.07	0.24	0.07				
2012	74,135,614	1,915,677 6	5,718,355	1.35	1.08	0.35	0.08				
2013	77,028,488	2,204,965 0	2,892,874	1.40	1.04	0.40	0.04				
2014	77,676,817	2,269,797 9	648,329	1.41	1.01	0.41	0.01				
2015	81,872,539	2,689,370 1	4,195,722	1.49	1.05	0.49	0.05				
Totals	731,847,797										

Source: Author's own calculations based on (INS, 2017)

In conclusion, the accommodation offer available to our country should be diversified by making investments in the field. These investments should be developed taking into account the existing regional and local tourism demand. Another aspect to be highlighted when developing strategies at central level is the diminishing of the negative effects of seasonality on the accommodation offer.

Table 5: *The evolution of the structures and the accommodation capacity, 2005-2015*

Index	2005	2007	2009	2011	2012	2013	2014	2015	I (%)	R (%)
Accommodation structures (number)	4226	4694	5095	5003	5821	6009	6130	6821	104.9	4.9
Evolution (%)	100	111.1	120.6	118.4	137.7	142.2	145.1	161.4		
Existing touristic accommodation capacity (places)	283194	283701	303486	278503	301109	305707	311288	328313	101.5	1.5
Evolution (%)	100	103.9	110.1	98.3	106.3	109.9	115.9	115.9		
Tourism accommodation capacity in function (thousands places-days)	54978	57137	61104	68417	74135	77028	77676	81872	104.1	4.1
Evolution (%)	100	103.9	111.1	124.4	134.8	140.1	141.3	148.9		
Index of net using the tourism accommodation capacity	33.4	36	28.4	26.3	25.9	25.1	26.1	28.7	98.5	-1.5
Evolution (%)	100	107.8	85.0	78.7	77.5	75.1	78.1	85.9		

Source: *Author's own calculations based on (INS, 2017)*

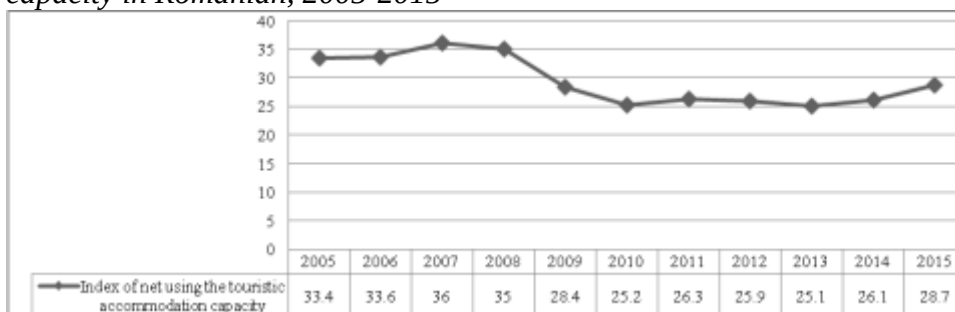
Analyzing the data in Table 5 during the eleven years compared to 2005, the key indicators of accommodation capacity are characterized by the following:

- The increase in the number of units, with an average annual rate of + 4.9%, which can be explained either by the opening of certain units that were upgraded or by building of new accommodation facilities;
- Fluctuations on the existing accommodation capacity, with a revival for the years 2005-2015, with a growth rate of + 1.5%;

- The increase in the accommodation capacity in operation, with an average annual rate of + 4.1%, owners finding ways to reduce tourism activities (meetings, team-building events, conferences, etc.).
- Decreasing occupancy, with an average annual rate of -1.5%, on one hand, because tourists prefer to spend less time in the accommodation unit and on the other, there is a still unsatisfactory level of service quality compared to the prices.

Analyzing the growth indices with fixed base (shown in 2005), the upward trend of housing units was recorded due to the new investments in material and technical basis of tourism and a significant increase in tourism demand. The same trend was registered in accommodation capacity, but rather modest compared to the growth rate of housing units in Romania. The occupancy rate of the accommodation capacity has experienced considerable fluctuations, as shown in Fig. 5, standing at 28.7 in 2015. After the occupancy reached the maximum value for the analyzed period in 2007, there is a continuous decrease until 2013. From 2013 onwards, there is a slight revival of this indicator. Unfortunately, for Romanian tourism, this increase in the employment rate is still insignificant, because at the level of 2015 we register a value of 28.7%, 4.7% less than the value recorded in 2005 (33.4%).

Figure 5: *Evolution of index of net using the tourism accommodation capacity in Romanian, 2005-2015*



Source: *Author's own calculations based on (INS, 2017)*

As (Stanciulescu & Micu, 2009) remark in their study, the values of this indicator are annual averages, which are oscillating from one month to another as a result of the seasonality phenomenon affecting tourism activity. Romanian tourism potential offers various opportunities for sustaining tourism sector growth. In the last decades, different tourism forms were developed such as mountain tourism, seaside tourism, balneal

tourism, cultural tourism, rural tourism, business tourism and so on (Surugiu et al., 2009).

Analyzing the (INS, 2017) datasets, from a total of 328,313 existing touristic accommodation capacity in 2015, the distribution by touristic destination was: Bucharest and county residence town, excluding Tulcea – 26.1%; Seaside, excluding Constanta town – 24.8%; Other localities and touristic routes – 19.7%; mountain resorts – 17.4%; Spas – 10.9% and Danube Delta area, including Tulcea town – 1.1%.(INS, 2017).

Evolution of tourist flows to and from Romania in the period 2005 - 2015

Arrivals of tourists during 2005-2015 period. As it can be noted from (INS, 2017), between 2005 and 2015, tourists' arrivals at the border fluctuated between 5.8 million in 2005, 7.1 million in 2008 and 9.9 million in 2015. This trend can be related to the overall evolution of the economic conditions, social situation and politics that marked Romania in the period under observation.

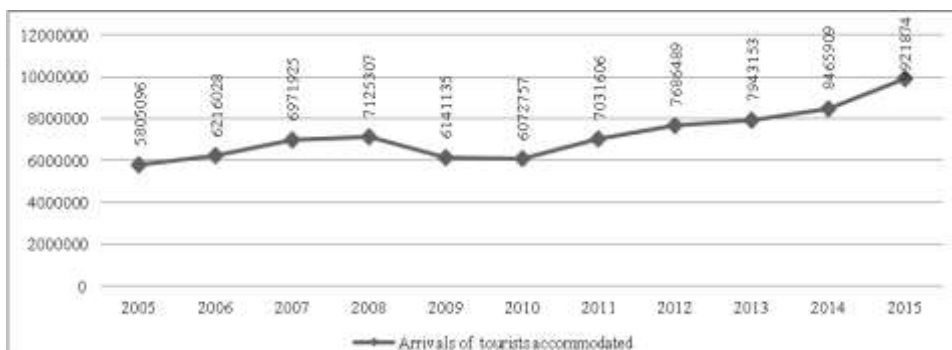
Table 6: *Arrivals of tourists in tourist accommodation establishments with tourism accommodation functions, 2005-2015*

Year	Absolute indicators			Relative indicators				Annual average			
	Level indicators	Absolute changes		Index dynamics		Growth rate		$\bar{Y}$	Δ	$\bar{I}$	$\bar{R}$
	Arrivals of tourists accommodated	$\Delta_{i/1}$	$\Delta_{i/i-1}$	$I_{i/1}$	$I_{i/i-1}$	$R_{i/1}$	$R_{i/i-1}$				
2005	5,805,096	0				0		7216479.9	411677.8	1.06	0.06
2006	6,216,028	410,932	410,932	1.07	1.07	0.07	0.07				
2007	6,971,925	1,166,829	755,897	1.20	1.12	0.20	0.12				
2008	7,125,307	1,320,211	153,382	1.23	1.02	0.23	0.02				
2009	6,141,135	336,039	-984,172	1.06	0.86	0.06	-0.14				
2010	6,072,757	267,661	-68,378	1.05	0.99	0.05	-0.01				
2011	7,031,606	1,226,510	958,849	1.21	1.16	0.21	0.16				
2012	7,686,489	1,881,393	654,883	1.32	1.09	0.32	0.09				
2013	7,943,153	2,138,057	256,664	1.37	1.03	0.37	0.03				
2014	8,465,909	2,660,813	522,756	1.46	1.07	0.46	0.07				
2015	9,921,874	4,116,778	1,455,965	1.71	1.17	0.71	0.17				
Totals	79,381,279.0										

Source: *Author's own calculations based on: (INS, 2017)*

The dynamics of the number of tourists' arrivals in accommodation establishments with tourism accommodation functions during the period 2005-2015 may be appreciated as being rising in the year 2015, when the maximum value of 171% is recorded. Compared to 2008, in 2009 and 2010 there was a decrease in the number of tourists arrivals.

Figure 6: *Arrivals of tourists in reception facilities with the functions of accommodation, 2000-2011*



Source: *Author's own calculations based on (INS, 2017)*

In terms of tourism in accommodation spaces in Romania - the number of accommodated tourists and overnights showed significant increases for 2015 (Table 7), instead the average length of stay decreased from 3.2 days in 2005 to 2.4 days in 2015, due to the tendency of sharing vacancies and intensifying the itinerant tourism.

Table 7: *Evolution of accommodated tourists, overnight stays and average stay time in Romania, 2005-2015*

Index	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	I (%)	R (%)
Number of tourists accommodated (thousand)	5805	6216	6971	7125	6141	6072	7031	7686	7943	8465	9921	105.5	5.5
Evolution (%)	100	107.1	120.1	122.7	105.8	104.6	121.1	132.4	136.8	145.8	170.9		
Number of overnight stays (thousands)	18372	18991	20593	20725	17325	16051	17979	19166	19362	20280	23519	102.5	2.5
Evolution (%)	100	112.1	112.8	94.3	87.4	87.4	97.9	104.3	110.4	128.0	128.0		
Average duration of staying	3.2	3.1	3.0	2.9	2.8	2.6	2.6	2.5	2.4	2.4	2.4	97.2	-2.8
Evolution (%)	100	96.5	93.3	91.9	89.1	83.5	80.8	78.8	77.0	75.7	74.9		

Source: *Author's own calculations based on (INS, 2017)*

Arrivals in the main reception facilities with accommodation functions by type of structure in 2015

Out of 9,921,874 arrivals, 7.21 million tourists, namely 72.70% used reception facilities as the type of accommodation structure, despite the fact that Romanian hospitality industry faces major problems such as the persistence of sub-standard accommodation structures, especially in spa and seaside/mountain resorts; the lack of coagulation of business interests; the chronic lack of coherent policies - here is also the fault of employers - concerning strategies for training, recruitment, promotion, motivation and loyalty of human resources, resulting in the low quality of services; the lack of adequate road infrastructure - motorways, modern and safe roads - for both personal and motorized tourism.

Table 8: *Arrivals in main reception structures in 2015, by types of structures*

Types of tourist accommodation structures	Number of tourists
Total	9,921,874
Hotels	7,214,613
Hostels	258,106
Apartment hotels	59,249
Motels	259,961
Inns	1,994
Touristic villas	291,540
Touristic chalets	94,976
Bungalows	24,491
Holiday villages	5,932
Camping sites	60,723
Touristic halting places	17,772
Houselet type unit	11,798
School and pre-school camps	48,109
Touristic boarding houses	899,494
Agroturistic boarding houses	672,756
Ships accommodation spaces	360

Source: *Author's own calculations based on (INS, 2017)*

The hotel industry has been severely affected by the economic crisis, starting with the occupancy rate, the average tariff, and staff deployment, tourism being the barometer of other economic branches and even of social or political life. Relansing has just begun in developed tourism countries and serious institutions. In 2015, 72.7% of all tourists opted for hotel accommodation structures. In the tourists' preferences follows the

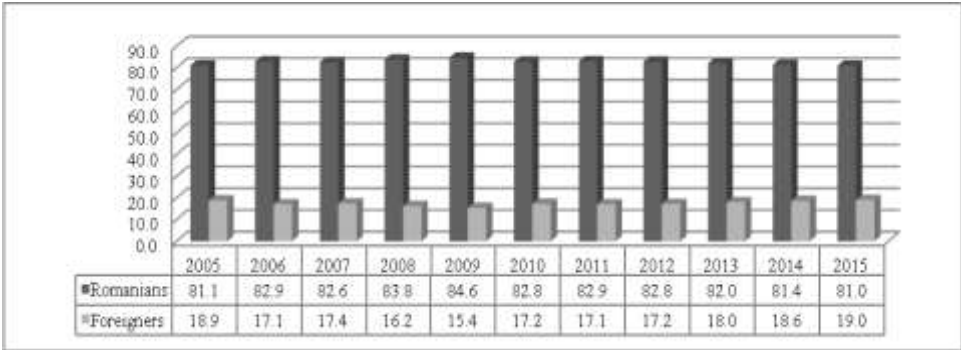
pensions, which together with the agro-touristic pensions rank on the next place with a total of 15.9%.

The distribution of arrivals and of spending the night of foreign tourists in tourism areas is of great importance. As it can be remarked by analyzing (INS, 2017), the urban tourism (the county capitals areas including Bucharest) is the form of tourism practiced by the foreign tourists (51.3%). To this we add the areas surrounding other towns with 16.5%. The mountainous areas and the seaside areas have a very small share of 15.4% and 8.3%, and the treatment resort areas even a smaller one of 7.9%. The Danube Delta has the smallest share of only 0.7%.

From the point of view of the spatial distribution, the receiving tourist flow has seen a strong concentration, as shown in the following table. Most of the tourists who visited Romania in the period 2005-2015 were Europeans, i.e. 93%, or 8.678 thousand out of a total of 9.331 thousand in 2015. In 2005, out of a total of 5,522 thousand arrivals of tourists in Europe, 51.9% came from the European Union (Eurostat, 2017). Ten years later, the number of tourists in Europe has increased to 8,678 thousand arrivals and the share of those in the European Union has increased to 61.6%. From the point of view of the country of origin, Hungarian visitors occupy the first position in 2015 with 1,661 thousand, followed by Moldova 1,633 thousand at a small distance. The podium is closed by the neighbors south of the Danube with 1,524 thousand tourists (Eurostat, 2017).

In the same manner, the number of overnight stays increased from 18,372 thousands in 2005 to 23,519 thousands in 2015, giving an increase of +28.0%. Again, increasing the number of overnight stays for foreign tourists was higher (+27.8%) than the one of Romanian tourists (+29.1%). It is important to mention that foreign tourists (Fig. 7) represent less than 20% from the total overnight stays. Therefore, it can be concluded that *tourism in Romania is mainly based on domestic customers*. Romanian tourism share is constantly high exceeding 84.6% in 2009, but decreasing to 81.0% in 2015.

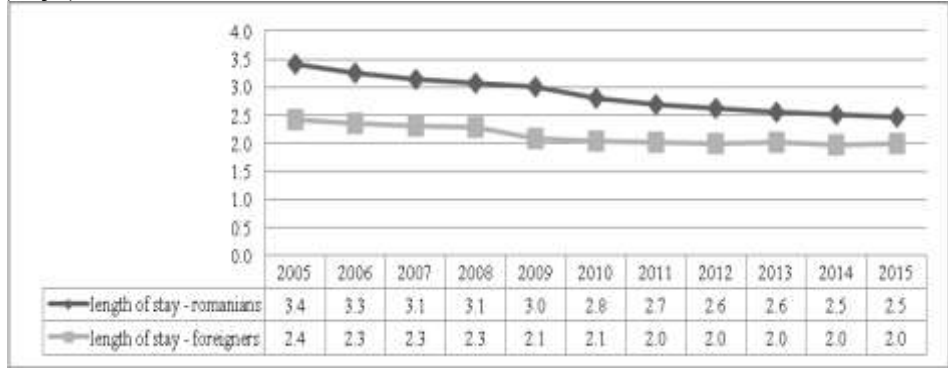
Figure 7: *Foreigners vs. Romanians share in overnight stays registered in the Romanian establishments, 2005-2015*



Source: *Author's own calculations based on (INS, 2017)*

Considering arrivals and overnight stays figures, the average length of stay could be computed. Therefore, in the period 2005-2015, the average length of stay in accommodation establishments has significantly dropped for foreign tourists, which it the trend followed by the Romanian tourists, however, only after a short period of increase (1996-2001). Nevertheless, the lowest values both for Romanian and foreigners are registered in 2015, 2.5 days for Romanians and 2.0 days for foreigners (Figure 8).

Figure 8: *Average length of stay for Romanian and foreign tourists (days), 2005-2015*



Source: *Author's own calculations based on (INS, 2017)*

Conclusions

The research allowed us to reach a series of conclusions and to suggest some recommendations.

- The Romanian tourist offer has not changed throughout the time becoming less competitive in comparison with the exigencies of the tourist request and with other similar tourism products on the international market;
- The tourist structures and mostly the entertainment offer are old, less competitive, the tourism services programs are performed as a routine and with a modest quality and the balance quality/price is inconclusive;
- Tourism development in Romania must be an objective and a means of economic and social development, in the context of the national development policy and the integration into European structures;
- The Romanian tourism has not occupied an important place in the Romanian economy, which was illustrated by the contribution to the GDP of the last ten years. The share of Romanian tourism in the national economic system is relatively small;
- To enjoy international competitiveness, Romanian tourism should increase both quantitatively and qualitatively, the number of care facilities, catering units but also the places of leisure;
- It is very important not only to modernize touring structures and resorts, but also to create new touring products, resorts, attractive original programs that can, by means of sustained activity of promotion on the international market, to redirect important touring incoming to Romania.

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