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STATISTICS OF THE EVOLUTION OF THE ROMANIAN TOURISM MARKET IN THE YEARS AFTER 1989

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Abstract *Tourism, as an economic phenomenon, is generally circumscribed to the theory of economic cycles and, in particular, to the long cycle theory, secular or Kondratiev. Over a period of 40-60 years, the long cycle has two phases, an upward one and a downward one, each with a duration of 20-30 years. After the era of industrialization in Romania, in the decades 6, 7 and 8, the inflection point is situated around 1980, followed by a long period of decline, accentuated even more by the squandering of the previously invested capital and by the structural changes which took place after 1989. After the recession of 2009-2010, in the sphere of tourism, several indicators have changed direction and intensity of development: the number of foreign visitors and the number of accommodation units have clearly increased, while the number of accommodation places, the number of overnight stays and, partially, the occupation rate were relaunched. „The world is beginning a new economic cycle, of 50 years of revolutionary technological innovation and digitalization of the industry" appreciates also Mugur Isărescu*

Key words:

statistic indicators, accommodation capacities, tourism circulation, long economic cycle, relaunch

JEL Codes:

C 15, E 32, Z 38

1. Introduction

Often, focusing on future projects, we do not solidly anchor those in past developments. From this point of view, economics recognizes the alteration of upward phases (expansion), with periods of economic crisis (contraction), i.e. cyclical fluctuations. Normally tourism, as an economic phenomenon, is circumscribed to this theory of economic cycles, and particularly to long cycles, secular or Kondratiev – named after Nikolai Kondratiev (1892-1938), the Russian economist who has studied them first.

Other economic cycles are the decennials or Juglar, with a duration of 4-5 years and 10-12 years, respectively short cycles, minor or Kitchin, between 6 months and 3 years.

Over a period of 40-60 years, the long cycle registers two phases, one upward and one downward, each for a period of 20-30 years. In the evolution of the global economy, during the last two centuries four Kondratiev cycles have been highlighted. In Romania, the last cycle started after the food shortages following the war, in the years 1946-1947, and ended with the economic relaunching after the recession of 2009-2010 (i.e. the fourth quarter of 2008 – third quarter of 2010), about 60 years away. After the era of industrialization in Romania, in the decades 6, 7 and 8, the inflection point is situated around 1980, followed by a long period of decline, accentuated even more by the squandering of the previously invested capital and by the structural changes which took place after 1989. Beyond the developments on its own path, the economy of each country and, in particular, the Romanian economy was and is always engaged in the global economy, the economy and command-economy countries, i.e. countries with market economies.

In present times „The world is starting a new economic cycle of 50 years, of revolutionary technological innovations and of industry digitalization", showed, in 2013, Mugur Isărescu, academician and BNR Governor.

Equally, tourism operates as part of the national economic complex. Obviously Romanian tourism cannot be an exception to the cyclical evolution. However, it can show a relative independence, can record a certain lack of synchronization, by either anticipating or delaying in relation to overall economic developments. Moreover, even though at more declarative level, in the economic policies of the Romanian governments, tourism is sometimes presented as a sector of economic priority, a possible „spearhead" of economic development, while the theory of tourism economy regards it as a consequence branch.

After the crystallization of Romania as a tourist destination in the years 1960-1970, there was a suite of damaging economic policies in the 1980s and beyond. Without minimizing the impact of the transition from command to market economy, the specific factors of long cycle recession at tourism sector level would be the life cycle of tourist destinations and the influence of the general economic crisis.

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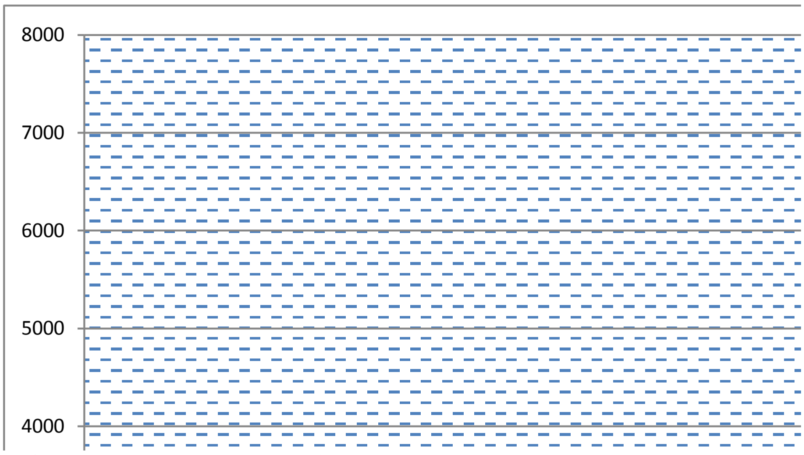
2. Evolution and distribution of accommodation capacities

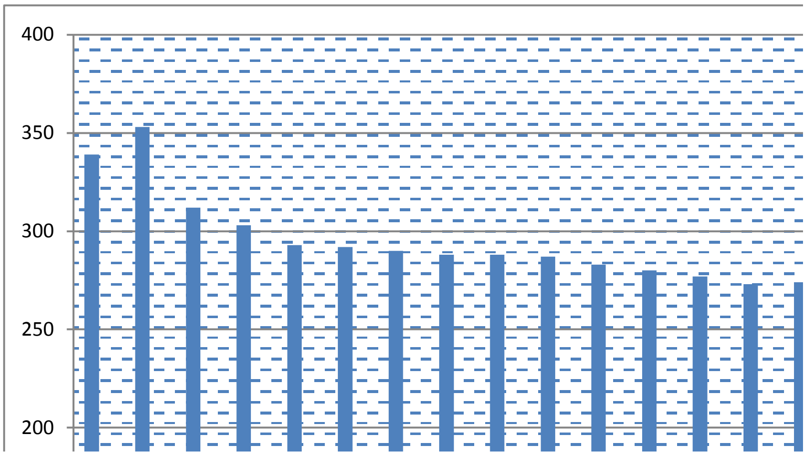
Accommodation capacity equally refers to all active units of accommodation (hotel activity units) and hotels. The number of accommodation units with a minimum of 5 places has evolved from a minimum level in 1993, of 2682 units, to 6821 units in 2015, which represents an increase of 154% (Graph no. 1). Out of the actual total, 51% are tourist pensions and agro tourism ones. A number of 4191 pensions with less than 5 places could be added to those.



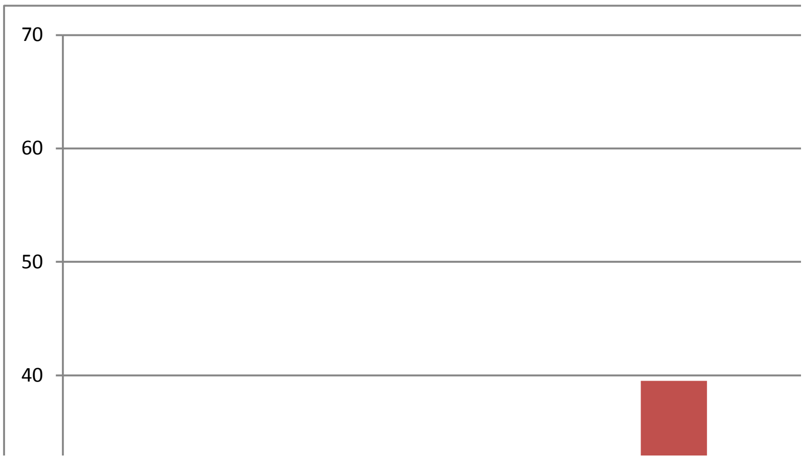
Graph no. 1 – The evolution of accommodation units with more than 5 places

The hotels – expression of the most known type of accommodation unit – were 804 in 1993, and reached 1522 in 2015 (an 89% increase). The distribution by levels of comfort for holes has moved from 76% in the 2* and 1* categories, summed, in 1994, to 75% for the 3* and 2* categories in 2015 (Graph no. 2). The increase of the comfort recognized by classification categories is a result of the orientation of new priority investments towards the 3* category, of the improvement of material condition of 2* and 1* preexisting hotels and their reclassification, of easing classification norms, of the will to justify the relatively high rates through a superior category.

Graph no. 2 – Distribution by classification categories for hotels (%)



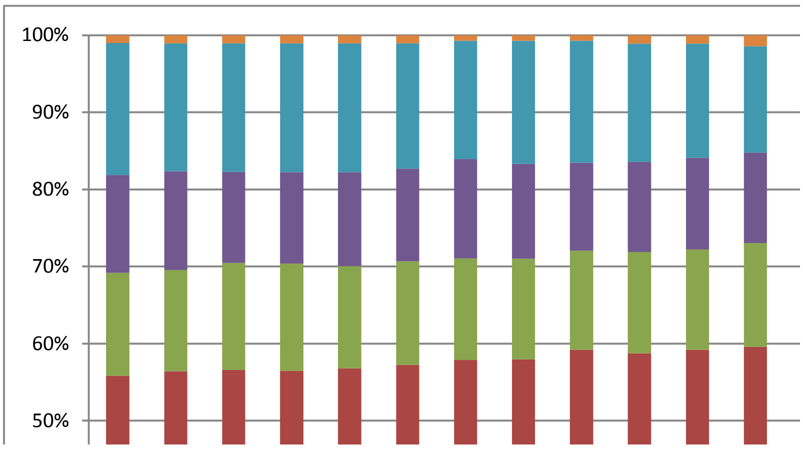
Graph no. 3 – The evolution of the existing number of accommodation places (ths)



Graph no. 4 – Distribution by classification categories of hotel accommodation places (%)

The number of places available in accommodation units with more than 5 places progressed in a less pronounced way (Graph no. 3). The total units in 2002 recorded the minimum number of places, of 273 thousand, and reached in 2015 the level of 328 000 places. For hotels, between 2002 and 2015, the evolution was from 157 000 to 189 000 places. Therefore, the increase is of 20%.

The distribution by categories of the existing places in hotels has also moved, from 79% for 2* and 1* categories in 1994, to 71% for categories 3* and 2* in 2015 (Graph no. 4).



Graph no. 5 – The structure by destination of the existing accommodation places

The structure by types of tourism destinations of existing accommodation places shows an increase of county capitals, including the Capital City, from 15% in 1994, to 27% in 2015, as well as of the mountain area, from 13% in 1994, to 17% in 2015 (Graph no. 5). Slightly surprisingly, there was a decrease for the seaside region, from 40% in 1994, to 25% in 2015, as well as for the spa resorts, from 17% in 1994, to 11% in 2015.

3. Tourism circulation indicators

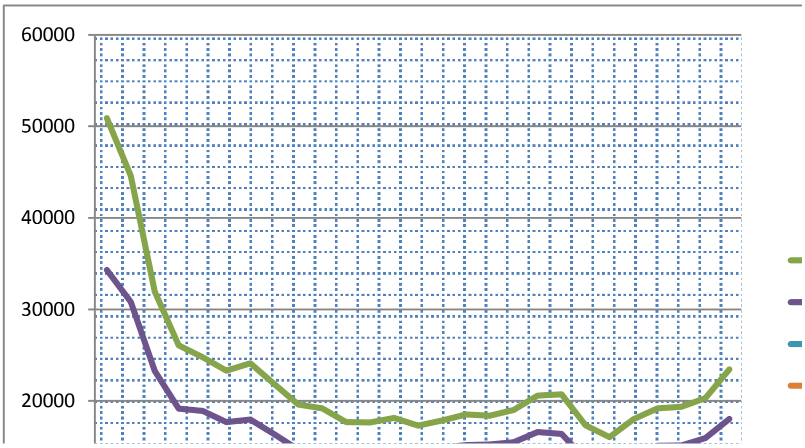
The tourism circulation can be expressed through primary indicators, like the number of accommodated persons/tourist arrivals, and the number of overnights, as well as through derived indicators, such as the average stay and the rate of occupancy.

The number of accommodated persons in the total number of accommodation units has evolved from approx. 13 mil. in 1988, to 4.8 mil. in 2002, 7.1 mil. in 2008, 6.1 mil. in 2010 and 9.9 mil. in 2015 (Graph no. 6). The number of overnights was approx. 51 mil. in 1988, 17.3 mil. in 2002, 20.7 mil. in 2008, 16.1 mil. in 2010 and 23.5 mil. in 2015.

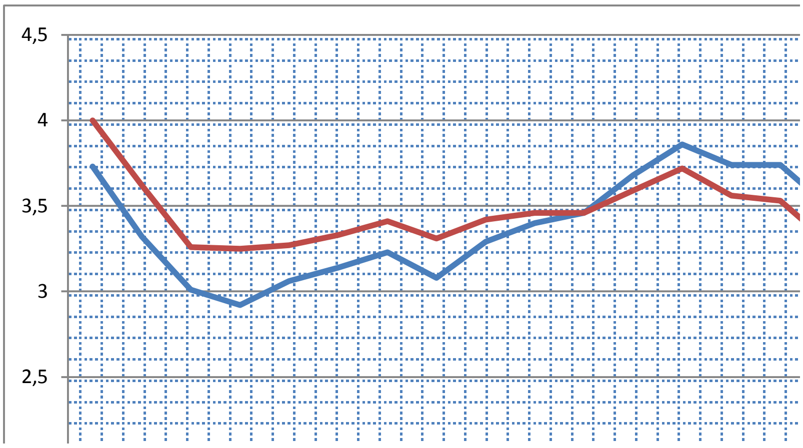
Therefore, the average stay in the total number of accommodation units has evolved from 4.0 nights in 1988, to 3.3 nights in 1992, 3.7 nights in 2001 and 2.4 nights in 2015 (Graph no. 7).

For hotels, the rate of places occupancy was approx. 72% in 1988, 40.4% in 1999, 43.2% in 2007, 29.9% in 2010 and 36.2% in 2015 (Graph no. 8).

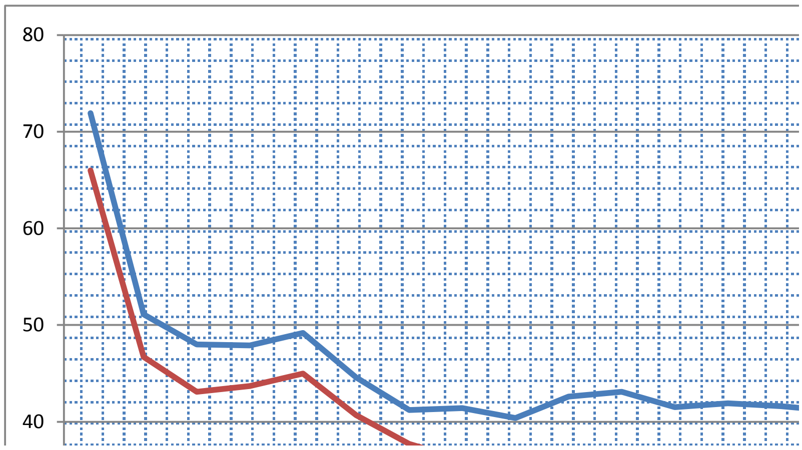
Romania's international tourism refers to both the departures of Romanian tourists abroad and foreign visitor arrivals in Romania (Graph no. 9). Departures have evolved from approx. 1 million in 1989 to 11.3 million in 1990, 5.7 million in 1995, 13.1 million in 2008, 10.9 million in 2010 and 13.1 million in 2015. Arrivals of foreign visitors at border followed a somewhat similar trajectory: from only 66 thousand in 1959 to 1.8 million in



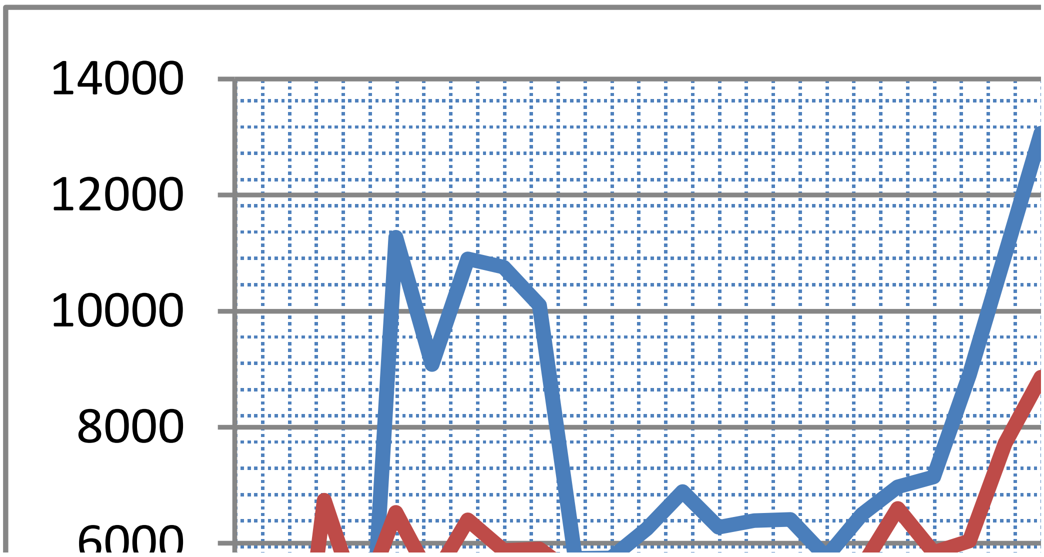
Graph no. 6 – The evolution of the accommodated people and overnights



Graph no. 7 – The average stay

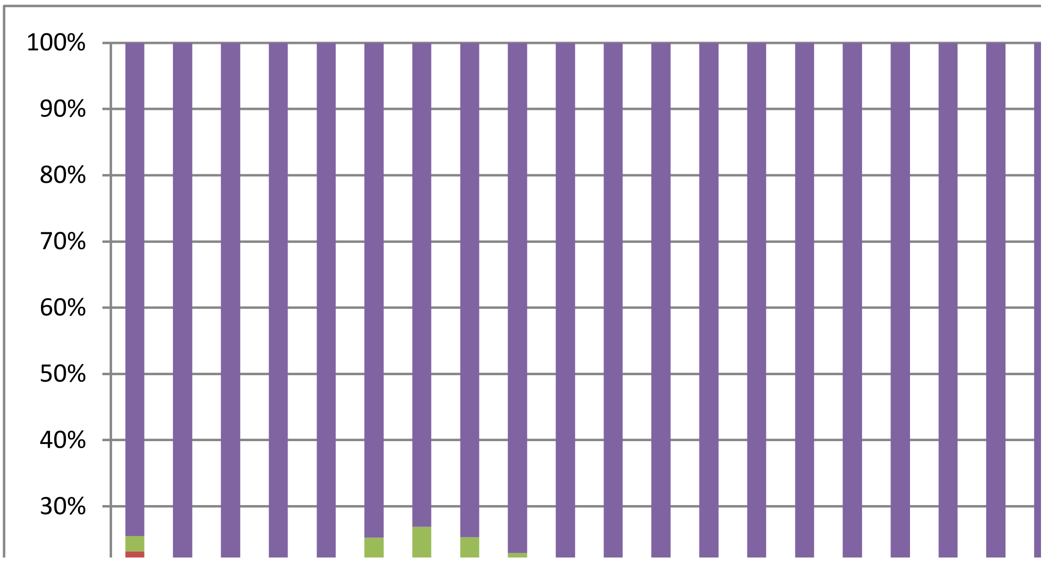


Graph no. 8 – Rate of places occupancy



Graph no. 9 – International tourism of Romania

1969, 6.7 million in 1980, 4.9 million in 1989, 6.5 million in 1990, 4.8 million in 2002, 8.9 million in 2008, 7.5 million in 2010 and 9.3 million in 2015.

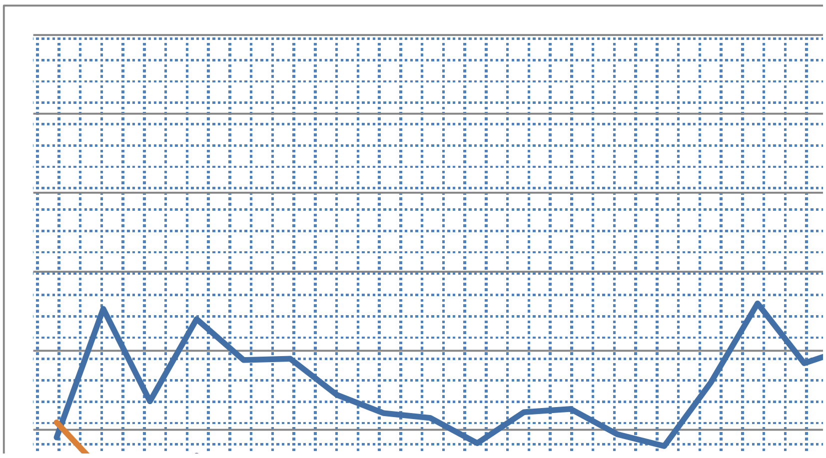


Graph no. 10 – The structure of means of transport – departures from Romania

The structure of the means of transport for the departures from Romania has changed with the „explosion" of air transport and the relatively inverse one for trains. Therefore the means of transport (Graph no. 10), between 1990 and 2015, the air transport has grown from 2.3%, to 20.7%, while the train transport has diminished from 22.2%, to 1.0%. Road transport keeps a relatively constant weight: of 74.5% in 1990 and, respectively, of 78.1% in 2015, with a maximum of 88.1% in 1992 and a minimum of 72.4% in 2011.

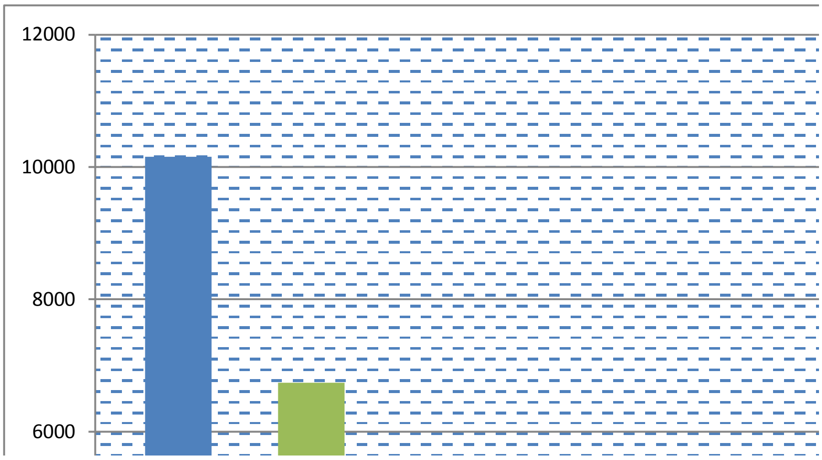
4. Conclusions

After the recession from 2009-2010, more indicators have changed their direction and the evolution intensity: the number of foreign visitors and the number of accommodation units are increasing, and the number of accommodation places, the number of overnights and, partially, the occupancy rate have relaunched. Only the average stay has been decreasing constantly since 2001 (Graph no. 11).



Graph no. 11 – The evolution of tourism market indicators

Through the long cycle, even empirically, the revival after 2010 seems evident (Graph. no. 12). The depression which started after 1980 would end. In 2015, the number of foreign visitors at the border and the number of accommodated foreigners exceeded the levels from 1980. Equally, the number of foreigners who apparently do not get accommodated (the difference between the previous two indicators) grew from 4.7 million in 1980 to 3.8 million in 2002, 6.2 million in 2010 and 7.1 million in 2015. The number of accommodated Romanians grows at a rapid pace, and the outlook for 2016 and further confirm these trends.



Graph no. 12 – The contraction phase of the long cycle and the beginning of a new economic cycle

At a closer look, the fluctuations of indicators allow capturing decennial cycles since 1989, years with minimum levels were both 2010 and 2002.

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