

Neacsu, Marius-Cristian; Negut, Silviu; Vlasceanu, Gheorghe

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THE DYNAMIC OF FOREIGN VISITORS IN ROMANIA SINCE 1990. CURRENT CHALLENGES OF ROMANIAN TOURISM

Marius-Cristian Neacșu^{1*}, Silviu Neguț² and Gheorghe Vlăsceanu³

^{1) 2) 3)} *Bucharest University of Economic Studies, Romania*

Abstract

This study represents a quantitative and qualitative analysis of the Romanian tourism phenomenon that focuses on the current challenges to which it has to adapt in order to become competitive on the European market and to overcome its current stage of "subsistence tourism". One of the selected criteria for highlighting the main dysfunctions of the Romanian tourism and that also represents the goal of this research is one of the indicators that quantify the annual flow of international tourists that come to Romania. In Romania's post-communist economic development (a negative evolution, of course), tourism remains a real lever for national and regional economic development that can bring Romania numerous competitive advantages on the European Union market.

Keywords: tourism index, the dynamic of foreign visitors, Romanian tourism

JEL Classification: L83, O18, O52

Introduction

This study's purpose is *identifying the main dysfunctions of the Romanian tourism industry*, both as an economic activity and as a social phenomenon, *reflected through the analysis of the flow of international tourists that come to Romania*.

Since Romania was accepted a European Union member in January 2007, the context has become even more challenging. One of our country's real chances to become truly competitive in this new context is the development of tourism and using it in two ways: as an internal instrument of territorial/regional development (a method also used by other countries with a low potential compared to Romania's, but with remarkable results) and as a lever for increasing its capacity to generate competitive advantages abroad.

In this context, the study will highlight further the literature review, research methodology and will present results obtained from analysing the dynamics of foreign visitors since 1990. In the results and discussions section will be highlighted Romania's place in world tourism and the major disruptions (also, challenges) of Romanian tourism derived from the interpretation of data analysis.

* Corresponding author, **Marius-Cristian Neacșu** – marius.neacsu@biblioteca.ase.ro.

1. Literature review

It also tries to illustrate the fact that despite the huge touristic potential that could be exploited - potential that is so well identified, detailed, analysed and quantified by the Romanian specialized literature (see Căndea, Simon and Bogan, 2012; Neagu and Neacșu, 2008; Ielenicz and Comănescu, 2006; Neagu, 2004; Muntele and Iașu, 2003; Cocean, Vlăsceanu and Negoescu, 2002; Dinu, 2002; Țigu, 2001; Glăvan, 1995 and others) –, Romania "does not exist" on the global tourism map. Thus, the research focuses on a series of quantitative and qualitative analyses regarding the dynamic and structure of the international flow of tourists coming to Romania over the last two decades defined by the post-communist evolution and transition towards a market economy.

Although we can intuitively and scientifically (as demonstrated by the specialized literature, some of the already mentioned above studies) acknowledge that Romania has a complex touristic potential - favoured by a diverse natural landscape and an old and authentic cultural component - supported by unique elements, at a European level we cannot overcome the "passive and subsistence tourism" phase, which is more or less based on "myths and traditions" than on science.

Moreover, tourist activity, at today's complexity level, involves many aspects and current problems of today's society, from sustainable development (and the associated concept of "responsible tourism") to territorial and social cohesion, being not only a revenue generating economic activity but also the means to develop and revive areas that have lost their economic competitiveness. Furthermore, not once was it proved that a well organised touristic activity can lead not necessarily to the "consumption" of the touristic resource but even to its "protection" (an area can also be protected not only by closing off or limiting access to it but also through regulated and monitored tourism, which on the one hand generates the necessary revenue for investments and on the other hand contributes to the shaping of that area's territorial identity; see Neagu and Neacșu, 2008).

Last but not least, tourism can help generate a positive country image and can thus be a defining element of the country brand.

2. Methodology

To summarise, this study consists of the interpretation of the data series registered by the National Statistics Institute (TEMPO) over a period greater than 20 years (starting with 1990, 1992, 1993 and ending with 2012) and focusing on certain indicators such as arrivals of foreign visitors in Romania, overnights in touristic accommodations, touristic capacity usage index and so on. All of this has shaped, at a macro level, the Romanian touristic activity, analysed in the context of its attractiveness to foreign tourists.

These quantitative analyses based on official numbers have been amended with other statistic information sources - UNWTO, MDRAP – and with other European ("Europe, the world's no. 1 tourist destination – a new political framework for tourism in Europe", COM, 2010) or national documents („The plan for arranging the national territory" – PATN, Section VIII - the resource area, Law 190/2009; Master Plan for Romania's national tourism 2007 – 2026, MDRAP, 2012; The national development strategy of ecotourism in Romania, MT, 2009; The Ski program in Romania, Law no. 526/2003, modified and amended by Law no. 418/2006 and others).

3. Results and discussions

Following the analysis of the data series registered by the National Statistics Institute (TEMPO) over a period greater than 20 years (starting with 1990, 1992, 1993 and ending with 2012), will be presented further several relevant issues regarding Romania's place in world tourism, the dynamic of the flow of foreign visitors in Romania since 1990 and the major disruptions (also, challenges) of Romanian tourism derived from the interpretation of data analysis.

a) Romania's place in world tourism

Beyond enumerations, statistics, interpretations, tourism is a *live reality* that can no longer be ignored. From a *luxurious undertaking*, reserved to privileged groups - going back to the semantic meaning of the term "tourist"/"tourism" derived from the British custom to send youngsters "on the continent" considering that a young man cannot be fully educated if he has not made a journey ("a great journey" / "a grand tour") through Europe -, it now metamorphosed into a clear need for increasingly more people, a truly *social phenomenon*.

It is also a social phenomenon because in present days, at a global level, a "tide" of over one billion people, more precisely 1 035 000 000 in 2012 (WTO, 2013, p. 3) travel for touristic purposes. Out of these, Romania received in 2012 7,94 million - the average number between 1990 and 2012 being 6 million foreign tourists (INS, 2013) which means that only 0,77% of the global touristic flow reaches our country, even though more than half (52%) of the global tourists are concentrated in Europe (Table no. 1).

The phenomenon is truly explosive in size, taking into consideration that at the end of the last century (in 1995, for example) the international tourist number barely reached half of today's (530 million) and at the beginning of the 20th century it was a very reduced activity, barely known. Moreover, serious efforts for tourism promotion were being made, remarkable and memorable at the same time being the globe-trotters competition (100 000 kilometres travelled on foot) organised by Touring Cloub de France in 1910 (it was not by chance that such undertakings with deep roots maintain France even today in the upper echelon of the countries with the largest number of tourists received, no less than 83 million in 2013, more precisely 8% of the global flow and 15,5% of the foreign tourists that travel on the European continent).

In the 100 years that passed since the bold tourism promotion idea, from the 100 000 kilometres travelled on foot to the first billion tourists of the planet, the touristic activity became shaded and increasingly complex. Nevertheless, the definition given by our Romanian geographer, George Vâlsan in 1936, remains valid: the essence of tourism resides in the "action to travel in time and space, with no material determining interest, but only a physical and intellectual one - to gain good vibes, health and culture" (Ielenicz and Comănescu, 2006, p. 1).

However, not only the number of tourists has increased exponentially, illustrating the so-called "mass tourism", but also the tourism revenue (Table no. 1), which in 2012, surpassed 1 070 billion dollars (approximately 835 billion euro) worldwide, (contributing with approx. 9 % to the global GDP), when at the beginning of the nineties the statistics showed a little over 235 billion dollars. In comparison, the revenue generated by Romania from tourism activities don't even reach 1% of the national GDP, approx. 1.5 - 2 billion dollars in present days.

Table no. 1: Romania's place in global tourism, based on the number of foreign tourists received and the revenue from tourism (2012)

Place	Country	No. of foreign tourists (mil.)	Place	Country	Revenue (billion \$)
1	China*	95	1	USA	126
2	France	83	2	China	126
3	USA	67	3	Spain	56
4	Spain	58	4	France	54
5	Italy	46	5	Italy	41
6	Turkey	36	6	Germany	38
7	Germany	30	7	UK	36
8	UK	29	8	Australia	32
9	Russia	26	9	Thailand	30
10	Malaysia	25	10	Turkey	26
...	Romania	8	...	Romania	~ 2

Source: processed after UNWTO, 2013 and INS, 2013

In table 1 that shows the top ten countries with the most foreign tourists received and the most revenue from tourism, we can find that among the countries with complex touristic potential such as China, USA, France, Spain, Italy there are also others that even though they do not have a particular variety of touristic attractions or are not situated in the Mediterranean, manage to place themselves high in the rankings with notable results. One of these examples is the United Kingdom, a country the size of Romania, in terms of territory, but without a spectacular natural landscape brings 30 million foreign tourists each year (and more than 35 billion dollars in revenues). Even though this is explained by the United Kingdom's economic power and its international status (former global colonial empire), probably one of the best examples of a country that managed to perform an economic revival of *old industrial areas* (mines, railway stations, docks, administrative buildings from industrial complexes) - remember that this is where the industrial revolution began -, by transforming them into *touristic areas*.

This means that tourism has stopped being, for some time now, strictly a social preoccupation, complementary to the economic activity - as it was in the XIX-XX centuries, when young British people were sent on a "grand tour" of the mainland in order to complete their education - but it has become a *definitive instrument of regional and local development*.

Although Romania has a remarkable touristic potential, both natural and anthropic, it does not manage to truly exploit it as a resource and transform it into a product, choosing to remain true to a "passive system", only offering accommodation and potential beauties without understanding that the modern tourist is much more sophisticated than his ancestors, without being especially prepared (mass tourism) but demanding a number of associated services specific to the touristic act that usually lead to an "active tourism". The aforementioned numbers stand as proof to the fact that during this post-communist period of over two decades, Romania has relied more on touristic "myths", rather than concrete

* Including Macao and Hong Kong.

realities tested at a European level. But still, where and how are the average 6 million tourists that Romania statistically accommodates on an annual basis?

b) The dynamic of foreign visitors in Romania since 1990

The quantitative analysis of the indicators used to quantify the touristic phenomenon over the course of the last two decades, after 1990, and the interpretation of the results prove a series of conclusions that lead to the idea that *the 6 million foreign tourists that come on an annual basis to Romania... are almost inexistent*, thus illustrating a series of dysfunctions in the preparation and unfolding of the touristic act in our country while also reflecting a low degree of international attractiveness of a country potentially very attractive.

Thus, a simple analysis of the dynamic of arrivals of foreign visitors to Romania (Figure 1) shows overall a slightly growing tendency between 1990 and 2012, identifying two periods opposite in dynamic: a slight decrease of values during 1990 - 2000 (from 6.53 to 4.79 million visitors), after which in the second part of the analysed period (2000-2012), the values start to increase, reaching a maximum in 2008 (8.86 million foreign individuals entering Romania). After 2008 the effects of the global economic crisis can be seen but even so the current general tendency is to bounce back.

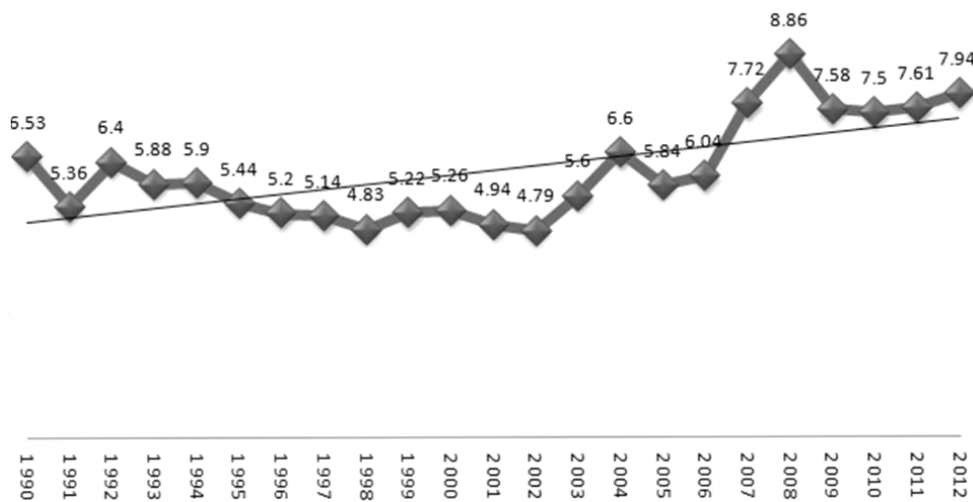


Figure no. 1: Dynamic of arrivals of foreign individuals in Romania (millions of individuals, 1990-2012)

Source: National Statistics Institute, 2013

How many of these foreign visitors that we frequently register in our national statistics as "international tourists" spend their night in the country in a tourist receiving establishment? The dynamic of overnights graphically illustrated in Figure 2 shows that *less than half* (an average of 47% over the last 23 years)!

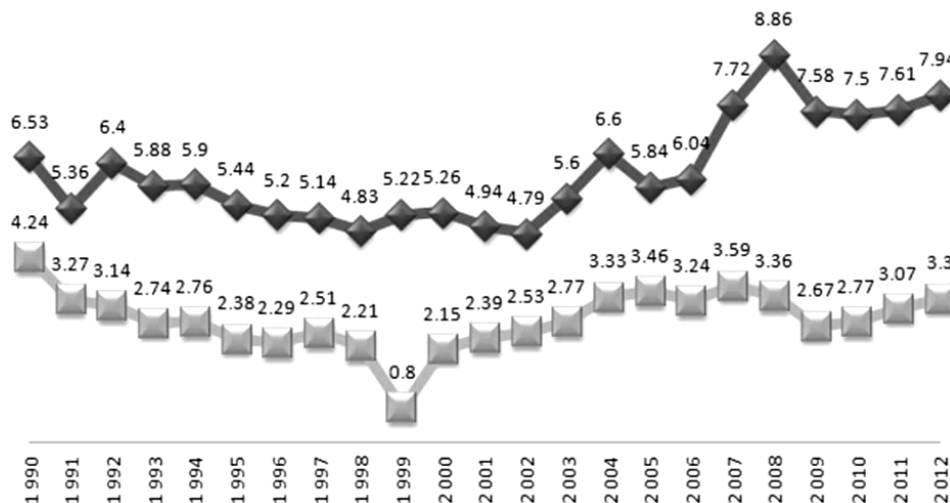


Figure no. 2: A comparative dynamic of arrivals and overnights in tourist receiving structures of foreign visitors in Romania (millions of individuals, 1990-2012)

Source: National Statistics Institute, 2013

The large difference between the number of arrivals and the number of effective overnights in touristic units - N.B.: in the graphic from Figure 2 the total number of overnights is registered – according to NSI (2013) "Overnights represent each night in which an individual is registered in a touristic accommodation unit, irrespective of being present in the room or not" –, which means that the half of foreign visitors spends a night in tourist receiving establishments -, indicates that: either the arrivals are transiting through Romania (the statistics actually register the *transit migration* and *small border transit*), or they are *staying with relatives*.

Both explanations are supported by the structure of foreign visitors based on their country of origin, the dynamic of which has been registered in the graphic in Figure 3.

We can mainly notice that more than half (62% being the annual average value calculated between 1990 and 2012) of the total number of foreign visitors that come annually in Romania originate from the neighbouring countries whose ethnics form the specific minorities in our country. Thus, from the total flow of foreign visitors a multi-annual average of 20% comes from Hungary and 19% from the Republic of Moldova and the rest from Bulgaria (10%), Ukraine (8%) and the ex-Yugoslavian area (5%). After the "*ethnic tourists*", an important part is also held by the visitors from Turkey and Germany, each with 5%, followed by Poland and Italy, each with 3%. It is well known that these represent the "traditional" countries with which Romania has had commercial exchanges after 1990.

The time dynamic of the structure of foreign visitors is also different: while the weight of "business tourists", larger than in the nineties, has constantly diminished since, the weight of "ethnic tourists" has slightly risen. The graphic also shows the situation of the visitors from the ex-Yugoslavian area which registered unusually high percentages (an average of 14% in comparison with the multi-annual one of 5%) between 1992-1995, the reason being the "refugees" from the Balkan wars that took place in that period.

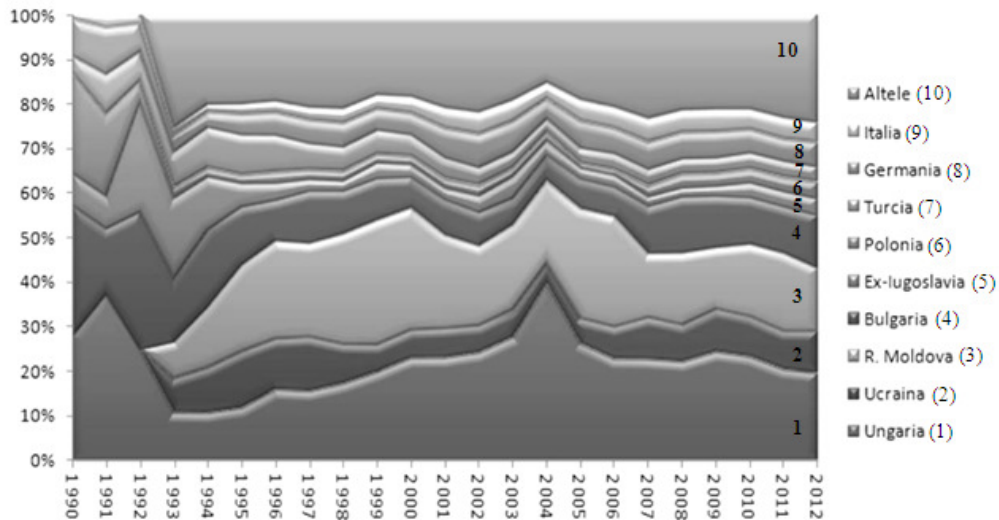


Figure no. 3: The dynamic of the share of foreign visitors in Romania based on the country of origin (1990-2012)

Source: National Statistics Institute, 2013

The rest of approximately 22% of foreign visitors (1.3 - 1.5 million individuals) that come from the rest of the world, from other countries than those listed above. It is interesting that for 2012 the statistic reports presented by UNWTO (2013, p. 8) for Romania show an amount of 1.65 million international tourists (1.51 million in 2011 and 1.34 million in 2010).

Interesting and relevant in this context is also the touristic destination of the foreign visitors that spend the night in touristic accommodation establishments. Thus, over the last 20 years, more than half (an annual average of 57%) have chosen to spend the night in Bucharest and county seats (which also indicates the specific activity performed, more specifically "business tourism"); the percentage of those choosing the Romanian seaside has been in free fall from values close to a third in the nineties (31% in 1994) to just 4% in 2012 - the conclusion being obvious, that the Romanian seaside is no longer competitive at a European level -, while the situation of mountain destinations is similar, with the percentage of foreign citizens dropping from 10-13% in the beginning of the nineties to 7% in recent years (with the same value in 2012); unfortunately the spa area has registered a similar setback as option for foreign tourists and thus the percentage drop from 10-12% at the start of the analysed period to a rather constant present value of 3% (Figure 4). All of this can only strengthen the conclusions previously stated: among the options of foreign visitors, the mountain, seaside and spa - in other words Romania's touristic strengths - have registered a continuous decline after 1990. The large percentage of Bucharest and the county seats as destinations chosen by the foreign visitors can only support the question mark - without minimising or altering their attractiveness - on the real number of visitors to Romania, with a true touristic purpose.

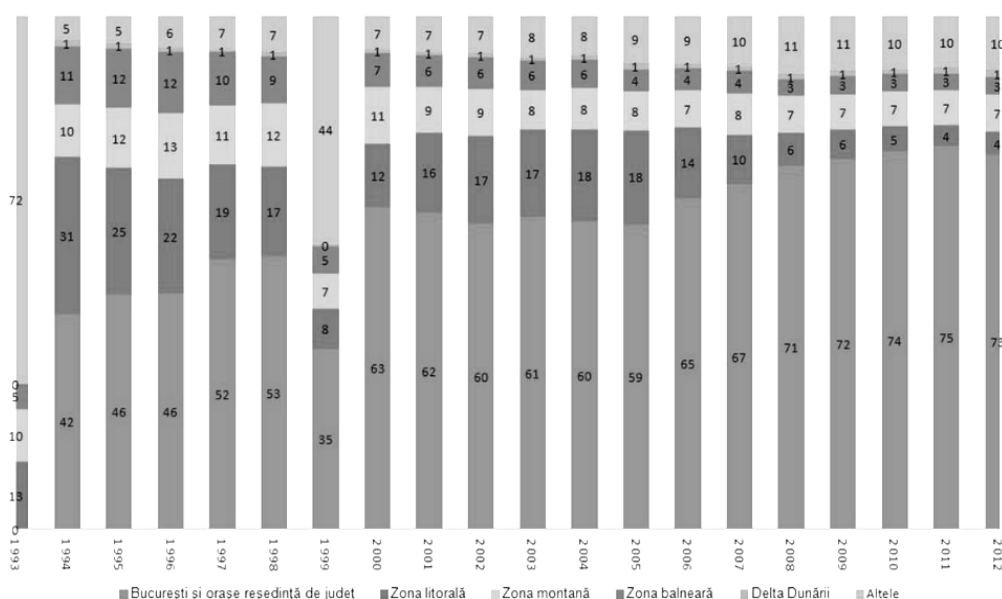


Figure no. 4: Percentage dynamic of foreign visitors in Romania based on the touristic destination (1993-2012)

Source: National Statistics Institute, 2013

c) Current challenges of Romanian tourism

A simple analysis of the total touristic accommodation in Romania shows that, even though the parameters are relatively the same (capacity of 335,200 in 1990 in comparison with 301,109 in 2012) – the outdated infrastructure being compensated in the post-communist period with new accommodation establishments (especially on the axis South-East - North - West: Constanța county, Bucharest, Prahova valley, Bihor county) –, the utilization index of the accommodation capacity has registered a continuous decline after 1990, reaching approximately 25% at the moment (Figure 5).

Maybe the most significant myth that dominates the touristic activity in Romania is that our country has an extraordinary touristic potential (both complex and diverse). The high position occupied by countries with a low natural or cultural potential compared to Romania in the rankings of the most attractive tourist destinations (with significant income generated) prove the fact that *"touristic potential does not exist, it is created/innovated"*. Or, in other words, it must go from *potential to touristic resource and then to attractive touristic offer*.

Worldwide there are countless such "lessons": for example, Tunisia, a country smaller than Romania in size and with half the population managed to double its number of foreign tourists, from 3.2 million in 1990 (4.1 million in 1995, 5 million in 2000 according to UNWTO, 2001) to 6.9 million in 2010, by building highways... in the desert. Even now, despite the geopolitical risks, Tunisia attracts around 6 million foreign visitors. In comparison, Romania has difficulties in connecting the capital's North Railway Station with the international airport "Henri Coandă" (Otopeni) via a subway system, "justifying" the

inopportune investment with the reduced passenger traffic of the airport!? How opportune must have seemed the investment to the Tunisians - building a highway through the desert? Or the Welsh lesson: in Wales, in a meadow with no significant economic value, a tombstone with a touching epitaph, a paved road and a small "pub" were "built" which triggered a touristic flow. And these are only two small examples from so many others.

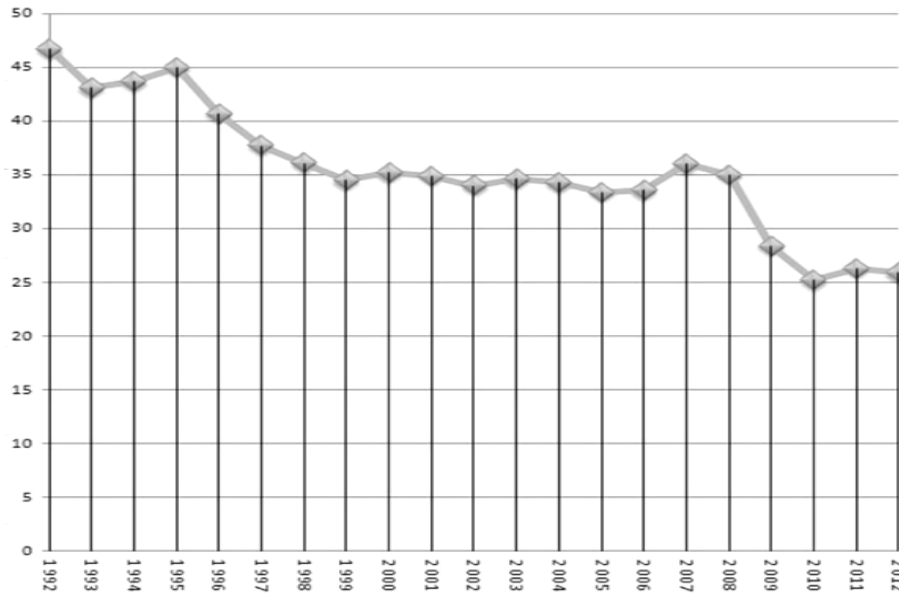


Figure no. 5: The dynamic of the utilization index of touristic accommodation in Romania (% , 1992-2012)

Source: National Statistics Institute, 2013

Another important myth of the Romanian tourism industry is the idea that *varied landscapes - "Near a low foothill/At Heaven's doorsill"* (or "the Carpathian garden Heaven" -, *attract tourists automatically!* Tourists "do not come, they are brought"! But... through where? Most of the billion international tourists (92%) registered worldwide travel via air (52%) and roads (40%, according to UNWTO, 2013, p. 5). Completely opposed to the global tendency, 75% (an average calculated in the period 1990-2012) of the visitors travelling to Romania do so via roads (which is both logic and natural given Romania's position in the South-East of Central Europe, but not completely justifiable; this is instead an additional proof that most of the foreign visitors that come to Romania are part of the border transit) and only an average of 12% use air transport; in regards to the latter, we can notice an increasing trend from 4-5% at the beginning of the nineties to 19-20% over the last few years (INS, 2013) and this is mostly thanks to the low-cost airlines operating in Romania.

Another dimension in which the Romanian tourism is completely opposite of the global trend is that of medical and curing tourism. Worldwide there is an increase in health recovery tourism (demographic aging specific to the Northern hemisphere, which is also affecting our country!), amounting to around a third of the tourists (and their number will

be increasing!), while Romania is mostly still "tributary" (over 93% in 2011) to the recreational tourism (visits, vacations, etc.). Especially in this context it would be necessary to *quickly revive the spa and curative tourism*, which was the most affected by the post-Communist events. For two decades it witnessed the continuous degradation of the spa infrastructure to the level where many of the once renowned resorts such as Băile Herculane, Bilbor, Borsec and others look today like ghost resorts with a specific relict infrastructure.

In addition to the above there are also several more aspects of note of the Romanian post-Communist tourism: "passive tourism" instead of "active tourism" (it requires the development of an animation in tourism); integration of touristic objectives, which are currently disparate, into themed circuits and/or areas (development of themed tourism); Romania's tourist resources are concentrated in the mountain region while the general infrastructure (access routes) is better in the plains (continuous improvement of the access and specific infrastructure) and so on; last but not least it is clear that our country, despite its tradition with touristic potential and heritage, does not have a tourist oriented culture, relevant in this case being the lack of almost all tourist information points in comparison with regions and cities in the Western world, where even if they have only one touristic resource, they know how to make it visible and accessible (*information, promotion, branding!*).

Conclusions

Tourism worldwide is no longer just a complementary economic activity, but it has become a real "social phenomenon". Over a billion people travel for tourist purposes on Earth and they generate more than 1 000 billion dollars in revenue and these numbers show the current dimension of this phenomenon. Romania receives less than half of a percent of both, remaining tributary to a touristic system stuck in the past offering simple accommodation and potential beauties.

The main conclusion that emerges from the analysis of the dynamics of foreign visitors in Romania, using chronological series of data for 23 years, is that *of the 6 million foreign visitors (the average of the last two decades) that come annually to Romania... mostly one quarter of them can be truly labelled as "international tourists"*. Of the 6 million foreign visitors registered annually at Romania's borders (47% of the average in the last 23 years!) spend at most a night in the tourist accommodation establishments.

Also, more than half (62% being the average value calculated between 1990 and 2012) of the total number of foreign visitors come from the neighbouring countries which clearly indicates the category of tourists they are part of, respectively "ethnic tourists" (almost half come from Hungary and the Republic of Moldova), "war tourists" (ex-Yugoslavian refugees from the middle of the nineties), "frontier tourists" (Bulgaria, Ukraine) and "business tourists", some of them being even "family tourists", originating from mixed marriages (Germany, Italy, Poland, Turkey, countries with which Romania developed commercial relations in the post-Communist period). The situation is fully explained by the fact that in the last 20 years more than half (an annual average of 57%) choose the capital city and the county seats as favourite tourist destinations.

Touristic potential does not exist, it is created/innovated! The simple accommodation capacity, several "pieces" of highway, varied landscapes ("*Near a low foothill/At Heaven's*

doorsill") and a nice name - "the Carpathian garden") are not guarantees of a well done touristic act. Romania registers large deficiencies in: transforming touristic potential into an adequate resource and building an attractive touristic offer (losing the competition in favour of neighbouring countries - Hungary, Bulgaria -, in almost all areas, even though one of the competitors is a predominantly plain region); using modern techniques - "tourism animation" -, remaining captive to a passive tourism, of exhibits (in how many Romanian museums are we greeted with warnings such as: "no photos", "no filming", do not touch" and so on, warnings that in truly famous museums worldwide - Louvre-Paris, Rijks Museum-Amsterdam and so on -, are missing completely. Furthermore, in Zollverein-Germania, a former coal mine turned museum, not only there are no such warnings but you are even invited to take coal pieces from the carts, to get dirty if you want to, to hold hammers, pickaxes and other mining tools in your hands and be really immersed in the atmosphere that was once in this mine); general and specific infrastructure; information, promotion, branding etc.

Although there is a general demographic aging trend in the Northern hemisphere (even pronounced in certain cases) - in other words, people that have at their disposal both the financial resources and the necessary time -, and almost a third of the global tourist flow is concentrated in the area of health recovery tourism, *in Romania the recreational tourism is predominant* (visits, vacations etc.) with a share of more than 93% while the spa tourism and other niche branches (medical tourism and so on) have been the most affected by the post-Communist period.

Although more than half of the billion of international tourists currently registered worldwide travel by plane, Romania is still poorly accessible by air. And 40% travel on roads which is also an area with deficiencies for Romania. It is true that the situation has somewhat improved in the last few years, but with several "pieces" of highway (none of which reaches the border) and a "new" bridge over the Danube, the infrastructure issue is far from being solved.

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