

# Romania

## Tourism in the economy and outlook for recovery

Tourism is an important sector of the economy of Romania. In 2019, tourism directly contributed RON 31.6 billion to Romania's economy, equating to 3.0% of total GDP. The sector directly supported 412 649 jobs, representing 6.3 % of total employment in Romania. The impacts of the COVID-19 pandemic saw tourism employment fall to 393 427 jobs in 2020, or 6.1% of the workforce.

International arrivals at the border totalled 5.0 million in 2020, a decrease of 61% when compared to 2019. International nights in registered accommodation declined by 81.1% to 1.0 million in 2020. An initial recovery in 2021 saw international nights return to 1.8 million, an increase of 83.7% compared to 2020. However, this remained 65.4% below the 2019 level. Romania's main source markets in 2020 were Germany, Italy, and France based on arrivals in accommodation units.

In 2021, domestic tourism remained a driver of recovery, totalling 19 million nights and 91.2% of total nights in accommodation establishments. After falling 44.4% in 2020, domestic tourists (in all accommodation types) recorded 8.5 million tourists in 2021, 20.2% below pre-pandemic levels.

## Tourism governance and funding

The Ministry of Entrepreneurship and Tourism has responsibility for tourism in Romania. The main tourism-related fields of activity include:

- Developing and implementing national and sectoral tourism strategies.
- Promoting Romania as a tourist destination domestically and internationally.
- Developing destinations and tourist products.
- Developing tourism-related infrastructure.
- Authorising and controlling tourism services.
- Representing Romania in international tourism organisations.

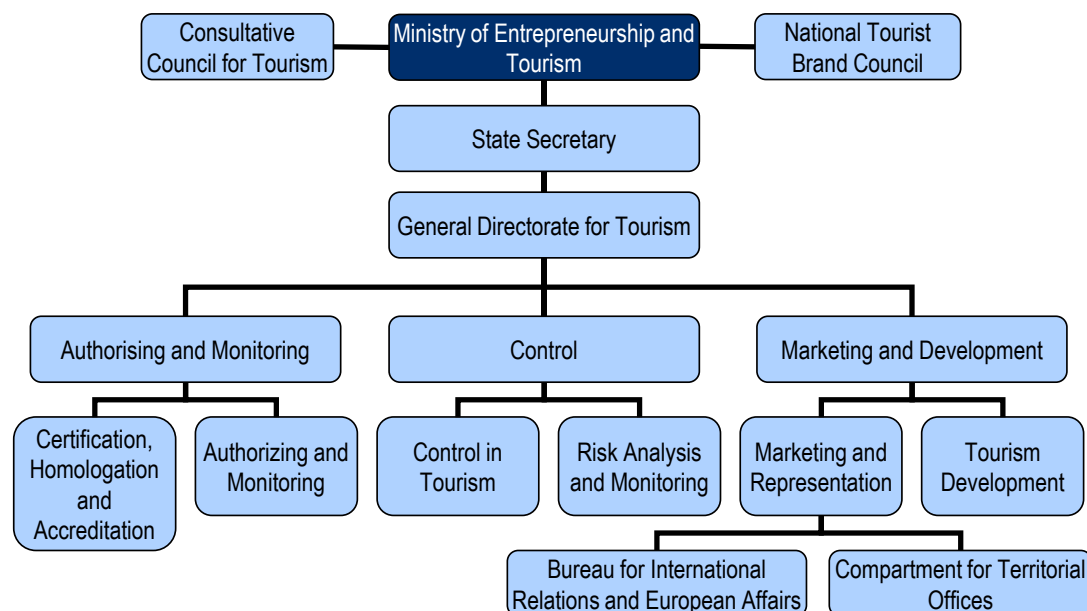
The Consultative Council for Tourism includes representatives of the central and local administration, the private sector, academia, associations for different tourism sectors or destinations in Romania, and cultural institutions of national interest. In 2022, Romania established the National Tourist Brand Council, which includes representatives of the public and private sectors, to co-ordinate tourism promotion activities.

The local administrations collaborate with the ministry in implementing tourism policy. At the local level, tourism associations bring together interested parties to contribute to developing tourism in their area. Additionally, 14 territorial representatives of the ministry work with local partners to help implement the national tourism policy.

There are three main budget lines related to tourism: the Programme for Tourist Products Development, the Programme for Tourist Marketing and Promotion and transfers from the central budget to the local budget for tourism investments (part of the Programme for Tourist Products Development). Additional

funds may be allocated to tourism, as was the case with the state aid scheme for the enterprises affected by the COVID-19 pandemic. The total tourism budget increased over the period 2020-22, from RON 11.6 million to RON 117.5 million.

### Romania: Organisational chart of tourism bodies



Note: The chart shows only the tourism section of the Ministry of Entrepreneurship and Tourism.

Source: OECD, adapted Ministry of Entrepreneurship and Tourism, 2022.

### Tourism policies and programmes

To support tourism enterprises affected by the COVID-19 pandemic, Romania implemented a state aid scheme for accommodation and food services businesses, travel agencies, travel guides and event organisers. The state aid was given in the form of grants of 20% of the turnover difference resulting from the eligible activities in 2019 compared to 2020, limited to RON 4 million (EUR 800 000) at the enterprise level. Romania also extended the validity of travel vouchers issued before or during the pandemic. Both public and private sector employees can benefit from the travel vouchers.

Romania's National Recovery and Resilience Plan (NRRP) includes a chapter related to Tourism and Culture. The tourism chapter refers to developing Destination Management Organisations, creating and promoting 12 cultural-touristic routes, creating and upgrading nine museums and memorials, and developing cycling tourism.

The 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 UNWTO.

There are also two sectoral strategies:

- The National Strategy for Ecotourism Development 2019-29, which has the general objective of creating the conditions for ecotourism development in natural protected areas. It aims to develop a network of certified ecotourism destinations and create competitive ecotourism products for both national and international markets. Based on the National Strategy for Ecotourism Development, the Ministry, together with other institutions and organisations from Romania, such as the Ministry

of Environment, Waters and Forests, the National Institute for Research and Development in Tourism and the Ecotourism Association of Romania, developed a system for evaluating ecotourism destinations in Romania. The system is based on the Global Criteria for Sustainable Tourism (GSTC) and the European Ecotourism Standard (EETLS). So far, five tourism destinations have received this recognition, and two others are under evaluation.

- The Strategy for the Development of Spa Tourism - 2019. The strategy is based on implementing an innovative approach combining public-private partnerships to support the development of a wide variety of health tourism-related products. It aims to provide a new and innovative green and spa tourism product.

The Ministry of Entrepreneurship and Tourism runs a programme for financial support to local public administration authorities to finance investment projects in tourism infrastructure. The programme is carried out based on the Master Plan for Tourism Investments.

### Recognising cultural tourism routes in Romania

In 2020, Romania's national tourism administration initiated a programme related to the recognition of cultural-touristic routes in Romania, taking into consideration the experience and knowledge gained as a member of the Enlarged Partial Agreement on Cultural Routes of the Council of Europe.

As of 2022, 116 cultural-touristic routes have been recognised, of which 27 are at the national level, 53 are at the regional level, and 36 are at the local level. Additionally, Romania has eight cultural routes in the Council of Europe network and four transnational routes.

The objectives of this programme are the following:

- Highlight rich cultural assets.
- Increase the capacity for accessing funding for developing and promoting cultural assets.
- Include cultural routes as part of the travel trade's offer.
- Develop tourism and stimulate local economic and social development.
- Increase collaboration between the counties in Romania.
- Promote the sustainable development of localities crossed by the routes.
- Increase tourist flows to and into throughout Romania.
- Promote the tangible and intangible heritage of Romania to international markets.
- Promote destinations by organising events with national and international participation.
- Develop collaboration between enterprises that are part of cultural tourism routes.

## Statistical Profile

### Romania: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	9 383	10 109	10 691	5 945	8 527
Overnight visitors (tourists)	9 383	10 109	10 691	5 945	8 527
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	21 801	23 315	24 795	13 582	19 003
Hotels and similar establishments	15 584	16 543	17 446	9 224	13 276
Other collective establishments	6 217	6 772	7 349	4 357	5 727
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	2 760	2 797	2 684	453	841
Overnight visitors (tourists)	2 760	2 797	2 684	453	841
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	325	327	298	57	106
Italy	242	241	223	40	73
France	168	172	155	30	55
Israel	293	278	235	29	50
United States	157	166	162	22	45
Nights in all types of accommodation	5 291	5 330	5 291	997	1 833
Hotels and similar establishments	4 538	4 560	4 544	888	1 626
Other collective establishments	753	769	747	109	207
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	10 446	10 469	13 651	4 267	8 237
Overnight visitors (tourists)	10 354	10 361	13 515	4 237	8 182
Same-day visitors (excursionists)	92	108	136	30	55
Top destinations					
Bulgaria	139	164	209	106	194
Türkiye	140	197	315	68	193
Egypt	..	..	43	16	148
Greece	163	161	130	46	75
Italy	52	69	44	..	13
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION USD</b>					
<b>Inbound tourism</b>					
Total international receipts	3 530	3 887	4 246	1 608	..
International travel receipts	3 058	3 396	3 578	1 431	..
International passenger transport receipts	472 e	491 e	668 e	178 e	..
<b>Outbound tourism</b>					
Total international expenditure	4 927	6 121	7 178	3 475	..
International travel expenditure	4 349	5 339	6 001	3 026	..
International passenger transport expenditure	578	782 e	1 177 e	449 e	..

.. Not available; e Estimated value

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/k3jlm8>

## Romania: Enterprises and employment in tourism

	Number of establishments <sup>1</sup>	Number of persons employed <sup>2</sup>				
	2019	2017	2018	2019	2020	2021
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>48 747</b>	<b>403 532</b>	<b>409 881</b>	<b>412 649</b>	<b>393 427</b>	..
Accommodation services for visitors	7 976	45 360	43 686	40 910	40 849	..
Hotels and similar establishments	7 976	39 294	36 954	35 511	36 947	..
Food and beverage serving industry	17 012	141 695	156 669	163 335	146 888	..
Passenger transport	11 354	156 002	152 623	146 191	143 973	..
Air passenger transport	68	5 896	6 626	6 884	5 208	..
Railways passenger transport	43	31 594	35 010	30 649	31 185	..
Road passenger transport	11 146	115 397	108 754	104 650	102 069	..
Water passenger transport	97	3 115	2 233	4 008	5 511	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	679	402	914	1 078	2 607	..
Travel agencies and other reservation services industry	2 198	15 797	11 993	13 718	12 570	..
Cultural industry	1 222	20 219	18 961	15 714	13 968	..
Sports and recreation industry	5 016	24 057	25 035	31 703	32 572	..
Retail trade of country-specific tourism characteristic goods	3 290	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	..	..	..	..	..

.. Not available

1. Data refer to number of enterprises.

2. Data refer to number of employees.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/dxsut4>


## Romania: Internal tourism consumption

Million RON

	2019		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>8 186</b>	<b>49 352</b>	<b>57 787</b>
Tourism characteristic products	7 641	42 951	50 809
Accommodation services for visitors	3 381	10 155	13 704
Food and beverage serving services	2 306	15 559	17 915
Passenger transport services	523	9 854	10 377
Air passenger transport services	44	3 706	3 750
Railways passenger transport services	24	531	556
Road passenger transport services	438	5 581	6 020
Water passenger transport services	16	36	52
Passenger transport supporting services	..	..	..
Transport equipment rental services	203	83	286
Travel agencies and other reservation services industry	..	4 946	4 946
Cultural services	310	485	795
Sports and recreation services	297	784	1 081
Country-specific tourism characteristic goods	482	..	482
Country-specific tourism characteristic services	140	1 084	1 224
Other consumption products	544	6 401	6 977
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/whkdj0>



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