

## Tourist Demand for Romania Over the Last Three Decades

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### Abstract

*This paper shows the fluctuations of tourist demand for the destination Romania over the last three decades (1990-2022) and explains their complex economic, social and political causes. Tourism was probably the economic sector most affected by the COVID-19 pandemic. However, tourism has quickly picked up after lifting the restrictions of the pandemic period.*

*The significant increase of tourism demand in recent times is the effect of implementing coherent action plans, coordinated nationally and supported by certain government measures to encourage the tourism industry, such as the investments in tourism infrastructure and in Romanian destinations' marketing and promotion.*

*Tourism will contribute significantly to Romania's economic growth and development. The focus will be on the quality and diversity of tourist offer for the incoming visitors. Given the current conditions, generated by the pandemic and the war in Ukraine, a doubling of foreign tourist arrivals and an increase in the average length of their stay are expected for the next 10 years.*

**Key words:** tourism indicators, tourism demand, destination Romania

**J.E.L. classification:** Z30, Z32, L83

### 1. Introduction

Precise and reliable information on demand and supply of tourist destinations is crucial in achieving an effective tourism policy. The decision-makers within a tourist destination must set clear objectives and understand the trends and current situation on a market, identifying the most suitable perspectives and options for its development, respectively recognizing in advance the constraints, challenges and obstacles and taking the most appropriate corrective measures. When the planning of activities within the destination is done rigorously, its appeal increases and the location can offer excellent tourism services. Destination planning and management is the key to sustainable tourism (Godfrey & Clarke, 2000).

This paper analyzes, from a quantitative point of view, the evolution of tourist demand for the destination Romanian over the last three decades, in order to draw apposite conclusions on the future evolution trends. The number of tourists (arrivals) and the number of overnight stays, as important indicators of tourist demand, are analyzed nationally and structured by type of destination. Although their overall evolution is favorable, the problems Romanian tourism is facing with cannot be ignored. Improvement trends may be observed and they are also reflected in the monitored indicators. But efforts in this direction must continue.

The future priorities, able to ensure the growth and competitiveness of the Romanian tourism, refer to a complex tourist offer, making the most of existing natural and human resources, preserving the environment and the heritage, as well as a sustained and efficient tourism promotion, to ensure a distinct identity of the national tourism on the specific European market (Toma, Mihai, 2020).

## 2. Theoretical background

The current trends in tourism are: the increasing number of tourists; more regions and countries entering the tourist circuit; more holidays and more free time; the decrease of the average duration of stay and several stages of rest leave; the strong increase of tourist demand and supply. The main factors that have led to the increase of tourist demand are: population's income growth; new habits of traveling; changing traditions and preferences. Other reasons that boosted the national tourism were: tourist offer diversification; increasing the role of promotional activity in tourism; improving the national legislation to stimulate tourism; involving central and local political power in developing tourist activities; the national and local strategies and programs in the field of tourism; ensuring the permanent training of the staff employed in tourism; educating the population to consume tourist products and services (Milin et al, 2005).

Tourism was perhaps the economic sector most affected by the COVID-19 pandemic. The period 2020-2021 recorded drastic falls for the entire tourism and hospitality industry. However, this sector of activity quickly picked up after lifting the restrictions from the pandemic period, with the year 2022 registering values of tourist indicators close to 2019.

## 3. Research methodology

The theoretical research, the analysis and the synthesis were used in drafting this paper. Interesting ideas and practices were extracted from the specialized literature. The statistical data supports the documentation stage of a tourism demand study (Cocean, Dezsi, 2001).

We consulted official documents and statistics compiled by some public authorities in Romania or other European countries. The research methodology was based on the analysis and interpretation of data offered by the National Institute of Statistics (tourism chapters from the Romanian Statistical Yearbooks, 1990-2023; Romanian Tourism Statistical Abstract, 1999-2023), using descriptive statistics.

This study analyzed, processed and interpreted the most significant indicators of tourist demand (the number of tourists/arrivals and their structure, the overnight stays, the average length of stay). The method of graphical modeling using the application Microsoft Office Excel was used to make diagrams for each indicator. The data tables were interpreted to extract conclusions on the evolution and structure of the main indicators of tourism demand for Romania.

## 4. Findings

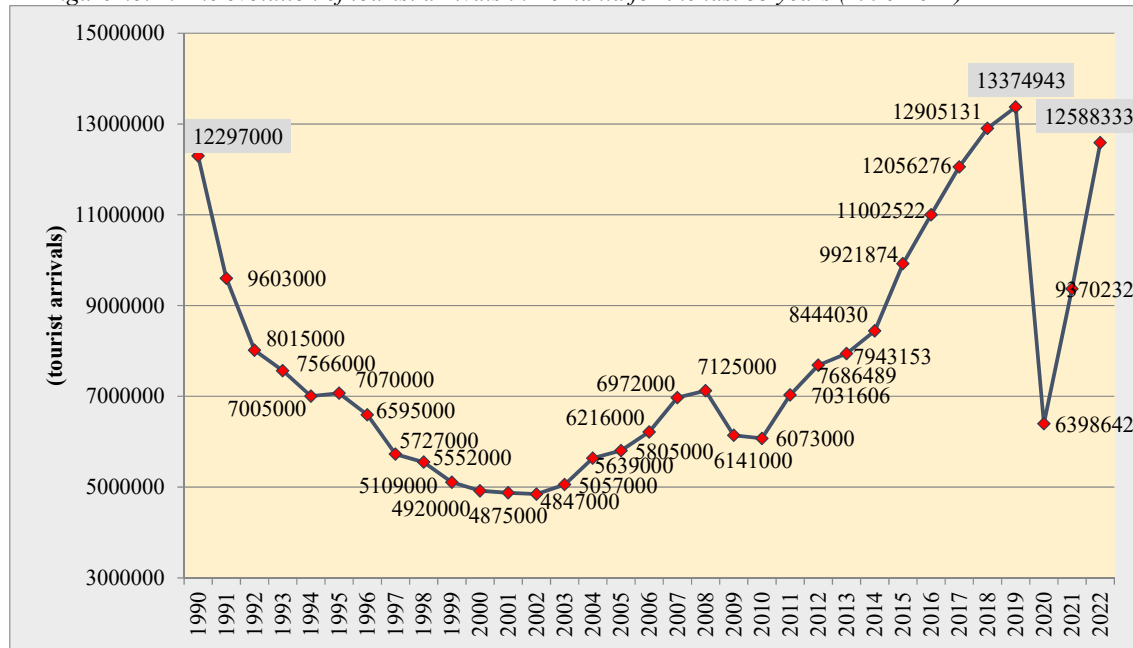
Tourist arrivals represents the most important indicator of tourist demand (Minciu, 2000; Stănciulescu et al, 2009). This quantitative indicator was analyzed in evolution (over a period of 33 years), structure, by types of destinations, by the origin of tourists (domestic and international) or by their preference for accommodation.

The number of tourists registered some significant fluctuations in the last 3 decades (Figure no. 1, Table no. 1). It declined drastically in the period 1990-2003: from 12.2 million tourists in 1990, to almost two-thirds less in the following years (1992-1995), followed by another steady decline (1996-2001), and a low of 4.8 million tourists in 2002. The reasons were economic, social and political, connected to the post-December transition period: the decrease in the standard of living of the resident population (unemployment, reduced incomes), the continuous increase in rates for tourist services and their poor quality in many Romanian resorts, the political instability, the insufficient promotion of Romanian tourism on the foreign markets (Țigu, 2001), the inadequate coordination of tourism at the national level (repeated changes within the Ministry of Tourism, deficient tourism legislation).

There was a constant increase in tourist arrivals starting from 2003, exceeding 7 million tourists in 2008. The increase from 2004-2008 was due to the increase in income and living standards of local people. In 2009 and 2010, the values decreased suddenly by 1 million tourists compared to the previous years, due to the effects of the economic crisis.

An important increase in the number of tourists (over 0.5 million tourists annually) was registered since 2011 (a trend also evident globally, except for the year 2009 that recorded a decline in international tourist arrivals). In the period 2009-2012, the Ministry of Regional Development and Tourism carried out significant investments in the tourist infrastructure and in the marketing and promotion of Romanian destinations, both from European and state budget funds - almost 820 million euros were allocated for tourism development, compared to 20 million euros allocated in the period 2006-2008.

Figure no. 1. The evolution of tourist arrivals in Romania for the last 33 years (1990-2022)



Source: data taken and processed using the Microsoft Excel application from the Statistical Yearbooks of Romania 1990-2023 and Romanian Tourism Statistical Abstract, 1999-2023, INS, [www.insse.ro](http://www.insse.ro)

Thus, in 2014 a high of the lastest 23 years was recorded: 8.4 million tourists (a value comparable to the period 1991-1992), a a surprising recovery of the Romanian tourism. High values of the annual growth rate of arrivals were also recorded in 2014: 6.3% in total, with 5.3% for the Romanian tourists and 11.5% for the foreign tourists.

Tourism has developed strategically in recent years, by implementing coherent action plans to coordinate this sector: the Strategic and Operational Plan for Tourism Marketing of Romania 2011-2015, the Strategic and Operational Plan for Tourism Marketing of Bucharest 2011- 2015, the National Tourism Brand Creation and Promotion Strategy, the National Ecotourism Development Strategy, the National Spa Tourism Development Strategy.

There was an unprecedented revival in the number of tourists in the period 2015-2019, so that more than 12 million tourists were recorded in 2017, a value reached only during the communist period (Figure no. 1), then 12.8 million tourists in 2018 and 13,2 million tourists in 2019. This was due to a better involvement of the Ministry of Tourism in initiating and applying laws and reforms in the field of tourism, a better promotion of the Romanian tourism, as well as a diversified offer of tourism operators. That was the result of policies and reforms in tourism, and in the case of foreign tourists, some insecurity reasons felt by them in relation to some Western European states (France, U.K., Spain, Belgium) or Turkey - the waves of emigrants and especially the terrorist attacks which started a few years ago led to the reorientation of tourist flows towards destinations considered safer, such as Poland, Hungary, even Romania and Bulgaria (Simoni, Teodoroiu, 2018).

In 2020, as a result of the COVID-19 pandemic, the number of tourists halved (6.4 millions), and that of foreign tourists was reduced to a quarter of the value recorded in the previous year. In 2021, although the restrictive measures were maintained due to the COVID-19 pandemic, the number of tourists recovered, reaching 9.4 million. There was a decline in foreign tourist arrivals, from over 2

million before the pandemic, to below 1 million in 2020 and 2021, due to the restrictions on the international travel during the pandemic.

In 2022, normal values of this indicator were recorded - 12.6 million tourists, as a result of pandemic restriction lifting and the rapid recover of this activity sector.

Table no. 1. The evolution and structure of tourist arrivals in Romania for the last 33 years (1990-2022)

Year	Total tourist arrivals in Romania	Yearly change (%)	Romanian tourist arrivals	Yearly change (%)	Share of total tourists (%)	Foreign tourist arrivals	Yearly change (%)	Share of total tourists (%)
1990	12297000		10865000		88.35	1432000		11.65
1991	9603000	-21.91%	8309000	-23.53%	86.53	1294000	-9.64%	13.47
1992	8015000	-16.54%	6830000	-17.80%	85.22	1185000	-8.42%	14.78
1993	7566000	-5.60%	6718000	-1.64%	88.79	848000	-28.44%	11.21
1994	7005000	-7.41%	6149000	-8.47%	87.78	856000	0.94%	12.22
1995	7070000	0.93%	6310000	2.62%	89.25	760000	-11.21%	10.75
1996	6595000	-6.72%	5833000	-7.56%	88.45	762000	0.26%	11.55
1997	5727000	-13.16%	4894000	-16.10%	85.45	833000	9.32%	14.55
1998	5552000	-3.06%	4742000	-3.11%	85.41	810000	-2.76%	14.59
1999	5109000	-7.98%	4314000	-9.03%	84.44	795000	-1.85%	15.56
2000	4920000	-3.70%	4053000	-6.05%	82.38	867000	9.06%	17.62
2001	4875000	-0.91%	3960000	-2.29%	81.23	915000	5.54%	18.77
2002	<b>4847000</b>	-0.57%	3848000	-2.83%	79.39	999000	9.18%	20.61
2003	5057000	4.33%	3952000	2.70%	78.15	1105000	10.61%	21.85
2004	5639000	11.51%	4280000	8.30%	75.90	1359000	22.99%	24.10
2005	5805000	2.94%	4375000	2.22%	75.37	1430000	5.22%	24.63
2006	6216000	7.08%	4836000	10.54%	77.80	1380000	-3.50%	22.20
2007	6972000	12.16%	5421000	12.10%	77.75	1551000	12.39%	22.25
2008	7125000	2.19%	5659000	4.39%	79.42	1466000	-5.48%	20.58
2009	6141000	-13.81%	4865000	-14.03%	79.22	1276000	-12.96%	20.78
2010	6073000	-1.11%	4727000	-2.84%	77.84	1346000	5.49%	22.16
2011	7031606	15.78%	5514907	16.67%	78.43	1516699	12.68%	21.57
2012	7686489	9.31%	6030053	9.34%	78.45	1656436	9.21%	21.55
2013	7943153	3.34%	6225798	3.25%	78.38	1717355	3.68%	21.62
2014	8444030	6.31%	6532213	4.92%	77.36	1911817	11.32%	22.64
2015	9921874	17.50%	7681896	17.60%	77.42	2239978	17.16%	22.58
2016	11002522	10.89%	8521698	10.93%	77.45	2480824	10.75%	22.55
2017	12056276	9.58%	9307004	9.22%	77.20	2749272	10.82%	22.80
2018	12905131	7.04%	10108509	8.61%	78.33	2796622	1.72%	21.67
2019	<b>13374943</b>	3.64%	10691195	5.76%	79.93	2683748	-4.04%	20.07
2020	<b>6398642</b>	<b>-52.16%</b>	<b>5944775</b>	<b>-44.40%</b>	92.91	<b>453867</b>	<b>-83.09%</b>	<b>7.09</b>
2021	9370232	46.44%	8527409	43.44%	91.01	842823	85.70%	8.99
2022	12588333	34.34%	10914023	27.99%	86.70	1674310	98.65%	13.30

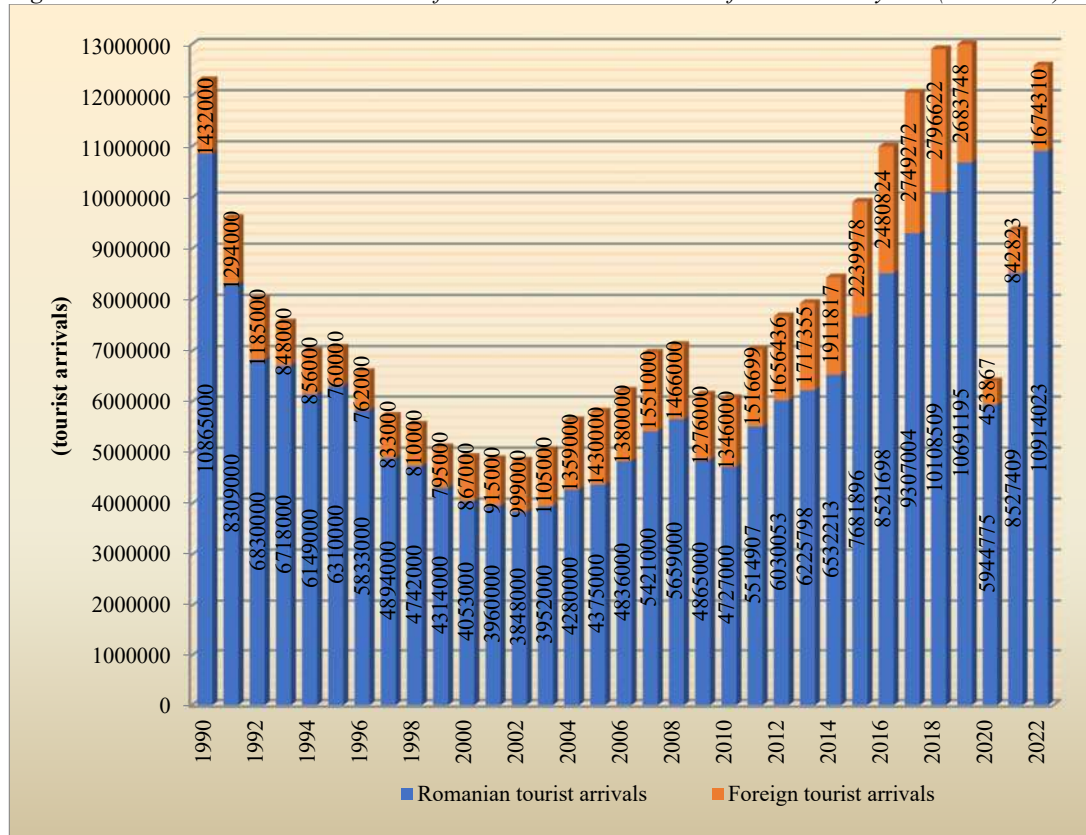
Source: data taken and processed using the Microsoft Excel application from the Statistical Yearbooks of Romania 1990-2023 and Tourism of Romania. Statistical Briefing, 1999-2023, INS, [www.insse.ro](http://www.insse.ro)

The average value of the annual growth rate of tourism in the analyzed period was 1.58% (Table no. 1), with peaks in the periods: 2006-2007 (12.16%), 2010-2011 (15.78%), 2014 -2015 (17.60%), 2020-2021 (46.44%), 2021-2022 (34.34%) and lows in the periods: 1993-1994 (-17.56%) and 1995-1997 (-13%) due to the political instability, the decrease in the quality of tourist services in many resorts and the non-correlation of the offer with the high rates, the insufficient promotion of Romanian tourist destinations on foreign markets; 2010-2009 (-16.73%) due to the financial-economic crisis; 2019-2020, 2021-2022 (-52.17%) due to the travel restrictions during the Covid-19 pandemic.

In case of tourist arrival structure over the last 33 years, we may notice that the Romanian tourists represented 75-90% of the total, and foreign tourists 10-25%, except for the two pandemic years, when due to travel restrictions, the share of foreign tourists dropped below 10%. The average of the analyzed period is 85% for the Romanian tourists and 15% for the foreign tourists. Figure no. 2 shows a doubling of both Romanian and foreign tourists in the period 2009-2019. In 2019, the maximum of the analyzed period was recorded: 13.26 million tourists, of which 10.59 million Romanian tourists (79.93% of the total) and 2.67 million foreign tourists (20.07% of the total). In the post-pandemic period, the number of tourists has recovered, reaching 10.9 million for the Romanian tourists (98% of the total) and 1.6 million for the foreign tourists (13%) in 2022.

Regarding the origin of foreign arrivals in Romania in 2022, the largest share was held by the tourists coming from Europe (75.63% of the total foreign tourists), and of these 73.66% were from the European Union countries. The main issuing countries of tourists for Romania in 2022 were: Germany (183,603 tourists, respectively 11% of the total foreign tourists), Israel, Italy, the USA, France, Hungary (each with 5-10 percentages), the Republic of Moldova, Poland, Ukraine, Spain, Bulgaria, Turkey, the Netherlands, Austria, Greece, Belgium, Serbia, China, Russia (Figure no. 3).

Figure no 2. The evolution and structure of tourist arrivals in Romania for the last 33 years (1990-2022)



Source: data taken and processed using the Microsoft Excel application from the Statistical Yearbooks of Romania 1990-2023 and Romanian Tourism Statistical Abstract, 1999-2023, INS, [www.insse.ro](http://www.insse.ro)

The demand structure by comfort category of the accommodation units (Figure no. 4) in 2022 showed that 51.22% of tourists preferred 3-star accommodation units (6,447,657 tourists), followed by 4-star ones (31.30%, respectively 3,940,077 tourists); the foreign tourists preferred higher degree of comfort (4 and 5 stars) for their accommodation.

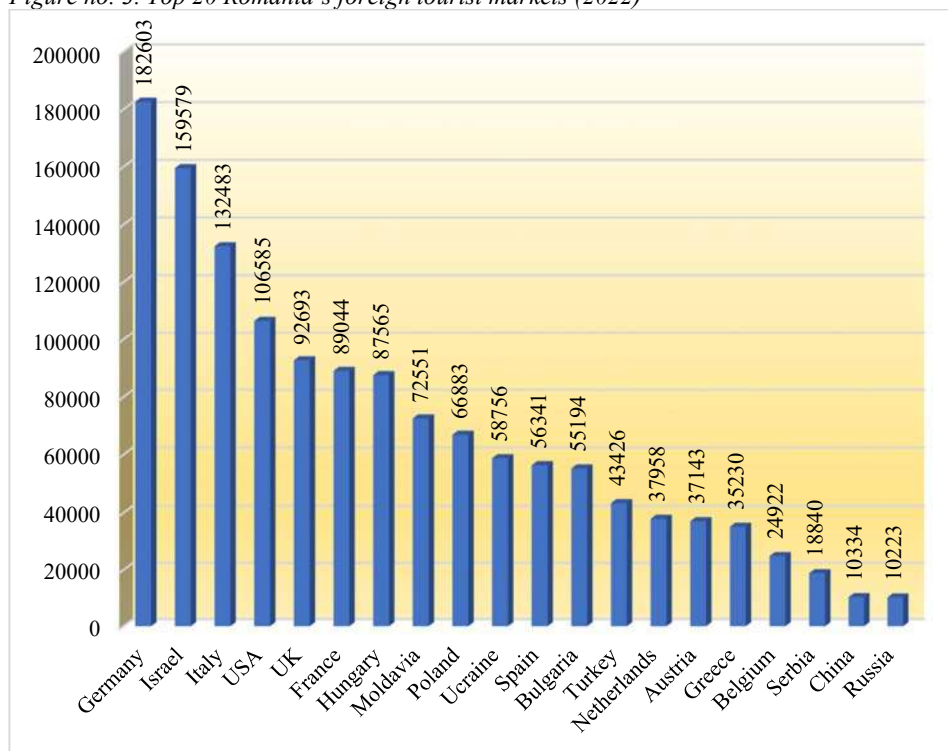
The structure of tourist arrivals by destinations in 2022 showed (Figure no. 5) that most tourists preferred urban (43.29%, respectively 5.4 million tourists) and mountain destinations (19.41%, respectively 2.4 thousand tourists – increasing compared to previous years), followed by the seaside (10.28%, respectively 1.3 million tourists) and the spa resorts (8.88%, respectively 1.1 million tourists).

The overnight stays in the accommodation units in 2022 totaled 27,044,372. Those of Romanian tourists represented 86.44% (23,377,839 overnight stays), while the overnight stays of foreign tourists represented 13.56% (3,666,533 overnight stays) of the total number of overnight stays.

The average length of stay in 2022 was 2.14 days for the Romanian tourists and 2.18 days for the foreign tourists. This indicator remained at values around 2, a maximum of 2.3 days throughout the analyzed period, with higher values for destinations such as the seaside and spa resorts.

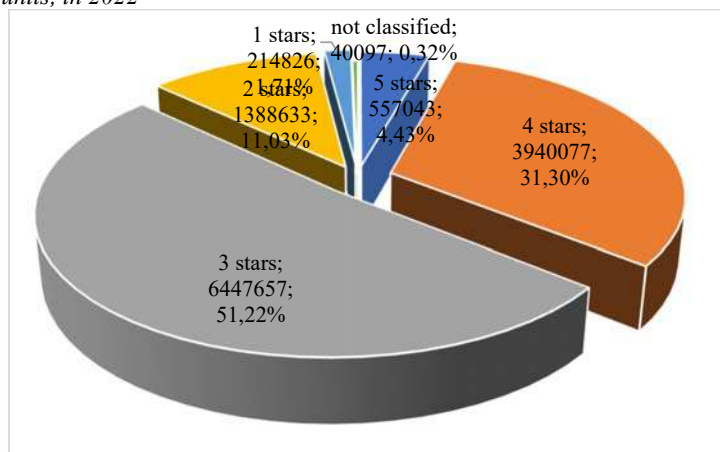
The net use index of the tourist accommodation capacity in use in 2022 accounted for 29.1% on total tourist accommodation units. Higher rates of net use of accommodation were recorded in hotels (37.8%), tourist villas (24.7%), bungalows (21.9%), rental apartments (23.4%), ship accommodation places (20.9%) and tourist guesthouses (19.9%).

Figure no. 3. Top 20 Romania's foreign tourist markets (2022)



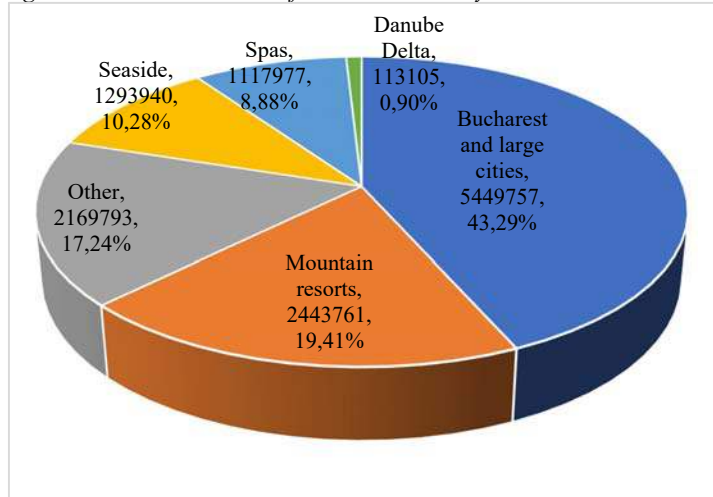
Source: data taken and processed using the Microsoft Excel application from the Statistical Yearbooks of Romania 1990-2023 and Romanian Tourism Statistical Abstract, 1999-2023, INS, [www.insse.ro](http://www.insse.ro)

Figure no. 4. The structure of tourist arrivals in Romania by the comfort category of the accommodation units, in 2022



Source: data taken and processed using the Microsoft Excel application from the Statistical Yearbooks of Romania 1990-2023 and Romanian Tourism Statistical Abstract, 1999-2023, INS, [www.insse.ro](http://www.insse.ro)

Figure no. 5. The structure of tourist arrivals by destinations in 2022



Source: data taken and processed using the Microsoft Excel application from the Statistical Yearbooks of Romania 1990-2023 and Romanian Tourism Statistical Abstract, 1999-2023, INS, [www.insse.ro](http://www.insse.ro)

## 5. Conclusions

For the tourist destination Romania, the most significant tourist indicator of tourist demand, the number of tourists or arrivals, has registered some significant fluctuations in the last 3 decades. It dropped sharply in the period 1990-2003, from 12.2 million tourists to about 5 million tourists due to intricate economic, social and political reasons. There has been a constant increase in tourist arrivals since 2003, up to over 7 million tourists in 2008, due to the increase in income and living standards of the resident population. In the years 2009 and 2010, tourist arrivals fell significantly by 1 million tourists compared to the previous years, due to the economic crisis. There has been a significant increase in tourist arrivals since 2011, due to the significant investments of the Ministry of Regional Development and Tourism from 2009-2012 in tourist infrastructure and in marketing and promotion of Romanian destinations, from European and state budget funds. In 2014, a peak of 8.4 million tourists was recorded, through the implementation of some coherent action plans for the strategic coordination of tourism.

The period 2015-2019 was one of unprecedented revival in the number of tourists, so that more than 12 million tourists were recorded in 2017, then 12.8 million tourists in 2018 and 13.2 million tourists in 2019. That was the result of a better involvement of the Ministry of Tourism in initiating and applying laws and reforms in the field of tourism, a better promotion of the Romanian tourism, as well as a diversified offer of tourism operators.

In 2020, as a result of the COVID-19 pandemic, the number of tourists halved (6.4 million), and that of foreign tourists was reduced to a quarter of the value recorded in the previous year. In 2021, although the restrictive measures were maintained due to the COVID-19 pandemic, the number of tourists recovered, reaching 9.4 million. There is a decline in foreign tourists, from over 2 million before the pandemic, to below 1 million in 2020 and 2021, due to restrictions on international travel during the pandemic. Normal values of tourist arrivals were recorded in 2002 (12.6 millions), as a result of the pandemic restriction lifting and a rapid return of this activity sector.

In case of tourist arrival structure over the last 33 years, we may notice that the Romanian tourists represented 75-90% of the total, and foreign tourists 10-25%, except for the two pandemic years, when due to travel restrictions, the share of foreign tourists dropped below 10%.

The average value of the annual growth rate of tourism in the analyzed period was 1.58%, with peaks in the periods: 2006-2007 (12.16%), 2010-2011 (15.78%), 2014 -2015 (17.60%), 2020-2021 (46.44%), 2021-2022 (34.34%) and lows in the periods: 1993-1994 (-17.56%) and 1995-1997 (-13%) due to the political instability, the decrease in the quality of tourist services in many resorts and the non-correlation of the offer with the high rates, the insufficient promotion of Romanian tourist

destinations on foreign markets; 2010-2009 (-16.73%) due to the financial-economic crisis; 2019-2020, 2021-2022 (-52.17%) due to the travel restrictions during the Covid-19 pandemic.

Most tourists preferred urban and mountain tourist destinations, followed by the seaside and spa resorts (8.88%, respectively 1.1 million tourists). The majority of tourists preferred 3-star and 4-star accommodations. Romania's foreign tourist markets in 2002 were Germany, Israel, Italy, USA, France, Hungary. The average length of stay in 2022 was 2.14 days for the Romanian tourists and 2.18 days for the foreign tourists. This indicator has settled at values of 2, a maximum of 2.3 days throughout the analyzed period, with higher values for destinations such as the seaside and spa resorts. The net use of accommodation units in 2022 was 29.1% on total tourist accommodation structures, with higher rates for hotels and tourist villas.

According to the Romania's National Strategy for Tourism Development 2023-2035, Romania will become a well-known, high-quality tourist destination throughout the year, focused on the uniqueness of its cultural and natural heritage and offering high quality services. Romania will climb on the top of tourism competitiveness rankings, thanks to strategic investments in infrastructure, training, marketing and promotion, which will result in some unique experiences for the visitors traveling to Romania, making it attractive for the relevant European and world markets.

Tourism will significantly increase its contribution to economic growth and development in Romania. The focus will be on the quality and diversity of tourist offer for the incoming visitors. Given the current conditions, generated by the pandemic and the war in Ukraine, 2.8 million foreign tourists are forecasted in 2025, 4.6 million foreign tourists in 2035 and the increase of their average length of stay to 2.2 days in 2025 and 3,3 days in 2035.

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