

## AN ANALYSIS OF POST-PANDEMIC TOURISM IN ROMANIA

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*Romanian tourism in the last 5 years is in line with the general trend of the European tourism phenomenon. Therefore, we believe that the national post-pandemic tourism is undergoing a process of re-dimensioning and reorganization, having as converging elements the revitalization of tourist circulation, the increase of domestic consumption and ensuring tourist comfort and safety.*

*The analysis of statistical data on Romanian tourism from 2019-2023 focuses on highlighting the dynamics of tourism flows based on 2019, the year before the outbreak of the coronavirus pandemic. The absolute values of Romanian tourism in the last 5 years show, starting in 2022, a revival of national tourism, both incoming and outgoing, but at least for the time being we cannot speak of a reach of the levels recorded before the Covid-19 pandemic. Most probably, 2024 will be the year when Romanian tourism will overcome this phase of inflection and setback associated with the Covid-19 pandemic.*

*It seems that Romanian tourism decision-makers have learned from the lessons of the past and since 2023 are trying to promote the local tourism offer under the umbrella of identity tourism, an element of the marketing mix that has the capacity to support Romania as a tourist destination to a greater extent.*

**Key words:** Romania, post-pandemic tourism, air traffic Covid-19.

**JEL Classification:** Z32, L83.

**I. INTRODUCTION**

Certainly, two of the most recent macroeconomic turning points, the coronavirus pandemic and the armed conflict in eastern Ukraine, have highlighted that tourism - one of the factors that foster the interconnection and development of societies and the formation of interdependent economic, social and cultural relationships - is more than just a barometer of the resilience of the global economy. Hence, characterisations such as 'a sudden global standstill' (Borio, 2020, p.181), driven by contractions in transport/travel, production and employment, can also be seen as benchmarks that call for a paradigm shift in economies of scale states.

Tourism has the capacity to generate competitive advantage, thus contributing to regional economic development and to an appropriate valuation of its products internationally (Crouch and Ritchie, 1999). A number of recent and older studies on tourism have shown that the social and cultural structures of the world's countries have undergone considerable changes due to the impact of international tourism (Alamineh, 2022; Hudman, Davis, 1994).

In line with the aspects highlighted above, at the local level, the post-pandemic transition of tourism in Romania is of interest, as well as the possible directions

of its development according to the factors that could support Romania to become an internationally relevant tourist destination.

The coronavirus outbreak (Covid-19) has had a severe impact on tourism globally (Ozbay et. all, 2022, p.65). Restrictive measures such as closed borders, quarantine periods, limited number of flights, staging and lockdowns in the country led to the postponement of more than 100 thousand contracts in the hospitality industry in summer 2020 (Csorba, Juravle, 2022). Moreover, despite the fact that the hospitality industry in Romania already has one of the lowest average monthly wages, it fell further by more than five percent in 2020 (NBR, 2021). The impact of Covid-19 on the tourism sector has also been reflected in tourism flows. Thus, tourist arrivals in accommodation establishments in Romania fell by more than 90 percent in April and May 2020 compared to 2019 and maintained a negative dynamic throughout the year (NSI, 2021). Moreover, in November 2020, Bucharest's Otopeni airport recorded a decrease of around 85% in passenger traffic in 2020 compared to the previous year (Forbes, 2021).

Tourism is seen as a significant component of the EU economy, with a significant impact on economic growth, employment and social development. The tourism sector in the EU is represented by around 2.3 million enterprises, mainly small and medium-sized enterprises (SMEs). These

businesses provide jobs for around 12.3 million people (Europarl, 2023). The hospitality and travel industry currently accounts for 10% of EU GDP, consolidating its position as one of the Union's major economic sectors. This significant contribution to GDP reflects the diversity and attractiveness of tourism destinations within the EU (EU-RO, 2021). Tourism is also not only a source of revenue but also a key driver of economic growth and employment. EU tourism policy aims to maintain Europe's position as a leading global destination. By maximising the industry's contribution to growth and employment, the EU aims to promote the sustainable development of the sector, including by promoting cooperation between Member States, including through the exchange of best practices.

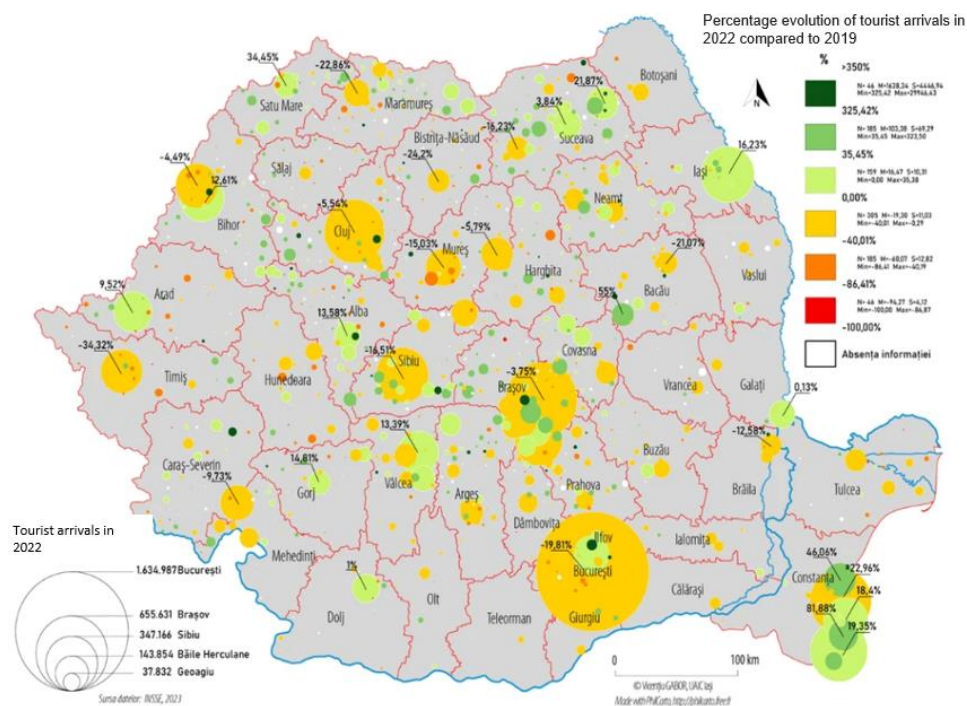
## II. TOURISM MARKET IN ROMANIA.

### NATIONAL STATISTICS

Tourism plays a crucial role in the economic landscape, effectively contributing around 10% to the EU's gross domestic product (GDP). On the other hand, the severe impact of the Covid-19 pandemic on the European Union (EU) tourism sector is supported by

figures showing a significant drop in international tourist arrivals and highlighting the economic repercussions on employment and EU GDP. The decline in tourism directly affects the overall economic health of the region. Europe, as the world's leading tourist destination, has experienced a sharp drop in international tourist arrivals. The decline was 66% in the first half of 2020 and 97% in the second half. These figures highlight the extent to which travel restrictions, bottlenecks and safety concerns have affected global tourism. The Covid-19 pandemic has had profound implications for the travel and tourism industry worldwide.

Romanian tourism is part of the same trends, given that after more than two years, the economic crisis in the tourism industry has been overcome, with air travel in our country seeing significant growth in the first quarters of 2023. National Airports Company Bucharest (CNAB), the stakeholder that manages Henri Coandă Bucharest - Otopeni International Airport, the largest in the country, and Bucharest Băneasa - Aurel Vlaicu International Airport, recorded 8.3 million passengers (Figure 1), 23% more than in the similar period in 2022 (www.news.ro).



**Figure 1 - Percentage change in tourist arrivals in 2022 compared to 2019**

(Source: INSSE, 2023)

It is truly impressive that the number of travellers choosing to use air transport in Romania has seen this revival. The 23% increase compared to the same period last year can be interpreted as a sign of a general increase in the desire to travel among Romanians. In addition, the fact that this level of air traffic is 0.2% higher than the baseline year 2019 (the

year before the coronavirus pandemic) suggests a return of the aviation sector to pre-pandemic levels, which is encouraging for the national economy in general and for the tourism and travel sector in particular. This development can be attributed to a number of factors, including the increased availability

of improving economic conditions and rediscovering confidence in international travel.

As a result, national airports such as Bucharest, Iasi and Cluj-Napoca have become real hubs for air travel, playing a crucial role in connecting Romania to national and international destinations. At the same time, the diversification of air routes from these airports

opens up new opportunities for industry development tourism and related services. For a clearer picture of the dynamics of the number of passengers registered at Romanian airports (Figure 2), the positive variation (5.8%) in the number of passengers in August this year (2023), compared to the same month of the pre-pandemic year (2019), is representative (airportaar.ro)

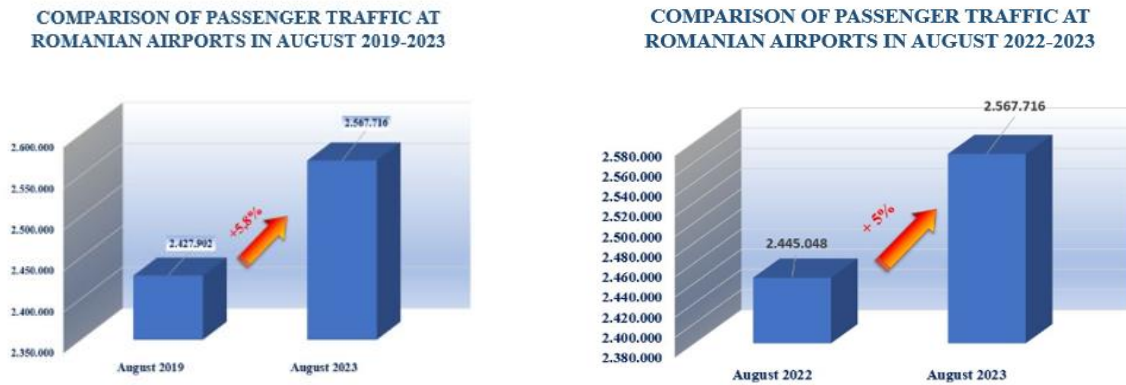


Figure 2 – Passenger traffic at Romanian airports in August 2019-2023  
(Source: AAR, 2023)

The air traffic handled by CNAB, mainly at Henri Coandă - Otopeni Airport, in the first 7 months of 2023 exceeded, in terms of passengers, the number of passengers in the same period of 2019, when historical highs were recorded. Thus, in the period January - July 2023 "there were 8,347,079 passengers, 23% more than in the similar period in 2022, and 0.2% more than in 2019, when there were 8,333,725 passengers" (www.airportaar.ro). There was also a significant increase in the number of aircraft landing and/or taking off from the country. From this point of view, the pace of 2019 has not yet been resumed although the number of flights and aircraft increased significantly compared to 2022, by 7.14% to 73,168 (Figure 2).

CNAB (www.bucharestairports.ro) forecasts an increase in air traffic, leading to a record number of passengers of around 13.6 million by the end of 2023, 11% more than the number of passengers in 2022. Thus, Otopeni and Băneasa airports in the capital recorded 12.6 million passengers this year, compared to 14.8 million in 2019.

Regarding the dynamic evolution of tourism in Romania, for the period 2019-2022, it can be seen that the total number of tourists was significantly lower in the first half of 2022 compared to the same half of 2019. This 15% decline in the number of overnight stays by domestic tourists is in line with the regional tourism trend (Hungary experiences a 13% decrease in the number of overnight stays, while Slovakia's domestic tourism decreases by 22%). At the same time, all three countries also report decreases in the number of nights spent by foreign tourists of at least 30% (Eurostat, 2023).

According to the statistical information on the development of air transport services on the territory of Romania, we can observe in the table below, the inclination of visitors to choose air transport both for visiting and leaving Romania, to the detriment of rail and sea transport. At the same time, we observe the openness of Romanian citizens to travel, since in the first 3 quarters of 2023, the departures of Romanians are registered in a percentage of about 20% higher than arrivals, the total difference between the number of arrivals and departures being about 3.5 million. (Table 1)

Table 1 – Percentage evolution of tourist arrivals in 2023, compared to 2019

ARRIVALS OF FOREIGN VISITORS IN ROMANIA AND DEPARTURES OF ROMANIAN VISITORS ABROAD, ACCORDING TO THE MEANS OF TRANSPORT USED, IN THE PERIOD 1.I - 30.IX.2023		
	Period 1.I - 30.IX.2023 <sup>1</sup>	Structure
	number	%
<b>Total arrivals</b>	<b>11416545</b>	<b>100.0</b>
- Road transport	8307328	72.8
- Airline	2525464	22.1
- Rail transport	142671	1.2
- Naval transport	44082	3.9
<b>Total departures</b>	<b>14994135</b>	<b>100.0</b>
- Road transport	8714226	58.1
- Airline	6154086	41.0
- Rail transport	102619	0.7
- Naval transport	23204	0.2

(Source: INSSE, 2023)

In September 2023, compared to September 2022, arrivals in tourist accommodation establishments with accommodation function including apartments and rooms for rent increased by 10,9% and overnight stays increased by 11,0%. In September 2023, compared to September 2022, at border points, arrivals of foreign visitors increased by 15.8% and departures of visitors abroad increased with 12.5%.

Arrivals registered in tourist accommodation establishments (including apartments and rooms for rent) in September 2023 amounted to 1312,0 thousand persons, up by 10,9% compared to September 2022. Out of the total number of arrivals, in September 2023, the arrivals of Romanian tourists in tourist accommodation establishments with accommodation function accounted for 83,3%, and the arrivals of foreign tourists for 16,7%.

According to Table 2, most tourists arriving in Romania came from countries such as Italy, Malta, Hungary, Slovenia, Greece, Netherlands, England, Spain, Belgium etc.

**Table 2 - Arrivals of foreign visitors in Romania, by country of origin of visitors, January - September 2023**

ARRIVALS OF FOREIGN VISITORS IN ROMANIA, BY COUNTRIES OF ORIGIN OF VISITORS, IN THE PERIOD 1.I - 30.IX.2023	
	First semester 2023 in % compared to the Period 1.I - 30.IX.2022
<b>TOTAL</b>	<b>118.8</b>
<b>EUROPE – of which:</b>	<b>118.3</b>
<b>EUROPEAN UNION</b>	<b>119.1</b>
Austria	110.1
Belgium	119.3
Bulgaria	103.7
Cyprus	134.1
Croatia	121.2
Denmark	117.2
Estonia	121.4
Finland	117.6
France	118.0
Germany	120.0
Greece	127.1
Ireland	109.8
Italy	139.8
Latvia	125.8
Lithuania	105.0
Luxembourg	118.4
Malta	136.8
Netherlands	122.4
Poland	115.1
Portugal	124.6
Czech Republic	119.2
Slovak Republic	114.3
Slovenia	137.2
Spain	131.5
Sweden	135.3
Hungary	136.0
<b>OTHER EUROPEAN COUNTRIES – of which:</b>	<b>117.8</b>
UK	129.2
Ukraine	118.7
Turkey	104.2
<b>AFRICA</b>	<b>106.5</b>
<b>AMERICA</b>	<b>127.6</b>
<b>NORTH AMERICA - of which:</b>	<b>127.4</b>
Canada	125.8
United States of America	127.5
<b>SOUTH AND CENTRAL ASIA</b>	<b>130.3</b>
<b>AUSTRALIA, OCEANIA AND OTHER TERRITORIES – of</b>	<b>187.7</b>
Australia	190.6
New Zealand	184.9
<b>UNSPECIFIED COUNTRIES</b>	<b>71.5</b>

(Source: INSSE, 2023)

The registered overnight stays in tourist accommodation establishments (including apartments and rooms for rent) in September 2023 amounted to 2836,3 thousand, increasing by 11,0% compared to September 2022. Out of the total number of overnight stays, in September 2023, the Romanian tourists' overnight stays in tourist accommodation

establishments with accommodation functions accounted for 84,4%, while the foreign tourists' overnight stays accounted for 15,6%. The average length of stay in September 2023 was 2.2 days for Romanian tourists and 2.0 days for foreign tourists. The net utilization rate of tourist accommodation in September 2023 was 31.1% on total tourist accommodation (including apartments and rooms for rent), increasing by 0.1 percentage points compared to September 2022. Arrivals of foreign visitors to Romania, registered at border crossings, in September 2023, totalled 1349,2 thousand persons, increasing by 15,8% compared to September 2022 (Table 3).

**Table 3 - Overnight stays in tourist accommodation in Romania from January to September 2023**

Turistic area	Total
<b>ALL TOURIST AREAS</b>	
<b>Overnights - total</b>	<b>23324238</b>
- romanian tourists	19860249
- foreign tourists	3463989
<b>BALNEARY RESORTS</b>	
<b>Overnights - total</b>	<b>3148874</b>
- romanian tourists	3061617
- foreign tourists	87257
<b>RESORTS IN THE COASTAL AREA, EXCLUSIVELY THE CITY OF CONSTANTA</b>	
<b>Overnights - total</b>	<b>4673744</b>
- romanian tourists	4600037
- foreign tourists	73707
<b>MOUNTAIN AREA RESORTS</b>	
<b>Overnights - total</b>	<b>3907441</b>
- romanian tourists	3670557
- foreign tourists	236884
<b>THE DANUBE DELTA AREA, INCLUDING THE TOWN OF TULCEA</b>	
<b>Overnights - total</b>	<b>254230</b>
- romanian tourists	237151
- foreign tourists	17079
<b>BUCHAREST AND THE CITIES SEAT OF THE COUNTY, EXCLUSIVELY TULCEA</b>	
<b>Overnights - total</b>	<b>8099521</b>
- romanian tourists	5408945
- foreign tourists	2690576
<b>OTHER LOCATIONS AND TOURIST ROUTES</b>	
<b>Overnights - total</b>	<b>3240428</b>
- romanian tourists	2881942
- foreign tourists	358486

(Source: INSSE, 2023)

At the same time, the number of overnight stays is also significant, which was recorded according to the resorts visited in Romania, the most attractive being the coastal area (20%), followed by the mountain area (17%) and seaside resorts (14%), which together account for about 50% of the total number of overnight stays.



### III. CONCLUSION

It is clear that tourism plays a significant role in Romania's economy, contributing to GDP and generating a number of business opportunities and jobs. However, the tourism industry has been severely affected by the Covid-19 pandemic, as restrictive measures have significantly reduced the flow of tourists and have had a negative impact on income and employment in the sector.

According to the quantitative analysis covering the period 2019-2022, the Covid-19 pandemic has had a significant impact on tourism in Romania, with the recovery period extending beyond December 2022. Although the revival of national tourism has been rather anaemic, it is encouraging that the trend observed in 2023 seems to be maintained, and there are serious premises that as early as 2024 the tourism phenomenon will reach and even exceed the level of the reference year, 2019.

The tourism sector itself has become one of the most important contributors to a country's economic growth and development, with tourism in Romania accounting for 4.19% of national GDP in 2023.

Taking into account the results and the contribution of the hospitality and tourism industry in the last two years, post-pandemic, the relevant ministry (Ministry of Economy, Entrepreneurship and Tourism) is pursuing a planned development of Romanian tourism, by adopting a set of actions aimed at preventing sectoral challenges, generated by destabilizing factors such as epidemic waves or armed conflicts, and to support domestic tourism consumption. Thus, the national strategy for tourism development 2023 - 2035 is structured around a theory of change and focuses on three levels in order to achieve sustainable tourism development in our country. The new strategic line foresees the further strengthening of Romania's image as a well-known, regional, year-round tourist destination and as a destination that meets EU standards in terms of the provision of tourism products and services and visitor safety. Last but not least, the objectives of the project include: appreciation and development of Romania's people, traditions, places, and natural and cultural heritage, all integrated under the umbrella of identity tourism.

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