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THE FUTURE OF ROMANIAN TOURISM AFTER COVID 19 PANDEMIC

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Abstract: *The present paper aims to analyse the evolution of tourism activity in Romania, in the period 2010-2021, focusing on the analysis of the effects that the COVID 19 pandemic has had on the Romanian tourism.*

To reach this objective, a set of indicators were analysed, such as tourism supply, tourist circulation and the supply-demand relationship. The analysis was conducted at national level, for the most important tourist reception structures, and for the number of tourist arrivals and overnight stays, both Romanian and foreign tourists were considered, using data from the national official statistics.

The main conclusions of the study indicate that the COVID 19 pandemic has modified tourists' behaviour. This has had an important impact on the sector, reducing tourist flows, resulting in a low degree of occupancy of tourist structures, with a lower impact on those located in the rural area, in the middle of nature, namely tourist and agro-tourist boarding houses, which can be considered the "survivors" of the recent period.

Key words: *tourism, Romania, COVID 19 pandemic, agro-tourist boarding houses*

JEL Classification: Z30, L83

INTRODUCTION

Tourism industry has had a favourable evolution in recent decades as a consequence of people's higher living standard, as well as of their stressful lifestyle. Tourism has thus become a form of leisure, as well as a form of entertainment.

However, there are a number of unpredictable events, such as epidemics, pandemics, earthquakes, flooding, which are increasingly part of our lives. These types of events, we learn to live and be able to manage the situation as well as possible (Păvăliuc, Brînză, Anichiti, Butnariu, 2020). In consequence, "understanding, managing and responding to these risks must be an integral component of sustainable tourism management" (Shakeela, Becken, 2015).

Unquestionable, the coronavirus pandemic is unique in scale and constitutes a blend of several disaster and crisis typologies (Ritchie, Jiang, 2019) and "it is a combination of a natural disaster, a socio-political crisis, an economic crisis and a tourism demand crisis" (Zenker, S., Kock, F., 2020).

The COVID-19 pandemic has put tourism industry in difficulty and has radically changed tourists' options, "the coronavirus pandemic can create deep marks in the tourist's thinking and feeling, and change how tourists travel" (Zenker, S., Kock, F., 2020).

According to the United Nations World Tourism Organization - UNWTO, tourism grew 4% in 2021, but remains far below the pre-pandemic levels. UNWTO estimated that in the year 2030, the number of international tourists will total 1.8 billion, yet these estimated should be revised, given the major impact of the COVID-19 pandemic on the sector. "Tourism is especially susceptible to measures to counteract pandemics because of restricted mobility and social distancing" (Gössling, S., Scott, D., and Hall, M., 2021). In this case, domestic tourism and travel close to home, as well as open-air activities, nature-based products and rural tourism are among the major travel trends that will continue shaping tourism in 2022 (UNWTO, 2022).

The tourism indicators analysed in the present study to reveal the tourism activity level in a given country were used by numerous authors, both Romanian, such as Minciu, R., (2004), Urban, V., Melnic, A.S., (2012), Popescu, A., Huntus, A., Stanciu, M. (2020), and foreign: Tanguay, G.A., Rajaonson, J., Thierrien, M.C., (2013), Liu, Y.M., Dong, Y.D., WU, J., (2014), Dash, A.K., Suresh, K.G., Tiwari, A.K., (2015), Mansor and Ishak (2015). Thus, indicators are considered as useful tools that allow tourism managers to diagnose the situation of the destination, and to identify and evaluate issues that need to be addressed to improve the level of sustainability of tourist activities (Lozano-Oyola, M. et al., 2012).

According to the latest official data, the gross domestic product in tourism represented 1.82% of Romania's GDP in the year 2010, with an upward trend, to reach 2.98% in the year 2019. In the period 2010-2019, the gross value added in tourism industries had an upward trend, with the largest share coming from the "road passenger transport", followed by the "food and beverage services". As regards the direct value added from tourism, the highest shares were noticed in the food and beverage services, which accounted for more than one-third of total, followed by the accommodation services, which accounted for one quarter of total, in the period 2010-2019.

Tourism is among the "most affected economic sectors" (UNWTO, 2020), as a result of restrictions imposed by the COVID 19 pandemic, as well as of tourism consumers' reticence to travel.

MATERIAL AND METHOD

In order to determine the current stage and evolution of tourism activity in Romania, mainly of tourist and agro-tourist boarding houses, a number of statistically representative indicators were analysed: indicators of tourism supply: number of tourist reception structures and existing accommodation capacity by the number of accommodation places; indicators of tourist demand or of tourist circulation: number of arrivals, number of overnight stays, average length of stay (AL); utilized formula: $AL = No / Na$, where No = number of overnight stays registered, Na = total number of tourist arrivals in the period selected for analysis; indicators of supply-demand relationship: the index of net using the touristic accommodation capacity (In); the formula is: $In = (No / Co) \times 100$, where No = number of overnight stays registered, Co = tourist accommodation capacity in operation, in the period chosen for analysis.

The analysis was made at national level, for all tourist reception structures; given that there are several categories in the official statistics, these were grouped as follows: the category hotels includes: hotels, hostels and apartment hotels; the category motels and inns includes both types of tourist reception structures; the category touristic villas includes: villas, chalets, bungalows, holiday villages, campsites, tourist stops and tourist cottages; the category other includes: accommodation facilities on river and sea ships and student camps.

The tourist and agro-tourist boarding houses are the only categories that appear in official statistics. There are similarities between the two tourist reception structures: both operate in citizens' homes or in independent buildings, which provide accommodation to tourists in specially equipped spaces and conditions for preparing and serving meals; but there are also fundamental differences: tourist boarding houses have up to 15 rooms in total, with maximum 60 places, while agro-tourist boarding houses have an accommodation capacity of up to 8 rooms, with the possibility of tourists' participation in household or craft activities.

For the number of arrivals and overnight stays, both the Romanian and the foreign tourists were taken into consideration. Data from official statistics were used, provided by the National

Institute of Statistics, through TEMPO Online database and from periodical publications: Romanian Tourism – statistical abstract and Tourism Satellite Account (TSA). The obtained data were centralized and processed using the Excel program.

The main hypothesis on which the present analysis was based was that in the first year of the COVID-19 pandemic, i.e. 2020, the tourist and agro-tourist boarding houses were preferred by tourists for spending their shorter or longer vacations.

RESULTS AND DISCUSSIONS

In the period 2010-2021, the tourism supply in Romania, in terms of tourist receival structures maintained its upward trend, with the exception of the category *other*, which included student camps, as tourist receival structures whose number was down by half in the period under analysis. In the year 2010, in Romania, there were 5222 tourist receival structures in total, whose number increased by 75% by the year 2021. In the year 2021, as compared to 2010, the greatest increase was noticed in the number of agro-tourist boarding houses, followed by tourist boarding houses and hotels.

Table 1. Evolution of the number of tourist receival structures

– number –

	2010	2012	2014	2016	2018	2020	2021	Changes 2021/2010 -% -
Total	5222	5821	6130	6946	8453	8610	9146	75.1
Hotels	1360	1578	1677	1817	1955	1927	1938	42.5
Motels and inns	155	209	217	221	235	217	218	40.6
Tourist villas	1305	1138	1177	1282	1647	1640	1708	30.9
Tourist boarding houses	949	1247	1323	1530	1709	1729	1745	83.9
Agro-tourist boarding houses	1354	1569	1665	2028	2821	3022	3460	155.5
Other	99	80	71	68	86	75	77	-22.2

Source: authors' processing based on NIS database, www.temponline

In the year 2010, 20% of the total number of tourist receival structures was found in each of the following areas: mountain area, on the Black Sea Coast, and in Bucharest municipality and county capital cities, the most numerous being found in other localities and tourist routes (more than 30% of total number). In the year 2021, there were changes in this hierarchy, namely: the mountain area had 27.2% of the total number of tourist receival structures, Bucharest municipality and the county capital cities had 16.9%, the resorts on the Black sea coast 8.4%, spa resorts 6.9%, the Danube Delta 5.8%, but the most numerous tourist accommodation structures were found in other localities and tourist routes, summing up 34.8% of total.

Table 2. Evolution of the number of accommodation places in the tourist receival structures

– thousand places –

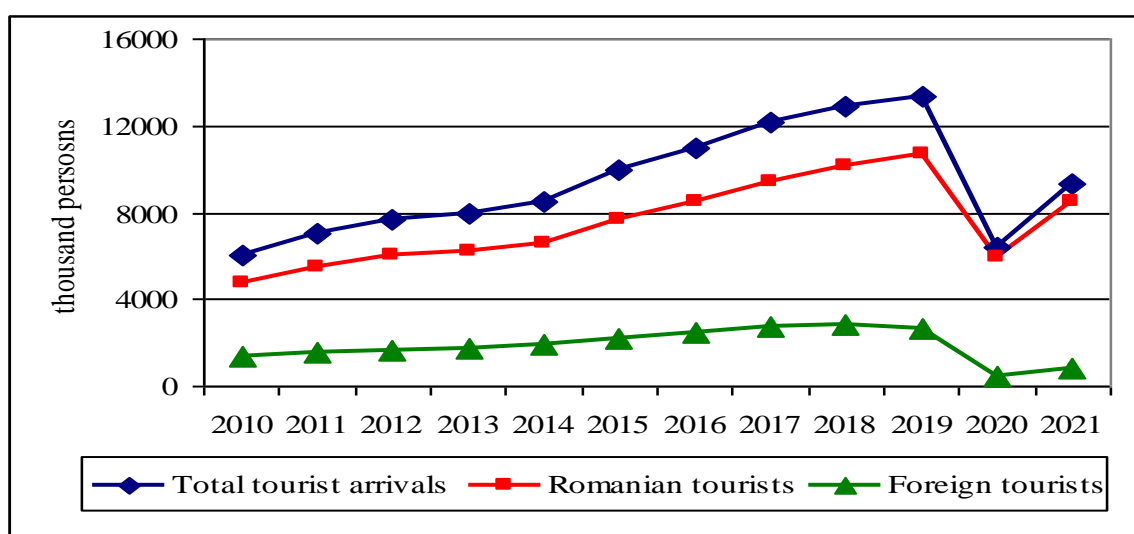
	2010	2012	2014	2016	2018	2020	2021	Changes 2021/2010 - %
Total	311.7	301.1	311.3	328.9	353.8	358.1	364.5	16.9
Hotels	190.7	189.3	195.4	202.8	211.5	211.4	214.4	12.4
Motels and inns	6.2	8.2	8.0	8.5	9.0	8.7	8.9	43.5
Tourist villas	58.8	39.8	39.9	40.4	41.4	43.8	43.4	-26.2
Tourist boarding houses	18.4	25.0	27.3	32.6	35.8	35.3	35.4	92.3
Agro-tourist boarding houses	20.2	27.5	30.5	37.4	48.6	52.4	55.7	175.7
Other	17.3	11.4	10.2	7.2	7.6	6.6	6.6	-61.8

Source: authors' processing based on NIS database, www.tempoonline

The total number of accommodation places was higher by 16.9% in the year 2021 compared to 2010, with the highest increase in the number of places in agro-tourist boarding houses (by 175.7% more numerous in the year 2021 as compared to 2010). It is worth noting that the greatest decline was in the number of accommodation places in other categories of tourist receival structures, due to the diminution in the number of student camps, followed by the tourist villas, because many of these have closed, being declared non-conform.

In the year 2021, there were more than 364.5 thousand accommodation places in Romania, most of these being found in hotels (214.4 thousand places), most in the 3-star category (53.8% of total hotels), followed by 4-star hotels (23.7%) and 2-star hotels (18.4%). The agro-tourist boarding houses come next (55.7 thousand places), followed by tourist villas (43.4 thousand places).

In the period 2010-2021, both the number of tourist arrivals and the number of overnight stays in the tourist receivals structures maintained an upward trend, an exception being the year 2020, the first year of the COVID-19 pandemic.

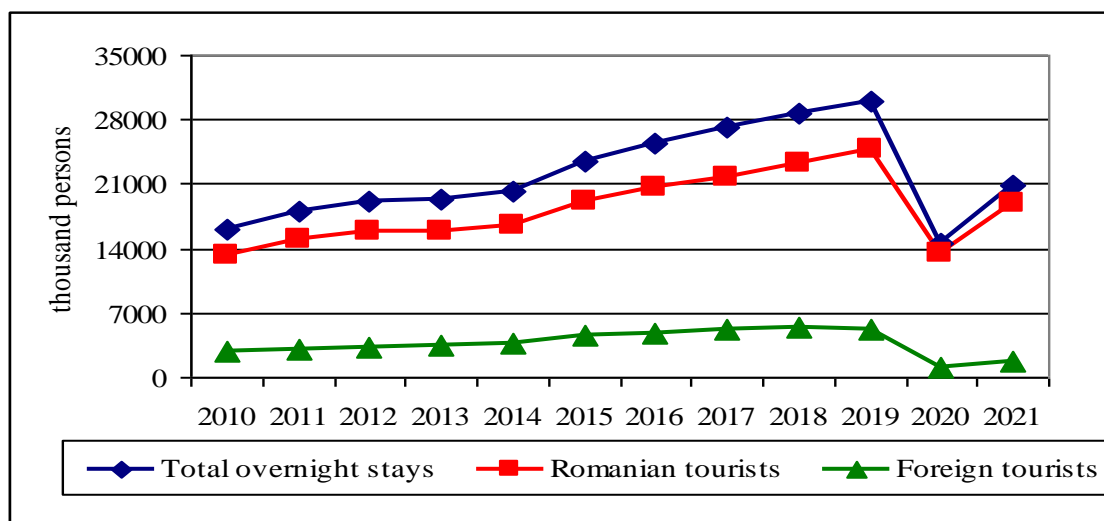


Graph 1. Evolution of the number of Romanian and foreign tourist arrivals, in the period 2010-2021

Source: authors' processing based on NIS database, www.tempoonline

Throughout the investigated period, the Romanian tourists prevailed, both in terms of number of arrivals and of overnight stay in tourist reception structures.

In the year 2010, the foreign tourists who arrived in tourist accommodation structures represented only 22.2% of the total number of tourists, and in the year 2021 they represented only 8.9% of total; the foreign tourists who stayed overnight in tourist accommodation structures represented 17.2% and 8.8% respectively. The foreign tourist circulation in Romania was seriously affected due to travel restrictions during the COVID-19 pandemic. Thus, both foreign tourist arrivals and overnight stays in the year 2020 represented less than one third of those in the year 2010, a situation that slightly recovered in the year 2021.



Graph 2. Evolution of the number of overnight stays of Romanian and foreign tourists, in the period 2010-2021

Source: authors' processing based on NIS database, www.temponline

As a result of the COVID-19 pandemic, in the year 2020, the total number of tourists who chose to stay overnight in the tourist reception structures in Romania was below the number recorded in the year 2010, both the number of Romanian tourists and the number of foreign tourists who made this choice being lower. In the year 2021, the number of overnight stays of tourists had an increasing trend, yet much lower than that in 2019.

The hotels were tourist accommodation structures where the most tourists arrived. In the year 2010, the percentage of tourists arriving in hotels was 77.4%, while in the year 2020 it was 67.9%, and 69.8% in the year 2021. The tourist and agro-tourist boarding houses were the tourist accommodation structures that attracted an increasing percentage of tourists, from 6.7% in the year 2010 to 9.5% in 2021 and from 4.8% to 11.6% respectively in the same period.

Table 3. Evolution of the number of tourists' arrivals in tourist reception structures

– thousand persons –

	2010	2012	2014	2016	2018	2020	2021
Total	6072.7	7686.5	8465.9	11002.5	12905.1	6398.6	9370.2
Hotels	4698.5	5933.6	6515.4	8290.2	9450.5	4347.3	6528.0
Motels and inns	205.2	231.7	233.1	267.5	270.9	144.1	211.9
Tourist villas	398.0	429.2	404.0	563.7	715.5	488.7	646.3

	2010	2012	2014	2016	2018	2020	2021
Tourist boarding houses	406.6	586.1	704.1	1020.6	1234.3	654.4	893.8
Agro-tourist boarding houses	289.9	447.1	549.3	813.5	1173.5	755.4	1087.3
Other	74.5	58.8	59.9	47.1	60.5	8.7	12.6

Source: authors' processing based on NIS database, www.tempponline

In terms of overnight stays, the hotels were also the tourist accommodation structures that attracted the most tourists, yet their percentage in total tourists was down from 80.9% in 2010, to 73.7% in 2021.

Table 4. Evolution of the number of overnight stays in the tourist receival structures

– thousand persons –

	2010	2012	2014	2016	2018	2020	2021
Total	16051.1	19166.1	20280.0	25441.0	28644.7	14579.1	20835.3
Hotels	12984.8	15515.4	16388.3	20032.8	21923.0	10485.0	15359.4
Motels and inns	344.9	373.9	367.5	441.0	436.4	239.2	318.0
Tourist villas	946.0	1032.4	930.5	1292.3	1583.8	1114.3	1424.6
Tourist boarding houses	802.2	1083.8	1273.1	1881.8	2229.5	1201.7	1605.7
Agro-tourist boarding houses	604.6	906.5	1081.5	1597.9	2255.3	1515.3	2089.7
Other	368.6	254.0	239.1	195.1	216.8	23.7	37.6

Source: NIS database, www.tempponline

The tourist and agro-tourist boarding houses were the accommodation structures preferred by tourists to stay overnight, their percentage increasing from 5% of total tourists in the year 2010 to 7.7% in the year 2021, and from 3.8% to 10.1% respectively.

In three categories of tourist receival structures there was an increase in the share of tourists who chose to get there or stay overnight, namely: in tourist villas, in tourist boarding houses and agro-tourist boarding houses. Agro-tourist boarding houses had the highest increase in the share of tourists who chose to arrive there or stay overnight.

In order to highlight the effects that the COVID 19 pandemic had upon tourist flows, the changes produced in the number of tourist arrivals and overnight stays were calculated for the year 2020, the first year of the pandemic, compared to the year 2019. Thus, in the year 2020, both the number of tourist arrivals and the number of overnight stays was down by half (in the year 2020 there were by 52.2% fewer arrivals and by 51.5% fewer overnight stays than in the year).

The tourist accommodation structures that had the lowest reductions in tourist flows in the year 2020 as compared to 2019 were tourist villas and agro-tourist boarding houses. These categories of tourist accommodation structures met the conditions that tourists preferred for a getaway.

In the year 2021, the situation was slightly better compared to 2019, tourists' arrivals and overnight stays in the tourist accommodation structures being only one third below the level of those in the year before the pandemic.

Table 5. Changes in the structure of tourist circulation

- % -

	Modifications in 2020 versus 2019		Modifications in 2021 versus 2019	
	Arrivals	Overnight stays	Arrivals	Overnight stays
Total	-52.2	-51.5	-29.9	-30.8
Hotels	-55.4	-54.1	-33.0	-32.8
Motels and inns	-48.5	-46.1	-24.3	-28.3
Tourist villas	-36.5	-36.8	-16.0	-19.2
Tourist boarding houses	-47.8	-48.3	-28.8	-30.9
Agro-tourist boarding houses	-40.7	-39.8	-14.6	-17.0
Other	-83.4	-88.1	-76.1	-81.0

Source: authors' processing based on NIS database, www.tempoonline

In the year 2021, in the tourist and agro-tourist boarding houses, the number of tourists' arrivals and overnight stays were quite close to their number in 2019. These were the tourist accommodation structures in the top of tourists' preferences, for the very conditions they provided, in accordance with social distancing as well as with the proximity to nature.

The average length of stay in total tourist reception structures decreased from 2.6 days in the year 2010, to 2.2 days in 2021. The agro-tourist boarding houses were the only tourist accommodation structures in which the average length of stay of tourists did not undergo major changes in the investigated period, which was also the trend in tourist boarding houses.

Table 7. Average length of stay in the tourist reception structures, by categories of structures

	2010	2012	2014	2016	2018	2020	2021
Total	2.6	2.5	2.4	2.3	2.2	2.3	2.2
Hotels	2.8	2.6	2.5	2.4	2.3	2.4	2.4
Motels and inns	1.7	1.6	1.6	1.6	1.6	1.7	1.6
Tourist villas	2.4	2.4	2.3	2.3	2.2	2.3	2.2
Tourist boarding houses	2.0	1.8	1.8	1.8	1.8	1.8	1.8
Agro-tourist boarding houses	2.1	2.0	2.0	2.0	1.9	2.0	2.0
Other	4.9	4.3	4.0	4.1	3.6	2.7	2.9

Source: authors' processing based on NIS database, www.tempoonline

The degree of use of tourist accommodation structures in Romania in all categories of tourist accommodation had an upward trend in the investigated period, except for the year 2020, when it collapsed. Thus, the index of net using the touristic accommodation capacity increased from 25.2 in 2010, to 32.2 in 2018, while in the year 2020 the index value was lower than in 2010. It is only in the year 2021 that the index of net using the touristic accommodation capacity in operation was slightly above the value recorded in the year 2010.

Table 8. Evolution of index of net using the touristic accommodation capacity in operation, by categories of structures, in the period 2010-2020

	2010	2012	2014	2016	2018	2020	2021
Total	25.2	25.9	26.1	30.5	32.2	22.8	26.3
Hotels	22.4	31.3	25.0	33.6	36.3	24.8	29.9
Motels and inns	21.9	12.7	12.4	15.8	13.5	9.7	10.4
Tourist villas	12.7	15.0	13.9	18.4	19.6	20.4	20.1
Tourist boarding houses	14.6	14.8	15.4	19.4	20.9	16.5	18.3
Agro-tourist boarding houses	12.4	13.2	13.2	15.5	18	16.5	17.2
Other	45.5	38.9	13.0	21.1	20.2	16.9	16.5

Source: authors' processing based on NIS database, www.temppoonline

In the period 2010-2018, the index of net using of the hotels steadily increased. A favourable evolution of this index was also noticed in the case of tourist villas, tourist boarding houses and agro-tourist boarding houses.

The smallest difference between the net usage index in the year 2020 and in the year 2021, as compared to 2019, was found in tourist and agro-tourist boarding houses; this proves that these tourist reception structures continued to receive tourists, only a smaller contraction of tourist flow being noticed compared to the other accommodation structures.

CONCLUSIONS

In the period 2010-2021, the highest increase was noticed in the number of agro-tourist boarding houses and of tourist boarding houses, compared to the total number of tourist accommodation structures. As regards the number of accommodation places, the highest increase was also noticed in the case of the two tourist accommodation structures mentioned above, compared to the total number of accommodation places in all tourist accommodation structures. The number of tourists who arrived and of those who stayed overnight in tourist and agro-tourist boarding houses had an increasing trend in the period 2010 – 2018, similarly to that in all tourist accommodation structures. In the year 2020, the first year of the COVID-19 pandemic, the tourist flow was down by half compared to the year 2018. The accommodation structures preferred by tourists in the year 2020 were tourist and agro-tourist boarding houses, because only these structures met the conditions that tourists preferred for a getaway. These two tourist accommodation structures had the most spectacular recovery in terms of tourist flows. The average length of stay in these two tourist accommodation structures was maintained at a constant level even in the pandemic period. The efficiency of use of these tourist accommodation structures was lower in the year 2020 compared to that in 2018, trend existing in all tourist accommodation structures, mainly in the case of hotels, for instance. In the year 2021, both tourist accommodation structures, i.e. tourist and agro-tourist boarding houses, had an index of net using close to its value before the pandemic, which reveals a high efficiency of the accommodation capacity utilization.

In spite of the diminution of tourist flows in the pandemic period, due to circulation and health restrictions, which led to the change of tourism consumer behaviour, two tourist reception structures, namely tourist and agro-tourist boarding houses, were less affected, compared to the others, and thus they can be considered the “survivors” of this period.

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