

## **ANALYSIS OF ROMANIAN TOURIST PREFERENCES IN CHOOSING TOURIST DESTINATIONS**

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### ***Abstract***

*This paper refers to the evolution of the number of tourist arrivals and departures in Romania and local tourists' preferences in choosing a travel destination. The actuality of the research topic is based on the fact that arrivals of international travelers represent about 1300 billion dollars for countries receiving foreign currency or income from foreign tourism. Romania, for instance, recorded a number of up to 8 million foreign tourists annually and it receives around 1.14 billion dollars from the international tourism, which is very low compared to other countries.*

***Key words:*** *international tourism, tourist arrivals, overnight stays, tourist destination*

***JEL classification:*** *D12, F20, L83*

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### **1. Introduction**

Although international tourism continued its global progress, despite the economic crisis, it entered a period marked by many uncertainties. The current dynamics of tourism remains fragile, the effects of economic mechanisms, especially monetary effects requiring always a reaction term within about 6 months. In addition, the trend of a resumption of worldwide economic growth delays to confirm significantly and consistently both in the U.S. and in Europe or Japan, the main emitting markets. In these circumstances, the future of the international tourism market depends increasingly on qualitative factors.

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UNWTO forecasts show that, compared to the limited growth of international tourism market, it is becoming increasingly necessary: to develop better adaptation of market products; business tourism (conferences, incentive trips, symposiums); cultural and sports tourism; short stays tourism; health tourism; third age tourism, by indiscriminating adaptation of products offered. It is also necessary to improve and promote the development of tourism through quality, competitiveness and originality.

To ensure sustainable development of international tourism, it is increasingly necessary to adopt economic programs intended to constitute genuine tourism dies in most tourist industrialized countries and developing countries. Adverse effects have been observed in many developing countries, which tend to cause an economic dependence more or less important of receiving regions compared with emitting regions.

Three main areas of development can be drawn from the current analysis of the tourism sector and the prospects for international tourism development: tracing a competitive price-performance ratio and therefore a better productivity; diversification of tourism products; multiplying economic driving effects of tourism.

The economic importance of tourism globally is reflected in the share that this sector holds in total GDP in the world, namely 9 % plus direct, indirect and induced effects. However, one in 11 jobs worldwide is occupied in tourism and related services.

## **2. International tourism overcomes the crisis**

### **2.1. Dynamics of international tourism**

In 2013 there were 1.087 billion international tourists, with 52 million more than the previous year, according to the latest barometer of the World Tourism Organization (UNWTO). The positive trend hence in international tourist arrivals is reflected in international tourism revenues reported by destinations worldwide in the first nine months of 2013.

Tourism revenues of ten of the 25 largest receiving countries of the international tourism experienced double-digit growth: United States ( 11 % ), Macau - China ( +10 % ), Great Britain (+18 % ), Thailand (+28 % ), Hong Kong - China (+21 % ), Turkey (+13 % ), India (+13 % ), Japan (+23 % ), Greece (+15 % ), Taiwan (+12 % ).

China will become the world's main tourism market, according to international tourism expenditure (102 billion dollars), as emerges from the data provided by the World Tourism Organisation at the *World Travel Market* tourism fair in London last autumn, registering a 22% increase in outbound tourism expenditure in 2013.

It should be recalled that in 2012, China became for the first time emitting travel market number one, based on the volume of total expenditure made by its travellers abroad, surpassing Germany and the U.S. (79.4 billion euros).

Last year, Russia, France and Sweden were the three tourists emitting markets that grew the most in Europe as shown by ITB World Travel Trends Report 2013/2014 compiled by IPK consultancy enterprise.

In general, and despite the problems and economic uncertainty, 2013 was a “good year” for emitting tourism in Europa, indicates IPK.

According to data collected from January to August, international trips originating in Europe increased by 2.5 %, while overnight stays abroad increased by 2 %. Instead tourism expenses increased by only 1%.

However, while *short breaks* or trips for a few days increased by 9%, the long-distance trips increased by 3%.

In addition, *travel bookings via the Internet* increased by 12 %, while booking through travel agencies increased by 3 %.

On the other hand, the *Russian emitting market* was the market that has grown the most in this year, with an increase of 12% of international trips in the first eight months of 2013.

*France* was surprisingly strong with an increase of 5% of trips abroad, given the weakness of its economy.

In this context, annual variations in traveling abroad in the following markets may be indicated: Russia +12 %, France +5 %, Sweden +4 %, Great Britain +3 %, Belgium +2 %, Switzerland +2 %, Germany + 2%, Austria 0 %, Holland 0 %, Ireland -2%, Spain -4%, Italy -5% .

Despite economic problems or uncertainty, 2013 was a good year for emitting tourism in Europe.

For 2014, the IPK provides an *increase of between 3% and 4%* of tourism trips of Europeans.

Moreover, long-distance destinations visited by European tourists in 2013 were quite disparate developments regarding the number of tourist arrivals, highlighting especially the 8% decrease in travel from Europe to the

Caribbean and the increase to South America +9 %, Pacific +6%, Africa +3 %, Asia +2 %, Central America +2 %, North America +2 %. For 2014, IPK provides an increase between 3% and 4% of tourism trips of Europeans.

Russia reduced its economic growth forecasts for 2014, the Russian Ministry of Economy estimates that GDP will grow this year between 2.8 % and 3.2 % compared with the previous estimate of 3.7 %. On the other hand, China's economy continues to slow; in the second quarter of 2013, its GDP grew by 7.5 %, two tenths less than the previous period, Chinese airlines being affected by this economic downturn of the country. Brazil's GDP experienced in the second quarter of 2013 an expansion of 1.5 % compared to the three months of the year, when it grew to a rate of 0.6 %. However, it is worrying the depreciation of the Brazilian Real (1 EUR = 2.49 REAL) against the U.S. dollar (a depreciation of 15 % in 2013), before the start of the World Cup this year.

China Airlines tops the list of the 15 largest travel companies in the world by stock market capitalization, according to a ranking compiled by U.S. trade publication Skift.com. Thus, the total outstanding shares of the company amounted to 58.210 billion dollars, according to market values taken as a reference on June 25 to develop ranking.

A second company as the stock market capitalization, with 55 billion dollars, is Eva Airways. This is also headquartered in Taiwan and in addition to the transport of passengers and goods, gets a good portion of its revenue from handling services and duty free sales.

A third company in the list is Las Vegas Sands, with 41.830 billion dollars, in addition to the hotels and casinos in Las Vegas, the company has expanded its operations in Macau and Singapore.

**Table 1: The 15 largest companies in the world according to capitalization on the stock exchange**

Company	Capitalization on the stock exchange (billion dollars)	Turnover in 2012 (billion dollars)
China Airlines	58.21 \$	2.9 \$
Eva Airways	55.08 \$	1.6 \$
Las Vegas Sands	41.83 \$	11.1 \$
Priceline	40.53 \$	5.2 \$
Walt Disney*	34.42 \$	12.9 \$

Carnival Corp.	28.17 \$	15.4 \$
British Airways	26.42 \$	16.9 \$
Delta Air Lines	15.55 \$	36.6 \$
Ryanair	14.46 \$	6.8 \$
Wynn Resorts	12.68 \$	5.1 \$
Starwood	12.22 \$	6.3 \$
Marriott	12.09 \$	11.7 \$
Singapore Airlines	11.76 \$	9.6 \$
United Continental	10.27 \$	37.1 \$
Southwest Airlines	9.75 \$	17.09 \$

Source: skift.com. \* Walt Disney's Co.'s total market cap actually is \$ 112.68 bilion. But the company derived only 30.55% of its total revenue in fiscal 2012 from its travel business, namely parks and resorts. The above market cap figure for Walt Disney is 30.55% of its actual total market cap.

## 2.2. Tourism in the European Union – developments

Spain was the country of the European Union (EU) with the largest incoming tourism revenue, reaching 43.521 million euros, followed by France and Italy, according to data on the tourism behavior of residents of EU published by *Eurostat* statistical office.

In its turn, France produced 41.680 million euros in tourism revenue, while Italy has reached 32.055 million euros.

Germany and Great Britain occupy the following places in the rankings with 29.666 million euros in revenue, as shown in the table below.

**Table 2: Ranking of EU member states countries by tourist income and expenses**

Country	Income (million euros)	Expenses (million euros)
Germany	29.666,0	64.944
Austria	14.706,0	7.825
Belgium	10.128,0	15.173
Bulgaria	2.917	1.015
Cyprus	2.023,0	1.005
Croatia	6.861	722
Denmark	5.110	7.471
Slovakia	1.789	1.666
Slovenia	2.090	734
Spain	43.521	11.911
Estonia	954	619

Finland	3.020	3.805
France	41.680	30.405
Greece	10.444	1.844
Hungary	3.782	1.537
Italy	32.055	20.511
Ireland	3.022	4.609
Latvia	586	534
Lithuania	1029	722
Luxembourg	3.592	2.798
Malta	989	265
Holland	10.696	15.707
Poland	8.533	6.842
Portugal	8.606	2.946
Great Britain	28.526	40.380
Czech Republic	5.480	3.345
Romania	1.141	1.427
Sweden	8.091	12.060

Source: Eurostat, 2013

Therefore, ranking of tourism emitting countries in the EU member countries is headed for another year by German tourists with expenses of 64.944 million euros abroad in 2012. A second tourist emitting market was the Great Britain (€ 40.380 million), followed by France (€ 30.405 million). Romania had revenues of € 1.141 million and costs of € 1.427 million, with a deficit of € 286 million.

### **2.3. Romanian people' s preferences in terms of tourism**

According to the latest data published by the National Statistics Institute (INS ), in 2013, tourist arrivals totaled 8.01 million, up by 1% compared to 2012 and 19.3 million for overnight stays (up by 3.5%). Romanian tourist arrivals accounted for 78.3 % of the total, a rate similar to that in 2012.

Arrivals and overnight stays in tourist units in Romania increased last year compared to 2012, by 3.5 % and 1.1%, declared the National Statistics Institute (INS).

Thus, 58.6 % of the total number of tourist arrivals in Romania are tourists from the European Union (EU). Most foreign tourists are from Hungary (30.3 %), Bulgaria (24%), Germany (9.5 %), Italy (7.0 %), Poland

(6.5%) and Austria (4.2 %). In terms of foreign tourist arrivals in the tourist establishments, the largest rate was held by those from Europe (80.5 % of total foreign tourists), and 85.7 % of these were from countries belonging to the European Union.

**Table 3: Evolution of the number of tourist arrivals and overnight stays in Romania**

	Arrivals*			Overnight stays *		
	Period 1.I – 30. XI.2012 - thousands -	Period 1.I – 30. XI.2013 - thousands -	Period 1.I – 30. XI.2013 compared to period 1.I – 30. XI.2012 - % -	Period 1.I – 30. XI.2012 - thousands -	Period 1.I – 30. XI.2013 - thousands -	Period 1.I – 30. XI.2013 compared to period 1.I – 30. XI.2012 - % -
<b>Total</b>	7.194,3	7.419,7	103,1	18.086,1	18.203,1	100,6
<b>Romanian tourists</b>	5.626,8	5.796,3	103,0	14.965,1	14.913,3	99,7
<b>Foreign tourists**</b>	1.567,5	1.623,4	103,6	3.121,0	3.289,8	105,4
<b>of which:</b>						
- Europe	1.274,5	1.308,7	102,7	2.525,1	2.651,2	105,0
- European Union	1.100,2	1.122,8	102,1	2.156,7	2.242,9	104,0
- Asia	137,9	155,6	112,8	295,6	336,6	113,9
- North America	99,3	100,9	101,6	182,3	186,0	102,0
- South America	12,2	11,3	92,6	26,4	24,4	92,4
- Africa	13,2	12,7	96,2	40,1	29,5	73,6

Source: National Institute of Statistics 2014 / \* Recorded in reception facilities/ \*\* By country of residence

Most of the total of foreign tourists, namely 1.71 million (over 60.000 more than in 2012), were from Germany (228.592), Italy (181.894) and France (118.649). Arrivals in hotels owned a rate of 74.7 % of total tourist arrivals in accommodation structures, which represents an increase of 2.4 % compared to 2012 (Table 4).

Most foreign visitors chose to go in Bucharest and other cities of residence (1.3 million), far fewer preferring mountain resorts (126.945), beachside resorts (31.540) or the Danube Delta (22.790).

Eurostat data show that although the number of nights spent by foreign tourists in accommodation structures in Romania increased last year by 5.1 %, Romanian tourism is still far behind neighboring countries, less than one of five overnights being used by visitors from abroad. Foreign tourists spent last year in Romania 3.5 million nights, among the lowest levels in the EU, ie. more than four times lower than Hungary and Bulgaria.

**Table 4: The number of tourist arrivals in Romania by destinations (no. of persons)**

	Total	București și orașele reședință de județ, exclusiv Tulcea	Alte localități și trasee turistice	Stațiuni din zona montană	Stațiuni balneare	Stațiuni din zona litorală, exclusiv orașul Constanța	Zona Delta Dunării, inclusiv orașul Tulcea
<b>Total turiști străini</b>	<b>1714538</b>	<b>1308260</b>	<b>192854</b>	<b>126945</b>	<b>32149</b>	<b>31540</b>	<b>22790</b>
Germania	228592	173760	24698	14930	2947	6111	6146
Italia	181894	148933	21768	7232	1066	1672	1223
Franta	118649	95518	11279	7021	698	2423	1710
Ungharia	99261	55060	30879	3809	8996	371	146
Israel	96615	74062	4238	15996	1632	484	203
Regatul Unit	92756	79050	6832	5228	300	977	369
S.U.A.	91625	78680	6563	4338	443	1313	288
Spania	66375	48328	8954	7293	266	537	997
Polonia	64152	40855	8701	7782	610	3130	3074
Austria	58765	45453	6695	4503	651	756	707
Olanda	47378	37918	5807	2664	271	478	240
Bulgaria	43751	31315	4874	6559	161	434	408
Grecia	39360	35098	1876	1726	84	434	142
Turcia	38375	29005	6819	1247	100	1073	131
Republica Moldova	33668	15690	3705	5612	7467	1118	76
Belgia	30299	24958	2498	1608	285	782	168
Federatia Rusa	29302	20031	2884	3800	278	2247	62
Republica Ceha	22246	15942	3498	1696	777	173	160
Elvetia	20556	17199	1566	1026	156	317	292
Ucraina	17227	11557	2554	2419	257	331	109
Japonia	16974	13244	1134	2343	39	138	76
Suedia	15049	12502	1054	750	229	388	126
Norvegia	14242	8156	1269	548	48	356	3865
Canada	13967	11129	1435	825	167	389	22
Serbia	13959	11834	785	717	436	62	125
China	13329	10488	616	1003	541	539	142
Slovacia	11678	9306	1576	441	243	80	32
Danemarca	11004	7307	2190	457	105	435	510
Albania	10884	3882	3808	639	1896	505	154
Portugalia	10145	7692	1200	576	24	181	472
Alte țări	162461	134308	11099	12157	976	3306	615

In this regard, it should be noted that only Latvia and Lithuania had less foreign visitors last year, 2.7 million or 2.8 million, but foreign visitors in these countries represent 70 % and 51 % of tourist arrivals market. In Romania, foreign tourists represent only 18 % of the market, the lowest

percentage in the EU, compared to 67 % in Bulgaria, with 14.3 million overnight stays last year, or 49 % in Hungary, where foreign tourists spent in 2013 about 12.3 million nights.

Net use index of accommodation places last year was 25.2 % of overall tourist accommodation places, down by 0.7% compared to 2012. Hotels registered a use index of accommodation places of 31.6 %. The average length of stay was 2.6 days for the Romanian tourists and two days for foreign tourists. However, departures of Romanian visitors abroad registered at border crossing points were 11.36 million, up by 1.9% compared to 2012.

*Euromonitor International* estimates for 2014 an increase in the number of tourist arrivals in Romania by **3.9%**, reaching more than 8,5 million. **Departures of Romanian tourists** abroad will also **increase** by **2.5 %**, exceeding 11.5 million, as can be seen from the analysis in Table 5.

**Table 5: Evolution of the number of tourist arrivals and the number of tourist departures by purpose of visit**

Geographies	Categories	2011	2012	2013	2014	2012-2013	2013-2014
Romania	Arrivals by Purpose of Visit	7.611,2	7.996,3	8.246,8	8.567,3	3,1	3,9
Romania	Business Arrivals	2.589,3	2.716,1	2.836,8	2.972,4	4,4	4,8
Romania	Leisure Arrivals	5.021,8	5.280,2	5.409,9	5.595,0	2,5	3,4
Romania	Departures by Purpose of Visit	10.936,4	10.963,5	11.177,4	11.452,1	2,0	2,5
Romania	Business Departures	2.783,1	2.845,4	2.973,9	3.007,2	4,5	1,1
Romania	Leisure Departures	8.153,3	8.118,1	8.203,5	8.444,9	1,1	2,9

Source: Euromonitor International, 2014

In these circumstances, the most used means of transport used by tourists to get to Romania will be the road, followed by air. The same means of transport will be used most by Romanian tourists during their trips abroad (see Table 6).

**Table 6: Evolution of the number of tourist arrivals and the number of tourist departures by mode of transport**

Geographies	Categories	2011	2012	2013	2014	2012-2013	2013-2014
Romania	Arrivals by Mode of Transport	7.611,2	7.996,3	8.246,8	8.567,3	3,1	3,9
Romania	Air Arrivals	1.550,8	1.652,8	1.812,7	1.954,3	9,7	7,8
Romania	Land Arrivals	5.854,5	6.162,7	6.253,6	6.428,5	1,5	2,8
Romania	Rail Arrivals	152,6	136,2	141,8	149,4	4,1	5,4
Romania	Sea Arrivals	53,3	44,5	38,8	35,1	-12,9	-9,4
Romania	Departures by Mode of Transport	10.936,4	10.963,5	11.177,4	11.452,1	2,0	2,5
Romania	Air Departures	2.126,2	2.118,2	2.145,1	2.294,2	1,3	6,9
Romania	Land Departures	8.522,4	8.559,5	8.752,2	8.853,8	2,3	1,2
Romania	Rail Departures	271,5	268,0	261,6	282,8	-2,4	8,1
Romania	Sea Departures	16,3	17,9	18,5	21,3	3,6	15,4

Source: Euromonitor International, 2014

**Expenditure of foreign tourists in Romania will increase in 2014 by 1.8 %**, while **expenditure of Romanian tourists abroad will decrease by 0.1%**. However, Romania will register this year a deficit in tourism, according to Euromonitor.

**Table 7: Evolution of tourism receipts and expenditure**

Geographies	Categories	2011	2012	2013	2014	2012-2013	2013-2014
Romania	Balance of Payments	-5.438,9	-5.236,3	-5.025,0	-4.962,1	-4,0	-1,3
Romania	Incoming Tourist Receipts	3.125,9	3.022,1	3.075,7	3.131,1	1,8	1,8
Romania	Outgoing Tourist Expenditure	8.564,8	8.258,4	8.100,7	8.093,2	-1,9	-0,1

Source: Euromonitor International, 2014

Expenditure of Romanian tourists in domestic tourism will increase by 0.5 % in 2014, totaling over 11.2 million RON.

After the publication of latest data for 2013 of the National Institute of Statistics, we will certainly see that international tourist arrival grew by 5% below the world average, and in 2014 Euromonitor predicts an increase of 3.9% below the world average which is between 4% and 4.5 %.

Romania ranks 68th in a ranking of 140 countries in tourism competitiveness report of 2013 published in the World Economic Forum (World Economic Forum, WEF).

The 140 countries included in the report are ranked according to 14 indicators of competitiveness in tourism, such as legislation, sustainability in environmental policies, health and hygiene levels, transport infrastructure, human, natural and cultural resources. At European level, Romania ranks 35th out of 42 countries assessed, the list being completed by the Republic of Moldova. Top 10 countries in Europe include Switzerland, Germany, Austria, Spain, Great Britain, France, Sweden, Holland, Iceland and Finland.

In terms of tourism marketing, Romania ranks 123 out of 140 countries. Direct contribution of tourism to gross domestic product (GDP) of Romania is about 1.5% below the world average of 5.2%.

In other countries in the region, contribution to GDP is much higher. In Croatia it is 11.9 %, 5.8% in Hungary and 3.8% in Bulgaria. The number of employees in tourism in Romania is 2.3 % of total employees, approximately 193.000, while the global average of those working in tourism is 13.9%.

The European Commission (EC) presented in early February 2014 the results of Eurobarometer survey "*Preferences of European towards Tourism*".

Eurobarometer on tourism is based on telephone surveys made on a sample of more than 26.500 people across the European Union between 10 and 14 of January, in which 1003 people are Romanian.

The analysis of data of this report regarding Romanian people's preferences in terms of tourism and forecasts for 2014 generates a series of conclusions presented below. The analysis of data on the preferences of Romanian tourists in 2013 indicates the following:

- among the reasons that most Romanian tourists traveled in 2013 include choice of sunny destinations (seaside , beach) and reunion with family and friends (37 %), spending time in nature (34 %);

- *cultural tourism* is the one that attracts the least the Romanian tourists (23%) compared to other Europeans;
- natural resources of a destination would lead most Romanian tourists to return to a destination (40%);
- *recommendations from friends, family and colleagues* are the most important *source of inspiration* of Romanian tourists when deciding their trip (48 %), followed by *travel websites* (23%). The Romanian market is somewhat atypical compared to other European markets , tourism websites, brochures and catalogs counting less in their travel decisions;
- most Romanian tourists used the Internet (35 %) to organize the trip or they were helped by a friend (22 %);
- Most Romanian tourists have traveled in Romania (60 %) and the countries of the European Union (43 %), Romania being in last place in the EU from the point of view of trips outside the Union with 10%, followed by Greece (7%);
- Most Romanian tourists (34 %) bought isolated travel services increased by 9 %) and purchase of tourism packages (27 %) experienced a 3% increase, while purchasing the all- inclusive services (27 %) saw an increase of 6%;
- Romania is among the countries that grew most tourists' satisfaction on the quality of tourist services (+8 %), followed by the satisfaction on the acquisition of accommodation places (+5 %);
- the Romanian people's satisfaction also increased on the general price level (11 %), but Romania was the country with the least satisfaction about services for people with disabilities;
- most Romanian tourists made short trips between one and three nights, and Romania is among the countries whose citizens make the fewest trips of 13 or more consecutive nights;
- Romanian tourists are amongst Europeans staying least in *accommodation places with more than 20 seats* (27 %), ahead of Croatia and Serbia, the majority preferring small accommodation units (44%). The number of Romanian tourists who opt for accommodation in camping decreased by 6 %;
- financial problems have been an obstacle for 58% of Romanian tourists who could not travel, down 2 % compared to last year.

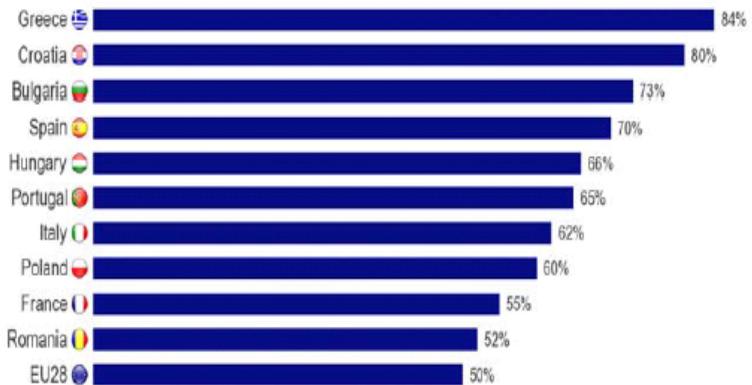
Trends regarding preferences of Romanian tourists *in 2014*:

- 30 % of the Romanian tourists state that their financial situation will influence travel plans in 2014;
- Most Romanian tourists intend to make short trips of up to three nights (34 %) or between 4 and 13 consecutive nights (31 %);
- 52% of Romanian tourists, above the European average, plan to travel in their own country, 42 % in the EU countries and 13 % in non-EU countries.

**Figure 1: Trends regarding preferences of tourists in 2014**

Question: Q12T. In which countries do you plan to spend your holidays in 2014?

Answers: In [OUR COUNTRY]



Source: Eurobarometer, 2014

After a comparative study on the last three years made by the *Romanian Institute for Evaluation and Strategy (IRES)*, we notice that the attention of the majority of respondents is focused on domestic holidays, only 12% of them prefer airplane as a means of transport and that foreign destinations preferred (by plane) are Greece, Turkey, Spain and Italy.

A Romanian in five states that he takes leave only in summer, while similar proportions (11 % and 13 %) say they take their leave half in the summer and half in the winter and they do not take into account the season when they take leave.

The proportion of respondents saying that they were on holiday in the last 10 years during the summer increases from 41 % in 2010 to 61% in 2012 over the three years in which this study was conducted. Men say they have gone on holiday during the summer in the last 10 years in higher proportion than women, as people living in the city; moreover, the higher the level of education of respondents increases, the lower the proportion of them that say they were not on vacation during the summer in the last 10 years (from 70 % for those with elementary education to 15 % for those with higher education). Respondents in Moldova compared to those of other historical regions of the country, declare in a lower proportion that they were gone on vacation during the summer in the past 10 years.

Compared with 2011, the proportion of people who say they have had or will have vacation days this year does not change, being 26% in both years.

Most respondents say they have a leave between 21 and 30 days (49% in 2011 and 47 % in 2012), while 28 % in 2011 and 31 % in 2012 say they have less than 21 days of leave, and 14%, and 23 % say they have more than 30 days of leave.

About a quarter of those surveyed say they will go on vacation in the year of the survey (25% in 2010, 23% in 2011 and 24 % in 2012). Men say they will go on vacation at a rate slightly higher than women.

Most respondents who were going on holiday the last 10 years say they have been left in Romania (71 % in 2011, 69 % in 2012), while 15 % and 11 % were living abroad, and 12% and 18% respectively, say they were both in Romania and abroad.

In 2012, 34 % of respondents were travelling in Romania, while 11 % were abroad, and 2% both in Romania and abroad.

In 2012, the proportion of respondents saying that previous year visited several places during the summer holidays increased by 10 %; decreasing the proportion of those who say they were at the seaside (by 5%), of those who visited a specific city (by 5 %) and the proportion of those who say they were both at the seaside and the mountains increases as well (by 3 %).

Budgets the respondents say that they have spent in 2012 for the summer holidays are slightly lower than those in 2011. The biggest difference is in the case of amounts between 1 and 1000 RON (from 29 % to 40 %).

One in three respondents (33 %) says he will go on vacation during the summer time in the next years, a rate similar to that achieved in 2012 (31

%). Men say they will go on summer vacation at a rate significantly higher than women (42 % vs. 25 %), as those living in urban areas compared to those living in rural areas. Respondents in the South, Bucharest and Dobrogea are those who declare in the highest proportion that they will go on holiday, compared to those in other regions of the country.

Like previous years, the majority of respondents say they will go on holiday with the family, ie the spouse and children - 48 %.

Regarding the holiday budget, the situation did not change significantly from previous years, 27% of respondents say they will allocate an amount between 1-1000 Ron for holiday, while 21 % say they will spend between 1001 and 2000 Ron for holiday purposes. Urban residents seem to be more generous in terms of holiday budget than people living in rural areas. 12.3 % of city dwellers will allocate between 3001 and 4000 Ron for a holiday, while a similar amount will be spent only by 2.4 % of people in rural areas.

In both moments of research, most people interviewed said their family's financial situation has worsened in the last five years (2011-60 %, 2012-53 %). Young people between 18 and 35 years declare at a rate of 22.8% that the family's financial situation has improved in recent years, standing out sharply from the other age groups, where a similar response is found in amounts below 10% (36 -50 years - 9%; 51-65 years - 6.7 %; over 65 years - 5.7%). Just under 50 % of people living in Transylvania and Banat regions say that their family's financial situation has worsened in the past, but people in the south of the country and Moldova express this view in higher proportion (55.3%, 55.4 %).

The question about the last visit made on Romanian seaside reported an interesting fact that 24% of Romanian people were never on the Black Sea.

In 2012, the majority of Romanian people (58 %) say they would prefer to spend their holidays in the country, if they could do so. Only 32 % prefer a holiday abroad. However, the Romanian people's opinions seem to have changed from previous years. In 2010 and 2011, 47 % and 49 % respectively, were expressing a preference for a holiday in Romania. Regarding a holiday abroad, preferences decreased from 48 % in 2010 to 42 % in 2011 and finally to 32 % in 2012. Distribution by age reveals that along with age, people's appetite for a holiday abroad decreases (18-35 years - 50.1 %, 36-50 years - 32 %, 51-65 years - 25.3 %, over 65 years - 14.8%). As young people, university graduates declare significantly more than those with

a lower grade of schooling that prefer holidays abroad if they have this possibility.

If in 2012 the tourist paid an average of 350 euros per person for a holiday, last year the average budget increased to 380 euros per person. In terms of comfort, this increase of 10 % means a lot more this year because tourists from Romania took full advantage of Early Booking discount type, reserving vacations from the early months of the year and benefiting from discounts of up to 40 %. Thus, although they did not pay much more than in previous years, they received comfort accommodation options or additional services in their touristic package.

For winter holidays Romanian people preferred either skiing holidays in Austria, Germany, France, Bulgaria or Italy or holidays in Mauritius, Kenya or New Year's Eve in New York.

In the past three years, the world's largest tour operators (TUI, DerTour, ITS, Frosch Touristik International) decided to reintroduce Romanian tourist destinations in their catalogs for positive results of ANT strategy for development and promotion of Romanian tourism.

Over 22 million Euros were invested so far (participation in international fairs, promoting the national tourism brand at sporting, artistic and cultural events, radio and TV campaigns, promotional materials, visits of foreign journalists in Romania, etc.), most representing European grants.

### **3. Conclusions**

Regarding the tourism market in Romania, the financial situation continues to influence many Romanian people in their travel decisions, many of them will continue to opt for domestic destinations and destinations in the EU, they will still prefer smaller accommodation units or apartment rentals and holiday homes, as well as short trips. Although the Internet is growing as a source of travel information and planning, family and friends recommendations will continue to have the highest importance. Thus, it is important that tourism business in Romania provide quality services and motivate customers to share their experience both offline and online, by social networks or review websites.

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### **Acknowledgment**

This work was supported by the strategic grant POSDRU/159/1.5/S/133255, Project ID 133255 (2014), co-financed by the European Social Fund within the Sectorial Operational Program Human Resources Development 2007-2013.