
The Romanian Tourism from Central and Eastern Europe's Perspective

Dorin Paul Bac¹

Tourism is considered by many, one of the most important components of the world economy. Romania makes no exception from this point of view. After the fall of communism in 1989, many Eastern European countries have tried to develop their domestic tourism in order to increase their incomes. In the present paper, we tried to compare Romania's tourism with that of other countries from the Central and Eastern Europe. Our main objective is to offer an objective image of the regional tourism market, as we compare indicators for six countries. For our research we have selected five other countries: Bulgaria, the Czech Republic, Hungary, Poland and Slovakia. We have selected and calculated a series of indicators for several years (2002-2010) or only for 2010.

Keywords: tourism market; Eastern Europe; supply;

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1. Introduction

One of the most important moments in the second half of the twentieth century was the collapse of communist (socialist) regimes in the countries of Central and Eastern Europe, including Romania. With

¹**Dorin Paul Bac**, University of Oradea – Faculty of Economic Science , E-mail: dbac@uoradea.ro

the fall of communism, countries such as Poland, Bulgaria, (former) Yugoslavia and Romania experienced significant increases in the number of international tourists. For this reason, many have reached the top 20 tourist destinations, developed by UNWTO (in 2010, Poland was ranked 19, according to UNWTO 2011: 19). Many Romanians, Serbs, Hungarians and Poles who have previously emigrated to other countries were able to return to visit their families and friends (Timothy and Teye 2009:21).

After the fall of communism in 1989, the countries of Central and Eastern Europe have tried to redefine their national identity. To achieve this goal, they tried rejecting the identity created over the 40 years of communism, including deleting memories of the recent past. The new identity would be based on democracy, pluralism, capitalism and an orientation toward Western values (Light 2000: 157-158).

The post-communist privatization process was often infiltrated by horizontal and vertical networks of reciprocity, which were rooted in the communist era. These networks could help or hinder the privatization of accommodation, leisure or catering. In a study conducted in Russia on the "import" of Western management techniques in the local tourist industry, Phillips (cited by Hall, 2000:443-444) identified two categories of "guards" of structural transformations:

- "new" tourism managers, who relied on vertical structures and blocking cultural development;
- entrepreneurs who apparently enjoyed the new conditions, but were part of the "reformed" communist nomenclature"

We can consider that similar situations could be found in most of the countries from the former Soviet Bloc.

Many authors (Snak 2003; Minciu, 2005; Bădulescu 2004; Băltărețu, Neacșu and Neacsu, 2008; Băleanu et. Al., 2006; Chasovschi and Nastase 2008, Nita and Nita 2008) argue that Romania has a significant tourism potential: mountain regions, seaside, the Danube Delta and an impressive cultural heritage etc. The data we have analyzed regarding tourism indicators, present a slightly different situation. Throughout this paper we tried to analyze Romania's tourism in a regional context, focusing on a series of indicators calculated for selected states.

II. Research methodology

From the point of view of the World Tourism Organization (UNWTO), Romania is part of the Central and Eastern Europe region, along with the following countries: Armenia, Azerbaijan, Bulgaria, the Czech Republic, Estonia, Georgia, Hungary, Kazakhstan, Kyrgyzstan, Latvia, Lithuania, Poland, the Russian Federation, Slovakia, Ukraine and Uzbekistan. We can see that this region is extremely heterogeneous and large in terms of total area and there are many cultural differences between countries.

In terms of tourism, Central and Eastern Europe was visited in 2010 by 94.9 million international tourists (up from 91 million in 2009), and recorded total revenues of \$ 47.7 billion (up 0.3 billion compared to 2009) (see Table 1).

Table 1

**The number of visitors (millions) and total receipts (billion \$) in
2007-2010**

Region	2007		2008		2009		2010	
	Visit.	Recip.	Visit.	Recip.	Visit.	Recip.	Visit.	Recip.
Northern Europe	62,6	70,7	60,8	68,5	57,7	58,6	58,5	59,2
Western Europe	153,9	149,6	153,2	162,6	148,6	143,8	153,6	142
Central and Eastern Europe	96,6	48,5	100	57,6	90,2	47,4	94,9	47,7
Southern Europe	169,9	166,3	171,2	185,3	165,1	161,3	169,7	157,4
<i>Total Europe</i>	<i>482,9</i>	<i>435,2</i>	<i>485,2</i>	<i>471,7</i>	<i>461,5</i>	<i>410,9</i>	<i>476,7</i>	<i>406,2</i>
Total World	898	857	917	939	882	851	940	919

Source of data: UNWTO, 2011, 2009

If we consider the international tourism market, Central and Eastern Europe accounted in 2010 for approximately 20% of the European market and 10% of the world market and its main drivers were: Ukraine, the Russian Federation and Poland.

For our analysis we focused only on the countries in the region that are also EU members, and have a profile somewhat similar to that of

our country: Bulgaria, Hungary, Poland, Slovakia and the Czech Republic. We classified the reasons for choosing these countries, according to several criteria:

a) geographical criteria:

- all six countries are located in the western part of Central and Eastern Europe;
- each country has different landforms and the climate is relatively similar;

b) political criteria:

- the countries are members of the EU in different stages of integration (Schengen countries: Poland, Czech Republic, Slovakia and Hungary, Euro area country: Slovakia) (www.axa-schengen.com/en/schengen-countries, www.ecb.int/euro/intro/html/map.en.html 13/06/2012)
- all six countries are members of NATO (www.nato.int/structure/countries.htm 13/06/2012)
- all six countries are former members of the Soviet Bloc;

c) cultural and religious criteria:

- all six countries have been in contact with several empires (the Austro-Hungarian Empire, the Ottoman Empire, the Russian Empire, the Prussian Empire), who left their mark on the local culture;

- the predominant religion is Christianity (Orthodoxy in Romania and Bulgaria, Catholicism in the Czech Republic, Slovakia, Poland and Hungary) (<https://www.cia.gov/library/publications/the-world-factbook/index.html>);

d) economic criteria:

- all six countries have experienced a transition from a centralized economy to a market economy;

e) tourism criteria:

- all selected countries have significant natural and man-made tourism resources and attractions and the capital cities of the six countries have become major attractions for foreigners.

Using Eurostat information, in order to avoid national disparities, we have calculated, analyzed and compared several indicators, which are presented in the following chapter.

III. Findings and results

The six countries selected in our analysis (Czech Republic, Bulgaria, Hungary, Poland, Slovakia and Romania) are important destinations for international tourists, which are attracted by numerous natural and man-made resources which exist in the region. During analyzed period, from 2002 to 2010, the six countries have shown the same trends as the European and global tourism:

- a period of steady growth from 2002 - 2007;
- the impact of the economic crisis in 2008 and 2009, which resulted in a decrease in international tourist arrivals, felt worldwide, during this period;

- the recovery in 2010, along with the economic recovery in most European countries.

Table 2

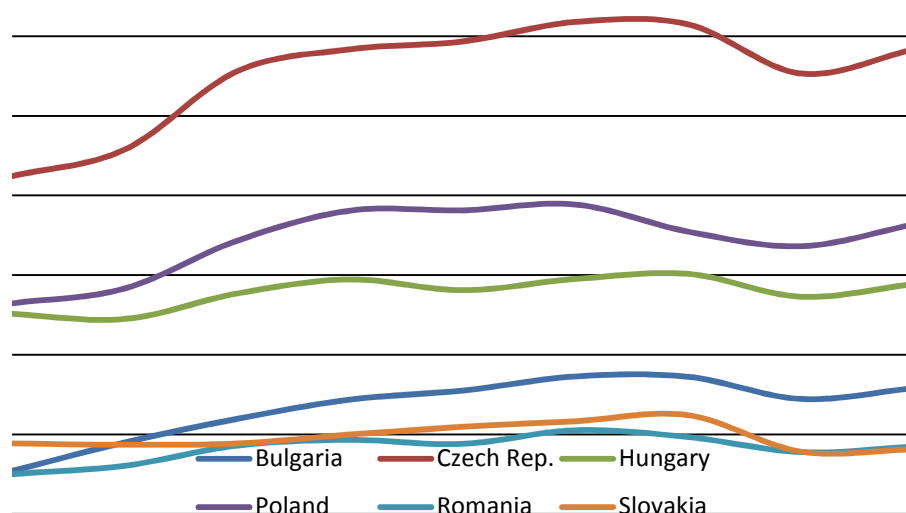
International tourist arrivals 2002 - 2010(thou persons)

Countries	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bulgaria	1.04 0	1.398	1.695	1.93 6	2.05 0	2.22 7	2.22 3	1.94 4	2.079
The Czech Rep.	4.74 3	5.076	6.061	6.33 6	6.43 5	6.68 0	6.64 9	6.03 2	6.334
Hungary	3.01 3	2.948	3.270	3.44 6	3.31 0	3.45 1	3.51 6	3.22 8	3.386
Poland	3.14 5	3.332	3.934	4.31 0	4.31 4	4.38 7	4.04 6	3.86 2	4.135
Romania	999	1.105	1.359	1.43 0	1.38 0	1.55 1	1.46 6	1.27 6	1.346
Slovakia	1.38 5	1.369	1.384	1.49 8	1.59 4	1.66 5	1.74 0	1.28 3	1.313

Source of data: <http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/data/database>

Figure 1

The evolution of international visitors for selected countries



Source of data: <http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/data/database>

The relatively low level of per capita revenues recorded in Romania (Figure 2) is caused by several reasons:

- there is still a large number of tourists who only pass through Romania, choosing lower classified accommodation establishments;
- there are not many 5 star hotels and in Romania there is a reluctance to create all-inclusive packages;
- leisure services are still at an early stage and the income from them is relatively low.

Figure 2



Source of data: <http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/data/database>

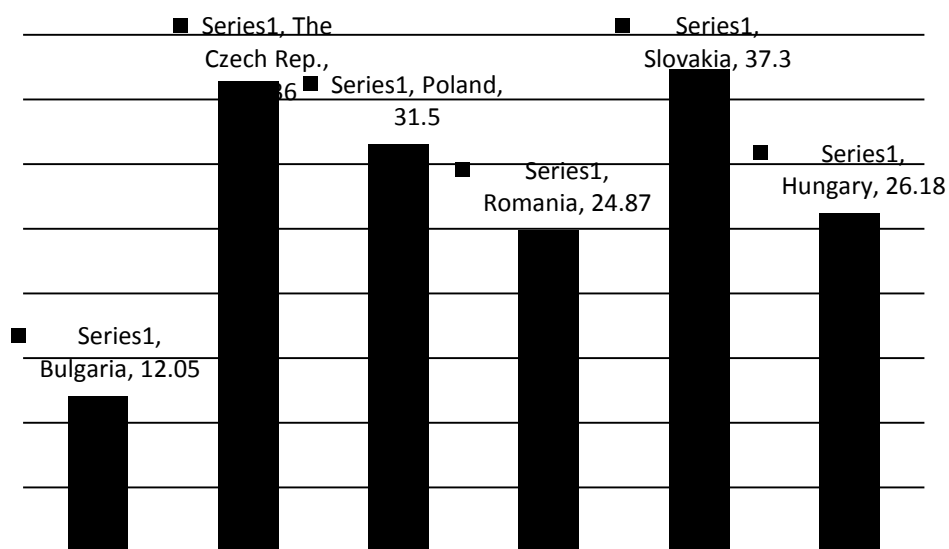
Regarding seasonality, as we can notice in Figure 3, only Bulgaria registered a high level of this indicator, followed by Romania and Hungary. We believe that the main cause is the importance of coastal tourism (Black Sea to Romania and Bulgaria, Lake Balaton in Hungary). Seasonality, although tourism is a new concept and has been researched in depth, is not a static concept.

Unfortunately, Romania has the lowest index of competitiveness (58.91) compared with the other analyzed countries: Hungary (78.44), Czech Republic (74.47), Bulgaria (68.57), Poland (66.03) and Slovakia (62.84). The tourism industry competitiveness index was calculated as the arithmetic average of the following indicators: prices,

infrastructure, environment, technology and social issues (Branza 2009:65).

Figure 3

Seasonality levels in selected countries in 2010



Source of data: <http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/data/database>

Among the six countries there is a significant exchange of tourists, the main destination being the Czech Republic and the largest number of tourists comes from Poland (see Table 3.).

Table 3

Intra-regional flows of tourists in 2010

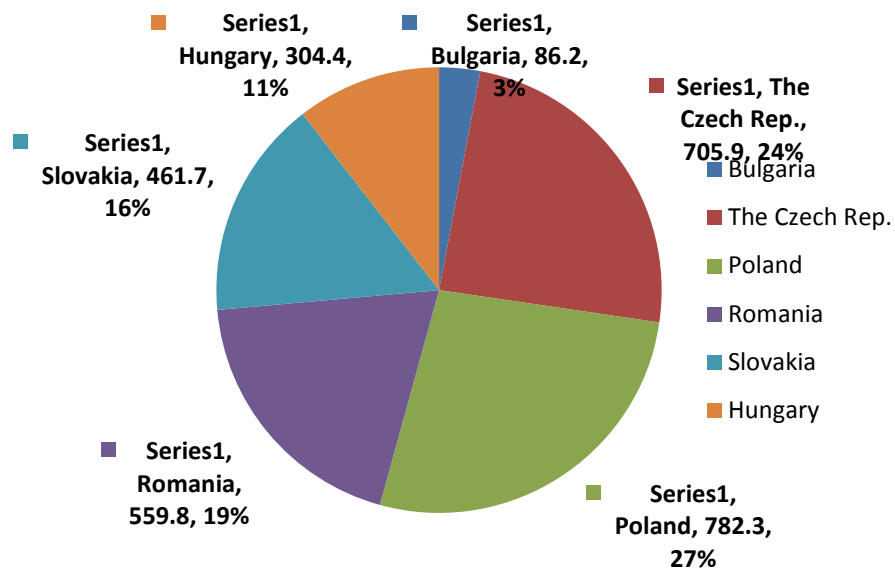
		Outbound (thou)						
		BG.	CZ	PL	RO	SK	HU	Total
Inbound (thou)	BG	0	36,7	84,5	260,3	17,3	25,2	424
	CZ	20,9	0	350,6	50,7	307,1	103,4	832,7
	PL	10,2	79,6	0	25,8	45,4	48,1	209,1
	RO	24,6	17,2	37,3	0	7,7	77,5	164,3
	SK	5,4	426,5	158,1	18,2	0	50,2	658,4
	HU	25,1	145,9	151,8	204,8	84,2	0	611,8
	Total	86,2	705,9	782,3	559,8	461,7	304,4	2900,3

Source of data: <http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/data/database>

The situation of the arrivals is shown in Figure 4. Romania is, unfortunately, again ranked last. Even if tourists from neighboring countries do not spend large sums of money on accommodation, it is unlikely that Romania will be able to attract tourists from greater distances, generating significant revenue for the tourism industry.

Figure 4

Outbound tourism to countries from the selected region in 2010



Source of data: <http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/data/database>

In Figure 5 we showed the share of tourist departures to other countries in the region. The Czech Republic and Poland, the countries which are most developed, are the most important markets for which Romania should focus its attention, covering about 50% of the total market.

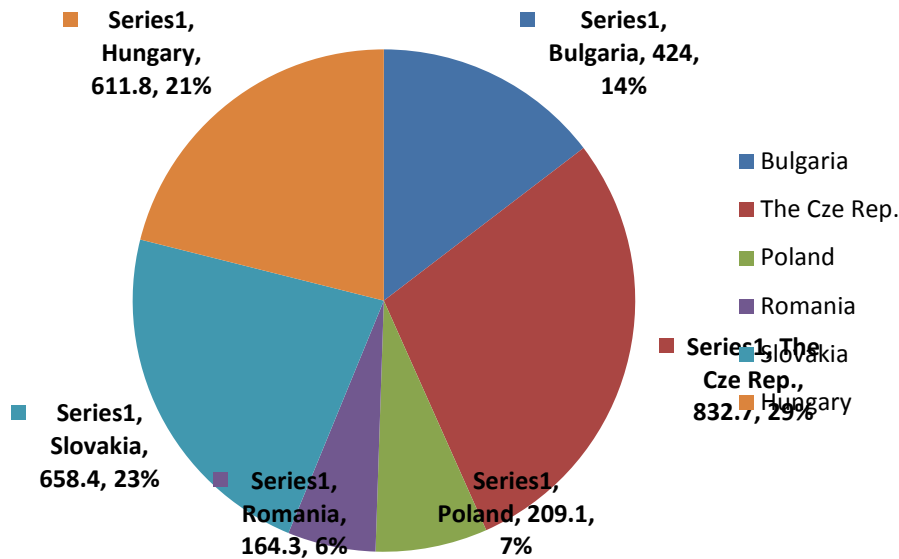
So, for the Romanian tourism industry to become a truly significant for the national economy several steps are required:

- the improvement of regional services and infrastructure;
- building an image and identity and promote it aggressively on the international market;
- diversification of target market segments, including Central European countries (Băleanu et al., 2006: 20).

Others think that Romania would need a national strategy for the revival of the domestic tourism (Niță și Nita 2008) and the main objective should be: "Romania's transformation from a country with rich and varied tourism potential in a country with a developed, modern and competitive tourism. The development of tourism products of our country can go in several directions: creation of a new tourism products for foreign visitors, based on natural and cultural values, especially in mountain regions; upgrading the seaside and spa tourism, promoting the historical and religious tourism and stimulating locals for the development of rural tourism, etc. "(Nita and Nita 2008:32).

Figure 5

Inbound tourism from countries from the selected region in 2010



Source of data: <http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/data/database>

Recognizing the importance of tourism to the national economy, the Ministry of Regional Development and Tourism has developed the National Tourism Development Master Plan from 2007 to 2026. An extremely large document, the Master Plan has the following vision: “to transform Romania into a quality tourism destination based on its natural and cultural heritage that will meet EU standards for the supply of goods and services by 2013 and to achieve a sustainable development of the environment”(MDRT 2007: 163).

IV. Conclusions

From the findings of the previous chapter we can draw some conclusions regarding tourism in the region of Central and Eastern Europe, in general, and more specifically for Romania.

First, the region of Central and Eastern Europe is establishing itself as an important tourism destination, with many countries which record significant increases in the number of foreign visitors and tourism receipts. The only issue with this growth is its long term sustainability. Countries should avoid over-exploitation of their resources both natural and man-made, in order to preserve them for future generations.

Second, we can conclude that, at least for now, Romania does not represent an important “player” on the regional tourism market. Although there is a significant number of Romanians who choose to visit countries from the region (especially Hungary), the total number of visitors from these countries who choose to visit Romania is relatively low. One reason could be the relatively short distance to important tourism destinations like: Greece, Turkey, Croatia and Italy.

Thirdly, Romania can't raise claims to become an important tourist destination in Europe and worldwide, unless it can attract tourists from neighboring countries. Therefore, it might be helpful in the next promotional campaigns to focus more on countries in the region.

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