

ROMANIAN TOURISM: PAST, PRESENT AND FUTURE IN THE CONTEXT OF GLOBALIZATION

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Abstract

Tourism is one of the factors that foster the interconnection and development of societies and the formation of interdependent economic, social and cultural relationships. Tourism may generate competitive advantage for a country, thereby contributing to its economic progress and to a proper assessment of its products on an international level. Recent studies on tourism have shown that the social and cultural structures of the world countries have undergone considerable changes due to the impact of international tourism.

Taking into account the above aspects, the authors attempt to highlight the post-communist evolution of tourism in Romania as well as its possible development directions depending on the factors that might help Romania emerge as an important international tourist destination. To this effect, the authors provide a number of arguments in favor of the tourism potential of a former communist country, emphasizing the prospects, opportunities and risks associated with its global integration.

Key words: *international tourism; economic globalization; Romania; tourism flows; tourism markets.*

JEL Classification: *F6; L83; M30; Z3.*

I. INTRODUCTION

Tourism has become today one of the factors that generate added value for the states that manage to leverage tourism for economic growth and development. However, there are countries in which there is severe downturn in tourism because of economic, cultural, social or geo-political instability or their resources are not fully exploited. International tourism has only recently been experienced by mankind as a driver of economic and social life, more specifically in the twentieth century. Religious pilgrimages to historic sites such as Stonehenge, Machu Pichu etc. (Drule, 2014) and the participation to sports games in Ancient Rome, Egypt and Greece may be viewed as forms of proto-tourism. Such events were not scheduled at regular intervals but only on certain occasions (Romero, 2013; Laws and Pan, 2004). In time, this new phenomenon developed so rapidly that it turned more and more into an economic indicator and a means of assessing the quality of life in developed states (Cole and Scott, 2004; Balducci and Checchi, 2009).

There are quite a few countries where people, due to the general welfare of the society in which they live, manage to devote more time to tourist activities, travelling, visiting frequently new destinations, attending cultural, sports events etc. In this way, they provide input to international tourism statistics. Far-flung, exotic destinations which until recently were inaccessible have turned into regular travel destinations as global mobility is on the rise (Whillans, 2014). Travelling into a former communist country, in Lapland or other Nordic countries, on the seashore of the Atlantic Ocean or the Mediterranean Sea is no longer a mere illusion but an attainable objective due to the development of international transportation in the tourism sector and the increase in its quality and safety, the ever-growing number of offers from tour operators, a reduction in costs per stay and the changing of tourism into a mass phenomenon (Tirados, 2011; Vainikka, 2014; Jovicic, 2016). There are more and more “city break” offers from travel agencies, in which tourists may visit various far-flung, attractive destinations with historic remains, attend concerts, sports competitions, cultural events and benefit from special cultural, social economic offers that are worth enjoying once in a lifetime (Wheeler, 2014).

Being able to evaluate these shortcomings based on the available international and national literature about tourist destinations in Romania and on tourism reports, the authors pursue a cartographic approach to pinpoint the development of the Romanian tourism in the European context by carefully examining its recent evolution, the capacity of a former communist country to generate viable economic growth through tourism, the

barriers and restrictions imposed on the tourism sector, its strengths and weaknesses and the challenges faced by an emerging economy in developing its strategy to reposition the country in the landscape of global tourist flows. The authors provide an overview of the Romanian tourism's capacity to reposition itself within the international tourist flows by describing the Romanian tourism during the communist era and highlighting the challenges it faced during the recent decades. Consequently, a number of arguments pointing to Romania as international tourist destination are analyzed, with focus on some risks and opportunities, as well as on the factors that ensure Romania's uniqueness within the global tourist flows.

II. INTERNATIONAL TOURISM—SOURCE AND PREMISE OF ECONOMIC GROWTH

Worldwide, tourist flows exceeded 1.1 billion people annually as early as 2013, mainly due to financially attractive offers from travel agencies and tour operators. Presently, international tourist movement has become a mass phenomenon, unprecedented in mankind's history (Tirados, 2011; Vainikka, 2014; Jovicic, 2016). Global statistics provide an impressive record of the scope of international tourist flows in the twentieth century. For example, destinations which until recently were difficult to reach, such as China, Dubai, Thailand, Cuba, Vietnam, have multiplied exponentially over the last decades. Massive investments, rethinking the strategies to attract tourists along with an increase of rebranding possibilities into globally known brands by creating a unique, positive image have generated an unexpected and un hoped-for attraction force for a number of developing countries. Some localities "won" titles such as European Capital of Culture (Sibiu in 2007), European Youth Capital (Cluj-Napoca in 2015), the City of Christian Youth Meeting (Cluj-Napoca in 2015), which enabled them to come into prominence and change into important destinations, not only for participants to such events, but also for tourists in general. The various events and favorable circumstances that allow a locality, region or country to come into prominence at international level have sometimes been the main contributors to the increase of its attractiveness, leading in time to an increase in the number of visitors and the strengthening of its tourist brand image (Liu, 2014). Some unique competitive advantages, when properly pressed home, and the existence of natural resources (beaches, mountains, lakes, forests, flora and fauna etc.) have fully contributed to the emergence of new forms of tourism, such as gastronomic tourism, adventure tourism, ecotourism, folk tourism (visiting ancient monuments or supporting efforts to preserve traditional handicraft), participation in cultural or leisure events as well as in sports competitions, concerts (Isaac, 2010; Anglin, 2015; Postelnicu and Dabija, 2016) and, last but not least, hunting tourism in the far-flung regions of the Siberian steppe. All these forms of tourism have contributed to the appearance of new destinations on the global tourist map. The development of international tourism has been the test of essential changes brought about by economic globalization.

According to the theory of sustainable tourism development, tourists' present demands must be satisfied while safeguarding the opportunities and interests of future generations (Bramwell, 1994; Dabija and Băbuț, 2013). This means that it is high time society started ensuring the needed economic, social and ecologic resources as well as tourists' rational access to various tourist destinations (too many tourists in a wildlife park during mating could result in ecological imbalance) along with balanced tourist consumption (Shaw, Agarwal et al, 2000). Even if tourism contributes significantly to investment attraction, the development of industries and infrastructure, the better positioning of local economies – as is the case of enclaves such as Macao, Hong-Kong of China etc. (Shaw, Agarwal, et al, 2000) – and the expansion of tourism toward a particular destination (Nurse, 2011), its direct contribution to the GDP varies greatly across countries. For example, on a wide scale between 2% and 12%, the average for the European Union is between 4% and 5%. Tourism's direct and indirect contribution to a country's GDP, when considered in relation to other economic sectors, is about 10% (RTSI, 2012, p.563). Presently, tourism's direct and indirect contribution to Romania's GDP is relatively small, being estimated at 3.5% (Master Plan, 2007, p.4). There are many reasons for this low figure, especially the structural changes and the strategic difficulties encountered by the Romanian tourism during the post-communist era.

2.1. INCOMING AND OUTGOING TOURISM FLOWS

Before World War II, tourism was mostly practiced by aristocrats, rich industrialists and high-income earners. However, during the postwar reconstruction era, tourism expanded and flourished among the middle classes. Therefore, countries which experienced a great economic boom have become the main contributors to the increase in the number of incoming and outgoing international tourists (Tirados, 2011). Some emerging countries, both economically and socially, have lately become either suppliers of outgoing tourists or destinations preferred by incoming tourists due to their exceptional natural, cultural, historical and human potential. This enthusiasm for tourism has been fueled by the appearance of large conurbations which generated a huge demand for leisure. The heavy international tourist flows are also generated by the increase in people's income, standard of living and their interest in recreation and leisure activities by practicing various forms of tourism. The result was a massive "overflow" of people from their traditional abode. The new townspeople and

especially the young people (Whillans, 2014) prefer repeated, short-distance and time-limited tourist travels. Moreover, the most varied reasons for travelling have been found with the young people as they are very interested in the national culture and the local cultural identity of the people they meet (Anglin, 2015). The reasons for travelling and for becoming a tourist, albeit at irregular intervals, have never been static but have constantly changed according to many factors related, on the one hand, to each person’s behavior and, on the other hand, to general society or generation trends, friendships, traditions, culture, customs, each individual’s lifestyle, the general interest in tourism, the advertising for a particular destination etc. Destinations touted as highly attractive for tourists sometimes prove to be quite the opposite. People who visited such destinations and “made use of” their facilities later expressed their dissatisfaction with the services, accommodations, cleanliness, the employees’ kindness and recommend others to avoid them. Such incidents impressed on the big tourist companies the need for a constant trend toward spatial, temporal and structural renewal and mobility.

2.2. RELEVANT INDICATORS FOR INTERNATIONAL TOURISM ASSESSMENT

As previously mentioned, the last two decades have witnessed a remarkable growth of international tourism. Despite the lingering economic problems caused chiefly by the recent financial crisis which had a profound impact on consumers (Pop, Dabija et al, 2011), the tourist sector has continued to develop, exceeding the most optimistic forecasts. After reaching an historic milestone of 1 billion people travelling annually all over the world in 2012, tourism propelled ahead by another 5% in 2013, the equivalent of an additional number of 52 million international tourists, reaching 1.087 billion travelers annually (UNWTO, 2013, p.3). In 2014, it reached 1.138 billion international tourists and in 2015 1.184 billion tourists (UNWTO, 2016, pp.1-3).

The development of international tourism and the process of globalization (Postelnicu and Postelnicu, 2000) have created good opportunities to identify solutions to important economic and social problems of the contemporary society: eradication of extreme poverty, supporting the pace of economic growth, reaching the goals set by the UNO within the UN Millennium Development Goals (UNWTO, 2013, p.3), promoting sustainable development, preserving and protecting the environment, alleviating the impact of tourist activities on nature and natural resources, reviving the international tourist sector and its contribution to improving the competitiveness of some nations, reducing the negative effect of financial crises by creating and offering competitively priced package holidays intended to help create and/or preserve jobs and cover the costs for operating the tourist units, implementing coherent and integrated policies and strategies in order to harness the tourist potential of each country etc. (Shaw, Agarwal, et al, 2000).

However, the regional development of international tourism still remains uneven. Europe is presently the Earth’s most visited continent, with 563 million tourists in 2013, by 29 million tourists more than the previous year. By sub region, strongest growth was recorded in Central and Eastern Europe (both 7%), followed by Southern Europe (Southern Mediterranean Europe, 6%) (WTO, Annual Report, 2013, p.11). By comparison with the world’s other tourist regions, the unevenness is even more obvious when the number of international tourist arrivals are taken into account.

Table 1 – World International Tourist Arrivals 2013, 2014, 2015

Total number of international tourists by the main regions (in millions)	Total number of international tourists by the main regions (in millions)			Percentage of world total		
	2013	2014	2015	2013	2014	2015
Africa	56.0	55.7	53.0	5.0	4.9	4.5
North, South, Central America and the Caribbean	169.0	181.0	191.0	15.0	16.0	16.1
Asia-Pacific	248.0	263.3	277.0	23.0	23.2	23.4
Europe	563.0	581.8	609.0	52.0	51.4	51.4
The Middle East	52.0	51.0	54.0	5.0	4.6	4.6
Total	1,087.0	1,138	1,184	100.0	100.0	100.0

Source: UNWTO, 2013, p.11; UNWTO, 2015a, p.4; UNWTO, 2016, pp.1-3.

According to UNWTO World Tourism Barometer, international tourist arrivals reached 1.138 million in 2014, by 51 million more tourists as compared to 2013 (UNWTO, 2015b). Therefore, tourism has proven to be highly resilient to the shocks of international market, being an important contributor to the reconstruction process and economic revival in the aftermath of the international economic and financial crisis. In fact, international tourism accounts for 9% of the global GDP. Tourism has contributed to the economic revival of almost all geographic regions and, in particular, of Europe which maintains its leadership, a positive evolution being projected for 2016 as well. Tourist demand is expected to increase by 4% to 5% (UNWTO, 2016). The low oil price and its impact on transport costs are factors which will boost even more the development of international tourism toward Europe and other large emerging markets, among which are the BRICS countries—Brazil, The Russian Federation, India, China (Buckley, Gretzel et al, 2015; Liu, 2016).

Despite the shocks suffered in the past, international tourism was and still is one of the most dynamic economic sectors. Although it only reached 25 million tourists annually in 1950, it reached 278 million tourists in 1980, 527 million in 1995 and 1,184 million tourists in 2015 (UNWTO, 2016). This is evidence of a dynamic evolution supported by the global receipts from international tourism, which increased from about US\$ 2 billion in 1950 to US\$ 104 billion in 1980, US\$ 415 billion in 1995 and US\$ 1,245 billion in 2014 (UNWTO, 2015a, pp.3-5). These receipts cover all accommodation, food, entertainment expenses as well as tourists’ occasional shopping expenses and/or expenses for services rendered. Transport alone is about US\$ 221 billion in 2014 (UNWTO, 2015b, p.10). The largest receipts were recorded in Europe (US\$ 508.9 billion), Asia-Pacific (US\$ 376.8 billion), North, South, Central America and the Caribbean (US\$ 274 billion), followed by the Middle East (US\$ 49.3 billion) and Africa (US\$ 36 billion). At the moment, international tourism’s direct and indirect contribution to the total world exports is 6% (UNWTO, 2015a, p.3). The main tourist destinations must always be associated with the largest beneficiaries of receipts from international tourism (Table 2).

Table 2 – Top 10 International Tourist Arrivals and Receipts in 2014

Arrivals (million tourists)		Top	Receipts (US\$ billion)	
France	83.7	1	United States	177.2
United States	74.8	2	Spain	65.2
Spain	60.7	3	China	56.9
China	55.6	4	France	55.4
Italy	48.6	5	Macao (China)	50.8
Turkey	39.8	6	Italy	45.5
Germany	33.0	7	Great Britain	45.3
Great Britain	32.6	8	Germany	43.3
Russia	29.8	9	Thailand	38.4
Mexico	29.1	10	Hong-Kong (China)	38.4

Source: UNWTO, 2015a, p.6.

The World Tourism Organization, through its specialized departments, has made projections about the future development of international tourism for the next fourteen years (up to 2030) by considering the joint action of various economic, social, political, geostrategic, environment etc. factors that influence and impact on the tourism sector. International tourism is estimated to achieve a huge increase between 2015 and 2030 (TT 2030, 2011), at an average annual pace of 3.3%, with some in-between variations (3.8% at the beginning and 2.9% toward the end). This would be an absolute rise of about 43 million tourists annually, by comparison with an average of 28 million tourists between 1995 and 2010. In light of these pace forecasts, the total number of international tourist arrivals will reach 1,400 million in 2020 and 1.800 million in 2030 (UNWTO, 2015a, p.14), of which Africa will draw 143 million, America 248 million, Asia-Pacific 535 million, Europe 744 million and the Middle East 149 million. Some caution must be exercised when making such forecasts because the global tourist industry is likely to be influenced by negative factors such as the persistence of violent conflicts in some areas, terrorist attacks and the migrant crisis. Because of these factors, tourists will choose to visit safer destinations (ITB, 2015).

III. ROMANIA IN THE CONTEXT OF GLOBAL TOURISM FLOWS

3.1. ROMANIAN TOURISM—PAST

Before 1990, Romania was not completely deprived of international tourist flows but neither was it actively involved in them because there was a relative self-exclusion mainly caused, as in most other communist countries, by the ideology that attempted to safeguard the “purity” of its own citizens from the ideas promoted by the capitalist society, nor could it use all chances due to the political conditions. It was in the 1970’s when Romania first began to open its gates to international tourism. The travels abroad to destinations in the neighboring communist countries (Hungary, Poland, Czechoslovakia, the German Democratic Republic, the Soviet Union etc.) were only allowed if tourists met highly rigorous and exclusivist criteria. The “healthy origin”, the existence of a guarantee that the person concerned would not “run away” from the communist bloc were often reasons to grant or deny the Romanian traveler, after having submitted several applications, the right to travel to western countries. People’s access to the Western Europe was very difficult to obtain since journeys were mainly approved of government officials on diplomatic missions, sportspeople and other staff categories (Light, 2000a; Light, 2000b; Tanasescu, 2006).

As far as incoming tourism is concerned, Romania adopted a different policy largely due to the then president’s desire to lower at all costs the external debt incurred by monthly credits obtained from the World Bank and the International Monetary Fund during the 1960’s and 1970’s. The credits had been given to reindustrialize the country, to develop the cities, to build new homes and to modernize the infrastructure. Foreign

tourists both from Eastern and Western Europe were mostly attracted by the Romanian seaside. They poured important amounts of money into Romania's economy, thereby helping it reduce its dependence on the foreign exchange market and balance the current account. In order to attract as many foreign and domestic tourists as possible, the Romanian government made huge investments in developing a string of resorts on the seaside of the Black Sea (Năvodari, Mamaia, Eforie Nord and Eforie Sud, Costinești, Olimp, Neptun, Jupiter, Venus, Saturn, Mangalia). They were equipped to meet high European standards. The National Tourism Office was responsible for outgoing and incoming international tourism. This organization alone had the right to manage trips and holidays based on bilateral agreements with external and domestic partners. However, the number of incoming tourists from Western Europe or other continents maintained at low levels, being limited to business people, diplomats, sportspeople, expats and Romanians from abroad (completed by Cosmescu, 1998; Cristureanu, 2006; Nistoreanu and Ghereș, 2010).

3.2. ROMANIAN TOURISM IN POST-COMMUNISM: STRENGTHS AND WEAKNESSES

After 1990, Romania's outgoing tourism increased significantly due to the opening of borders and the Romanians' desire to travel abroad. Tourist trips were mainly made to the Western European countries which until then represented not only the "forbidden fruit" but also the mirage of overall well-being. The number of Romanians who were able to travel abroad after 1990 was not quite large because of several reasons: difficulties in obtaining transit visas and/or residence permits, difficulty in earning one's livelihood, the lack of financial means to cover travel and insurance costs etc. Moreover, the number of incoming tourists who visited Romania during the early 1990's was relatively small mainly because there was no integrated strategy to promote Romania as a tourist brand and/or a tourist destination, and the tourist resources were fragmented on account of defective privatization and incoherent and misapplied policies on how to make hotel industry more profitable. Other contributing factors were the deterioration of transport infrastructure, tourists' difficult access to specific tourist destinations, the low quality of services and, last but not least, the growing competition from the neighbouring states and/or tourist destinations (Bulgaria, Greece, Croatia, Turkey etc.) as compared to the weak offer of Romanian hotels in the first years after the fall of the communist regime.

Although Romania shared a common European culture and identity with the other European countries, visiting the Socialist Republic of Romania before 1990 might have had an "exotic" touch for foreigners. When capitalism was embraced, this competitive advantage vanished. Other countries such as Poland, Hungary (with no access to seaside), and Bulgaria managed (using well-thought-out strategies and cleverly implemented policies), to attract more international tourists and became important destinations for their West European neighbours. These countries were more successful in developing their transport infrastructure than Romania and attracted tourists who had time and desire to "explore" the new unknown offers which until then had been behind the "iron curtain" (Cosmescu, 1998; Cristureanu, 2006; Nistoreanu, Ghereș, 2010).

It was only after Romania's accession to the European Union (January 1st, 2007) that incoming and outgoing international tourism began to improve. This improvement was accompanied by profound qualitative changes in terms of tourists' behavior, tourist and transport infrastructure to and from preferred tourist destinations, the diversification of tourism forms (spa, cultural, rural, seaside, medical/wellness tourism etc.) (Nistoreanu and Ghereș, 2010; Jovicic, 2016). Despite its exceptional natural and human potential, Romania seems to stay aside of the large international tourist flows. The reasons for this situation are manifold, being the subject matter of many research studies which have not been translated into immediate practical application so far.

The domestic literature on tourism is relatively young. This concerns first of all the chances in the course of the process of European integration. Noteworthy are the studies on the new dimensions of development of Romanian tourism after 2007, the detailed analysis of the national tourist market the framing of a tourism policy (Buruiană, 2008), the introduction to the strategic management vision (Băcanu, 2009), and on the tourist activities of accommodation and food units and tour operators (Bordean and Borza, 2014), the promotion of the country image (Delea and Tăruș, 2009), highlighting the influence and impact of sustainable development in tourism (Bâc, 2013; Dabija and Băbuț, 2013) and the sustainability of tourist activity in a globalized economy (Mazilu and Marinescu, 2009), watching the competitiveness of tourism organizations and pinpointing the economic implications of tourism in Romania (Paicu and Hristache, 2013), emphasizing the contribution of religious tourism and pilgrimage to the development of international tourism flows (Drule, 2014) etc. The picture is completed by a plethora of papers that skillfully and accurately dealt with subjects related to tourism management, the marketing of tourist services, the tourist marketing and planning (Cocean, Moisescu et al, 2014), the characteristics of the Romanian tourist market, tourist satisfaction (Souca, 2014), ecotourism, rural tourism and/or agrotourism (Nistoreanu and Ghereș, 2010), tourism and quality of life, economy and politics of international tourism etc.

Romania's share of international tourism is extremely small. The data provided by Romania's National Institute of Statistics show insignificant numbers of incoming foreign visitors. Supposing the year 2010 is

associated with the benchmark index of 100, the index of foreign tourist arrivals was 101.5% in 2011, 104.3% in 2012 and 101.0% in 2013 (INS, 2014b, p.71). In 2014, the number of foreign tourists who arrived in Romania was 1,912,000 (UNWTO, 2015a, p.8). However, the international travels recorded at Romania’s borders in 2014 amounted to 8.4 million outgoing and 12.3 incoming tourists (INS, 2015, p.636). This gap is mainly caused by how the two indicators are calculated. The same incoming person may travel several times to Romania over the course of a year and is registered as a new person each time he or she crosses the border. This situation applies to the small border traffic, which is very active in the case of Romania’s relations with the Republic of Moldova, Hungary, Serbia or Bulgaria. Small border traffic may also consist of frequent border crossings to friends or relatives or it may take place by bicycle as well. The development of industrial areas in western Romania prompted the Hungarian authorities to consider setting up a metropolitan transport route between Oradea and localities in eastern Hungary.

In 2014 there were 6130 tourist accommodation establishments (hotels, tourist and agritourist boarding houses, motels, tourist villas, chalets etc.) spread throughout Romania, with a total capacity of 311,288 bed places (INS, 2015, p.637). The receipts from international tourism, as they were reflected in Romania’s balance of payments for 2013, amounted to EUR 1.063 billion (Eurostat, 2014). This was a small amount by comparison with those of some neighboring countries. Although having a population smaller than Romania’s, some countries boasted larger receipts: The Czech Republic received EUR 5.3 billion, Croatia EUR 7.2 billion, Bulgaria EUR 3.0 billion, Poland EUR 8.59 billion and Hungary EUR 3.8 billion (Eurostat, 2014). Some of the reasons for the low receipts are the classification of tourist accommodation establishments according to categories of comfort and the usage index of accommodation capacity. Romania still has a relatively small number of tourist accommodation units belonging to the upper category of comfort (Table 3).

Table 3 – Number of tourist establishments by comfort categories in 2013

Establishment	Total	5 star	4 star	3 star	2 star	1 star	Uncategorized
Hotels	1.445	29	252	703	391	65	5
Tourist villas	621	61	84	257	175	41	3
Chalets	152	-	1	79	31	26	15
Tourist boarding houses	1.335	14	131	737	394	58	1
Agrotourist boarding houses	1.598	15	159	769	597	58	-

Source: INS, 2014b.

Foreign tourists (especially the ones who practice the business tourism) mostly prefer the accommodation establishments with a high and very high comfort level. In 2013 there were 0.63 million overnight stays of foreign tourists in the five-star establishments, 1.26 million overnight stays in the four-star establishments, 1.22 million in the three-star, 0.33 million in the two-star and 0.03 million overnight stays in one-star tourist establishments (INS, 2014a, p.625). Out of the 1,912,000 incoming tourists in 2014, 1,717,355 (89.82%) used the services of categorized tourist establishments (of which 1,537,460 were booked in hotels—80.41%) and the rest were lodged at relatives, friends and acquaintances (INS, 2014b, p.36). Out of the 8,018,576 incoming arrivals in 2013, 1,717,000 arrivals (21.4%) were registered in the accommodation establishments. Therefore, the significant difference is accounted for by the fact that most tourists came from the Republic of Moldova, Hungary, Bulgaria, Serbia and Ukraine (INS, 2014a, pp.630-637).

According to the usage index of accommodation capacity, the situation is quite unfavorable, as Table 4 indicates. A great number of factors may account for this situation, such as the failure to officially declare the real occupancy rate to diminish taxation, adverse, rainy weather or cool summers which leads to a fall in the number of visitors, national tourists’ preference of foreign destinations etc.

Table 4 – Net usage index of accommodation capacity by types of tourist establishments

Establishment	2013	2014	Establishment	2013	2014
Hotels	31,1%	32,0%	Chalets	11,0%	6,8%
Motels	12,1%	12,5%	Boarding houses	13,3%	15,4%
Tourist villas	19,9%	20,1%	agrotourist	12,6%	13,2%

Source: INS, 2014b; INS, 2015.

The data analysis (Table 4) reveals that the usage indices of accommodation capacity maintain at unacceptably low levels (a total average of 26.1%) (INS, 2015). This had a strong bearing on all profitability and competitiveness indicators. The available data must be carefully interpreted because the reason for the non-usage of the current accommodation capacity lies with the foreign tourists as well as the domestic tourism. This influence may be inferred indirectly by pointing that, out of the 19,363,000 overnight stays registered in all types of accommodation establishments in 2013, only 3,478,000 overnight stays were booked by foreign tourists (INS, 2014a, p.631) as these generally preferred four-star and five-star hotels. The reasons for this situation are related less to the “strengths” and more to the “weaknesses” of the Romanian touristic offer.

Among the positive characteristics of Romanian tourism, namely, those that ensure its lastingness and define Romania's tourist potential, are the natural and the human components. The following aspects must be underlined as far as the natural component is concerned (In addition to the authors' experience, see Cosmescu, 1998; Păcurar, 2004; Cristureanu, 2006; Master Plan, 2007, pp.4-7; Nistoreanu and Ghereș, 2010; Postelnicu and Dabija, 2016):

- Romania has over 40 natural lakes (glacial lakes, lakes formed in volcanic craters, landslide lakes, tectonic lakes, oxbow lakes, lagoons, floodplain lakes, lakes from the Danube Delta etc.);
- There are 13 national parks and 13 natural reservations covering about 7% of the country's area;
- Varied relief forms (28% of the country's area is covered by mountains, 40% by hills and 30% by plains);
- Favourable weather conditions (continental temperate climate);
- A large part of the natural environment is well preserved and less polluted (a large diversity of flora and fauna with unique species in Europe);
- The great appeal of the rural landscape which offers excellent opportunities for practicing tourism;
- Many wells with mineral water. Romania has over 3000 mineral springs, by comparison with only 450 springs in Hungary, 264 in Italy, 250 in Switzerland, 116 in France and 57 in the Czech Republic;
- The therapeutic benefit of some cures with oligomineral waters that have a beneficent effect on the chronic inflammatory diseases and the metabolic digestive disorders (Călimănești, Căciulata, Slănic-Moldova, Olănești etc.), the carbonated water needed to treat digestive, renal and bladder diseases (Băile Malnaș, Bodoc, Sângeorz-Băi, Buziaș, Lipova etc.), chlorinated waters to treat rheumatic diseases (Techirghiol, Ocna Sibiului, Sovata, Turda, Ocnele Mari), sulfur waters (Pucioasa, Amara, Băile Govora, Sărata Monteoru, Mangalia), thermal water (Felix, Herculane, 1 Mai, Marghita, Moneasa, Geoagiu-Băi), therapeutic mud baths etc. All these facilities can be found in more than 117 spa resorts throughout the country, of which 29 are of national importance;
- The Carpathian Mountains—easily accessible, with many opportunities to practice winter sports in resorts such as Poiana Brașov, Sinaia, Predeal, Borșa, Păltiniș, Durău, Semenic, equipped with modern hotels, tourist villas, ski slopes and aerial cableways;
- The Romanian seaside, 245 kilometers in length, with its famous resorts Mamaia, Năvodari, Eforie Nord, Eforie Sud, Costinești, Olimp, Neptun, Jupiter, Venus, Aurora, Mangalia, Vama Veche;
- The Danube Delta—a unique natural landscape in Europe under UNESCO protection and Biosphere Reserve covering 450,000 hectares. It is the richest fauna park hosting over 300 bird species and about 60 fish species of high economic value (sturgeon, beluga, pike, carp, sheat-fish etc.). The natural levee deposits host typical fishing villages (Crișan, Maliuc, Mila 23, Caraoman, Sfântu Gheorghe).

The human component of the Romanian tourist potential is equally rich, consisting of the following (in addition from the authors' experience, according to Cosmescu, 1998; Păcurar, 2004; Cmeciu and Druga, 2011; Iorio and Corsale, 2013; Corsale and Iorio, 2014; Postelnicu and Dabija, 2016):

- Over 26 man-made lakes (with dams such as Porțile de Fier I și II, Stânca-Costești pe Prut, Bicaz, Fântânele, Stejerești, Frunzaru-Olt, Vidraru, Lotru etc.), all of which are fit for water sports;
- In Romania there are sites on the list of UNESCO's World Heritage Sites, such as the wooden churches of Maramures, the painted churches of Moldavia (Bukovina), Dacian Fortresses of the Orastie Mountains (Sarmisegetusa Regia, Blidaru, Costești etc.), the fortified churches of Transylvania etc.;
- There are over 6,000 monuments of national importance throughout the country: hermitages, monasteries, fortified churches, fortresses, princely courts, memorial Houses, castles (Peleş, Pelișor, Bran, Hunedoara etc.), arts and architectural monuments, over 670 museums etc.;
- Many archeological remains (sites, Roman castles) which show the evolution of lifestyle and work and also the elements of continuity of the people in these lands;
- The uniqueness of the Romanian folklore, traditions and customs that make up a very strong and original culture in this part of Europe;
- The warm hospitality of citizens from all historic regions of Romania;
- A well-developed telecommunications system;
- A network of civil airports, sea and river harbours (Drobeta-Turnu-Severin, Giurgiu, Orșova, Oltenița, Hârșova, Brăila, Galați, Tulcea, Sulina etc.) as well as an extended railway transport system (the fourth largest in Europe);
- The unique value of tourist villages.

From a synergetic point of view, the natural and the human components make up Romania's tourism potential. Unfortunately, these two components are insufficiently used at the moment and scarcely integrated into the national strategy. The lack of vision in managing Romania's fantastic tourism potential, coupled with lingering weaknesses, both old and new, reduce the role of international tourism in placing Romania considerably. The weak points cannot be overlooked because they make the Romanian tourist activity appear unpleasantly conspicuous in contrast to competing tourist destinations. It is important for the tourism business to know its shortcomings because their effects have a direct bearing on supply and demand, the prices of holiday

packages, the decisions of economic stakeholders etc. The following are some of the most relevant shortcomings of the Romanian tourism (in addition from the author's experience, according to Master Plan, 2007):

- Poor infrastructure of roads to some tourist areas/destinations of national interest, which hinders foreign and Romanian tourists who want to visit them;
- Poor preservation and maintenance of historical monuments;
- Tourists' indifference and authorities' carelessness towards the environment;
- Insufficient professional training of some workers in the hospitality industry (certification and licensing);
- The lack of employee compensation (higher salary, bonuses etc.) for tourist service providers generates increased migration of labor force to other countries or to other fields of activity;
- The insufficient development of the education system that is expected to provide young people with tourism knowledge;
- The use of outdated methods to promote tourist services both inside and outside the country;
- The delayed updating of tourist offers at consumers' demands;
- The presence of industrial ruins in the areas visited by tourists, which fosters a negative visual impact;
- Excessive and chaotic forest exploitation;
- Designed roads and highways which are under construction but unfinished;
- Insufficient number of tourist information centers abroad;
- Increased seasonality of Romanian tourism, especially the seaside resorts, which cannot be offset by the winter sports tourist destinations;
- Insufficient use of funds from the European Union for tourism development during the 2007-2013 period.

The description of Romanian tourism development cannot and should not be limited only to the above-mentioned strengths and weaknesses but has to include the growth opportunities and prospects and the risks associated with an emerging economy pursuing the way of full European integration and globalization (Postelnicu, Postelnicu, 2000). The shortcomings of the Romanian tourism have seriously impeded the tourist sector in the previous years and tarnished the image of Romania's tourist destinations in the eyes of foreign visitors, thus confirming their prejudices that will be very difficult to eradicate.

3.3. ROMANIAN TOURISM – GLOBAL PROSPECTS, OPPORTUNITIES AND RISKS

The Romanian international tourism has important development prospects. This is true with reference to preserving the classical types of tourism (mountain, seaside, leisure, sports, cultural tourism etc.) or the strong promotion of new forms of tourism such as the introduction of thematic tourist routes (the wine road, the plumb brandy road—a Romanian traditional product), the visiting of national parks, the practice of ecotourism in the Danube Delta, increasing the number of cruises down the Danube river from Sulina upstream to the river's entry into the country or in cooperation with neighboring countries and visiting the neighboring areas, increasing the number of mountain routes, forming circuits to visit important historic monuments, organizing religious pilgrimages, reviving period railways (used more than one hundred years ago to transport wood and other resources), working out tourist routes in collaboration with neighboring countries, the large-scale promotion of traditional festivals and local folk events varying from one historical region to another (Banat, Moldova, Muntenia, Transilvania, Crișana, Oltenia, Dobrogea, Maramureș etc.), developing the niche tourism intended to reduce its seasonality (hosting international conferences and conventions, symposiums, fairs and expositions, sports competitions, concerts, excursions, winter sports etc.), encouraging the business tourism and the creation of recreational holiday packages, encouraging the gastronomic and shopping tourism etc.

Some forms of tourism might be outdated and call for their replacement with other innovative forms of tourism (for example, the Dracula symbol is an old-fashioned form of tourism which never reflected the real image of Romania's history and did not manage to attract enough tourists either), the avoidance of tourist overcrowding in some sensitive geographical areas (resorts in Valea Prahovei, the Romanian seaside) where the destination's accommodation capacity is sometimes exceeded, reviewing the urban planning of tourist localities in terms of rethinking and rebuilding old or new constructions according to the regional traditional architecture so as to avoid the deplorable and persistent image of a flea market. Serious problems have also been pinpointed in the field of accommodation. Although Romania has a quite large material base in the tourist accommodation sector, a sort of imbalance between the current offer and the international tourist demand projected for the near future has been noticed. The Romanian government (Master Plan, 2007, p.12) estimated an increase in international tourist arrivals to 12,279,000 million tourists in 2021, with a further peak of 15,485,000 tourists in 2026. Since there is high demand on the part of foreign tourists for highly comfortable hotels (4 and 5 stars), both in the leisure and the business tourism, the current offer is still poor and mainly oriented toward the large cities and less toward spa, mountain, seaside etc. resorts.

The insufficiently harnessed opportunities have been identified in the case of the exploitation of museums, arts galleries, heritage buildings, memorial houses, statues which, in other countries, draw numerous amateur and professional tourists. Todt and Dabija (2008) analyze the contribution of monument protection to

the support of tourism. The special cultural heritage of some tourist destinations must be preserved by means of local, national and international regulations (their being viewed as UNESCO monuments) because they generate visits of specific segments of tourists' eager to remember the past and/or contribute to its preservation. In other countries (Todt and Dabija, 2008), professional tourism associations not only organize annual collections to protect and ensure the visitation of the tourist heritage, but they also fully contribute to the promotion of the image of the human tourist heritage and its proper positioning on the international tourist map. Other researchers, such as Erdeli and Istrate (1996), Bran (1999), have also had important contributions to the promotion of the tourist heritage and emphasized the need to properly exploit it. Salt mines (Turda, Praid, Târgu Ocna etc.), caves with a high potential for attracting speleologists as well as tourists, and the narrow gauge railways (steam trains or *Rom: mocănițele*) are also insufficiently promoted. Among the ones still operating is the steam train of Valea Vaserului (Maramureș), the only one used for tourist purposes, and the one used for carrying wood in Comandău-Covasna, Abrud-Câmpeni, Brad-Criscior, Moldovița (Bukovina) (*Mocănițele din România*, 2014). Moves are afoot to put into service again the railway Agnita-Sibiu (123 kilometers), which was reopened in 2015 for a length of 3.2 kilometers between Cornăețel and Hosman (Sibiu Agnita Railway, 2016).

Another highly important resource is the spa tourism. As in other European states, the evolution of spa tourism has experienced fluctuations in time. Much of the spa tourism is in a deplorable condition on account of defective privatization. Many spa resorts acquired international renown even early in the 19th century (Băile Herculane). Now they lie in ruins or are severely damaged, abandoned or in conservation (Zolnoc, Chirui, Bazna, Tinca, Șugar etc.). Consequently, some treatments and spa procedures can no longer be applied. While the old treatment facilities have not been repaired or modernized, the new ones are of poor quality due mainly to the insufficiently trained personnel and the owner's desire to get the most with minimum investments. Rural tourism is in a similar condition, as is agrotourism, appreciated by the foreign visitors searching for traditional lifestyles, the long forgotten customs, the historic picturesque places and alternatives to the hubbub of the big cities. Even though the number of agroutourist boarding/guest houses increased significantly over the last years, the national average occupancy rate stayed low despite the foreign tourists' high preference for agrotourism in some localities or regions (Iorio and Corsale, 2010). Some positive examples are the localities along Romania's borders where the Visiting Friends and Relatives tourism and the return-to-native-land tourism flourishes. A lover of virgin land is Prince Charles of Great Britain, who bought land and buildings in Viscri, Covasna, thus becoming an unofficial ambassador of Romanian tourism (Tanasescu, 2006; Dinu and Cioca, 2008; Corsale and Iorio, 2014). Seaside tourism also goes through difficult periods. After 1990, the inflow of foreign visitors reduced considerably on account of its strong seasonality, the ill-conceived offer, the lack of all-inclusive package holidays and the failure to meet foreign tourists' demands and expectations. The new entrepreneurs failed to notice that the tourist international market was mature and consumers demanded a wider and more complex range of services. The situation was aggravated by the fierce competition of the neighboring states, such as Bulgaria, Greece, Turkey, Croatia, which constantly offered longer stays at more competitive prices and tariffs. In spite of its great cultural potential, Bucharest, Romania's capital city, has not yet surpassed its status as an important business destination. The hotels record a high occupancy rate achieved only by business tourism.

The above list of shortcomings in Romanian international tourism is not complete. Therefore, all participants in tourist activities are faced with the need to adapt to new trends in international tourism. The first thing to highlight is the bipolarity of tourism in tourists' orientation either toward luxury tourism or low-cost tourism. The latter seems to gather more momentum as the weekend breaks or the "fragmented holidays" (Whillans, 2014; Wheeler, 2014; Shaw, Agarwal, et al, 2000) are more and more on the agenda of international airlines such as Wizzair, Ryanair, Blueair etc. Every month these airlines inaugurate flights from Romania's large cities to closer or more distant destinations. For example, in 2015 Wizzair carried 20 million passengers from and to Romania, with an annual growth rate of about 20% (Wizzair Passengers, 2015). Another challenge for the Romanian tourist destinations is the choice of short vacations. This option concerns only some large cities in which festivals, concerts, and large sports competitions are organized. On the other hand, luxury tourism should no longer be viewed as a provider of expensive services but rather as a promoter of any holiday package that fosters the improvement of the quality of life.

A similar bipolarity may be noticed in the case of junior (students, employed young people in the early stage of their career etc.) versus senior tourism (pensioners with good financial resources and willing to travel). The first group tends to outnumber the latter, and has already reached an important share of the international market while senior tourism begins to lose momentum. The "hybrid" leisure and business trips and the "creative" tourism focused on interactive experiences between tourists and local communities also play an increasingly important role in today's society. The new requirements imposed by international tourism on the chosen destination may be narrowed down to the search for "novel and genuine". The purchaser of a package holiday tries to reach a lifestyle that differs from a regular one, which he or she cannot enjoy in any hotel whatsoever. The tourist's interest in discovering local specificity marked by great evocative capacity leads to the spreading of new holiday patterns that combine recreation with various cultural experiences, the so-called "living culture".

To make full use of the opportunities provided by the Romanian tourism, one has to take into account the tourist's preferences, attitudes, motivations and behavior. Tourist behavior becomes more and more bipolar because tourists prefer both the most favorable offers and the all-inclusive package holidays. This polyvalent behavior is generated by the challenges and the problems arising from the need to preserve the environment and to adopt a sustainable consumption of resources (Dabija and Pop, 2013; Dabija and Băbuț, 2013), the spread of new technologies, the visitors' cultural sensitiveness and background, including their lifestyle, personality, character traits, motivations etc., as well as the careful attention to travel safety.

The new trends in international tourism cannot be identified and explained while disregarding some travel-related risks, e.g. politico-juridical, economic, social and organizational. These risks are the result of poor infrastructure, particular circumstances typical of accommodation establishments, tour operators, travel agencies, food suppliers etc. (Oroian and Ghereș, 2012). The most serious risk to be avoided is terrorism. The Romanian tourism is affected by the restrictive actions of natural (repeated floods, earthquakes, pollution causing the disappearance of species belonging to the spontaneous flora) factors and human factors (abusive exploitation of forests, overburdening of some tourist destinations and related routes, the wrong choice of methods and means to ensure environment protection, the lack of professionalism on the part of some workers in the hospitality industry, the underfunding of the tourist sector, which threatens mainly the quality of the tourism potential—see the case of spa tourism—the degradation of historic monuments of national importance, excessive exploitation of slowly renewable resources such as sapropelic mud, esthetic pollution of localities etc.).

Defined as the “smokeless industry” (Păcurar, 2004), tourism is also a source of pollution because of the means used to transport tourists, whose numbers have increased exponentially and overburdened the insufficiently developed network of roads and highways. The competitiveness of the Romanian tourism is another basic problem as it is ranked sixty sixth (with a coefficient of 3.78) after the Czech Republic (position 37), Croatia (position 33), Hungary (position 41), Bulgaria (position 49), Poland (position 47), Turkey (position 44) and Slovakia (position 61) (WEFTTCR, 2015, p 5). The top positions are held by Spain, France, Germany, the USA, the Great Britain, Switzerland, Austria, Italy etc.

IV. CONCLUSIONS

The last two decades have witnessed a remarkable increase of international tourism. Despite many changes and shocks at global level, international tourism, though vulnerable, proved remarkably resilient. Being a source of many opportunities, international tourism is high position within the agenda of all decision-makers, taking priority in all national policies for economic growth. Naturally, the extent to which tourism is made a part of a coherent national policy or strategy varies greatly across countries. Some countries such as Malta (Malta Tourism Strategy, 2016) or India (Indian Tourism Strategy, 2016) have clear national tourism policies and strategies. However, in other countries such as Germany (Advisory Council on Tourism Issues), the Great Britain (Tourism Industry Council) or Island (Icelandic Tourism Council), there are public-private partnerships that regulate the tourism policy. In Spain (Inter-ministerial Tourism Committee), Portugal (Inter-ministerial Commission for Tourism), Japan (Ministerial Committee on the Promotion of Japan as a Tourism Oriented Country) etc. the national tourism policy is dictated by the common consensus of ministries (WTTC, 2016).

Tourism's recognition as a major driver of economic growth depends not only on political decisions but mainly on the extent to which the population of a country or region is fully aware of the natural and human potential of the area and manages to properly harness it for touristic purposes. Tourism has a great importance for the economic growth but is not always its primary driving force. The main drawback of tourism as a driver of economic growth is that its effects are more directly noticeable at local level and less visible at national level (the exceptions are the very small countries such as the Vatican, Malta etc.). The promotion of tourism through coherent and well-thought-out national policies may boost economic growth and “elevate” some poor areas where natural resources are either limited or non-existent. Supporting tourism in such areas may ensure a certain level of economic and social well-being.

To accomplish this, it is imperative to inform foreign tourists about the offer to be found in the concerned country or region with respect to the various types of tourism. The tourism message, the campaigns to promote the local image, customs, hospitality, should be oriented to areas that supply international tourists, such as some Asian (China, Japan etc.), European (Germany, France, Italy, Spain etc.) and American (the USA, Canada etc.) countries. The application of such a strategy to the Romanian tourism and the promotion of the country image and of Romania as tourist destination represent measures that should be adopted immediately. They should be joined by other urgent measures aimed at promoting, in an integrated manner, domestic tourist destinations, capable of highlighting the uniqueness of settlements, places, traditions, culture, society and of initiating policies adapted to the regional tourism and agrotourism, of increasing the concern of national as well as local authorities for supplying accurate information about the quality of tourist services, package holidays, the cooperation between tour operators, accommodation and food establishments, museums, local developers and owners of entertainment and leisure properties. A national initiative to promote tourism and attract foreign

visitors should consider the guests' expectations and encourage by all means the domestic and foreign capital investments, the development of the vocational education to ensure the training of tourist employees, the identification of new opportunities/possibilities to extend the tourist season throughout the year and, last but not least, modernize the infrastructure of roads to the tourist areas.

Although Romania has a large pool of natural and human resources, Romania's placement on the orbit of international tourism, through a coherent and well-founded policy, has not been accomplished to date. The statistics of the World Tourism Organization puts Romania at the periphery of important tourist destinations. As has been shown, the reasons are manifold. Some decisive actions are called for to break this deadlock, namely, the substantial improvement of the general and specific tourist infrastructure, the intensification of efforts to preserve the sustainability of natural resources, the promotion of innovation in the human resources sector, the diversification of marketing practices, the introduction of new forms of recreation and the extension of the services network in parallel with a better informing of domestic and foreign tourists.

The authors are aware that their research has some quite significant limits. One of these limits is the relative and variable reliability of statistical data. For the communist period, the statistical data in Romania about international tourists are not only extremely limited but also not entirely reliable. Following the fall of the communist regime, data became more and more accurate but their manner of collection varied in time, thus hindering their full comparability. Another relevant aspect is the fact that Romania's tourist potential is not only limited to relevant ideas but particularly comprises other varied forms of tourism. Increased importance has lately been noticed with respect to cruise tourism on the Danube river, the adventure tourism etc. (Postelnicu and Dabija, 2016). However, it is difficult to study these forms of tourism and, in particular, highlight the extent to which they can help boost the economic growth and better position Romania as a tourist destination because the statistical data are not available in an appropriate format.

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