

The Effects of the Pandemic on Romanian Incoming Tourism

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Abstract

In this paper we study the impact of Covid-19 pandemics on the incoming tourism in Romania. Following the typology of crises in general and the specific nature of the Covid crisis, we will see what effects this most recent pandemic had globally and what economic policies were taken to counteract the adverse effects of the pandemic. We will see that the lockdown and mobility restrictions at European level have led to a free fall of the incoming tourism, increasing the share of domestic tourism on the one side, while on the other hand we observe the tendency of people to move to the countryside. There have been observed some trends that favoured nature tourism, but we also witnessed, that OECD recommends continuing with a more sustainable tourism. We witnessed in 2022 a recovery of tourism in the European Union, which seems to invalidate the trends reiterated by OECD. Through a statistical regression we try to forecast the trend of incoming tourism in Romania, which gives us two possible directions of its evolution. Analysing the pessimistic case, we also identify systemic risks at the level of Romanian incoming tourism, that is focusing on a few countries only, so we see diversification as a very urgent matter for Romanian tourism.

Keywords: incoming tourism, COVID-19 pandemic

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1. Introduction

According to Wut et al. (2021), crises are events that cannot be foreseen, but threaten important expectations of the parties involved – regarding health, safety, environmental and economic issues. Crises have both an important impact on the performance of organizations, and they generate negative comments. Moreover, crises regularly have a disruptive effect on the tourism and hospitality industry and in some cases on the entire economy and daily life, as we saw during the last pandemic of COVID-19. Diaconu and Georgescu (2016) define crises as the results of situations characterized by instability, followed by episodes of uncertainty, volatility and increasing inequality between economic, political, and ideological components, uncovering an interconnection between economic crises and the economic cycle. It is a phase of accumulation of surplus goods, which is at odds with the purchasing capacity of the population, resulting in declining production, rising unemployment and bankruptcies.

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The Asian financial crisis and the global economic crisis of 2008-2009 affected tourism negatively (Wut et al. 2021), while people from those countries generally lost purchasing power, while visitors from other countries benefitted, given the devaluation of the country's own currency. Low domestic demand was compensated by the arrival of more foreign tourists.

We want to see both the solutions found by tourism companies at European level, and how people's demand for tourism has evolved. The obvious answer is nature walks, making more use of holiday homes in rural areas. A lot of literature in 2020 and 2021 confirms the trend, culminating in the study of OECD (2020), preaching for sustainable tourism. What will remain of all these?

Then, we discuss to what extent the last pandemic crisis will affect particularly the incoming tourism in Romania for the coming years. We will both use statistical data in Romania's case to see how the overall number of tourists evolve and make a structural analysis of the incoming tourism of Romania, to see what markets could also be explored, knowing the markets with high demand for outgoing tourism, as presented by Ștefanovici and Mazilu (2021). This will tell us to what extent Romania should change or intensify its marketing efforts.

2. Methodology

In this paper we will review the available literature to see first the background of the pandemics, and why it was such an atypical crisis.

Then, we shall use a statistical model to see a possible evolution of incoming tourism in Romania because of the pandemic. For this, we shall start from the raw data taken from the database of the National Institute of Statistics, from which calculate the logarithmic dynamics from one year to another according to the formula: $\ln \frac{T_1}{T_0}$, where T_1 is the number of arrivals of international tourists in the current year and T_0 is the number of arrivals of international tourists in the previous year.

The dynamics thus determined will help us forecast the annual dynamics of tourists for the coming years, using a polynomial regression of grade 6, which fits best on the data set. The regression will show us to what extent and how the dynamics of foreign tourist arrivals depends on the value of time, putting on the x axis the time (years) and on the y axis the number of arrivals of non-resident tourists to accommodation units in Romania. F significant and probable value are for our data set less than 0.05, which means it is statistically significant. In order to get statistical relevance, 2020 has been removed from statistical calculations, as the value furthest from the trend axis of all years from 1990 until now.

Once we have the prediction of the dynamics of arrivals of non-resident tourists, we will reverse the logarithmic formula, in order to have the forecast of the actual number of arrivals forecast for the coming years using the following formula:

$\left(e^{\ln \frac{T1}{T0}} \right) \times T0$. Here $\ln \frac{T1}{T0}$ is the value of the dynamics forecast for the current year, and T_0 is the number of arrivals of international tourists in the previous year.

In addition, we will analyse the trend in the number of tourists of Romanian travel agencies, which will give us an idea of the future evolution of incoming, domestic and outgoing tourism, in order to see them comparatively. A structural analysis of the Romanian incoming tourism markets over time, will shows us to what extent there is are risks for the industry.

Based on the statistical results, we will make recommendations in accordance with the literature, reaching the necessary conclusions of the study.

3. Literature review

Diaconu and Georgescu (2016) divide crises into three categories. The first category is currency crisis, including crises due to inflation, currency deterioration or currency collapse, all leading to a decreased purchasing power. This includes commodity price bubbles. The first crisis in the world was determined by the growing popularity of tulips in the Netherlands at the end of the 16th century and the beginning of the 17th century (Dash, 2014). Rapid price increase led to a crisis when many amateurs began trading cheap tulip bulbs. Once the prices of the forward market could no longer be paid by end customers, a chain of defaults and bankruptcies arose. Economy witnessed minimal state intervention, leaving traders to find their own solutions. Oppositely, the Ottoman Empire banned trade with tulips more than a century later. The measure had only partial effect, as it could be imposed mainly in the capital and in its neighbourhood (Dash, 2014). A second category of crises would be banking crises, and the third category being external debt crises (Diaconu and Georgescu, 2016).

We would add to this list the health crises, as they were called during the COVID-19 pandemic, a branch of natural disasters, alongside with hurricanes, floods and tsunamis, earthquakes, biosecurity and diseases (Wut et al., 2021). They have in common fatalities among tourists, in addition to devastating the destination and property of companies in the area (Wut et al., 2021). Wut et al. (2021) add to this category the avian influenza in 2006, SARS in 2003, foot-and-mouth disease in 2001, all of which have a great impact on tourism. The Swine Pest of 2009

resulted in losses of \$2.8 trillion, and the Ebola outbreak in 2014 and 2015 has affected the African tourism through a 5% reduction in income (Wut et al., 2021).

Taleb (2010) introduces the concept of the Black Swan, which defines those rare events with extreme impact – negative or positive – that cannot be predicted, while explanations in retrospect may be closer or farther from truth. Many of the crises so far seem to fall under this definition, including the one attributed to COVID-19.

Following the picture of the economic cycle of the pre-pandemic years, the literature seems to converge on the fact that the world was in full economic expansion up to the COVID-19 pandemics, making it an unusual crisis in many aspects. Mozambique, for example, reduced poverty between 1997 and 2008 by 20%, falling further by another 4% by 2016 (Barletta et al., 2021). Svabova et al. (2022) note that real per capita income in Slovakia is forecast to fall to 2015 levels, meaning the loss of five years of income growth. Chen et al. (2020) show that Samoa depends on remittances from its citizens working abroad, which increased in pre-pandemic years, to represent 20% of the country's GDP, while for 40% of Samoan households these remittances represent a significant part of family income. Danciu (2020) studies the impact of the COVID-19 crisis on global value chains, finding that they are among the most important economically, contributing 60-70% to global trade in terms of added value. According to the same study, in the last 20 years we have witnessed a large increase in trade, mainly due to global value chains, which has led to the economic growth of many countries.

Studying the effects of the COVID-19 crisis in the general economy, we need to say, it does not fit in any category described above, as we saw the power of the state imposed on us, through a terrible lock-down. And indeed, Foucault (1991) deals with matters of power, seeing the soul as a product of the *"methods of punishment, supervision, constraint."* (Foucault, 1991:29)

Power relations imply a permanent hierarchy of the world that did benefit some – as it also happens during times of crises. They create an advantage of some over others, a power, greater experience, higher level of knowledge, in a word, the ability for one party to compel the other to do something that it would not normally do (Dahl, 1957, leading to a financial advantage. Thus, the school, the hospital, the factory, and later the prison, all became institutions of coercion, of supervision, later appearing institutions of punishment, of manifestation of power of one side over another – institutions, in which the activity of the person concerned was supervised day by day, hour by hour, and minute by minute (Foucault, 1991).

Hospitals were used in the classical period especially by the favoured few, who
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needed cheap labour, and rarely, to bring national economies out of impasse, respectively recession. In a word, it meant forced labour, in an attempt to reintroduce into society all those who would otherwise walk on the streets – the poor, the sick, thieves, beggars, all associated with murder, laziness, or refusal to work. (Foucault, 2002).

Up to the Covid pandemics, this play of power translated in the globalization preached by the business literature of the past 20-30 years. Nike was among the first ones to use the benefits of globalization, outsourcing operations to Asian destinations, with cheap, but hard-working labour (Klein, 2000). It came hand in hand with protests at home, so adaptation was necessary (Klein, 2000). The situation escalated to the point that Miron and Cojanu (2013) find that the intra-product trade accounts for 60% of the international trade. Soon, Chinese FDI produced great fear in western countries at some point, when they started building ports in the USA (Anon. 2012a) or with the penetration of Western markets by Chinese technology, like Huawei (Anon. 2012c). But it was the pandemics that raised concerns to produce more at home (Danciu, 2020), more so that Chinese labour is not that cheap anymore (Anon. 2012b).

We witnessed during the pandemic a Foucaultian power of authorities with the two-month lockdown starting in March 2020. It was explained by its very rapid transmission from one person to another. Neither can we forget the many high fines in Romania, which were given to fulfil this noble purpose, but were cancelled by decision in court due to the many lawsuits initiated by individuals against them.

The context was a medical one. Lima et al. (2021) reiterate that 19% of infected individuals developed severe disease, while 5% developed a critical variant of the disease, requiring admission to the intensive care unit. Many risk factors for the latter possibility were stipulated at that time – old age, smoking, the existence of other non-communicable diseases (diabetes, hypertension, heart disease, chronic lung disease or even cancer). Further research has found stronger or weaker associations between these predispositions and the severity of the consequences of infection with this type of corona virus. As all the implications were unknown, the pandemic started with a closure of all activities, while hospitals were full during the various periods of the pandemic, often not coping with that many sick people. Delays in the supply chain of medicines have been encountered, as well as deliveries of many things have been delayed.

The social component of the crisis manifests itself through the measures of social distancing, lockdown, closure of institutions and service providers both at medical services and event organizers, according to Danciu (2020).

Among consequences, Hoffmann et al. (2022) found a slight shift in eating habits among Poles towards a healthy diet during the pandemic, respectively an increase in physical activity of a segment of their respondents. O'Connell, Smith and Stroud (2022) note an increase in daily calories consumed by UK adults, which resulted in 40% of UK adults gaining weight during the lockdown period. Many others cooked at home, which resulted in an increase in the supply of raw materials, while the purchase of cooked food decreased drastically. Paul et al. (2023) find that people travelled less by public transport or by their private means of transportation, preferring to walk or to cycle to keep fit.

Marrotta et al. (2020) deal with the psychological impact of the lockdown during the pandemic and note less life satisfaction due to uncertainty of the situation and the measures to be followed, a degraded state of well-being and an increase in suicidal tendencies, anxiety, depression and indignation. Authors find, that it can lead to loneliness and boredom, which could be detrimental if experienced over extended periods of time. At the same time, they found that the dominance of social networks and social media had a protective role in Italy, which compensated (partially) for social connections. Elliott (1998) shows how people are usually motivated to maintain a positive emotional state, using strategies to maintain mood, respectively strategies to repair emotions, through which they seek to relieve negative emotional states.

With regards to online study, Saneh et al. (2022) note that it is a monotonous method, while at the end of the pandemic students stayed away from everyone. It has led to the addiction of many students to online games, and parents could not do anything about it. Fears arouse about future asocial behaviours of these students. In addition, confronting some students with the death of their parents due to COVID-19 or situations where survival is an important concern, getting sheltered was a very important aspect. Furthermore, free online education could not be technically provided in many countries or areas. Moreover, children's online education overlapping with parents' teleworking that led to problems concerning sharing available spaces. After the lockdown, parents needed sometimes days off or teleworking approved because of children's online study (Dumitrescu and Prisecaru, 2022). Among its benefits, it requires 40-50% less energy and less time, but Saneh et al. (2022) conclude that traditional education is still more beneficial. This seems to be supported by the study by Iosif et al. (2021) on Dentistry students, who did not have a proper practice because of lockdown and social distancing rules.

Komanda (2022) notes a decrease in cultural activities in Poland, witnessing an 80-90% decrease in participants in such events. A decrease of the same size in

organized cultural and entertainment events followed. A third of the artists had to be helped by family, while musicians witnessed a 77% drop in income in the first year of restrictions compared to pre-pandemic years. In many other areas, that do not require physical proximity between supplier and customer (Ando, 2022), remote work has increased (Kalogiannidis, 2021). Kalogiannidis (2021) notices an increase in unemployment, respectively a decrease in wages, corroborated with an increase in the agility and flexibility of HR professionals. Danciu (2020) notes a rapid increase in global unemployment in April 2020, given that in the US over 15% of the active population was applying for unemployment benefits. Rusu and Nucu (2020) show, that the dismissal of employees was one of the rarest measures taken by companies – we connect it with the state intervention with policies to preserve jobs and prevent business closures (Svabova et al., 2022). Romania is no exception (Dumitrescu and Prisecaru, 2022). If individual employment contracts were suspended at the initiative of the employer because of the pandemic, people benefited from payments from the state budget of 75% of the basic salary corresponding to the job, for May and June 2020. During the alert period or during periods of temporary closure of schools, parents received similar allowances. In other cases, indemnities were lower or technical unemployment was resorted to with payment of 75% of the basic salary of the position.

Due to the decrease in both consumption and in the income of the population amid reduced demand due to the pandemic, poverty increased, according to the study of Summer et al. (2020). Affected by unemployment and poverty are those with the least education, who could not work remotely and therefore provided services that required physical presence (Daly et al., 2020). Barletta et al. (2021) note that in poor countries such as Mozambique, a short-term loss of income would lead to long-term detrimental effects due to panic selling of fixed assets, as well as poorer health or failure of children in the labour market, as they will not return to school.

Problems on political level were encountered both developed countries and developing countries. In the first, the health system has proven inefficient. In the second, the health infrastructure is inadequate, insufficient or poorly developed, governments not having the resources to counter such a crisis, Shaheen et al. (2020) say. The difficulty arose when diverting resources from other sectors to stop this phenomenon, given that the world economy has been halted and their exports were no longer functioning. All this adds up with a fragile democracy, politically divided leadership and lack of political will to give a coordinated response from the government, given that the opposition makes this much more difficult (Shaheen et al., 2020).

Danciu (2020) analyses the impact of the pandemic on the global value chain and finds repercussions of the pandemic on the entire economy. Because of the economic shut down, many products and services could not be obtained, such as air transport, tourism, car parts, electronics and many others. Job losses resulted into the loss of income and interruption of the supply of raw materials for certain sectors. This led to a drop in demand for cars, clothing and footwear, which has had a domino effect on jobs in other areas. The automotive industry received a strong shock due to the closure of factories in China (80% of parts and materials come from China), and subcontractors' sales fell by 92%, revealing an "irresponsible and unreasonable" dependence on China (Boshkoska and Jankilovski, 2020). They show how car sales in China fall by 92%, which has repercussions on all manufacturers – Tesla had to postpone production of the Model 3, Volkswagen had delays in production of all factories in China, and Hyundai stopped production altogether in February 2020 due to lack of stocks. More than 95% of the supply of batteries and 80% of raw materials related to the active components of medicines are supplied by China or other Asian countries (Boshkoska and Jankilovski, 2020), while the pharmaceutical and healthcare industry have witnessed a very rapid increase in demand (Danicu, 2020), having delays both in production and in the supply of necessary materials and medicines. Transport capacities of goods became also too small because of the steep decrease in air passenger transport, due to border closures – almost half of air cargo services are carried out by passenger planes (Ando, 2022). In this context, Danciu (2020) proposes more resilient structures by building customer maps to reveal the bottlenecks of the supply system, using more flexible digital technologies or moving manufacturing back to the continent.

Aviation itself suffered quite a lot from restrictions, followed by a decrease in demand from both travellers and due to social distancing, that led to both a one-third decrease in aircraft capacity and a 50% decrease in receipts compared to 2019 (Boshkoska and Jankilovski, 2020). After the first restrictions, air traffic decreased by 48-61%, which led to losses of millions of euro per month, due to high fixed costs of airlines (Boshkoska and Jankilovski, 2020). Consequently, laying off personnel has been one of the solutions taken by many airlines – and SME-dominated tourism has suffered a similar fate.

In a comparison to the financial crisis of 2008-2009, when trade in goods declined sharply and trade in services remained almost unchanged, the spread of COVID-19 had a major negative impact on trade in services (Ando, 2022). Thus, if trade in services decreased overall by 20% in 2020, the largest decreases are only on three components – tourism services (with a decrease of 60%), transport services and services for various goods, each of the two with a decrease of 20 % (Ando 2020).

He also shows that trade in goods decreased by 30% at the beginning of 2020, which then had a V-turn, which was not the case of trade in services.

Lopez-Garcia and Szörfi (2021) note an increase in labour productivity that has benefited from an acceleration of digitalisation because of the pandemic, given that many firms chose the option of teleworking (notably IT and finance), allowing employees to work from anywhere in the world. New channels of sales and of maintaining contact with customers had to be established, which impacted the working and business arrangements of those firms. The authors notice here the process of creative destruction, which could have a beneficial influence on productivity by exiting the market of firms with low productivity. However, the exogenous and horizontal nature of the coronavirus shock affects all firms in a particular sector, so they doubt that the process of creative destruction will take place, considering the policies to support firms that were introduced by many governments during the pandemic.

Bloom et al. (2020) take into account total factor productivity in the UK between 2020 and 2021 and find a decrease of 5%, alongside unmeasured inflation due to deteriorating product quality, which adds 1,4% to the negative impact of factors. Rusu and Nucu (2020) find that the most affected companies in Romania are SMEs, 75% of them suffering from reduced sales, compared to 61% of multinationals reporting sales decreases of only 25%. Those working in services and utilities were the most affected, reporting decreases of over 50% in sales. As a result, many companies had to decrease, suspend activity or resort to technical unemployment. Large corporations had resources to introduce teleworking, involving a major investment, unplanned at this level, which was not always available to SMEs in Romania. The result: supply from Romania failed to meet the domestic demand surplus, so imports doubled in the balance of payments, maintaining a robust growth rate.

Svabova et al. (2022) find that the most affected areas in Slovakia were hotel and restaurant businesses (those two also had the largest increases in the number of newly unemployed people in Slovakia), real estate, administrative and support services, arts, entertainment, and recreation. Bloom et al. (2020) find a spectacular drop in UK sales in the second quarter of 2020 (35% on average), with the most affected industries being those belonging to HORECA and recreational services (with a 75% drop of sales). Tourism and related industries suffered the most – IATA estimates losses of 63-113 billion USD (Zekra, 2020), given the overall drop in air traffic due to travel restrictions. In addition, movie-related advertising could lose more than \$5 billion USD due to lower receipts at cinema box offices (Zekra, 2020).

Because the economy of the EU was caught again without effective crisis management at the onset of the pandemic, the European tourism and hospitality industry was almost unable to recover by regaining the confidence of tourists and guests (Wut et al., 2021). To what extent a return to normal will be possible, time will tell. Ural (2016) brings arguments on both sides. A decrease should be seen only for a finite period of time, after which a recovery is possible, given the marginal product of capital to rise to abnormally high levels, converging to their pre-disaster trend. But there is also the possibility that they will not recover, due to the fact that different recovery mechanisms will fail to counterbalance the negative effect of capital loss. In this respect, the accounting result of the tourism industry will continue to grow in the long run, but it will be permanently below the trajectory preceding the disaster (Ural, 2016).

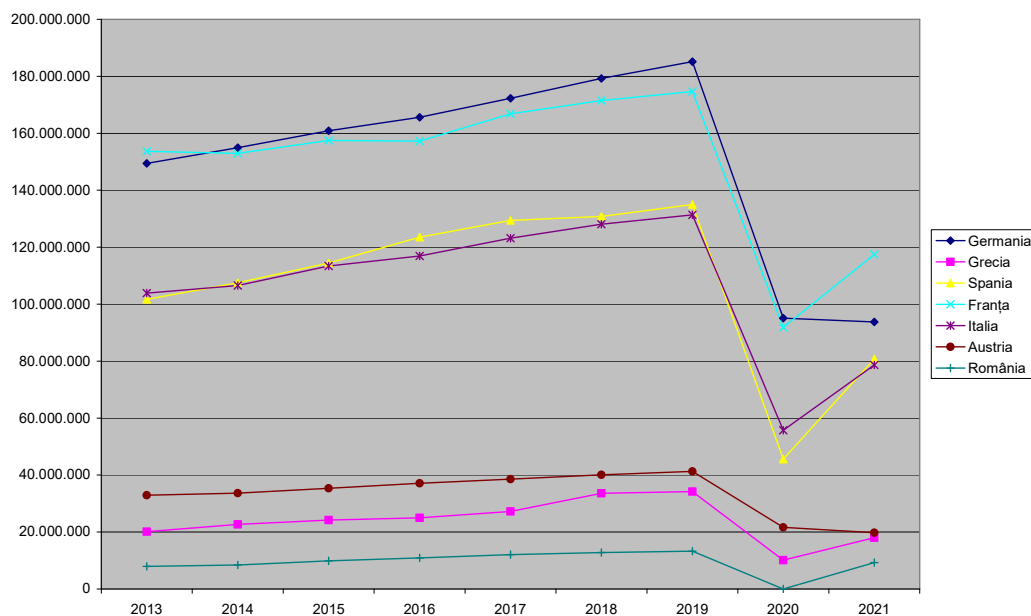
For 2020 we were witnessing a fall in the number of international tourist arrivals across the European Union. Ștefanovici and Mazilu (2021) estimate decreases in the number of tourist arrivals between 65% and 79%, averaging globally 70%. On the positive side, pollution and carbon emissions decreased, according to the authors. Statistical data for 2022 are not yet available at the time of writing, but we already see an attempt at tourism recovery in 2021 (Figure 1). But the recovery was not as rapid in 2021 for all countries involved as we will see next. We could observe a drastic reduction in the number of international tourist arrivals globally. Looking at European Union tourism, we can easily extrapolate to global tourism, given that the European tourism industry accounts for half of the world's tourist arrivals (Ștefanovici and Mazilu, 2021).

Folinas and Metaxas (2020) analyse the world tourism in March 2020. In Rome 90% of bookings to hotels and travel agencies were cancelled, while in Sicily 80% of bookings were cancelled. Areas of Italy almost unaffected by the virus suffered a similar fate. Ireland's case has not been any better – cancellations have led to a reduction in revenue of €2 billion, which is an important part of its national revenue (Folinas and Metaxas 2020). Popșa (2021) shows that the share of tourism in Germany's GDP decreased by 46.9%, in Italy's by 51%, in France's by 48%, in the UK's by 62.3% and Spain's by 62.7%. During the pandemic we witnessed the weakest demand from outbound passengers of most major source markets (Australia, Canada, China, France, Germany, Italy, Korea, Russia, UK, USA) – a steady decrease in demand by 99% between April and December 2020 (Ștefanovici and Mazilu, 2021). This aggravates the situation for many countries hosting them – Romania included.

These figures are undoubtedly unsettling. They were all the more unsettling at the onset of the crisis and when operators witnesses massive cancellations that

followed. We will analyse below the market response, both on the demand side and on the supply side – the trends of tourists to organize their holidays during this period, but also to the survival strategies experienced by tourism operators. Wut et al. (2021) propose a possible solution in finding other outlets or other ways to serve customers, by expanding or serving the same customers in another way.

Figure 1 Number of arrivals of non-resident tourists in 7 EU countries



Source: Own design graph based on Eurostat data

Thai hoteliers offered, for instance, 14-day full-board packages at very competitive prices for those who want to self-isolate (Folinas and Metaxas 2020). Meals were served by room-service to ensure isolation and no interaction with other guests. The linen and dishes used by those in isolation were separated from the one in normal circuit, to be disinfected. Once guests showed specific symptoms, they were sent to nearby hospitals. The Dorset hotel chain brought a similar offer – quarantine packages of 9 or 27 days (Folinas and Metaxas 2020). Some of Hong Kong's top hotels had similar offers, while others closed, the authors say.

OECD (2020) finds that it was not only necessary to have good cash flow management, but also access to government support to survive. Many firms have promoted pandemic-safe operations, including safety protocols, standards and labelling, employee training, providing information to visitors, and marketing and promotion campaigns. In addition, adapting to the new conditions has meant introducing food delivery services or picking it up for consumption elsewhere,

flexible booking conditions, offering digital experiences, but also diversifying products and service packages. Other firms have improved their facilities, restructured businesses or closed parts of the firm. Other firms had to pivot operations to serve new markets, namely domestic markets – as accommodation for students, but also dedicated spaces for teleworking (OECD, 2020). Other trends include providing medical employees with meals, accommodation or rooms, others have received Covid-19 patients, people to self-isolate or quarantine (Folinas and Metaxas 2020). Some Danish hotels offered accommodation to students. Hoteliers in Bratislava together with the Bratislava Tourist Office created a promotion campaign "City in 72 hours", where participating hotels offered those who spent two days in Bratislava a third one free of charge. TUI introduced health and safety guidelines for hotels, planes and aircraft to operate safely.

On the demand side, Barazi et al. (2021) find an increased perception of psychological risk of tourists, fearing the contraction of the disease. As such, people will feel anxious and unsafe, deciding to travel to their own country, as was the case of tourists from Saudi Arabia (Barazi et al., 2021) or those visiting South Tyrol (Scuttari et al. 2021). The latter had traditionally a high share of international arrivals, especially from Austria. With the sharp drop in foreign tourist arrivals (44,5% fewer arrivals from Germany, 55,4% fewer arrivals from Austria and 36,7% fewer arrivals from Switzerland), the authors note a modest (4.4%) increase in domestic tourism, arriving mainly by car (88%) to ensure isolation from other potentially ill tourists.

Scuttari et al. (2021) find that rural tourism was most attractive during the pandemic, being perceived to be safer than urban or resort tourism, as B&Bs have smaller accommodation capacities and distancing can be better ensured with nature walks. However, Scuttari et al. (2021) find that they have two types of tourists. The adventurous but attentive guests, who need less information about the evolution of the disease and infections, will also go by bus and take walks outside the guesthouses, while very conscientious guests need constant information on the evolution of the disease, do not trust others so much and ask for the hosts to be vaccinated – those will stay predominantly in the guesthouse. Scuttari et al. (2021) and OECD (2020), see in the pandemic the opportunity to promote a more sustainable form of tourism, including walking or cycling.

Botricevic and Stankovic (2021) note a 56,9% decrease in foreign tourist arrivals to Serbia, which correlates with an increase in domestic tourism, accounting for 73% of accommodation days in the first half of 2020. The authors find the same trends as above applying to Serbian tourism. There have been cases, when tour operators had to close their businesses (10% of respondents to the study led by

Botricevic and Stankovic 2021).

According to Aberg and Tondelli (2021) residents of big cities moved to country locations, possibly to their holiday homes. Moreover, access to green spaces and nature was an unaffordable luxury in Europe, North America and Russia during the lockdown (Aberg and Tondelli 2021). Working from home has given increased flexibility – a good opportunity both to repopulate and regenerate rural spaces and to invest in rural areas.

The motivations of wealthy townspeople for seeking new rural lifestyles were manifold. Not only they searched for natural environments and private space, but for some it also meant seeking shelter from disease. But busy roads and overstretched water networks in villages are only part of the inconvenience. The rise in country house prices (by 126% in the UK) was the main disadvantage arisen from this situation (Aberg and Tondelli, 2021).

On the island of Gotland some areas outside the island's main city have been exposed to great pressure from increasing tourism and temporary residences used more intensively during this period (Aberg and Tondelli, 2021). But it was a good opportunity to develop rural areas – the year 2020 brought to the island more tourists than usual, with all restrictions in place at that time. People came to their holiday homes, but also increasingly with caravans and cars (Aberg and Tondelli, 2021). They could also discover the lesser-known areas of the island, which were not dedicated to tourism.

Figuroa and Rotarou (2021) in their study on the sustainable development of islands through tourism, found that they fared better during the pandemic than many other destinations. But their dependence on mass tourism – as the Easter Island (Chile) – is not good, and local occupations should be diversified to seek shelter from such crises.

In line with studies from 2020 and 2021, OECD (2020) proposes that crises like this could be an opportunity to rethink the tourism system and move towards more sustainable and less environmentally intrusive models. Sustainability implies, according to Ural (2016), three important points. First, to use environmental resources to preserve nature and biodiversity. Secondly, to preserve the socio-cultural authenticity of host communities, preserve their culture and cultural values. Thirdly, to ensure socio-economic benefits to all stakeholders who are fairly distributed, such as stable jobs, opportunities to have income and social services within the host community, and to contribute to poverty reduction. In line with the studies presented above, Ural (2016) sees several forms of sustainable

tourism – nature tourism, ecotourism and cultural tourism, thus avoiding mass tourism by the sea or spa and wellness tourism, which have been very successful in the pandemic.

Finland is an example of sustainability (OECD, 2020), who created a corona virus development fund, which has awarded grants of up to €100,000 to create new products and innovative solutions for manufacturing, new and accommodation-related tourism services, and business development.

Iceland has invested in national parks and protected areas, as well as expanding its airport and ports (OECD, 2020). Lithuania promotes innovation and digital technologies through the development of tourism services and products. And Slovenia is betting on ecotourism, changing the paradigm towards green development through priority investments in sustainable and "green" tourism facilities, digitalization and investment in the knowledge, skills and competences of tourism workers. Spain, according to the OECD (2020), has developed a modernization and competitiveness plan, which has created a model of sustainable tourism transformation and which calls for the development of tourism products, digitalization, tourism resilience strategies and competitive positioning of the tourism offer.

Thus, the directions proposed by the OECD (2020) are those of using digital tools, creating contactless solutions to support safe tourism experiences and innovating to address the new trends in demand coming from the internal market in rural destinations and natural areas.

Escaping into nature is not new, where "*[the] untouched wildernesses devoid of human influence, where consumers can quit everyday life and enjoy transformative pleasures or sacred rituals of rejuvenation.*" (Canniford and Shankar, 2013). But we see it just as a good addition to the offer of travel agencies, to stay robust, but not as a main trend. The inclusion of such a direction, in addition to offers for the internal market, will certainly lead to a robust supply that has a great chance of passing any crisis.

Several studies into consumer behaviour support our saying. Elliott and Wattanasuwan (1998) find that certain brands can take on a deep meaning, those objects (we would add places) being reminiscent of grandparents, often through smell, which brings them back in the time and place of childhood. Their use can also be used in the sense of nostalgic activity or to recreate a sense of security – it is the example of all those who emigrated from Romania, for instance. All this leads to the construction of a personal identity that will further define consumption. As such, we do not think that a radical, lasting change will occur in tourism consumption – Toncescu and Perrier (2009) note the reluctance towards the unknown, unfamiliar and different. These situations are unpleasant, generally

avoided, give states of longing or regret after the old, familiar and known. There will be adaptation strategies according to Elliott (1998), but adaptation will not always occur (Nesdale & Mak, 2000). Aberg and Tondelli (2021) see trends in tourism demand during the pandemic as not lasting ones – families with children will not remain in the countryside if local authorities do not build schools for the greater number of children coming to the area. Tauber and Bausch (2022) also observe in a study of several European countries and the US – the pandemic has not led to long-term results in terms of sustainability. Tauber and Bausch (2022) argue that this occurs through the prism of consumers' personal values, which are formed in childhood and youth (Elliott and Wattanasuwan, 1998, confirm this statement), after which they remain very stable over the years, like the values of society as a whole. The pandemic, in the authors' view, changes at most the importance of individual values at some point, demand having largely returned to destinations that were in vogue before, even if numerically pre-pandemic values have not yet been reached (Tauber and Bausch, 2022). They motivate these trends in terms of each individual's agenda – there are destinations that have been on personal lists for a long time, some being postponed due to personal security and restrictions imposed by authorities.

To add to the robustness, we will analyse the firm's options from the point of view of risk management. Insurance is not a sufficient solution (Ural, 2016) in the case of disasters (events with low frequency and high risks of loss). First, to control losses incurred, before the disasters happen – mitigating measures, based on rules, regulations, education and safety measures. Risk should be avoided, where possible (not to build in risk areas). Resilience measures are those, where firms will try to reduce the effect of risk materialization through precautionary measures in areas where risks may occur – all actions taken by hoteliers to reduce infections once the pandemic has started.

A second set of measures identified by Ural (2016) is the financing of loss through reinsurance – insurance, catastrophe bonds, derivatives and hedging. A third set of measures are capital market instruments, and the fourth set of measures is materialized through public financing – and we saw that European states have provided such support. In addition, risk reduction includes partial or total exit from compliance or diversification through cross-sectoral integration (Ural, 2016). We have seen this happening in the hotel sector, which has partially adapted to the conditions of operation during the pandemic. For tour operators and retailers, this option was more of a post-lockdown solution to find new markets and outlets.

4. Results

Turning to the Romanian incoming tourism, we expect there an increase in post-

pandemic time, to follow the European trend. In Romania, we have some well-defined influences regarding tourism. First, a success of tourism marketing from communist times is the one that refers to Dracula's Castle in Bran. Although Dracula, or rather the historical character behind him – Vlad the Impaler – did not have a historic connection with Bran Castle, the legends of the mythical person based on Bram Stoker's novel was preferred to talk about to the Romanian royal family, to whom it belonged in the period following World War I. The campaign, run by the communist regime, was especially successful on US and UK markets.

The second great influence on Romanian incoming tourism was the emigration of the Transylvanian Saxons, especially after the revolution. We could observe an increasing interest from tourists for the German-speaking area of Transylvania. As such, we expect this trend to continue and Romania to continue to be on the list of tourists to visit in the future, which will bring the number of foreign visitors back to the pre-pandemic level. On the other hand, we cannot deny the influence of war in the vicinity of the country's eastern border – with the finish of the pandemic, in February 2021, Russia invades Eastern Ukraine, a fact that has kept many fearful tourists away from visiting our country in the post-pandemic years.

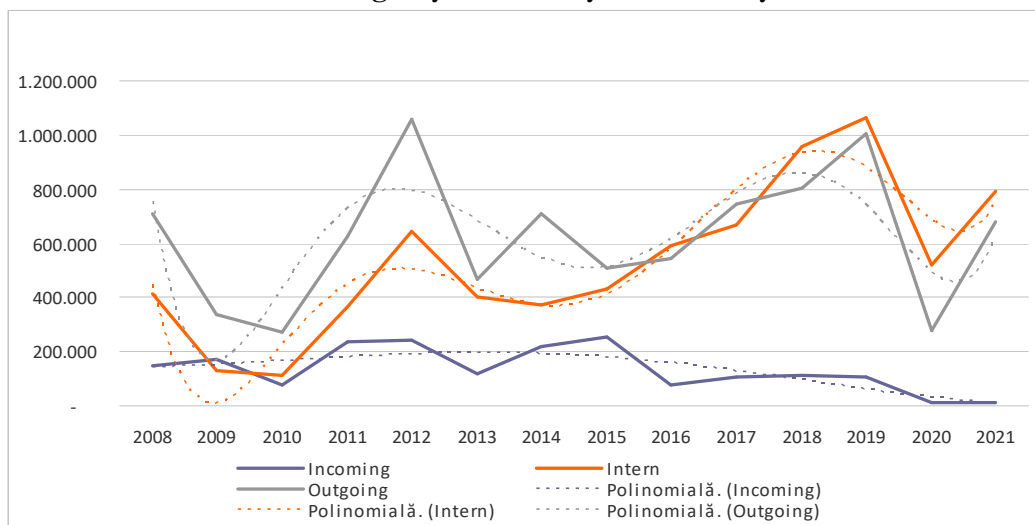
To get an idea of the direction in which these influences will work in Romanian incoming tourism, we will statistically analyse the data from Table 1 regarding international arrivals at approved accommodation units in Romania. We notice an increase in the number of foreign tourists in Romania until 2019, which was also the historical maximum, after which in 2020 we identify the same sharp decrease as in European tourism discussed above, followed by a slight recovery in 2021. Although in Figure 2 we hope for a recovery of incoming tourism, like the one forecasted by the specialized literature at European level, statistical data show us the opposite. Following the methodology, we obtained the forecast from Table 2, showing a pessimistic scenario.

Faced with those two scenarios – the one of optimistic recovery, that presents no problems for the Romanian incoming tourism industry and a second, diametrically opposed scenario, where we need to be prepared for the worse (according to Table 2, only in 2027 we can hope for a timid recovery). Fortunately, the market of incoming travel agencies is atomized, there are many small agencies, often family-owned, mostly micro-enterprises, while small and medium-sized companies are just a few. They specialise in a particular market or product (cultural circuits or day trips from cruise ships, others specialising in nature or mountain trips and biking in nature). From Porter's (1998) point of view, this is a huge advantage under normal conditions – it offers a specialization that can make a difference and make Romania an interesting tourism destination. Furthermore, they have the

flexibility to a fast reorientation. Hoteliers won't do something entirely different – markets are different, but not substantially.

At this point, we want to see how the situation of travel agencies would look like, how it evolved immediately after the pandemic and what chances there are to recover. Looking at Figure 2, we see that during 2022 there were better signs of recovery, but consolidated statistical data for the year did not appear at the time of writing. The graph in Figure 2 suggests that incoming tourism will suffer in the years to come, with the trend going downward. But there is hope for domestic and outgoing tourism, going somewhat in the direction of the pessimistic scenario of international arrivals from hotels that we saw in Table 2. To some extent, we see the need a slight change of direction of incoming tour operators regarding the market in which they operate. The suggestion of OECD (2020) becomes a possibility to be considered. Sustainability, however, implies both learning and creation of new products, atypical until that moment.

Figure 2 Number of tourists participating in travel agency activities by travel activity



Source: Self-design graph using data provided by INS (2)

We see it necessary to analyse a few aspects. First, we want to see the purpose with which tourists come to Romania (to what extent for business or private interest, as well as the detailed structure of the costs of the trip). Based on the data presented by INS (3) for 2019, 51,50% of non-residents who came to Romania were on business travel, slightly more than leisure travel. Of leisure travellers, 60%

came for vacation, 12,30% for cultural and sports events, another 10% for visiting friends and relatives, while 17% for other reasons (Iagăr, 2020). This structure can lead us to think about broadening the scope of circuit or city tour offers, advertising places or finding new possibilities for cooperation between operators. The structure of non-residents' expenditures in Romania will also help us here – according to INS (3) business travellers spend more on accommodation, food and beverage and transportation, while private travellers spend more on shopping, recreation and healthcare. The fact that recreation has a certain share (4,5%, as opposed to 10% as in the case of private travellers) in the expenses of business travellers makes us think of offering them short activities.

Table 1 Arrivals of non-resident tourists to accommodation units in Romania by year

Year	Non-resident tourist arrivals	Logarithmic dynamics	Year	Non-resident tourist arrivals	Logarithmic dynamics
1990	6.531.923		2006	6.037.000	0,033347651
1991	5.359.445	-0,197840962	2007	7.722.000	0,246166198
1992	6.401.116	0,177611925	2008	8.862.000	0,137699075
1993	5.875.575	-0,085668423	2009	7.575.000	-0,156919121
1994	5.898.081	0,003823116	2010	7.498.000	-0,010217033
1995	5.444.991	-0,07993094	2011	7.611.000	0,014958251
1996	5.205.487	-0,044982842	2012	7.937.000	0,041940801
1997	5.149.151	-0,010881415	2013	8.019.000	-0,010278356
1998	4.830.838	-0,063811895	2014	8.442.000	0,051405522
1999	5.223.896	0,078223532	2015	9.331.000	0,100122943
2000	5.264.000	0,00764771	2016	10.223.000	0,091297894
2001	4.938.000	-0,063930803	2017	10.926.000	0,066505186
2002	4.794.000	-0,029595255	2018	11.720.000	0,070151514
2003	5.595.000	0,154508206	2019	12.815.000	0,089319576
2004	6.600.000	0,165196307	2020	5.023.000	Not used for calculation
2005	5.839.000	-0,1225101	2021	6.789.000	-0,635312704

Data source: NIS (1). Own calculation of dynamics

Table 2 Possible evolution of Romanian incoming tourism

2022	4.611.759
2023	4.125.742
2024	3.643.142
2025	3.173.297
2026	2.724.749
2027	4.611.759

Source: Own calculations based on the data from table 1.

We also saw the possibility of addressing a new market – that of domestic tourism, which gained momentum during the pandemic, while incoming tourism collapsed. Having some common points with incoming tourism (knowing the

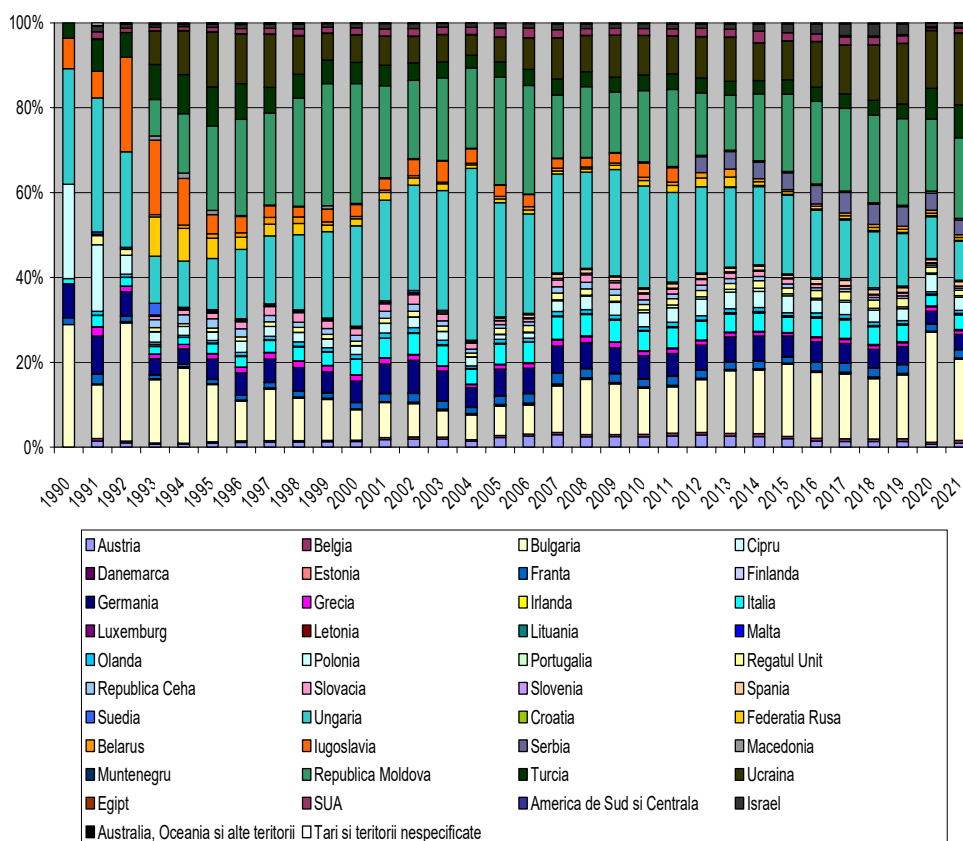
destination very well), it differs from it in terms of different tourists with different needs and requests. Hard, but not impossible, would also be to start an outgoing activity, at first by reselling packages to outgoing tour operators. Micklethwait and Woolridge (2015), talking about the future of the company, bring into question both Porter's (1998) "knowledge workers" and networks managed by companies and beyond, which can be a solution to these challenges. In tourism, this translates, on the one hand, into cooperation between agencies, which can resell packages of outgoing tour operators. On the other hand, an increasingly common partnership in the industry is between hotels and agencies. Not in the classical sense, where agencies include hotel services in their own packages, but broadening cooperation between the two entities by offering individual day trips from hoteliers to their own clients, that they order from partner agencies. The relationship is at hand. Not everyone who stays at the hotel arrives through travel agencies, nor are they all tourists coming on vacation, as we saw. So, it can become an additional service offered by the hotel, which comes with the possibility of building customer loyalty, promotion of the area and therefore convincing customers to return.

But Figure 3.6 shows a worrying fact, that most foreign tourists arriving in Romania are from neighbouring countries – Bulgaria, Hungary, Republic of Moldova, not the major outgoing markets (Germany, UK, USA). It stroke us the concentration of sales in very few markets. Not only the decrease in interest from any of these markets would mean a major risk for incoming tourism in Romania, but neither are they major sources of outbound tourism. Therefore, we see the need to diversify both on other source markets and on domestic and outgoing markets, to build a robust business in the sense of Taleb (2010), otherwise Romania will be the loser of incoming tourism from Europe. Provided that tourism is possible and no other lockdown or movement restrictions are imposed again. Such a diversification would be possible, given that they are mostly flexible micro-enterprises, with a short decision-making process and the possibility to adapt to new situations. The possibility of cooperation at associative level (Porter, 1998) will also help those involved in this field.

Building this robustness must be sustained by diplomacy to overcome the reluctance of many foreigners from Western Europe to visit Romania. Improving the country's reputation and image will help foreigners to look favourably at the country. Malița (1970) presents, among others, cultural diplomacy. Some successful films by foreign directors have already been shot in Romania. However, they are not enough. We expect Romanian films to have international success. It is necessary to change the vision on the country of the Romanian diaspora. Cultural diplomacy should include at this point schools for children from diaspora families

(teaching in Romanian), including, in addition to compulsory subjects in that country, Romanian language and literature (taught at mother tongue level). We already have the model in Romania – German and Hungarian public schools and kindergartens (those having a tradition in Transilvania), open also those sympathizers of the respective language and culture, thus contributing to an easier acceptance of ethnic minorities, but also to getting closer to them and creating an interest in those countries. Apart from this, organizing events of Romanians in the diaspora echoed in the local press would also be desirable. These elements would have a similar effect to German schools in Romania – not only would they promote Romanian language and literature abroad, but we can also hope to create a growing interest in our country, which benefits Romanian incoming tourism.

Figure 3.6 Structure of arrivals of non-resident tourists to accommodation establishments by country of origin between 1990 and 2021



Source: Self-design graph based on data from INS (1)

While the commercial solutions are more available to tourism operators, this last

path of diplomacy largely comes out of their control, capacity and expertise. Here, the entire economy and especially the state must contribute. Prioritizing tourism would also have a positive impact on the economy – the movement of goods depends, as we saw in Ando's study (2020), also on passenger planes.

Due to the COVID pandemic and its restrictions, new ways of online tourism arose. Cacioara et al. (2021) present how virtual reality is used in tourism in Bihor. Three wooden churches were photographed and presented online to those interested – not designed to replace traditional tourism, but to promote the destination, being a research opportunity that precedes physical travel to avoid disappointment with uninformed choices.

Furthermore, the COVID-19 pandemic and related restrictions brought to the market companies such as Virtualtrips.com, later called Heygo.com, where tourism companies or guides had the possibility to make real-time broadcasted walking tours around the city. They used the GSM internet technology of mobiles. However, personal experience has shown us what we infer from Figure 3.6, namely what Tauber and Bausch (2022) found in Western markets – tourists kept their pre-pandemic agendas. Romania, respectively Bucharest, was not on the list of many, except for a few – a weak promotion option. Romania was not the only destination proposed by Heygo.com, however in April 2023 they closed the site as demand for virtual tourism plummeted.

However, such a promotion can be tried in the longer term, respectively with links or videos commented on YouTube and social media, to see possible results after a longer time. Pandemics, health crises at their core, when they impose movement restrictions offer a very good opportunity for a sustained promotion of new tourism products, respectively the entry into new markets so necessary Romanian tourism. To what extent Romanian tourism has managed to attract new tourists or to convince of the destination, we will be able to see only in the coming years.

5. Conclusions

Analysing data obtained from the literature review, we showed how crises often cannot be predicted (Wut et al., 2021), having a disruptive effect on tourism and on the economy and daily life (Wut et al., 2021). The Covid pandemic led, on the one hand, to the emergence of teleworking due to lockdown and to the halt of international tourism.

Researching the solutions found by tour operators during the pandemic, as well as the demand from end customers, it seems that European incoming tourism will eventually recover, also supported by the agenda of individual tourists. The statistical data forecasted at the level of Romania seem to show an apparent

recovery, followed by an even greater decrease in the number of foreign tourist arrivals in Romania. This data should make us think about building robustness – at least on the travel agency side. This robust business model will certainly get us through the next health crisis. We have several options in this regard, starting with Ural's (2016) suggestions, which concern diversification of supply and integration into industry, insurance, hedging, catastrophe bonds and derivatives. State aid should not be the only option on which tour operators should rely. Once the crisis or pandemic begins, time should not be wasted but instead used for promotion.

The structural problem in Romania's tourism industry, focussing on just a few neighbouring countries can be overcome by a cultural diplomacy could help in these conditions.

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