

Romania

Tourism in the economy

According to the Tourism Satellite Account, the direct contribution of tourism to GDP in 2017 was RON 23.9 billion, 2.8% of the total GDP, and the tourism sector directly supported 373 074 jobs.

In 2018, Romania received 11.7 million international arrivals at the border, an increase of 7.3% over 2017. International tourists totalled 2.8 million in 2018, the leading source markets being Germany (11.7% market share), Israel (10.0%), and Italy (8.6%), followed by France (6.1%) and the United States (5.9%). The United States market has shown the largest growth from 2017 to 2018, with a 5.3% increase in tourists.

The number of overnight stays by international visitors increased by 0.7% in 2018 compared to 2017, reaching 5.3 million nights. While domestic overnight stays in accommodation units recorded an increase of 6.9% for the same period, to reach 23.1 million nights in 2018.

Tourism governance and funding

Tourism lies under the responsibility of The Ministry of Economy, Energy and Business Environment. The main tourism related fields of activity include:

- Developing and implementing the national tourism strategy,
- Promoting Romania as a tourist destination domestically and internationally,
- Developing destinations and tourist products,
- Developing tourist related infrastructure,
- Issuing accommodation and tourism licences as well as controlling the quality of tourism services,
- Representing Romania to international tourism organisations.

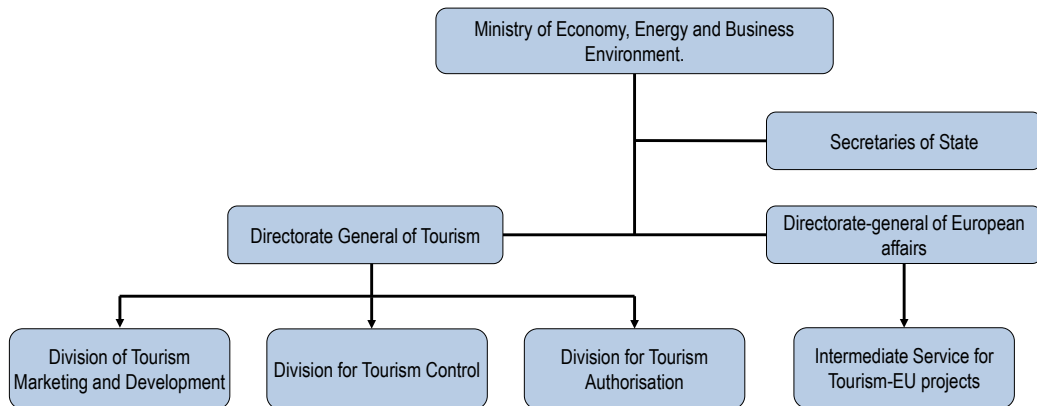
The Ministry collaborates with other ministries, central government bodies, local government and other public bodies. At national level, the Consultative Council for Tourism includes organisations from private sector and academic backgrounds as well as tourism associations representing different destinations in Romania.

The Inter-ministerial Committee for Tourism has an advisory role to facilitate the development of tourism. Its aims are to co-ordinate tourism policies and actions at the national level, monitor sector developments and set strategy. The Committee assembles 16 ministries and 3 institutions from a range of sectors including development, environment, business, education, economy, transport, labour, research, culture, and health.

At regional and local levels, tourist associations bring together interested parties to contribute to the development of tourism for their area. Additionally, 14 representatives from the ministry work with local partners to help implement the national tourism policy. Local administrations assist the ministry in implementing tourism policy. Their responsibilities also include maintaining inventories of tourism

resources, developing proposals for annual development programmes, participation in the certification of pedestrian routes and ski slopes, improving the quality of products, and surveillance of tourist activity.

Romania: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economy, Energy and Business Environment, 2020

Tourism policies and programmes

The 2018 National Tourism Development Strategy was developed with the support of the World Bank, and is built upon previous related documents, such as the National Tourism Development Master Plan for Romania 2007-26, which was developed in collaboration with the UN World Tourism Organization.

The vision of the National Tourism Development Strategy is for Romania to be a well-known premier, year-round tourism destination by 2030, focussed on unique cultural and natural heritage, and world-class customer service. The Strategy is based on four operational objectives:

- Improve the connectivity and quality of tourist infrastructure,
- Support the private sector innovation,
- Enhance the quality of visitor experiences and services at destinations,
- Strengthen tourism policy-making capacity, increase digitalisation and better align marketing mechanisms and campaigns.

Two key priorities are identified in the National Tourism Development Strategy:

- Better capturing visitor spending at tourism sites which are insufficiently developed and difficult to access, and improve the consistency and quality of the visitor experience and service across destinations.
- Attract higher-value tourists to the country through stronger tourism policies, improved market segmentation and greater visibility of the country in international markets.

Another policy document, the Master Plan for Tourism Investments, takes account of the two sectoral strategies; the National Strategy for Ecotourism Development and the Master Plan for the Development of Balneary Tourism.

The National Strategy for Ecotourism Development is planned for the period 2019-29, and it has the general objective of creating the conditions for ecotourism development in natural protected areas, by developing a network of certified eco-tourist destinations and by creating competitive eco-tourist products for national and international markets. Key areas of focus include the development of institutional and

associative organisations, tourist infrastructure and land management, education and awareness raising, human resources development, and private sector and local development.

The Master Plan for the Development of Balneary Tourism, is based on the implementation of an innovative approach and of a public- private partnership, supporting the development of health tourism. It has the final aim of providing an innovative positioning regarding a new green balneary tourism product.

To stimulate business development, in 2018, the Government reduced the VAT rate for tourism services from 9% to 5%. The reduced rate applies to accommodation within the hotel sector, and sectors with a similar function, including land rentals for camping, restaurant and catering services, the use of sports facilities, and access to fairs, amusement parks and recreational parks.

In 2018, the Romanian government launched a travel voucher scheme as an incentive for employees, with the aim of encouraging domestic tourism and tackling seasonality. The travel vouchers, which come in the form of printed tickets or electronic cards, can be used in any Romanian destination for accommodation, transport, spas and wellness services, food and beverages, and entertainment.

Tourist packages purchased with travel vouchers must include at least one overnight stay in any affiliated accommodation unit certified by the ministry. The vouchers are valid for a period of one year from the date of issue, and can hold a maximum value of the equivalent of EUR 300 per employee. The travel voucher policy has been a success so far, contributing to increasing domestic tourism and the scheme is planned to continue into the future.

Statistical Profile

Romania: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
TOURISM FLOWS, THOUSAND					
Domestic tourism¹					
Total domestic trips	50 084	52 762	46 986	51 253	52 085
Overnight visitors (tourists)	15 840	16 194	15 015	16 444	16 461
Same-day visitors (excursionists)	34 244	36 568	31 971	34 809	35 624
Nights in all types of accommodation	16 468	18 985	20 463	21 648	23 144
Hotels and similar establishments	13 813	15 649	16 833	17 442	18 481
Other collective establishments	2 655	3 336	3 629	4 206	4 663
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	1 912	2 234	2 471	2 749	2 785
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	234	267	282	324	326
Israel	139	219	252	293	277
Italy	185	211	234	241	240
France	124	134	146	167	171
United States	113	130	138	157	166
Nights in all types of accommodation	3 762	4 460	4 812	5 268	5 305
Hotels and similar establishments	3 504	4 100	4 400	4 800	4 854
Other collective establishments	259	360	412	468	451
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	11 307	11 153	9 895	10 446	10 469
Overnight visitors (tourists)	11 021	10 988	9 782	10 354	10 361
Same-day visitors (excursionists)	286	165	113	92	108
Top destinations					
Turkey	105	99	103	140	197
Bulgaria	86	111	133	139	164
Greece	106	137	136	163	161
Spain	56	60	65	56	71
Italy	37	47	52	52	69
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	2 225	2 097	2 170	2 945	3 184
International travel receipts	1 827	1 711	1 734	2 522	2 752 e
International passenger transport receipts	398	386	436	423	432
Outbound tourism					
Total international expenditure	2 641	2 330	2 463	4 038	5 048
International travel expenditure	2 417	2 058	2 135	3 468	4 282 e
International passenger transport expenditure	224	272	328	569	766

.. Not available; e Estimated value

1. Trips from demand side surveys; Nights from supply side surveys.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078794>

Romania: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed ²				
	2017	2014	2015	2016	2017	2018
Total	..	..	..	..	..	..
Tourism industries	46 112	349 375	342 755	371 696	373 074	..
Accommodation services for visitors	7 719	50 035	39 767	45 282	44 584	..
Hotels and similar establishments	7 719	..	..	..	..	..
Food and beverage serving industry	17 213	111 812	126 420	144 122	142 207	..
Passenger transport	8 960	131 894	123 046	125 039	125 078	..
Air passenger transport	51	5 938	7 781	6 902	5 896	..
Railways passenger transport	34	37 228	36 203	40 810	32 708	..
Road passenger transport	8 812	86 824	76 091	75 153	82 378	..
Water passenger transport	63	1 904	2 971	2 174	4 096	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	522	1 013	607	100	710	..
Travel agencies and other reservation services industry	2 367	14 707	13 769	14 456	16 301	..
Cultural industry	1 401	15 427	13 981	15 470	18 027	..
Sports and recreation industry	4 439	24 487	25 165	27 227	26 157	..
Retail trade of country-specific tourism characteristic goods	3 491	..	..	..	..	..
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/10.1787/888934078813>

Romania: Internal tourism consumption

Million RON

	2017		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	14 509	4 465	18 974
Tourism characteristic products	13 392	3 775	17 167
Accommodation services for visitors	6 095	1 505	7 600
Food and beverage serving services	2 038	814	2 852
Passenger transport services	3 125	1 108	4 233
Air passenger transport services	1 385	855	2 240
Railways passenger transport services	948	49	996
Road passenger transport services	788	182	970
Water passenger transport services	5	22	27
Passenger transport supporting services	..	..	..
Transport equipment rental services	411	125	536
Travel agencies and other reservation services industry	1 167	15	1 182
Cultural services	123	72	195
Sports and recreation services	433	137	570
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	1 116	691	1 807
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078832>



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