

TOURIST MARKET IN THE CURRENT POST- PANDEMIC CONTEXT

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Abstract:

The negative effects of the COVID -19 pandemic on the tourist traffic and the tourism sector have been felt globally, but to different extents, depending on the tourism regions and countries.

In Romania, the decrease recorded in tourist traffic during the pandemic period has been severe, but within the limits of the average recorded in European Union Member States and with considerably different values, depending on the categories of tourist destinations in the country.

The main challenge for Romania remains carrying out a large-scale promotion campaign on the foreign markets related to its tourist offer, given the modest results obtained so far in attracting foreign tourists, despite the tourism potential that it has. The post-COVID-19 period could represent a reset of tourism in Romania.

Key words: *tourism in Romania, COVID-19 pandemic, tourism recovery, evolution trends, strategy and innovation*

JEL Classification: Z32

1. Introduction

Tourism is the most important social, economic and cultural phenomenon in the world, being one of the most profitable sectors of the world economy. Romania is trying as much as possible to pay more attention to the development of tourism, In this sense, tourism development strategies and policies in Romania were created, tourism development programs, as well as other actions aimed at the development and innovation of tourism, in order to create or enhance a positive image of the destination brand.

Tourism and travel have been affected, after the onset of the COVID-19 pandemic, more than other economic activities, in many countries of the world, including Romania, due to the travel restrictions imposed by the authorities and the fact that, in certain periods, tourist reception structures with accommodation and food facilities for tourists were closed or could only operate within a limited capacity.

The aim of this paper is to perform a comparative analysis of the evolution of the tourism sector in Romania, after the onset of the COVID- 19 pandemic, compared to the other European Union countries and to the global developments, in order to identify some particularities of the situation in Romania. We believe that some conclusions of the performed analysis may be useful for tourism stakeholders, in the coming period, but also represent a basis for further research on some aspects related to the tourism sector and some categories of tourist destinations in Romania.

2. Literature review

2.1. Strategy and Innovation

As defined by Alfred D. Chandler, strategy is "the determination of a company's core long-term goals and objectives, as well as the adoption of courses of action and the allocation of resources to achieve those objectives" (Chandler, 1962, p. 21). Porter defined the term of "strategy" as "a broad formula, which guides a business's approach to compete on the market, defines its goals and establishes policies that will be needed to fulfill those goals" (Porter M., 1980, p. 62). In a different approach, strategy is "the framework that guides those choices that determine the nature and direction of an organization" (Tregoe, 1980, p. 142).

Innovation is a concept of interest in all fields of activity and has often been associated with human evolution. According to Schumpeter, innovation is the

introduction of new elements in a field of activity (Schumpeter, 1930, p. 8). According to Mohr, innovation means "a new use of existing products or a new market for products or even a new method of marketing." (Mohr, 1969, p. 35) According to Romanian authors, Ioan L.Gheorge P. and Monica B. (2010) innovation is described as "the introduction or modification of a new idea, product or service". (John L.Gheorge P. and Monica B., 2010, p. 12).

2.2. Tourism Marketing

Marketing is "the development of all activities necessary to ascertain the needs and demands of the market, scheduling product availability, transferring ownership of goods, their physical distribution and facilitating the entire research process related to these issues." (McCarthy E., 1964, p. 3). In the opinion of other authors, marketing is "the economic and social process by which individuals and organizations meet their needs and desires through the creation, supply and exchange with stakeholders (customers) of valuable products and services" (Ph. Kotler et al. 2006, p. 6).

Tourism marketing can be defined as a managerial process through which tourism organizations identify the actual and potential dimensions of tourism demand, communicate with demand carriers (tourists) in order to acknowledge and assess their touristic needs and stimulate their desires, motivations and preferences in order to design and adapt the offer (tourism products and services) with the purpose of optimizing and satisfying their requirements and exigencies , maximizing organizational objectives at the same time(Balaure et al., 2005).

2.3. Innovative Marketing

Andrews and Smith (1996) consider innovative marketing as a significant process that differentiates and helps the organization achieve a specific goal. (Andrews J., Smith D.C., 1996, p. 14). On the other hand, Clemmer (1998) explained that marketing innovation and creativity are the main elements that provide the key to success in an organization's business environment. (Clemmer J., 1998, p. 8). Haddad and Algadeer (2004) believe that marketing innovation reflects the firm's ability to continuously improve its products and services, which in turn helps to achieve major benefits for customers because their products and services will meet their needs in a unique way. (Haddad, Algadeer, 2004, p. 82).

3. Innovative marketing strategies in the Romanian tourism sector

Tourism services are a category of leading products that must be promoted and distributed in consumer markets through a variety of methods and using different

electronic platforms and ideologies. By using different ways and platforms, tourism organizations are allowed to innovatively approach marketing strategies, in order to attract as many customers as possible. However, in many respects, the marketing challenges faced by tourism businesses are exceptional, due to the fact that some touristic products cannot be promoted in isolation from their competing and complementary products (Middleton and Clarke, 2001, p. 238). In addition to this challenge comes the fact that the tourism industry is part of the services sector, and the tourism product is mainly a range of services. Moreover, although tourism businesses are considered to be users of new technologies, there is still an under-utilization and under-exploitation of innovative technologies as strategic marketing tools.

The innovation of marketing strategies in Romanian tourism involves the introduction and use of new, modern concepts, adapted to the new digital era, so that tourist destinations become as visible and visited as possible. Innovating tourism marketing must be aimed at improving, modernizing, changing and adapting production methods, transport, changes in hospitality services, opening new market segments, etc. Tourism marketing innovation strategies focus mainly on the use of new technologies, materials, methods and energy sources in order to develop the tourism sector and increase its profitability.

In order to develop marketing strategies for the development of tourism in Romania, as complex and efficient as possible, it is necessary to use innovation as a tool for obtaining and applying the results of scientific thinking. From this point of view, tourism is an extremely vast field for innovation as a complex transversal socio-economic system. Tourism not only creates a new product or service, but also uses innovations introduced in other areas of management. For example, hotels, travel agencies, transport companies are widely used in the field of information technology development. Creating a tourist product, tourist services, booking plane and train tickets - all these processes have reached a new level with the introduction of the latest developments in information technology.

The main strategic factors of innovation that influence the development of tourism refer to the level of scientific and technological development, economic and political stability, the availability of the relevant legislative framework and other external factors. It also implies the availability of the necessary volume of natural and financial resources, as well as the level of development of the tourist infrastructure. In order to develop tourism in Romania, the developed tourism market and the degree and type of competition must be taken into account. Quality is another important factor for innovation and attracting tourists, as well as the availability of highly qualified staff in all areas of tourism. (Verma, R., 2008, p. 4).

In the tourism marketing sector, certain specific characteristics are identified, such as the fact that tourists are temporary, being exposed to an area of goods and services for shorter periods and they must immediately feel well, the difference between daily life and "escape from everyday life". Tourists seek relaxation, to be left with beautiful memories, which is why a marketing strategy that uses innovation should consider strategies that appeal to emotions. (Chron, 2019). Also, tourism marketing innovation strategies can establish promotion mechanisms and create more development opportunities by cooperating with the organizers of local festive and cultural events, horizontal alliances and integration of resources, etc. (Yeh, et al., 2019, p.23). The inclusion of innovation strategies in tourism marketing involves following current, modern market trends. Tourism marketing must keep pace with the dynamic developments of the industry, relating to the diversity of marketing in modern organizations.

Through marketing innovation strategies it is desired to achieve the proposed objectives in the most innovative and modern ways; the complexity of tourist services and the importance of intermediaries in the distribution of tourism products must be taken into account, as well as the criteria for choosing tourist services by consumers.

Innovation in marketing policy in the field of tourism must be based on efforts at a national level and requires a coherent set of action practices, based on specific programs. Any innovation-based marketing strategy must take into account identifying its target audience, attracting new customers by understanding the behavior of the consumer of tourist services, providing high quality services and using effective promotion tactics locally and globally. (Bizfluent, 2019, p. 3).

4. Marketing tools and techniques related to new technologies

The tourism industry was among the top five economic industries that took advantage of the opportunities offered by new technologies. Since 1980, advances in technology along with globalization, has led to the emergence of the concept of e-tourism, an important segment of e-commerce which involves the application of information and communication technologies in the tourism industry; it is considered to be the future of the tourism industry.

Digital marketing is a term that encompasses all marketing processes that take place through a variety of digital channels and gadgets in order to promote the products or services of a business. The term actually means implementing marketing ideas through the use of resources such as computers, laptops, tablets,



Issue 2/2023

smartphones, digital panels, game consoles, mobile phones, digital magazines, catalogs or other digital media.

Online marketing (also known as Internet marketing or e-marketing), on the other hand, is defined as a subset of digital marketing. Online marketing involves the use of resources that require a direct connection to the World Wide Web (more specifically, the Internet) to promote a business's products and services.

The difference from online marketing is that digital marketing uses all digital platforms, digital channels and digital devices, whether online or not (including mobile marketing, video marketing, web television, etc.) . In other words, digital marketing is not limited to using the Internet. Most digital marketing activities revolve around the use of the Internet. Due to the fact that Internet access can be achieved from any type of device, we can therefore define online marketing as a component of digital marketing.

Today, in the modern world of digital business, communication between individuals and companies takes place, mostly, in the online environment, through a series of online tools and techniques. Among the most commonly used online tools are: websites, social networks, e-mail and blog, and in terms of online techniques, those that have the highest efficiency are: online advertising, online PR, online sales promotion, search engine optimization (SEO), social media marketing (SMM), e - mail marketing (via newsletter) mobile marketing (ex: through specific apps), viral marketing ("buzz" marketing or e-WOM), and online branding.

The accelerated interaction and the strong relationship between technology and tourism makes the use of information and communication technologies suitable for the target group to increase the competitiveness between organizations, between tourist destinations, but also changes the way individuals interact with the organization.

The Internet is an important marketing tool that offers tourism organizations competitive advantages, such as reducing costs, increasing revenue, conducting marketing research necessary for the development of the organization, or, in the other case, for national development, in order to identify present trends, make predictions and directing marketing and management efforts in an optimal manner.

The continuous development of information and communication technology applications makes e-tourism focus on consumer-centered technologies. Also, the adoption of new technologies makes tourism service providers more efficient towards their customers, gaining the opportunity to quickly restructure their communication strategy.

5. Research methodology

This paper is based on a longitudinal, quantitative, desk research, using mainly online data sources, but also in the classic format (Jupp 2010; Jugănaru1998).

In this article we have used, analyzed and interpreted some available statistical data on the evolution of the main indicators of tourist traffic at global, European and Romanian level, in the period after the onset of the COVID-19 pandemic, in an attempt to identify some causes of and explanations for the different evolution of these indicators, depending on the country, area or tourist region.

We have analyzed and compared a series of studies, statistical databases and reports of specialized or relevant organizations in the field of tourism, such as UNWTO, WTTC, but also Eurostat, etc., which presented the evolution of the tourism sector or that of some aspects related to it.

6. Findings

6.1. The evolution of international tourism during the COVID-19 pandemic

The number of international tourist arrivals globally plummeted by 72% in 2020 compared to 2019, from 1.466 billion to 405 million, and the value of receipts by 62%, from USD 1.483 billion to USD 546 billion.

Analyzing the evolution of the 5 major tourist regions of the world, as they have been designated by the UNWTO, we observe the decrease in the number of international tourist arrivals, globally, by 72% in 2020 compared to the previous year, and by 61% in 2021 compared to 2019. The most affected region was Asia-Pacific, with decreases of 84% in 2020 and 94% in 2021, followed by the Middle East (-73% and -75%, respectively) and Africa (-74% and -78%, respectively). The most moderate decreases were recorded in the Americas and Europe regions, with identical percentage values (-60% in 2020 and -62% in 2021).

The evolution of international tourist arrivals, by months, according to UNWTO data, shows that, worldwide, in the month of January of the year 2020, there was an increase of 2%, followed by a decrease of 14% in February, and then a real collapse (65% decrease) in March, 97% in April, 96% in May and 91% in June 2020, compared to the corresponding period in 2019. A slight increase followed in July and August, then the situation started to worsen again. The best situation was recorded in August 2020, -75% of the August 2019 level.

In the first months of 2021, the situation remained serious, with declines between 87% in February, 81% in May and 91% in June 2021, compared to the levels recorded in the corresponding periods of 2019. In the warm season, the

results were better (-63% in July and -53% in August and September), followed by slight decreases in arrivals in the following months.

In the first 3 months of 2022 the evolution was slightly better, from -66% in January to -60% in February and -56% in March, compared to the corresponding period of the year 2019.

In terms of international tourism receipts, the worst situation was recorded in the Asia- Pacific Region (-79% in 2021, compared to 2019), followed by the Americas and Africa (both with -61%), and the smallest decreases were recorded in Europe (-50%) and the Middle East (-52%).

For the first 3 months of 2022, compared to a 61% decrease globally, the number of international tourist arrivals recorded the smallest decreases, compared to the same period of the year 2019, in Europe (-43%) and the Americas (- 46%), and the most severe decrease in Asia-Pacific (-93%), with the slowest recovery (UNWTO, 2020 a).

6.2. The evolution of tourism in Romania in the 2019-2021 period

The privatization process in the field of tourism, which followed the change of the political regime at the end of the year 1989, in Romania, started slowly and lasted longer than in other activity sectors, which made the performances obtained to be relatively modest, compared to those of neighboring countries, such as Bulgaria and Hungary.

Romania's tourist accommodation capacity experienced a significant decrease after 1990, from 353,236 places in 1990 to 282,806 places in 1999 (mainly due to the removal from the tourist circuit of some old accommodation units, in which no investments were made for repairs and modernization), followed by a slight increase, so that in 2009 there were 303,486 places, and in 2019 there were 356,562 places. In 2020 and 2021, the accommodation capacity continued to increase, reaching 358,119 places, respectively 364,507. As for the number of tourist reception structures, it has grown significantly, from 3,213 in 1990, to 3,250 in 1999, 5,095 in 2009, and 8,402 in 2019. Even after the onset of the pandemic, the number of accommodation units continued to grow significantly, reaching 8,610 in 2020 and 9,146 in 2021, as many investments in building new units were underway. This increase in the capacity of tourist reception is primarily explained by the fact that many new, privately owned, mostly small-sized units, predominantly tourist villas and boardinghouses (guest houses/pensions), but also hotels, were built in the last two decades. At the same time, the level of comfort of classified tourist reception structures increased. Thus, the share of only 2.7% of the

number of places within tourist accommodation structures classified into the 3-star category in the year 1991 reached 39.6% in 2019, the share of those classified into the 4-star category rose from 0.26% to 17.6%, and those classified into the 5-star category from 0.3% to 2.5% (NIS, 2022).

However, Accommodation Capacity Net Utilization Index has seen significant decreases, from 46.7% in 1992 to 34.5% in 1999 and 28.4% in 2009. Ten years later, in 2019, the value of this indicator improved to 33.9%, yet it was still well below the level reached in 1992. Following the Covid-19 pandemic, this indicator fell dramatically to 22.8% in 2020, then rose slightly to 26.3% in 2021 (NIS, 2022).

The number of tourist arrivals in tourist reception structures with accommodation functions has experienced a sinuous evolution after 1990, in Romania, in terms of internal tourism, and especially in terms of international inbound tourism. Thus, compared to a total number of arrivals of 12,296,552 tourists in 1990, their number decreased by 58.45% until 1999, reaching 5,109,444, increasing then to 6,141,135 in 2009 and reaching a maximum of 13,374,943 tourists in 2019.

Regarding the total number of overnight stays (of Romanian and foreign tourists), the evolution was largely similar to that of the number of arrivals, with a spectacular decrease in the first decade, from 44,551,804 overnight stays in 1990, to 17,669,777 in 1999 and to 17,325,410 in 2009, followed by a considerable increase to 30,086,091 in 2019, which is still 32.5% lower than the one recorded in 1990 (NIS, 2022).

Due to the restrictions introduced during the pandemic period, the number of tourist arrivals in Romania decreased to 48% in 2020 compared to the 2019 level, the decrease being more severe in terms of foreign tourist arrivals (down to 17% of the 2019 level), and the number of total overnight stays also decreased to 48% compared to 2019. Moreover, the number of overnight stays by foreign tourists in Romania decreased even more compared to the Romanian tourists (down to 19%, compared to 2019).

According to the WTTC, the total contribution of travel and tourism to GDP formation in Romania has known a decrease by 44% in 2020 compared to 2019 and recorded an increase by 14.9% in 2021 compared to 2020; however, the decrease in 2021 was of 36.4% compared to 2019. While in 2019 tourism and travel had a 6.0% contribution to GDP, in Romania, in 2020 the contribution dropped to only 3.5%, and in 2021 it slightly increased to 3.8%.

Regarding the contribution of this sector to job creation, whereas in 2019 the number of jobs in this sector was 568,3 thousand, in 2020 it decreased by 11.5%, reaching 503 thousand, and in 2021 it increased by 5.6% compared to 2020, up to 531 thousand, representing 93.4% of the 2019 level. This loss of skilled workers is at least as serious as the financial losses of tourism operators in Romania, given that even before the pandemic it was very difficult to cover the shortage of staff especially because of the phenomenon of emigration of workers from Romania to other Western countries.

International visitor spending in Romania decreased from a level of USD 4,692.5 million in 2019 to USD 1,725.4 million in 2020 (- 63.2%), followed by a 9% increase in 2021 compared to 2020, reaching USD 1,882.6 million in 2021.

Internal (domestic) tourism spending in Romania decreased from USD 5,337.3 million in 2019 to USD 3,110.5 million in 2020 (-41.7%) and it increased by 39.8% in 2021, compared to 2020, reaching USD 4,348.2 million.

While in 2019 the ratio between domestic spending and international spending in Romania was 53% to 47%, the share of domestic spending rose to 70% in 2021, due to the travel restrictions imposed internationally during the COVID-19 pandemic.

In terms of the structure, the share of Leisure spending was, in 2019, 71%, compared to 29% - Business spending, reaching, in 2021, a share of 77%, compared to 23%.

The most important markets supplying international tourists for Romania in 2019 were Germany (11%), followed by Israel (9%), Italy (8%), US and Hungary (with 6% each). In 2021 Germany remained first (with 13%), but the order of the other countries changed, with France (10%) in second place, followed by Italy (8%), Israel (6%) and Hungary (5%).

As for outbound departures of Romanian visitors, while in 2019, as country of destination, Hungary was first (14%), followed by Greece and Italy (12% each), Bulgaria (10%) and Spain (8%), in 2021 Bulgaria (22%) was first, followed by Hungary (15%), Greece (12%), Italy (9%) and Turkey (8%), the first two being Romania's neighbors (WTTC, 2022).

6.3. The evolution of the main indicators of Romania's internal tourism, in the 2019-2021 period, by categories of tourist destinations and types of tourists

We have analyzed the evolution of the number of tourist arrivals in Romania, both Romanian and foreign tourists, in the tourist reception structures with classified accommodation functions, as well as the number of overnight stays, per total and by main destination categories, using statistical data published by the

National Institute of Statistics of Romania (NIS, 2022). Thus, regarding the number of arrivals indicator, we can observe (Table no. 1) a decrease in the total number of arrivals (of Romanian and foreign tourists) in 2020, down to the level of 48%, compared to the level of the year 2019 and to 70% in 2021, compared to 2019. The main explanation for this negative evolution lies in the travel restrictions imposed after the onset of the COVID-19 pandemic. The decrease was much more severe for foreign tourists (inbound tourism) than for Romanian tourists (domestic tourism), down to a level of only 17% in 2020 and 31% in 2021, compared to 2019.

Regarding the main categories of internal tourist destinations, the evolution was quite different compared to the national average. Thus, the weakest results were recorded in Bucharest (the country's capital) and in the county seat towns/cities (excluding the city of Tulcea in the Danube Delta), with a level of only 38% per total arrivals in 2020 and 58% in 2021, compared to 2019, followed by the category "Other localities and tourist routes", where the decrease reached 48% in 2020 and 70% in 2021, compared to 2019, and the balneary resorts, with a decrease reaching 53%, respectively 82%, compared to 2019.

The smallest decreases were recorded in the tourist resorts on the Romanian Black Sea coast, where the decrease was 78% in 2020 and it reached, in 2021, almost the same level as in 2019 (more precisely, 99%), followed by the Danube Delta area, including the city of Tulcea, where a level of 71% was reached in 2020 and 82% in 2021, compared to 2019. But in this tourist area the most severe decrease in foreign tourist arrivals was recorded, down to only 7% in 2020 and to 29% in 2021 compared to 2019. The main explanation for this evolution could lie in the fact that in the countries of origin of the foreign tourists who used to come to the Danube Delta the travel restrictions imposed were more severe.

In the balneary resorts, the main cause for the large decline in tourist flows to these destinations was the fact that the Romanian authorities imposed very severe restrictions, going as far as banning certain categories of therapeutic procedures within the treatment centers.

In the resorts of the Romanian Black Sea coast, the better results obtained compared to other tourist areas of the country can be explained by the fact that other tourist destinations with coastal offers in countries where the Romanian tourists used to go in the previous years (especially Bulgaria, Turkey and Greece) were more difficult to access, due to the travel restrictions imposed by the authorities of each country, depending on the evolution of the number of COVID-19 infections.

Table no. 1 The evolution of the number of tourist arrivals in tourist reception structures with tourist accommodation functions, according to tourist destinations, by type of tourists, in Romania, in the 2019-2021 period

Tourist destinations	Types of de tourists	Years				
		2019	2020	Evolution 2020/2019	2021	Evolution 2021/2019
		Number of arrivals	Number of arrivals	Change %	Number of arrivals	Change %
Total	Total	13374943	6398642	48%	9370232	70%
.	Romanians	10691195	5944775	56%	8527409	80%
.	Foreigners	2683748	453867	17%	842823	31%
Balneary resorts	Total	1133359	601326	53%	924400	82%
.	Romanians	1098706	595762	54%	911438	83%
.	Foreigners	34653	5564	16%	12962	37%
Coastal resorts, excluding the city of Constanta	Total	1153682	905266	78%	1142271	99%
.	Romanians	1119401	899104	80%	1115593	100%
.	Foreigners	34281	6162	18%	26678	78%
Mountain resorts	Total	2305517	1295105	56%	1866402	81%
.	Romanians	2109378	1269109	60%	1816197	86%
.	Foreigners	196139	25996	13%	50205	26%
Danube Delta area, including the city of Tulcea	Total	166411	118325	71%	137182	82%
.	Romanians	146006	116797	80%	131224	90%
.	Foreigners	20405	1528	7%	5958	29%
Bucuresti and county seat cities, excluding Tulcea	Total	6275835	2359090	38%	3660935	58%
.	Romanians	4209530	1994058	47%	3017694	72%
.	Foreigners	2066305	365032	18%	643241	31%
Other localities and tourist routes	Total	2340139	1119530	48%	1639042	70%
.	Romanians	2008174	1069945	53%	1535263	76%
.	Foreigners	331965	49585	15%	103779	31%

Source: Author's own processing of INS Romania, Tempo-online data

Table no.2. The evolution of the number of overnight stays in tourist accommodation units, by tourist destinations and type of tourists, in Romania, in the 2019-2021 period

Tourist destinations	Types of de tourists	Years				
		2019	2020	Evolution	2021	Evolution
		Number	Number	Change %	Number	Change %
Total	Total	30086091	14579140	48%	20835314	69%
.	Romanians	24795253	13581775	55%	19002611	77%
.	Foreigners	5290838	997365	19%	1832703	35%
Balneary resorts	Total	4805188	2208832	46%	3361147	70%
.	Romanians	4688161	2187634	47%	3314599	71%
.	Foreigners	117027	21198	18%	46548	40%
Coastal resorts, excluding the city of Constanta	Total	4657955	3267464	70%	4218916	91%
.	Romanians	4534514	3246820	72%	4134964	91%
.	Foreigners	123441	20644	17%	83952	68%
Mountain resorts	Total	4810148	2613246	54%	3707917	77%
.	Romanians	4421424	2552251	58%	3613572	82%
.	Foreigners	388724	60995	16%	94345	24%
Danube Delta area, including the city of Tulcea	Total	380375	299766	79%	281078	74%
.	Romanians	333885	295084	88%	269974	81%
.	Foreigners	46490	4682	10%	11104	24%
Bucuresti and county seat cities, excluding Tulcea	Total	11055160	4119604	37%	6313310	57%
.	Romanians	7028229	3334463	47%	4911497	70%
.	Foreigners	4026931	785141	19%	1401813	35%
Other localities and tourist routes	Total	4377265	2070228	47%	2952946	67%
.	Romanians	3789040	1965523	52%	2758005	73%
.	Foreigners	588225	104705	18%	194941	33%

Source: Author's own processing of INS Romania, Tempo-online data

As regards the evolution of the number of overnight stays (Table 2), the evolution was somewhat similar to that of the number of tourist arrivals. Thus, per total (Romanian tourists, plus foreigners), the number of overnight stays in 2020 reached 48% of the level recorded in 2019, and in 2021 it reached 69% compared to 2019.

By main destinations, the most important decreases were recorded in Bucharest and the county seat towns/cities, reaching 37% in 2020 and 57% in 2021 compared to 2019, followed by "other localities and tourist routes", with decreases up to 47% in 2020 and 67% in 2021 compared to 2019, and by the balneary resorts, where the values were at the level of 46% in 2020 and 70% in 2021 compared to 2019.

The smallest decreases were recorded in the coastal resorts, up to 70% in 2020 and 91% in 2021, compared to the 2019 levels, and in the Danube Delta, up to 79%, respectively 74%.

In the mountain resorts, the results recorded were slightly above the national average (decreases to levels of 54% in 2020 and 77% in 2021, compared to 2019), with the observation that here the most significant decrease in the number of overnight stays of foreign tourists was recorded in 2020, reaching only 16%, and in 2021 it rose slightly to 24%, compared to the level reached in 2019.

6.4. Evolution of tourism in Romania in 2023

While the results recorded by the tourist traffic in Romania have been encouraging in the first months of 2022, as we are moving towards the second semester of the year, we can observe a series of worrying developments.

In 2022, almost 11.3 million people stayed in tourist establishments in Romania, an increase of 21.8% compared to 2021. But more than 17.2 million Romanians went to visit other countries.

In 2022, Romanian tourists accounted for 86% of the total number of arrivals in tourist establishments with accommodation function, while arrivals of foreign tourists accounted for only 14%. In total, 24,319,600 overnight stays were recorded in Romania last year, an increase of 17.8% compared to 2021. The average length of stays was 2.1 days for Romanian tourists and 2.2 days for foreign tourists.

By counties, the number of tourist arrivals in accommodation structures recorded higher values in Bucharest (1,480,800 persons), Constanța (1,253,500 persons) and Brasov (1,187,400 persons). The number of overnight stays was highest in Constanța (4,106,100), followed by Bucharest (2,937,900) and Brasov (2,212,100).

In 2023, Timisoara could be in the top 3, as the city takes the title of European Capital of Culture this year. More than 500,000 visitors are expected to stay overnight in Timisoara, both from home and abroad.

As far as foreigners choosing Romania as a holiday destination are concerned, there has been a positive development in recent years. If in 2019 more than 2.5 million tourists visited us, in the following year the figure dropped sharply to just over 400,000, but since 2021 the number has started to increase. And in 2022 there were over 1.5 million foreign tourists who came to discover Romania.

The good news for tourism entrepreneurs is the adoption of changes to the legislation on the establishment, with government support, of Destination Management Organizations in Romania at local, county, regional and national level. These would primarily boost the promotion activity of tourism destinations in Romania. The expectations of tourism entrepreneurs from these DMOs are very high, in particular regarding the drawing up, adoption and implementation of tourism promotion strategies at destination level (Government of Romania, 2022 a).

7. Conclusions

The COVID-19 pandemic has led to a severe crisis in the tourism sector in Romania, due to the restrictions imposed by the authorities. Internal tourism, although considerably reduced, has recorded slightly better results than the inbound sector, which has been affected the most.

In Romania, as in other countries, some of the measures taken by the authorities seemed to have been sometimes unfounded, illogical, and especially unpredictable, seriously affecting the majority of the businesses in the hospitality sector. Furthermore, the losses suffered by them were not only financial, but also in terms of human resources, as a result of the departure of a significant number of qualified workers to other sectors, where there were no restrictions, or these restrictions were less severe. Tourism proved to be one of the less secure sectors of employment during the pandemic, as restrictions imposed by the authorities led to the closure of establishments or the drastic reduction of some activities. Nowadays, considerable efforts are being made to bring in workers from other countries, especially from Asia, to compensate, at least partially, for the shortage of skilled workers in the Romanian hospitality sector.

Studying the effects of these measures taken by the authorities during the pandemic on tourist traffic can be the basis for more detailed analyses of the causes and especially of the mistakes made during the pandemic, so that, if similar situations occur in the future, their repetition can be avoided. The analysis carried out in this paper can and needs to be deepened, especially regarding tourist destinations.

8. References

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