

TOURISM – THE MAIN COMPONENT OF HOSPITALITY INDUSTRY – ITS EVOLUTION IN ROMANIA

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ABSTRACT: Tourism, by its nature, generates important economic, social, political, and cultural effects on the society as a whole, thus playing an indisputable role in the development of a nation. As a socio-economic activity, tourism represents, by its content and role, a distinct domain of activity, a component of first importance for the economic and social life of a larger and larger number of countries in the world, including for our country.

The objective of this article is to analyse the evolution of some indicators of the tourist movement and their influence on the macro-environment of Romania. As regards the research methodology, this article is based on a positivist quantitative research, which is at the same time longitudinal, given that the various indicators for measuring the impact degree of the hospitality industry on the national economy are presented in their evolution. The main sources used in this research are represented by the information published by the websites of different authorised organizations, such as INS (National Institute of Statistics), BNR (National Bank of Romania), WTO, using the exploratory method for analysing the evolution of the phenomenon in the course of time, but the interpretative method was also applied and the results of the performed analysis were then presented.

Keywords: tourism, macro-environment, indicators of tourist movement

JEL Codes: M 21, E 29

Introduction

Etymologically, the word `tourism` comes from the Latin `tornus` (touring trip), from which the French term `tour` originates and the meaning of which is `journey`, `outdoor activity`, `walk`, `touring trip`. Most dictionaries state that the term `tourism` comes from the English words `tour` or `to tour` (to travel, to take a journey, to wander), which began to be used in England, around the year 1700.

The most simple definition of tourism, according to which it is `the action, the desire, and the art of travelling for one`s own pleasure`, refers only to recreation as a motivation for travelling, but a more complex definition shows that `Tourism is a leisure activity that consists in travelling or living far away from our place of residence for amusement, rest or enriching our experience and culture by discovering new aspects of human activity and unknown landscapes.` (J. Medecin)

The most popular meaning of the term `tourism` is the one according to which tourism means travelling for pleasure and spending at least one night in a different place, and it tends to be synonymous with holidays (Medlik, 2003).

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In his paper 'Hendbuch der Schweizerischen Volkswirtschaft', R. Guyer Freuler shows that, in the modern meaning of this word, tourism is a phenomenon of our times, which is based on the increased necessity of recovering our health and changing the environment, cultivating our sensitivity to nature's beauty, and which is a result of the development of trade and industry, as well as of the improvement of transport means.

In 1933, the author F. W. Ogilvie defined tourists as those persons who fulfill two conditions: they travel away from home for a period of less than a year and they spend money during all this time. A. C. Norwal said that a tourist is a person who enters a foreign country for any other purpose than settling a permanent residence or for business reasons, and who spends in that country of temporary residence money that were earned somewhere else.

Beyond these opinions of some authors, the definitions given by some 'authorised' organisations should be taken into account.

Dictionarul Explicativ al Limbii Române (Explanatory Dictionary of the Romanian Language) defines tourism as a recreational or sporting activity that consists in travelling on foot or using transport means across a picturesque or otherwise interesting area.

According to Dictionnaire Touristique International (International Dictionary of Tourism) of 1969, tourism represents the ensemble of measures applied for organising and taking some leisure trips or other types of trips, either through specialised companies, either on one's own, for a limited period of time.

The United Nations Conference on International Travel and Tourism (Rome, 1963) adopted a definition of the tourists, which differentiates them from simple visitors and rambles: a tourist is a temporary visitor who remains for at least 24 hours in the visited country and whose travelling reasons can be classified as follows: leisure (holidays, recreation, studies, health, religion, sports), business, family, missions, reunions; a visitor is any person who leaves in other country than the country of residence, for any reason except for practising a remunerated profession; a rambler is any temporary visitor whose stay in the visited country lasts less than 24 hours, and who does not remain there overnight.

Based on its role and functions, tourism is the result of the combined effect of several braches. The large number of branches that are concurring at the performance of tourism services indicates that 'the tourism product' can only have a high-quality level when all these branches contribute to its creation with high-quality elements.

The role of tourism in the economy of a nation can be analysed by: the contribution to the GDP; the superior capitalization on the territorial resources; the economic revival of some areas that are lacking natural resources on the ground or underground; the stabilisation of the workforce; the ensurance of a normal circulation velocity of money; the diversification of economic structures; training and education; the adjustment of the balance of payments.

The system of indicators

The indicators of tourism are capturing and presenting, in a synthesizing mathematical expression, information regarding different aspects of the tourism activity, information that is useful for measuring the phenomenon and its effects, for anticipating the evolution tendencies and for providing the grounds for the development policy in the field. The elaboration of indicators and their diversity are conditioned by the existence of some primary sources for data collection and some adequate working methods and techniques (Rodica Minciu, 2004).

The system of indicators presented at the macro-economic level are also found at the micro-economic level, but much more detailed, thus allowing a much more in-depth analysis of the manner in which the tourism activity is performed, as well as of the factors that influence it (Nicoleta Petcu, 2005). These indicators can have the form of absolute measures, relative measures of structure, coordination, intensity, dynamics, average measures, and they are structured as follows (Silvia Elena Cristache et al 2005):

- Indicators of the tourism demand;
- Indicators of the tourism supply;
- Indicators of the demand-supply relationship;
- Indicators of results;
- Indicators of the economic efficiency of tourism;
- Indicators of the quality of the tourism activity.

The evolution and the impact of tourism in Romania – the main branch of the hospitality industry

In the scholarly literature, the opinions regarding the relationship between the hospitality industry and tourism are the following:

- 1. Tourism is a component part of the hospitality industry, together with other activities**, a conception which corresponds to the American approach (Formica, S, 1996), and which is also supported in Romania
- 2. Hospitality industry is a component part of tourism, a conception that corresponds to the European approach** (Goeldner and Brent Ritchie, 2009);
- 3. The two domains are independent, but the existence of a common ground is accepted.**

As far as we are concerned, we are supporting the idea that the hospitality industry is the branch of the national economy the objective of which is to meet the needs of tourists during the period of their holiday or trip, first of all their need for accommodation and meals, but also their need for a very pleasant manner of spending their free time, by organizing entertainment activities. But people need a part of the hospitality industry not only as tourists, but also at their place of residence, for spending their free time.

It must be noted from the beginning that it is difficult (if not impossible) to accomplish an analysis regarding the impact of the hospitality industry on the Romanian economy because, as we mentioned before, this industry has several components (catering and public food service, tourism, auxiliary activities such as transport, conference organization, sale of gifts, souvenirs, and handicraft articles, etc.). But the information regarding catering and public food service, as well as auxiliary activities are not centralized in the publications issued by Institutul Național de Statistică (National Institute of Statistics), and neither in the official statements of the authorized institutions. For example, the data regarding transport that can be found in the statistic annuals is not presented on categories (transport for tourists, transport for commuters, local public transport). As a result, we have considered that it is important to focus on the main component of the hospitality industry, namely the tourism industry.

As a component part of the Romanian hospitality industry, tourism is characterized by an evolution that reflects the transformations at the political, economic and social levels, and it was influenced by a series of positive phenomena, such as the globalization and internationalization of the economic and social life, the significant technological upgrade in all the sectors of the economy, industrialization, but also by the negative ones, such as the global economic crisis, climate change and global warming, the spread of unemployment and the decrease of the standard of living.

In the context of the emphasis that is currently placed on sustainable development, the improved utilization of all the resources of tourism is one of the most urgent priorities of the economic policy. Practice has shown that the development of the Romanian tourism has been conjunctural and extensive, without a unitary concept that includes all the categories of resources and concerns the national and the international tourism to the same extent, (Istrate et al 1996, 123), situation that has transformed Romania from a tourist receiving country into a tourist sending country.

Inbound tourism as a form of tourism represents an important and effective source of foreign currency earnings for the tourist receiving countries, and the outbound tourism refers to the

residents of a country who travel abroad. The evolution of the two streams in Romania is presented in Figure 1.

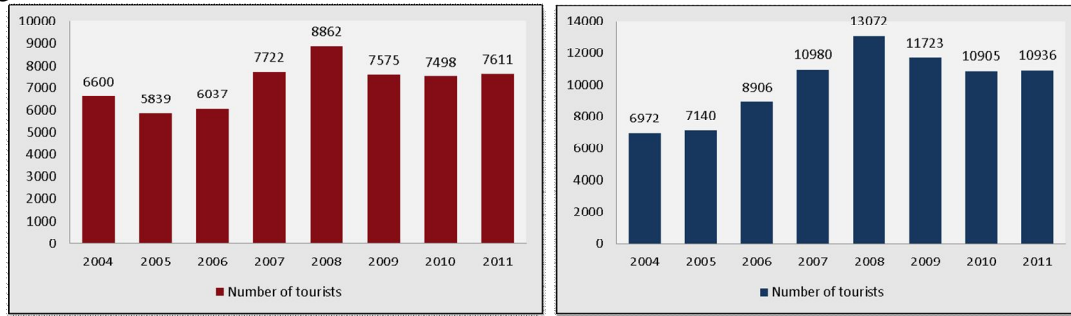


Figure no. 1 - The evolution of the arrivals of tourists at the borders and the evolution of the departures of Romanian tourists abroad, in the period 2004-2011 (thousands)

Source: Personal work based on Anuarul Statistic al României (Romanian Statistical Yearbook) 2010, 2012

While in the year 2000 the arrivals of tourists at the borders reached a number of 5.2 millions, in the period 2005-2008 existed a rising trend, which overturns starting from the year 2008, the year when the global economic crisis began. In the years 2009-2010, the number of arrivals of foreign tourists in Romania drops by 1.4 millions (16%), mainly because of the global economic crisis. A slight revival of the activity in this economic sector is noticed in the year 2011, when the number of foreign tourists arrived at the borders of Romania increased by over 100,000, namely 1.5%. By analysing the data published by Institutul Național de Statistică (National Institute of Statistics) in *Buletinul Statistic Lunar* (Monthly Statistic Bulletin) no. 11/2012, it can be seen that the rising trend continues to exist also in 2012 and until the month of November a number of 7,428,736 tourists was reached. If we considered that the number of foreign tourists arrived in Romania in the month of December remains at the level of the previous month of December, we would observe that the number of arrivals at the frontiers increases by 4.7% and it could reach a number of 7,970,757 persons.

As regards the second stream, the departures of the Romanian tourists abroad, significant changes can be noticed in the period 2004-2011. The year 2008 represents the top year for the analysed period as well, the increase in the number of departures of the Romanian residents abroad reaching almost 50% in the period 2004-2008. As one would expect, this spike was generated to a great extent by the international political opening of Romania, but in our opinion this happened also due to the fact that a wrong policy was applied in respect of the quality/price ratio in this sector, which determined a massive reorientation of Romanian tourists towards the foreign tourism markets. In the years 2009-2010 a decrease by 2.1 millions (16.5%) can be noticed in the number of departures of residents towards tourist destinations outside Romania, the driving factor being the global economic crisis. In the year 2011 a very small increase occurred in the number of the Romanian tourists who went abroad. By comparing the evolution of the arrivals at the borders with the evolution of the departures one can notice that as regards the number of incoming tourists the increase reaches over 100,000 persons and the number of departures increases only by 31 persons, which gives us hope that a proper economic policy and promotion can transform Romania into a tourist receiving country again.

Concerning the means of transport used in the period 2008-2011, as it can be noticed in Figure 2, both in the case of arrivals and in the case of departures, the road means of transport predominate. In the case of arrivals, road means of transport were used in over 75% of the cases, railway means of transport in 3% of the cases, the nautical means of transport occupying the last place with only 2%. In the analysed period, an increase in the demand for the air transport by about 4% can be noticed, the number of tourists using this mean of transport reaching 20%, which may

indicate the need to increase the comfort degree and shows a rise in the standard of living of tourists.

Road transport predominates also in the case of departures, but however its percentage decreased from 79.41% in 2008 to 72.43% in 2011. The second place in this hierarchy is occupied by the air transport, the percentage of which increased from 18.39% in 2008 to 25.40% in the year 2011. The preference for railway and nautical transport remained constant, the transport on water being preferred by only 0.2% of the tourists. By comparing the percentage of arrivals with each mean of transport with the percentage of departures, the same tendency of increase in the preference for the air transport at the expense of road transport can be noticed. Ship transport is preferred by much more foreign tourists (2%) than Romanian tourists (0.2%), which means that cruise tourism is not a very tempting option for Romanians, perhaps because of the duration and the very high costs of such a trip. Based on the data presented by Institutul Național de Statistică (National Institute of Statistics), it can be noticed that only a number of 191 Romanian tourists demanded sea or river cruises in the year 2010, compared to the year 2008, when a number of 803 Romanian tourists demanded this type of trip to the tour operators.

The frequency of the use of the airplane as a mean of transport is expected to grow in the future, given the increase in the number of low-cost airlines, which will become more and more accessible to a large number of travellers.

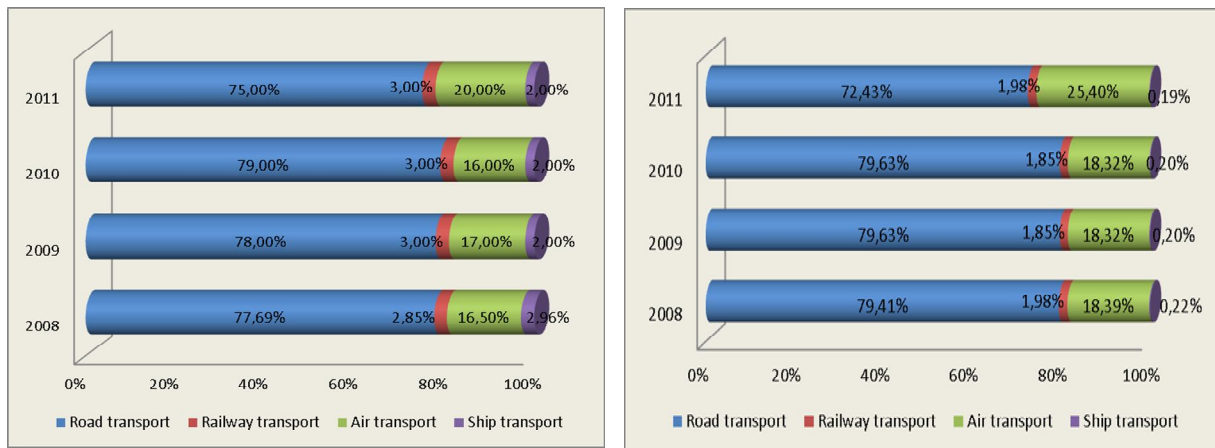


Figure no. 2 - The percentage of tourist arrivals with each mean of transport in the period 2008-2011

Source: Personal work based on Anuarul Statistic al României (Romanian Statistical Yearbook) 2009, 2010, 2011, 2012

The motivations of the Romanian residents for travelling abroad in the period 2008-2011 are presented in Figure no. 3. In the year 2008, 89% of the travels abroad for holidays and business reasons took place in countries of the European Union and only 11% in the rest of the European countries. From the viewpoint of the purpose of the travels in Europe, the overwhelming majority is represented by the travels for holidays, with 64% in 2008, the rest of the travels being distributed between visits of relatives and friends 31% and business tourism 5%.

According to the data presented by Institutul Național de Statistică (National Institute of Statistics) in the period 2008-2009, only 38% of the Romanian tourists travelled abroad for recreation and rest and in the years 2010-2011 only 35-36% of the tourists declared this to be their purpose. The motivation expressed by the most resident tourists for their travels abroad is the visit to relatives and friends, and their percentage increased from 54% to over 57%. At a great distance are the travels for pilgrimage and treatment with 4.1% for the years 2008-2009, which decreased in 2010 to 3.8%, this motivation being preferred afterwards by 4.5% of the Romanian tourists, while travels for business and other professional reasons are on the last place.

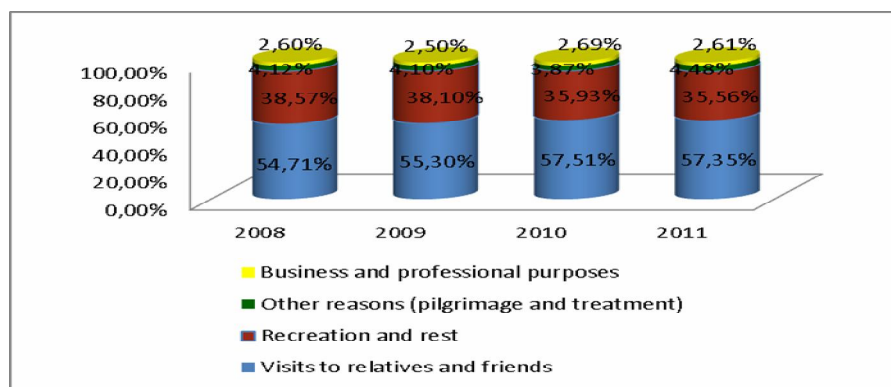


Figure no. 3 -The distribution of the departures of the Romanian tourists, in the period 2008-2011

Source: Personal work based on the Anuarul Statistic al României (Romanian Statistical Yearbook) 2009, 2010,2011, 2012

In Romania, the largest part of the residents prefer short trips (1-3 nights), their percentage being of 51% in 2008, 59% in 2009, 64% in 2010, and almost 63% in 2011. According to the data provided by Institutul Național de Statistică (National Institute of Statistics), unlike the short stays of 1 up to 3 nights, all the other types (4-7 nights, 8-14 nights, 15-28 nights, 29 nights and more) have known a marked decrease in the period 2008-2010, and in 2011 a return to the value of 2008 in the case of the stays of 4-7 nights occurred. In the case of the other types of stays, with a different period, the values of 2011 are above those of 2010, but they do not reach the values of 2009. We consider that the marked increase in the number of short stays is one of the effects of the global economic crisis, together with the decrease in the number of tourists. The predominant destinations of short trips are mountain areas and the places destined for religious tourism and visiting places of worship. In 2009 a rapid growth of the number of tourists who preferred the Danube Delta took place, and the demand for this area that is unique in Europe became almost 5 times larger. But in 2010 the demand for this area decreases to values comparable to those of 2008. An increase can also be noticed in the case of the other destinations (seaside, mountains, health resorts, tours), but a moderate one.

Overall, in the period 2008-2011 the most constant demand is the demand for seaside, that is to say the demand for the type of tourism called `sunlust` and the demand for various tours. After a careful analysis of the values, we reached the conclusion that one of Romania`s natural resources (geothermal, mineral waters), which provide the possibility of developing the medical tourism, is not currently used. In the period 2008-2011, the number of tourists who preferred health resorts remained below 3% and decreased under 2% in the year 2010.

As regards the organization of trips, it can be noticed that tourists prefer to organize their trips on their own, this type of organization being preferred by over 95% of the tourists. We consider that tourists organize their trips and holidays on their own because of their desire to avoid having to accept a certain duration of their stay that is decided by a different organizer, as well as other services included in a package holiday, but this is also an effect of the decrease in the standard of living of the largest part of the population, as a direct consequence of the global crisis. An important percentage is represented by the trips organized through travel agencies and then the trips organized by cultural, religious or professional associations. In the year 2010, a decrease of 72% in the number of trips, holidays and stays `organized` by Oficiul de Pensii (Office of Pensions) and the line ministry occurred, a decrease which was due to the Government`s policy of reducing the public spending.

The increase in the number of tourists in Romania could be influenced by the increase of the investments in this sector, which is considered the locomotive of the national economy in other countries.

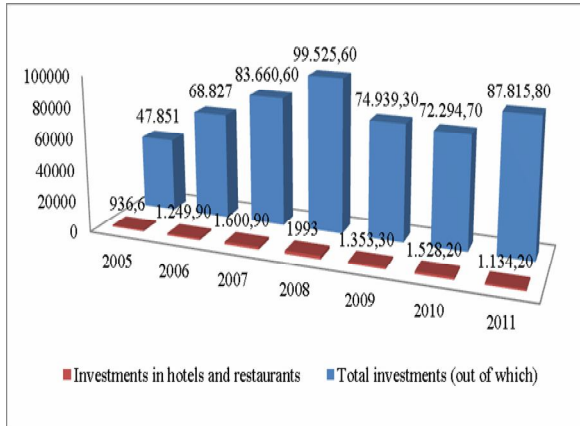


Figure no. 4. - The evolution of the investments in hotels and restaurants in the period 2005-2011 (thousands RON)

Source: personal work based on Anuarul Statistic al României (Romanian Statistic Yearbook) 2009, 2010, 2011, 2012

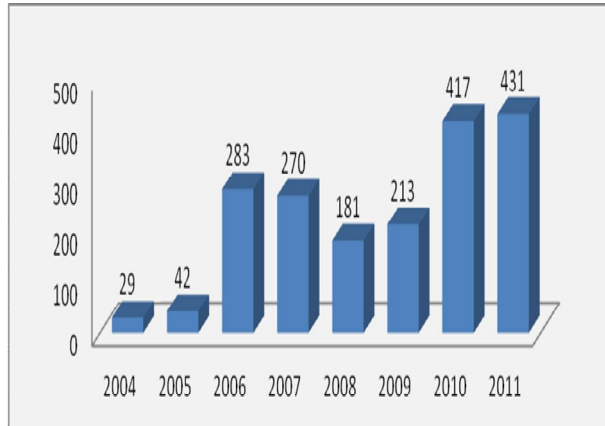


Figure no. 5. - Direct foreign investments in hotels and restaurants in the period 2004-2011 (thousands €)

Source: personal work based on the statistics of BNR(National Bank of Romania)

By analyzing the data in Figure 4 according to the data published by Institutul de Statistică (Institute of Statistics), one can see that the total value of investments decreased in the period 2008-2010, a tendency that is somewhat different in the case of the hospitality and tourism industry. Particularly in this sector, a constant increase in the value of investments in hotels and restaurants took place until the year 2008, but their percentage in the total investments of the national economy varies between 1.81% in the year 2006 and 2% in the year 2008. In the year 2009, the value of investments decreases by 639.7 million RON and their percentage by 0.2% compared to the year 2008. In the year 2010, although one could say that this is the year in which the effects of the global economic crisis were visible the most in the case of the number of tourists, the investments in hotels and restaurants (the front line companies in the hospitality industry) reach the highest percentage in the period after 2005, namely 2.11%. In our opinion, this increase is generated by the finalization of the investments started in 2007-2008, before the period when the global economic crisis began. In the year 2011 the investments decreased to 1.29% of the total investments, which we could say that supports our reasoning regarding the increase of investments in the year 2010.

According to the data provided by BNR (National Bank of Romania), the situation of the direct investments⁴ in hotels and restaurants is the following (please see Table 5): in the year 2006, a significant increase in the value of foreign investments in accommodation and food service capacities in the hospitality industry from 42 millions of euros in 2005 (0.2% of the total 21,855 millions of euros) to 283 millions of euros (0.8% of the total 34,512 millions of euros). It should be noted that in the year 2006 the value of the greenfield investments in hotels and restaurants reaches 205 millions of euros. In the year 2007 the percentage of direct investments in Romania in the total direct investments is of 0.6%, and in 2008 and 2009 it decreased to 0.4%.

⁴A direct foreign investment is a durable investment relationship, between a resident and a non-resident entity; it usually involves a significant managerial influence exerted by the investor in the entity in which the investment was made.

As one can notice in Figures 4 and 5, the investments in this sector are small, and this fact is also reflected by the small number of receiving structures with accommodation functions existing in Romania in the period 2008-2011. The evolution of this aspect is presented in Table 1.

Table no.1

The number of facilities for tourists with accommodation functions in each of the comfort categories

| Year | Total | 5 stars | 4 stars | 3 stars | 2 stars | 1 star | Unclassified |
|------|-------|---------|---------|---------|---------|--------|--------------|
| 2008 | 4,840 | 65 | 291 | 1,165 | 2,151 | 888 | 280 |
| 2009 | 5,095 | 69 | 367 | 1,487 | 2,072 | 850 | 250 |
| 2010 | 5,222 | 75 | 428 | 1,729 | 1,927 | 834 | 229 |
| 2011 | 5,003 | 91 | 502 | 2,101 | 1,689 | 468 | 152 |

Source: Personal work based on Anuarul Statistic al României (Romanian Statistical Yearbook) 2009, 2010, 2011, 2012

The data provided by Institutul National de Statistică (National Institute of Statistics) shows first of all the increase in the number of structures with accommodation capacity from 4,840 in the year 2008 to 5,222 in the year 2010, and a decrease in the year 2011 to 5,003 receiving structures with accommodation functions, the decrease being of 4%. As we have already mentioned, a reclassification of the accommodation units also takes place in the period 2008-2011. However, there is a high percentage of structures classified in low comfort categories of two stars and one star. If in the year 2008 the percentage of the two-star accommodation structures was 45% and the percentage of those with a one-star rating or unclassified was another 24%, in 2011 the percentage of the two-star structures decreased to 14% and the percentage of those with a lower comfort degree decreased to 12%. Still, there is a high percentage of unclassified units (6% in 2008), even if in the year 2011 a decrease of almost 50% can be noticed in their number and proportion in the total number of receiving structures with accommodation functions for tourists. In all this period, the number of 4-star receiving structures with accommodation functions for tourists nearly doubled.

Although Romania has a huge potential for tourism and the Master Plan for the Development of the National Tourism in the period 2007-2026 provides for an increase in the impact of hospitality and tourism industry on the national economy, anticipating an increase in the contribution of this sector to the GDP of 4.3% in 2011, 4.9% in 2016, 5.9% in 2021 and 6.9% in 2026, we have to notice with disappointment that the situation is the one shown in Table 2.

Table no. 2

The impact of tourism on GDP in the period 2004-2011 (thousands RON)

| Year | Total GDP | Hotels and Restaurants | Impact in % |
|------|-----------|------------------------|-------------|
| 2004 | 247,368.0 | 3,803.6 | 1.53 |
| 2005 | 288,954.6 | 5,089.9 | 1.76 |
| 2006 | 344,650.6 | 6,621.5 | 1.92 |
| 2007 | 416,006.8 | 7,817.3 | 1.87 |
| 2008 | 514,700.0 | 8,727.3 | 1.66 |
| 2009 | 501,139.4 | 8,534.8 | 1.71 |
| 2010 | 522,561.1 | 5,151.8 | 0.98 |
| 2011 | 578,551.9 | 6,360 | 1.09 |

Source: Personal work based on Anuarul Statistic al României (Romanian Statistical Yearbook) 2010, 2011, and 2012

But all the estimations made before the beginning of the crisis might be useless for being much too optimistic. Unlike the foreseen values, although as regards the number of tourists the differences between what was foreseen and what was accomplished are not very large, as regards the contribution to the GDP the difference is of 3.2% (we are referring to the direct contribution).

Although as we mentioned before, the potential of our country in the field of tourism is not sufficiently valorized, Romania is one of the countries that could offer some the most manifold tourism products, considering that it has natural resources, a biodiversity of flora and fauna that is unique in Europe, and the Black Sea coastline, which has a surface of 245 km. One must not forget the cultural heritage that we possess: over 6,600 monuments of national importance and over 670 museums, the Romanian popular culture and the visual arts, not to mention the 30 monuments included on the UNESCO World Heritage List, among which the Wooden Churches of Maramureş, the painted Churches of Moldavia and the Dacian Fortresses of the Orăştie Mountains. Still, according to Euromonitor, among the countries with tourism potential, Romania occupies the last place in the Central and Eastern Europe as regards the tourism revenues with only 1.21 billions of dollars, while our neighbouring countries had much larger tourism revenues, as follows: Ucrain 3.92 billion dollars, Hungary 3.84 billion dollars, Bulgaria 2.95 billion dollars.

Although the global economic crisis has affected the hospitality and tourism industry as regards the number of tourists and investments, if we examine the situation in this sector from the perspective of the number of employees, the situation looks differently. According to the data provided by Institutul Național de Statistică (National Institute of Statistics) in the period 2008-2011 the number of employees in hotels and restaurants increases from 154,000 to 185,000 in the year 2011, which represents an increase of 20%. Among the age groups of the employees, the first place is occupied by the persons between 25 and 44 years old, a segment which represents 60% of the total number of employees. This fact could be one of the strengths in this domain, because young persons are more open to new things, to a new approach of the importance of this sector in the national economy, and more willing to change their attitude in this sense. As regards the structure of the labour force by gender, the largest part of the employees in this sector are women, their percentage in the total number of employees being of 65.2% in the year 2008, but with a decreasing tendency, therefore in the year 2011 women represent only 60.3% of the total number of employees, namely 111,555 persons. The situation of the employees in the sector of hospitality and tourism on gender and age groups is presented in Table 3.

Table no. 3

The structure of the employees in hotels and restaurants in the period 2008-2011

| Explanation | Year 2008 | | Year 2009 | | Year 2010 | | Year 2011 | |
|--|-----------|------------------|-----------|------------------|-----------|------------------|-----------|------------------|
| | Total | Of which Women % | Total | Of which Women % | Total | Of which Women % | Total | Of which Women % |
| Total active population (thousands) | 154 | 65.2 | 165 | 63.7 | 180 | 59.7 | 185 | 60.3 |
| Total 15-64 years old % | 99.9 | 65.2 | 100 | 63.7 | 99.8 | 59.5 | 99.9 | 60.2 |
| 15-24 years old % | 15.9 | 8.4 | 13.1 | 7.9 | 15 | 8.9 | 16.5 | 8.8 |
| 25-34 years old % | 31.9 | 19.9 | 32.3 | 18.6 | 34.2 | 17.9 | 34.1 | 19 |
| 35-44 years old % | 27.3 | 19.2 | 28.4 | 18.7 | 26.5 | 17.2 | 26.4 | 17.4 |
| 45-54 years old % | 20.4 | 14.6 | 21.1 | 15.5 | 17.4 | 12.2 | 15.8 | 11.2 |
| 55-64 years old % | 4.4 | 3.1 | 5.1 | 3 | 6.4 | 3.3 | 7.1 | 3.8 |
| 65 years old and above | 0.1 | - | - | - | 0.2 | 0.2 | 0.1 | 0.1 |

Source: Personal work based on Anuarul Statistic al României (Romanian Statistical Yearbook) 2009, 2010, 2011, and 2012

A particular importance is given to the labour force in the National Tourism Development Master Plan. According to the provisions of this document, a great emphasis has to be placed on improving the attitude of the personnel, a change for the accomplishment of which a general

programme needs to be developed and implemented for raising awareness in the tourism and hospitality sector as regards the responsibility in the performed work and the ability to meet the client's needs. The structural problems related to the lack of qualified personnel, the poor quality of services and the low level of the attitude towards services and clients in the hospitality industry in Romania can only be solved by a clear and firm human resource development strategy for the whole sector of hospitality and tourism. A maximum priority needs to be given to the training of the existing personnel of hotels, pensions, restaurants, entertainment sector and auxiliary activities as regards practical skills, food and drink serving skills, for food preparation and the organization of the rest, recreation or treatment part included in the package holidays.

The analysis of the tourism indicators requires taking into account the payments made by the Romanian tourists abroad.

Table no. 4

The balance of payments of the international tourism of Romania in the period 2004-2012
(million euros)

| Year | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 (temporary data) |
|-------------|------|------|-------|-------|-------|-------|-------|-------|--------------------------|
| Revenues | 406 | 851 | 1.034 | 1.172 | 1.358 | 884 | 860 | 1.019 | 1.128 |
| Expenditure | 434 | 751 | 1.036 | 1.118 | 1.477 | 1.051 | 1.238 | 1.408 | 1.424 |
| Balance | -28 | 100 | -2 | 54 | -119 | -167 | -378 | -389 | -297 |

Source: Personal work based on the data presented by Banca Națională a României (National Bank of Romania), www.bnr.ro.

The increase in the volume of the payments made by Romanian tourists abroad was associated to a great extent with the increase in the number of departures. By analysing the balance of payments of the international tourism of Romania, we notice that starting from 2004, in the context of the increase in the number of Romanian tourists who left abroad (unfortunately too little correlated with an increase in the number of foreign tourists who arrived in Romania), the balance is negative. In the year 2009, the tourism and trips section in the balance of payments showed an increase by 167 million euros, which means an increase by 40.3% compared to the year 2008, because of the significant decrease in the revenues from business trips. While in 2008 the revenues from business trips reached 1,077 million euros and 643 million euros in 2009, the value of payments was 752 million euros in 2008 and 666 million euros in 2009. Also in the year 2011 the tourism and trips section in the balance of payments showed a deficit of 389 million euros, with 2.9% more than in the year 2010, a deficit that was generated mostly by the private tourism. Banca Națională a României (National Bank of Romania) also provides data regarding the private tourism, which generated a deficit of 444 million euros in 2008, which decreased to 144 million euros in 2009. In the period 2010-2011, an increase of 235 million euros can be noticed in the revenues from the business tourism, but also a decrease of the revenues from the private tourism, these tendencies of the revenues being accompanied by an increase in the expenditure, both in the business tourism and the private tourism, the total expenditure increase reaching almost 14%. In the year 2012, according to the temporary data presented by Banca Națională a României (National Bank of Romania), a decrease in the deficit of the balance of payments occurs in the sector of trips and tourism, especially owing to the increase of the revenues by almost 11%. Having the full picture of the dimensions, evolution and structure of the national and international tourist movement requires, on one hand, the inclusion of a larger number of indicators and, on the other hand, a deeper analysis of their causes/influencing factors.

Table no. 5

The objectives regarding the arrivals of foreign visitors depending on their country of residence in the period 2006-2026

| Origin | 2006 Base (thousands) | 2011 (thousands) Forecasted | 2011 (thousands) Accomplished | 2016 (thousands) | Increase 2011-16 (% yearly) | 2021 (thousands) | Increase 2016-21 (% yearly) | 2026 (thousands) | Increase 2021-26 (% yearly) |
|----------------------------------|--------------------------------------|--|--|-----------------------------|--|-----------------------------|--|-----------------------------|--|
| Non-EU Europe | 2,886 | 3,428 | 2,789 | 4,022 | +3.25 | 4,663 | +3.0 | 5,340 | +2.75 |
| EU | 2,803 | 3,777 | 4,391 | 4,990 | +5.73 | 6,569 | +5.65 | 8,642 | +5.64 |
| North America | 164 | 235 | 182 | 337 | +7.5 | 484 | +7.5 | 695 | +7.5 |
| Israel | 62 | 89 | 83 | 128 | +7.5 | 184 | +7.5 | 263 | +7.5 |
| Japan | 14 | 23 | 16 | 37 | +10.0 | 60 | +10.0 | 86 | +7.5 |
| Rest of the world | 108 | 155 | 150 | 222 | +7.5 | 319 | +7.5 | 459 | +7.5 |
| Total | 6,037 | 7,707 | 7,611 | 9,736 | +4.8 | 12,279 | +4.75 | 15,485 | +4.75 |

Source: Personal work based on the National Tourism Development Master Plan 2007-2026, page 167

Anuarul Statistic al României (Romanian Statistical Yearbook) 2011 and Breviarul statistic Turismul României (Romanian Tourism Statistical Breviary) 2012

The overall analysis of the international tourist movement of Romania reveals the modest level of this movement, given the resources available in our country and the reserves for future growth. The development of the international tourism and the improved utilization of the natural and human potential require on the one hand efforts to boost the Romanian economy, on which tourism strongly depends, and on the other hand the elaboration of an adequate strategy, the main objectives of which should be to improve the quality level of services, to modernize the specific material base and the general infrastructure, to accomplish an aggressive promotion policy, and to expand the international cooperation in the field.

The objectives of the decision-makers in the hospitality and tourism industry are to use the natural and cultural heritage of Romania in order to turn it until 2013 into a high-quality destination that corresponds to the standards of the European Union regarding the provision of products and services and to accomplish a sustainable development from the viewpoint of the environment, the tourism sector, in a more rapid pace of development compared to other destinations in Europe.

In the following table are presented the objectives regarding the arrivals of foreign tourists in the period 2006-2026. An increase of 2.5 times in the number of tourist arrivals is anticipated to take place between 2006 and 2026, which represents an average yearly increase of 4.8%, namely more than double compared to the forecasts made by the World Tourism Organization in the Tourism 2020 Vision for Europe concerning the arrivals of visitors. The increase is expected to be more rapid in the case of the countries in the European Union (5.5% per year) and the countries outside Europe (8% per year) than in the case of the European countries that are not members of the European Union (3.1% per year). The data comprises all the arrivals, including the tourists who preferred stays and daily visitors.

Conclusions

By analysing the forecasted values with the accomplished values, at least for the year 2011 we can notice that the accomplishments as regards the total number of tourists are almost 1.5% smaller, an exceedance occurring only in the case of the tourists arrived from the countries of the European Union, the increase being of 16%. In the case of the other countries of residence, the forecasted values are larger than those published by Institutul Național de Statistică (National Institute of Statistics) on this topic.

Tourism is a specific phenomenon of the modern civilization, strongly anchored to the life of the society and, as such, influenced by its evolution. Since it is receptive to the dynamics of the changes taking place in the contemporary civilization, tourism evolves under their impact, as a component of the general development process. It acts as well as a factor that stimulates progress and development by the massive human and material potential that it involves and by its beneficial effects on related domains, it is a sector that deserves our full attention, both in the present and in the future, when the development strategies in this domain will be clearly defined.

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