

Romania

Tourism in the economy

Romania welcomed 10.2 million international arrivals in 2016, an increase of 9.6% on 2015. Of these, 2.5 million stayed overnight in commercial accommodation (up 10.6% on 2015). Germany, Italy, France and the United Kingdom were the main source markets in 2016, together accounting for 32.4% of overnight international visitors. Romanian's made nearly 47 million domestic trips in 2016, of which 15 million were overnight (down 7.3%), generating nearly 20 million nights in hotels and similar establishments (up 8.2%). Despite a decrease of 3.9% in 2016 to RON 14.5 billion, domestic travel receipts have demonstrated strong growth in recent years, more than doubling from RON 6.9 billion in 2010.

In 2014, tourism directly contributed RON 12.5 billion (up 7.6% on 2013) or 2% of GDP.

Tourism governance and funding

The Ministry of Tourism and Culture (the “Ministry”) performs various functions, including:

- Policies and strategies for tourism promotion and marketing aimed at international and domestic markets, including promotion of the national brand,
- Policies and strategies for the development of destinations and products, including investment programmes and collaboration with public and private bodies,
- Policies and strategies to increase the competitiveness of destinations, promoting natural and cultural assets and working with businesses to improve service quality,
- Authorisation and control of the activities of the tourism industry,
- Evaluation and selection of applications for EU programmes.

At a national level the private sector is organised into associations based on different sub-sectors of tourism (rural tourism, spa tourism, business tourism, ecotourism) or on different professions (tour operators and travel agents, hotels, bed and breakfast, tour guides, cooks and confectioners). There is also a Federation of Tourism Patrons.

An Inter-Ministerial Committee of Tourism, which brings together several ministries, was established to help the integration and sustainable development of tourism, with a focus on addressing environmental protection, economic measures, and the protection of cultural and natural heritage.

The Consultative Council for Tourism brings together national representatives from the public and private sectors and NGOs to discuss aspects of tourism policy.

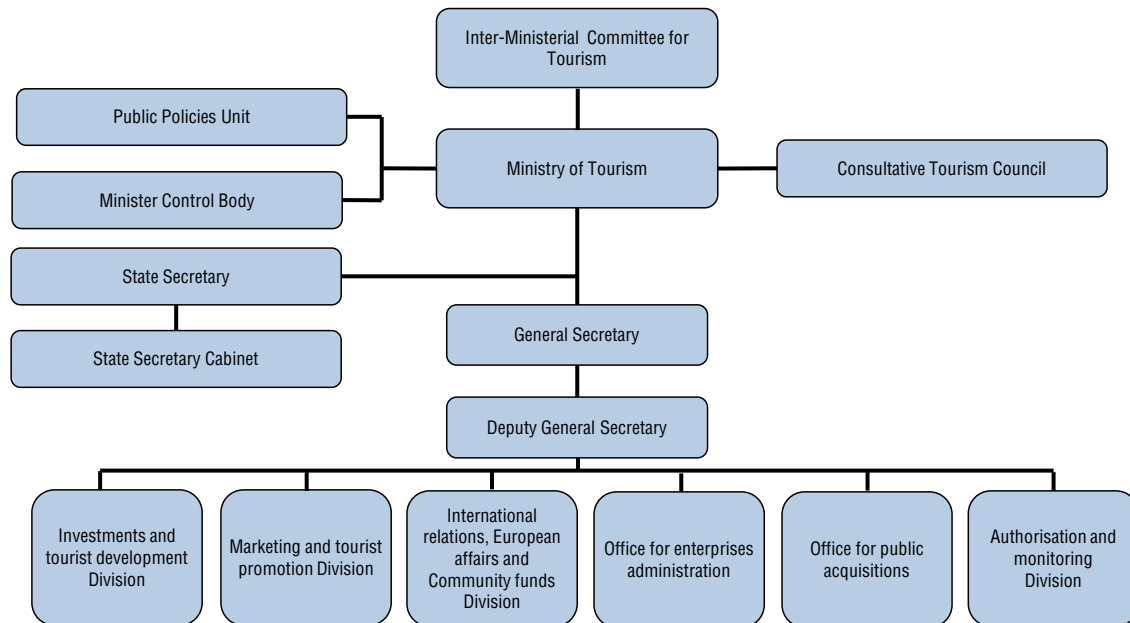
Tourism related departments can be established within local authorities but are not subordinate to the Ministry or other central bodies. Rather, the relationship is based on

co-operation. However, the Ministry is responsible for legal acts and regulations relating to tourism that need to be implemented locally.

Local tourism associations at a regional, county or municipal level bring together the public and private sectors, and NGOs.

The Ministry of Tourism has a budget of RON 80 million, from which RON 25 million is utilised for investment in tourism infrastructure.

Romania: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2018.

Tourism policies and programmes

Tourism faces many challenges in Romania. These include the development of the tourism infrastructure and the need to improve promotion, together with a shortage of financial resources, a lack of collective vision and a passive attitude by the travel trade. Many issues are structural, including creating the legal framework for running tourist activities, frequent changes in tax policies, inadequate stakeholder collaboration, and lack of professional managers for effective destination management.

The main policy document is the National Tourism Development Master Plan 2007-2026, developed in collaboration with the UN World Tourism Organization. This is supported by sectoral strategies, including the National Ecotourism Strategy (elaborated in 2009), the National Strategy for Spa Tourism (elaborated in 2009), and the Marketing Strategy and Operational Plan for Romania (2011-2015).

The strategic direction is towards the sustainable development of tourism and to a higher value added model, powered by knowledge, innovation, improvement in living standards and harmony with the natural environment. The short and mid-term strategic objectives are to:

- Adopt the Tourism Law in 2017,
- Adopt the Master Plan for investments in tourism,

- Implement the law on holiday vouchers for public employees,
- Develop an integrated tourism strategy in order to adjust to global trends in the tourism sector,
- Provide high quality human resources, which will lead to increased quality of tourism services and raise the competitiveness of Romanian tourism,
- Adopt the law for Destination Management Organisations,
- Enhance the position of Romania as a tourism destination within European markets,
- Attract new segments and markets by respecting the principles of sustainability and ethics in tourism.

There have been various achievements in the process of developing more sustainable tourism. A specific area of focus has been in the field of ecotourism, with activities including: the National Ecotourism Strategy; recognition of ecotourism destinations based on specific criteria; the certification of 50 eco-products, with a further 16 undergoing certification; and the development of walking routes and trails. Other achievements include training programmes for people working in tourism.

Romania has been particularly active as a partner in international collaborative programmes. Examples include:

- Coordination with the Ministry of Tourism of Bulgaria, in the promotion of culture, tourism and interpersonal contacts within the EU Strategy for the Danube Region,
- Collaboration between Ministries of Tourism and of Culture within the Enlarged Partial Agreement on Cultural Routes, established by the Council of Europe,
- Collaboration with the Ministry of Environment within the Carpathian Convention, which aims to encourage co-operation for the protection and sustainable development of the Carpathians, to improve quality of life and preserve natural and cultural values.

A particularly important initiative for 2017 is the adoption of the law regarding the development and implementation of a three-tiered Destination Management Organisation (DMO) structure (national, regional and local). The law will create a partnership between the public and private sectors and NGOs and raise awareness of their roles in promoting the tourism destination as a whole (Box 1.3).

Statistical profile

Table 1. Romania: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	53 513	52 411	50 084	52 762	46 986
Overnight visitors (tourists)	15 833	16 358	15 840	16 194	15 015
Same-day visitors (excursionists)	37 680	36 053	34 244	36 568	31 971
Nights in all types of accommodation	15 800	15 831	16 468	18 985	20 463
Hotels and similar establishments	15 361	15 438	16 049	18 471	19 990
Specialised establishments	..	..	..	..	..
Other collective establishments	439	393	419	514	472
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	7 937	8 019	8 442	9 331	10 223
Overnight visitors (tourists)	1 653	1 715	1 912	2 235	2 471
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	230	229	234	267	282
Italy	182	182	185	211	234
France	118	119	124	134	146
United Kingdom	92	93	112	126	141
Hungary	90	99	217	120	138
Nights in all types of accommodation	3 292	3 471	3 762	4 460	4 812
Hotels and similar establishments	3 215	3 405	3 746	4 428	4 782
Specialised establishments	..	..	..	..	..
Other collective establishments	77	67	16	33	30
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	9 874	10 608	11 307	11 153	9 895
Overnight visitors (tourists)	9 474	10 228	11 021	10 988	9 782
Same-day visitors (excursionists)	399	380	286	165	113
Top destinations					
Greece	147	98	106	137	136
Bulgaria	139	101	86	111	133
Turkey	197	117	105	99	103
Spain	122	53	56	60	65
Italy	..	45	37	47	52
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	1 466	2 006	2 225	2 097	1 723 e
International travel receipts	1 466	1 590	1 827	1 711	1 723 e
International passenger transport receipts	..	416	398	386	..
Outbound tourism					
Total international expenditure	1 832	2 164	2 641	2 330	2 137 e
International travel expenditure	1 832	2 057	2 417	2 058	2 137 e
International passenger transport expenditure	..	108	224	272	..

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933642210>

Table 2. **Romania: Enterprises and employment in tourism**

	Number of establishments ¹	Number of persons employed ²				
	2014	2012	2013	2014	2015	2016
Total	..	..	..	..	..	..
Tourism industries	43 993	368 952	348 871	349 375	..	..
Accommodation services for visitors	11 083	46 501	45 837	50 035	..	..
Hotels and similar establishments	6 206	..	..	..	..	..
Food and beverage serving industry	16 445	122 478	114 097	111 812	..	..
Passenger transport	6 626	152 249	139 552	131 894	..	..
Air passenger transport	53	8 982	7 817	5 938	..	..
Railways passenger transport	26	42 883	35 855	37 228	..	..
Road passenger transport	6 507	98 124	93 175	86 824	..	..
Water passenger transport	40	2 260	2 705	1 904	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	405	814	250	1 013	..	..
Travel agencies and other reservation services industry	2 237	6 753	10 366	14 707	..	..
Cultural industry	846	12 264	11 652	15 427	..	..
Sports and recreation industry	3 154	27 893	27 117	24 487	..	..
Retail trade of country-specific tourism characteristic goods	3 197	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available

1. Data refer to number of enterprises.

2. Data refer to number of employees.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933642229>Table 3. **Romania: Internal tourism consumption**

Million RON

	2014		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	5 316	27 741	33 410
Tourism characteristic products	4 806	24 160	29 249
Accommodation services for visitors	2 464	5 864	8 508
Food and beverage serving services	1 036	6 969	8 108
Passenger transport services	164	6 924	7 088
Air passenger transport services	36	2 426	2 462
Railways passenger transport services	8	366	374
Road passenger transport services	111	4 118	4 229
Water passenger transport services	9	14	23
Passenger transport supporting services	..	..	..
Transport equipment rental services	154	..	154
Travel agencies and other reservation services industry	..	3 006	3 006
Cultural services	121	328	448
Sports and recreation services	433	444	877
Country-specific tourism characteristic goods	267	..	267
Country-specific tourism characteristic services	168	626	793
Other consumption products	510	3 581	4 161
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933642248>



From:
OECD Tourism Trends and Policies 2018

Access the complete publication at:

<https://doi.org/10.1787/tour-2018-en>

Please cite this chapter as:

OECD (2018), "Romania", in *OECD Tourism Trends and Policies 2018*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/tour-2018-54-en>

This work is published under the responsibility of the Secretary-General of the OECD. The opinions expressed and arguments employed herein do not necessarily reflect the official views of OECD member countries.

This document and any map included herein are without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area.

You can copy, download or print OECD content for your own use, and you can include excerpts from OECD publications, databases and multimedia products in your own documents, presentations, blogs, websites and teaching materials, provided that suitable acknowledgment of OECD as source and copyright owner is given. All requests for public or commercial use and translation rights should be submitted to rights@oecd.org. Requests for permission to photocopy portions of this material for public or commercial use shall be addressed directly to the Copyright Clearance Center (CCC) at info@copyright.com or the Centre français d'exploitation du droit de copie (CFC) at contact@cfcopies.com.