

## The Evolution of Tourist Accommodation Capacity in Romania. The Case of the Romanian Black Sea Tourist Coastal Resorts

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### Abstract

*After 1990, in Romania, following the privatization of most tourist accommodation units, investments were directed towards modernizing and raising the comfort level of tourist accommodation units and new units were built.*

*In this paper, we have analyzed the evolution of Romania's tourist accommodation capacity in recent years, especially regarding the coastal area. The analysis can be useful in making future investment decisions in new units.*

*Even though, compared to the EU-27 countries' average, in Romania the increase in the number of bed - places has been superior in the last decade, nevertheless we consider that there is still a need for investment in new units of superior comfort and for further modernization of the older units.*

*The main issues faced by tourism in Romania are not about the existing accommodation capacity, but rather with the low occupancy rate, the short average length of stay and the small number of foreign tourists.*

**Key words:** tourist accommodation capacity, Romania, Romanian tourist coast, net occupancy rate, evolution perspectives

**J.E.L. classification:** L83, O11, O47, O57, Z31

### 1. Introduction

The tourist accommodation capacity of a country, region or tourist destination, as well as its structure, by type of tourist accommodation unit/establishment and by category of comfort are essential for the tourist offer of the respective destination. Not only the number of tourist accommodation units with tourist accommodation facilities and the number of existing bed - places are important, but also their level of comfort and their structure, by type of accommodation unit.

The existing tourist accommodation capacity in Romania has undergone important transformations in the last 3 decades, both in terms of quantity and of quality, in terms of the significant increase in the number of accommodation units and tourist bed - places classified into medium and superior comfort categories. Thus, after 1990 there was, on the one hand, a significant decrease in the capacity of operating tourist accommodation, through the removal of some old units from the tourist circuit, and on the other hand, especially, an improvement of its structure in terms of increasing the degree of comfort through investments which allowed the classification of tourist accommodation units into higher categories of comfort.

The highest concentration of Romania's tourist accommodation capacity is in the Black Sea coastal area, namely in Constanța County. Romania's coastal area has a total length of about 245 km, from the Danube River's mouth into the Black Sea, through the Chilia branch, from the border with Ukraine, to the North, down to Vama Veche, at Romania's border with Bulgaria, to the South.

The resorts and tourist localities on the Romanian coast are concentrated exclusively in Constanța County, on a length of about 100 km. In Constanța County, more than 99% of the existing accommodation capacity is located in the coastal area, which is why, often, when referring to the Romanian coast, the analysis focuses, in reality, on data about Constanța County (INS-DJSC, 2021, p. 119).

The aim of this paper is to demonstrate the fact that, although Romania's tourist accommodation capacity has developed and expanded at higher rates in the last decade compared to the average developments in EU countries, there is still a need for further investment in new units, especially in the ones pertaining to superior comfort categories, including those in the coastal area. For example, Romania still has insufficient tourist accommodation capacity as far as 5-star units are concerned.

## 2. Literature review

An attractive tourist area cannot become a tourist offer without first having the necessary facilities to welcome tourists (Minciu, 2004, p.178).

Tourist accommodation capacities in the hotel industry, i.e., those units of the material base of tourism which ensure the conditions for tourists to stay overnight for a certain period of time, make up the most characteristic element of the technical-material base of tourism (Snak *et all.*, 2001, p. 320).

While analyzing the evolution of tourist accommodation capacity in Romania since 1970, Minciu highlighted the trend of increasing the number of tourist accommodation units and bed-places until the years 1988-1989. Thus, in the year 1988 the maximum number of 427,543 bed-places was reached, followed by almost continuous annual reductions in the period after 1990, mainly due to the removal from the tourist circuit of some old units in an advanced state of wear and tear (Minciu, 2004, p. 183).

More recent analyses of the evolution of accommodation capacity in Romania, including after the outbreak of the COVID-19 pandemic in the year 2020, have highlighted not only the changes in the size of tourist accommodation capacity in Romania after the year 1990, but also some changes regarding their structure, by comfort category (Jugănar, 2022, pp. 309-318).

## 3. Research methodology

In order to achieve the intended purpose, namely the analysis of the evolution of the tourist accommodation capacity in Romania, in this paper we have used the desk research method, so as to create a secondary, quantitative, longitudinal database (Jugănar, 1998). The information was selected from official statistics published by the Romanian authorities at central and territorial level, as well as from Eurostat and it refers to indicators, such as: the number of tourist accommodation units with tourist accommodation facilities by tourist destinations, the tourist accommodation capacity in tourist accommodation units with tourist accommodation facilities; the existing tourist accommodation capacity by types of tourist accommodation units; the number of tourist bed - places in some EU-27 member states; the net occupancy rate of operating tourist accommodation capacity, as well as other relevant tourism indicators (Tables no. 1-7).

The processing of statistical data and the interpretation of their evolution have been the basis for the elaboration of conclusions and proposals for further analysis, with a view to formulating future decisions regarding the realization of new investments in the expansion and modernization of tourist accommodation capacity in Romania, by tourist areas and destinations, as well as regarding the construction of new units, according to the evolution of tourist demand.

## 4. Findings

Although some tourist resorts in Romania are more than 100 years old (as is the case, for example, of Mamaia resort, on the coast), the most important development of the tourist accommodation capacity took place in the 7th-8th decades of the last century, especially through the construction, from the ground up, of new tourist resorts totaling tens of thousands of tourist bed - places, in the Black Sea coastal area.

Whereas in the year 1970, in Romania there were 2,385 operating tourist accommodation units, with a total number of 248,434 bed - places, due to the investments made in the construction of new units, in order to meet the growing tourist demand, in the year 1980, there were 2,570 units, with 301,519 bed - places. In the year 1985 the number of units reached was 3,330, with 353,236 bed - places, until the maximum capacity was reached in 1988, of 427,543 bed - places, after which the

accommodation capacity was significantly reduced, so that in the year 2000 there were only 3,121 units, with 280,005 bed - places (INS, Statistical Yearbook of Romania, 1997, p. 712 and Operational Statistical Information Bulletin no. 4/2003).

In the year 2010, the tourist accommodation capacity on the Romanian coast was 124,643 bed - places. However, in the subsequent statistics published by the National Institute of Statistics of Romania (INS) a change in methodology was made, i.e., the statistical research on the occupancy of tourist accommodation units with accommodation facilities only addressed the tourist accommodation units with at least 10 bed - places. This is why, in the year 2011, the data published by the INS showed a capacity of only 83,751 bed - places on the coast. In other works, such as the annual publication entitled *Tourist accommodation capacity existing on 31 July*, available since 2016, the INS shows tourist accommodation units with a capacity of at least 5 bed - places.

In the 2012-2019 period, in Romania, the total number of tourist accommodation structures with tourist accommodation facilities increased by 44% (Table no. 1); however, the developments were quite different, depending on the main categories of tourist destinations (Table no. 1). Thus, the most important increase in the number of units was recorded in the tourist resorts in the Danube Delta area, including the city of Tulcea (+87%), followed by those in the mountain region (+70%) and other localities and tourist routes (+53%). More modest increases were recorded in Bucharest (the capital of the country) and in the county seat localities, but also in the balneary resorts (+19% each), as well as in the coastal resorts, with the exception of Constanța city (+25%).

*Table no. 1. The evolution of the number of tourist accommodation units with tourist accommodation facilities by tourist destinations, in Romania, in the 2012-2019 period*

<b>Year</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2019 / 2012</b>
<b>Tourist destinations</b>									
Total Romania	5821	6009	6130	6821	6946	7905	8453	8402	1,44
Balneary resorts	488	499	451	479	486	577	594	597	1,19
Coastal resorts, excluding Constanța city	676	689	690	686	701	776	766	848	1,25
Mountain resorts	1376	1497	1609	1822	1878	2270	2374	2342	1,70
Danube Delta area, including the city of Tulcea	136	135	138	138	136	125	286	254	1,87
Bucharest and county seat cities, excluding Tulcea	1295	1337	1318	1450	1433	1472	1545	1535	1,19
Other localities and tourist routes	1850	1852	1924	2246	2312	2685	2888	2826	1,53

*Source:* Author's own calculations, based on information taken from the INSSE Tempo online database

While in the year 2019, compared to the year 1990, the number of tourist accommodation units increased by more than 3.3 times, in Romania, in the tourist resorts from the coastal area of the country it increased by only 12%.

However, more significant and more important than the evolution of the number of units is the evolution of the existing tourist accommodation capacity, expressed in bed - places (Table no. 2).

Table no. 2. The evolution of tourist accommodation capacity in tourist accommodation units with tourist accommodation facilities in Romania and in the coastal resorts, excluding the Constanța city, in the 2012-2019 period

Year	Number of bed - places								
	2012	2013	2014	2015	2016	2017	2018	2019	2019 / 2012
Indicator									
Number of bed - places Romania	293,036	301,109	305,707	328,313	328,888	343,720	353,835	358,119	1,22
of which, by categories of comfort:									
-5*	7,881	7,806	7,887	8,650	8,608	8,925	8,918	9,150	1,16
-4*	38,635	40,710	42,496	46,699	49,065	54,361	61,618	62,917	1,63
-3*	96,579	104,249	109,691	117,153	119,403	125,940	134,075	141,355	1,46
-2*	91,700	90,747	86,092	87,726	84,862	82,923	75,905	70,790	0,77
-1*	23,822	19,364	20,025	22,039	19,937	17,676	15,982	14,802	0,62
- unclassified	15,039	14,056	14,617	10,852	9,619	9,396	8,763	8,495	0,56
-in coastal resorts, excluding Constanța City -total	80,840	82,563	83,625	83,353	81,635	80,618	80,665	85,081	1,05
of which, by categories of comfort:									
-5*	868	818	818	836	952	1208	1184	1386	1,60
-4*	6,444	8,097	7,369	9,039	9,512	11,242	12,802	13,000	2,02
-3*	21,237	23,580	26,887	26,946	28,446	30,828	34,843	39,267	1,85
-2*	35,631	35,240	32,739	32,432	30,699	28,918	24,709	24,346	0,68
-1*	11,549	9,583	10,805	12,235	10,505	7,010	5,685	5,506	0,48
- unclassified	4,872	5,006	4,768	1,652	1,286	1,228	1,228	1,214	0,25
Share of bed-places in coastal resorts, excluding Constanța City in total Romania	27,5 %	27,42 %	27,35 %	25,34 %	24,82 %	23,45 %	22,80 %	23,76 %	

Source: Author's own calculations, based on information taken from the INSSE Tempo online database

From the developments presented in Table no. 2, we can notice the fact that, in Romania, in the 2012-2019 period, the total existing tourist accommodation capacity, expressed in bed - places, increased by 22%, reaching 358,119 bed - places in 2019. However, compared to the year 1990, the total existing accommodation capacity of the country was only 4% higher in 2022 (Table no. 6).

In terms of structure, by category of comfort, the highest increase was recorded in the 4-star category, i.e., 63%, followed by 3-star units, with an increase of 46%. On the other hand, there were significant decreases in the number of bed-places in the one-star category (-385%) and in the two-star category (-23%). This means that there has been an improvement in the comfort level of the tourist accommodation offer, given that the share of bed - places in the 3-star category was 39.48% in 2019, and the share of 4-star bed - places was 17.57%, compared to the shares of 32.96% in the 3-star category and just 13.18% in the 4-star category in 2012. The 9,150 bed - places with a 5 stars

classification remain, however, too few, in 2019, representing only 2.59% of the total number of bed - places in Romania.

As regards the evolution of the tourist accommodation capacity in the Romanian Black Sea coast area, which represents the area with the highest concentration of tourist accommodation capacity in Romania (over 24% in 2019), its quantitative evolution was rather modest, the increase in the total number of tourist bed - places being only 5% in the 2012-2019 period; however, the qualitative evolution, by category of comfort, was better than that of the whole country. Thus, the number of bed - places in the 4-star category doubled during this period, and the number of those in the 3-star category increased by 85% (they account for more than 46% of the bed - places in the coastal area). Moreover, there was a 60% increase in the number of 5-star bed - places. In contrast, there was a 52% decrease in the number of bed - places in the 1-star category and a 32% decrease in the number of 2-star bed - places.

We would like to point out that these figures do not accurately reflect reality, given that the statistical data of the National Institute of Statistics (INS) in Romania do not include in this category the tourist bed - places in the city of Constanța, even though it is also located on the Black Sea coast. Therefore, in reality, the number of tourist bed - places found on the Romanian coast exceeds a quarter of the total number of tourist bed - places in the country.

Taking into account the fact that all the tourist resorts and localities on the Romanian Black Sea coast are located in Constanța County, and that almost 99% of the tourist accommodation capacity in this county is found on the coast, we consider that it would be closer to reality to compare the evolution of the tourist accommodation capacity in Constanța County, which concentrates the entire tourist offer on the coast, with that of Romania (Table no. 3).

*Table no. 3. The evolution of existing tourist accommodation capacity by type of tourist accommodation units in Romania and Constanța County in the 2012-2019 period*

Year	Number of bed - places								
	2012	2013	2014	2015	2016	2017	2018	2019	2019/ 2012
<b>Existing tourist accommodation capacity</b>									
Total Romania	301,109	305,707	311,288	328,313	328,888	343,720	353,835	356,562	1,18
Constanța County total, of which, in:	84,690	85,756	87,496	87,848	85,285	84,157	85,418	89,902	1,06
- hotels	63,148	64,232	65,209	65,616	64,083	65,733	66,949	69,272	1,10
- hostels	2,117	2,141	2,302	3,607	3,837	4,081	4,134	3,534	1,67
- apartment hotels	672	672	672	752	752	752	704	704	1,05
- touristic villas	4,519	4,483	4,580	4,833	4,439	4,698	4,925	5,248	1,16
- bungalows	1,599	1,599	1,531	1,531	1,543	1,779	1,785	1,896	1,19
- camping	6,907	6,770	6,963	9,037	8,087	4,366	3,883	5,815	0,85
- tourist lodges	194	194	702	194	194	194	619	619	3,19
- tourist cottages	1,102	1,102	978	456	456	506	506	482	0,44
-tourist pensions/ guest houses	351	468	468	537	569	501	450	635	1,81
Share of accommodation capacity from Constanța County in total Romania	28%	28%	28,1	26,8%	25,9%	24,5%	24,1%	25,2%	

*Source:* Author's own calculations, based on information taken from the INSSE Tempo online database

If we analyze the situation by types of tourist accommodation structures, we can notice that in the year 2012, the share of tourist bed - places in hotels was 74.6% of the total accommodation capacity in Constanța County, and in the year 2019 the share increased to 77.1%.

### 5. The evolution of tourist accommodation capacity in some EU-27 member states, in the 2012-2019 period

Throughout the analyzed period (2012-2019), the number of tourist accommodation units in the EU-27 increased overall by 33% (Table no. 3), whereas the increase in the number of bed - places was only 9% (Table no. 4), which indicates the fact that more new establishments, with relatively small accommodation capacities in comparison with those with large capacities, were created and put into operation during this period.

In order to adhere to the size limits required for the publication of this paper, we have selected for our analysis a limited number of EU countries: Romania, Bulgaria (Romania's neighboring country, with a similar, comparable tourist offer), Italy, France, Spain, Germany, the countries with the largest accommodation capacities in the EU, as well as Greece and Croatia, other important European destination countries undergoing interesting developments.

From the analysis of the evolutions recorded in these countries, we can notice different situations, namely significant increases, well above the EU-27 member states' average, in the number of tourist accommodation units in Croatia (+97%), Romania (+60%), and in other countries we note smaller increases than the EU-27 member states' average, in France (+4%), Greece (+13%), Spain (+16%), while in Germany there was a 4% decrease in the number of units, even though the number of bed - places increased. Bulgaria registered the same increase in the number of existing tourist accommodation units as the EU-27 member states' average (+33%).

Table no. 4. Number of establishments in the European Union and in some selected countries

TIME GEO	2012	2013	2014	2015	2016	2017	2018	2019	2019 vs 2012
European Union - 27 countries (from 2020)	466, 363	475, 200	483, 230	501, 355	524, 752	571, 674	599, 507	617, 953	1,33
Bulgaria	2,758	2,953	3,163	3,202	3,331	3,346	3,458	3,664	1,33
Germany (until 1990 former territory of the FRG)	52,401	51,652	50,925	50,572	50,152	50,032	50,020	50,498	0,96
Greece	33,540	33,657	34,563	35,112	35,597	35,867	37,919	37,827	1,13
Spain	45,740	46,488	47,689	48,328	48,701	50,518	51,418	52,894	1,16
France	28,480	28,246	28,895	30,045	30,047	29,835	29,652	29,683	1,04
Croatia	57,808	62,026	67,724	73,439	83,233	98,341	108, 212	113,761	1,97
Italy	157, 228	157, 521	158, 412	167, 718	178, 449	204, 903	216, 141	218, 327	1,39
<b>Romania</b>	<b>5,113</b>	<b>6,027</b>	<b>6,191</b>	<b>6,949</b>	<b>7,028</b>	<b>7,762</b>	<b>7,720</b>	<b>8,202</b>	<b>1,60</b>

Source: Eurostat, Tourism Database

The evolution of the number of tourist bed - places in the selected EU-27 countries during the analyzed period was much more modest compared to the evolution of the number of tourist accommodation units. Thus, the average increase in the number of tourist bed - places in the EU-27 countries was only 9% in the 2012-2019 period (Table no. 5). Out of all the analyzed countries, the

highest growth was recorded in Croatia (+45%), followed by **Romania (+23%)**. The most modest growth was recorded in France (+2%), followed by Spain (+7%) and Italy (+9%). These are European countries with a tradition in tourism, which have developed their tourist accommodation capacity over many decades, in order to cope with the increasing tourist demand for their respective destinations. Greece recorded a 12% increase and Bulgaria a 13% increase.

Table no. 5. The evolution of the number of tourist bed - places in some EU-27 member states in the 2012-2019 period

GEO	TIME								2019 vs 2012
	2012	2013	2014	2015	2016	2017	2018	2019	
European Union - 27 countries (from 2020)	26,316,227	26,658,362	26,964,220	27,215,720	27,407,105	27,785,616	28,284,065	28,752,559	1,09
Bulgaria	301,140	302,433	314,257	322,465	328,264	348,724	335,597	341,506	1,13
Germany (until 1990 former territory of the FRG)	3,326,576	3,326,821	3,318,592	3,340,072	3,336,207	3,377,728	3,473,630	3,594,701	1,08
Greece	1,204,845	1,207,394	1,256,518	1,265,992	1,272,640	1,275,436	1,320,890	1,348,890	1,12
Spain	3,414,798	3,437,362	3,482,983	3,526,937	3,515,810	3,558,650	3,599,886	3,638,875	1,07
France	5,013,188	5,049,726	5,109,884	5,133,314	5,133,645	5,113,963	5,111,960	5,098,729	1,02
Croatia	798,928	867,110	893,827	938,613	987,272	1,059,992	1,115,659	1,157,870	1,45
Italy	4,762,601	4,728,180	4,849,432	4,879,333	4,942,512	5,037,798	5,113,197	5,175,803	1,09
<b>Romania</b>	<b>285,488</b>	<b>303,236</b>	<b>308,997</b>	<b>325,841</b>	<b>326,098</b>	<b>338,791</b>	<b>348,592</b>	<b>351,161</b>	<b>1,23</b>

Source: Eurostat, Tourism Database

## 6. The evolution of the accommodation capacity in Romania and in its coastal area after the outbreak of the COVID-19 pandemic

Contrary to many expectations, in Romania, both in the year 2020, after the outbreak of the COVID-19 pandemic, and in the following years, not only has the existing accommodation capacity not decreased, but it has increased each year. The explanation for this situation lies in the fact that there were many investment projects, at various stages of implementation, regarding the creation of new tourist accommodation spaces or the expansion of existing accommodation spaces at the beginning of the year 2020, which continued and were completed in the following years, given that during the pandemic period construction works could be carried out in Romania without severe restrictions, compared to other categories of activities.

The total number of tourist bed - places existing on 31 July 2022 was 367,4 thousand, most of which were in hotels (60.5%). In the coastal tourist area (excluding the city of Constanța), 79,7 thousand bed - places were recorded (INS, 2022, pp. 2-3). However, this tourist accommodation capacity (leaving aside the influence on the results of the changes in the measurement methodology

of the National Institute of Statistics) is 14% lower than the one in the year 1988, when the highest tourist accommodation capacity in Romania was recorded (427,543 bed - places).

In the Romanian coastal area, the evolution has been different in recent years from the one recorded at national level, with decreases in tourist accommodation capacity being recorded in both the year 2020, compared to 2019 and in the year 2021, compared to 2020. However, in the year 2022 there was an increase in the accommodation capacity on the coast which compensated the decreases recorded in the previous years, and a higher capacity than in the year 2019 was reached in the year 2022. Compared to 1990, the existing tourist accommodation capacity on the Romanian coast decreased by 40% in 2022; however, this happened not only as a result of the removal of some old tourist accommodation units from the tourist circuit, but especially as a result of the change in the methodology of the INS, which starting from the year 2010 stopped monitoring the tourist accommodation structures with less than 10 bed - places, which were numerous in the coastal area in the years 1980-1990 (and still are today, because, in the meantime, many other small-sized units have been built).

Table no. 6. The comparative evolution of the tourist accommodation capacity in Romania and in Constanța County in the 2019-2022 period

Year Tourist accommodation capacity	1990	2019	2020	2021	2022	Bed - places				
						2020 / 2019	2021 / 2020	2022 / 2021	2022 / 2019	2022 / 1990
Total Romania	353, 236	356, 562	358, 119	364, 507	367, 386	1,004	1,018	1,008	1,030	1,04
In Constanța County	149, 442	89, 902	89, 304	88, 992	90, 146	0,993	0,996	1,013	1,003	0,60

Source: Author's own calculations, based on information taken from the INSSE Tempo online database

## 7. The evolution of the net occupancy rate of tourist accommodation capacity and the average length of stay in Romania and in the coastal area, after the year 1990

According to the National Institute of Statistics, the net occupancy rate of tourist bed - places "expresses the relationship between the operating tourist accommodation capacity and its actual use by the tourists in a given period" and is calculated by relating the total number of overnight stays to the operating tourist accommodation capacity throughout that period (INS, Tempo online, 2022).

While analyzing its evolution since the year 1992, we can see that the net occupancy rate of tourist accommodation capacity (net occupancy rate of bed-places) in Romania has decreased significantly, from 46.7% in the year 1992 to 34.5% in 1999, to a minimum of 25.2% in 2012, then it improved, reaching 33.9% in 2019, while the fall to 22.8% in the year 2020 was caused by the travel restrictions during the pandemic period, whereas in the year 2021, when restrictions were less severe, the rate rose to 26.3% (INS Tempo online, 2022).

In the coastal tourist area, respectively in Constanța county, the values of the occupancy rate were better, but this is explained by the fact that most of the tourist accommodation capacity on the coast (about 90%) operates only during the summer season, for a duration of only 3-4 months. Thus, after the year 1990 and until 2011, the net occupancy rate of the tourist accommodation capacity in Constanța County gradually decreased, down from 53.2% in 1990 to 40.2% in 2000 and to only 29.7% in 2011, after which it started to improve, up to 35.7% in 2012, then to 48.3% in 2018 and 49.3% in 2019 (Table no. 7).

Table no. 7 also shows the evolution of other significant tourist indicators concerning the coastal area tourism of Romania after the year 1990. Thus, we can notice the fact that, after the sharp decreases in the early 90s of the past century, after 2011 the decrease in the operating accommodation capacity continued, even though the existing accommodation capacity increased every year, due to the reduction of the operating periods of tourist accommodation units, most of them only being



opened on the coast during the summer season, i.e., 3-4 months/year.

*Table no. 7. The evolution of the net occupancy rate of the operating tourist accommodation capacity and of other relevant tourism indicators in Constanța County, after the year 1990*

Indicator Time	Existing accommodation capacity (bed - places)	Operating accommodation capacity (thousand bed places-days)	Number of arrivals (thousands)	Number of overnight stays (thousands)	Net occupancy rate of accommodation capacity (%)
1990	149,442	23,387	1,696	12,448	53,2
1995	121,169	12,124.3	1,042.9	6,859.8	56,6
2000	122,598	9,571.7	757,8	4,801.9	40,2
2010	124,643	9,965.6	803,1	3,166.7	31,8
2011	83,751	11,328.9	844,8	3,361.1	29,7
2012	84,690	10,656.9	953,0	3,799.5	35,7
2018	85,418	10,376.2	1,312.4	5,010.8	48,3
2019	89,902	10,541	1,381	5,197	49,3

*Source:* INS - Constanța County Statistical Directorate, Statistical Yearbook of Constanța County, 2020, p. 217

On the other hand, although the number of tourist arrivals has increased in recent years, surpassing the number of those registered in 1995 (but still well below the level recorded in 1990), the number of overnight stays registered in 2018 and in 2019 barely exceeded the threshold of 5 million, compared to over 6.8 million in 1995 and over 12.4 million in 1990, due to the gradual decrease in the average length of stay, both nationally and in the coastal area of Romania.

The average length of stay has been decreasing in recent years and it remains modest. Thus, for Romanian tourists it was 2.5 days in 2014 and in 2015, decreasing to 2.4 days in 2016 and to 2.3 days in 2017-2019, while for foreign tourists it was even more modest, from two days in 2014 and in 2015, to 1.96 days in 2014 and in 2015, to 1.9 days in 2017-2019 (INS Tempo online, 2022).

In the coastal area, the reduction in the average length of stay has been much more severe, especially after the year 2000. Thus, while the average length of stay in Constanța County was 7.34 days in 1990, it fell to 6.58 days in 1995, 6.33 days in 2005, then to only 3.94 days in 2010, reaching just 3.76 days in 2019. (INS-DJS Constanța, 2021, p.117).

## 8. Conclusions

Romania's tourist accommodation capacity has undergone profound transformations in the last 3 decades, especially in terms of the significant increase in the share of tourist bed - places with a higher comfort, 3 - star and 4 - star, achieved both through investments in the modernization and increase of the comfort level of the old 1- star and 2 - star units, which represented a majority in the early 1990s, and through the construction of new establishments in all tourist destination areas of Romania. Nevertheless, compared to the year 1990, the total existing accommodation capacity of the country was only 4% higher in 2022 (Table no. 6).

In order to adhere to the maximum limits allowed for publication, this paper does not include an analysis of the evolution of bed - places in apartments and rooms for rent.

Regarding the evolution of the existing tourist accommodation capacity in the Romanian Black Sea coastal area, the tourist accommodation capacity of Constanța County in the year 2022, expressed in bed - places, was only 60% of the one existing in the year 1990, which means that investment is still needed for its development; however, this development should not be chaotic, as it has been the case in the last 3 decades.

The main issues faced by tourism in Romania are not related to the existing tourist accommodation capacity, but rather to the low occupancy rate of the existing accommodation capacity, the short average length of stay and the low number of foreign tourists, due to the low interest in its external tourism promotion.

The analysis in this paper will be detailed and expanded taking into consideration the tourist resorts and localities in Romania, the types of tourist accommodation units and the categories of comfort.

In some tourist resorts located in the coastal area of Romania, but also in other areas, there has been significant investment in recent years in the construction of new tourist accommodation units, without always respecting the rules of urban planning and without adhering to sustainable limits in the process of developing the territory for tourism purposes, as is, for instance, the case of the tourist resort Mamaia Nord-Năvodari, where many of the new buildings (most of which are holiday homes or second homes) are located too close to each other, they are very cramped and lacking sufficient parking spaces.

In Romania, the legal framework for the establishment of Destination Management Organizations at local, county, regional and national levels was adopted in the year 2022 (Jugănar, 2022, pp. 298-308). These organizations will have to monitor, among other things, in collaboration with the destinations' local public administration authorities, the compliance with the urban planning rules and the limits of the territory's tolerance for new constructions in the tourist resorts, so as not to end up in situations of a decreased attractiveness of the respective destinations due to excessive real estate development. In other words, as McCool and Lime put it: 'Tourism carrying capacity is the maximum level of use before degradation occurs' (McCool and Lime, 2016, p. 381).

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