

THE DEVELOPMENT OF TOURISM IN BUCHAREST-ILFOV REGION IN THE NEW GEO-POLITICAL AND POST PANDEMIC CONTEXT

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Abstract

Bucharest-Ilfov region represents the biggest economic power of Romania. Regardless of the economic, pandemic or political context, this region has had the highest contribution to Romania's GDP. As for tourism indicators, Bucharest-Ilfov is also facing the negative effects of the European and global political and economic crisis. Even though the accommodation capacity of Bucharest has tripled in the last 20 years, the Covid 19, the Ukraine war and, more recent, the war in Gaza Strip and Middle East, have had negative repercussions on tourism activity. The number of foreign tourist arrivals has been significantly influenced by these negative events and the geographical localization of Romania determines fluctuations for tourism flows indicators, as well. This study aims to present the impact of these events on the tourism economic environment in Bucharest Ilfov and will accentuate the factors that are contributing to its spectacular revival of the travel and tourism industry, in this unexpected context.

Keywords: geo-political context, tourism, foreign tourist arrivals, Bucuresti-Ilfov tourist region.

JEL Classification: Z30.

1. The impact of covid 19 pandemic and the ukraine and gaza war on romanian tourism

The tourism industry is, by definition, one of the most vulnerable one in regard to economic, military or health potential crisis. Therefore, the new geo-political context, but also the new global challenges, has run to malfunctions and mutations of tourism companies, not only in Bucharest, but also in Romania and the entire South East Europe. The study of Bucharest's situation is required based on multiple considerations, as it represents, first of all, the main engine of Romanian economy and secondly, this is where, the biggest challenges in terms of survival, revival, development, innovation and legislation of Romania are experienced. After the significant decline of Covid19 cases, war has broken out in the Ukraine, with a negative effect on economy

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and tourism, in the border area of Romania and Bucharest as well. The Bucharest initiatives, in accordance with the European directions, have led to important attempts of assisting and supporting the HORECA sector, which has already been hit hard by the pandemic. The pandemic and Ukraine war have generated massive inflation, major labour force shortages, and reduction of financial access. As crisis continues since 2020, in 2023 begins the Gaza war, affecting once more the Romanian tourism.

The Covid-19 pandemic has had dramatic effects for the tourism industry and the Romanian businesses have not been bypassed.¹ The pandemic has generated a strong impact on global tourism, influencing the requirement for a safe, clean and sustainable tourism practice. Europe countries are striving to remain major tourism destinations. Tourism represents one of the most affected sectors; 27 million people were actively working in this industry, representing around 10% of European Union's GDP.

Ever since the beginning, **the Ukraine war**, has affected European tourism, especially in Eastern Europe and South East Europe and Ukraine nearby countries and therefore Romania. At first, the Russian invasion in Ukraine has produced a significant decline of tourism flows in the Eastern Europe, particularly in Romania and Poland² but the reductions of tourist arrivals have also been registered in Bulgaria, Latvia and Hungary. As for Romania, the 2023 Russia's attacks on Ukraine Danube ports, has damaged significantly the Danube Delta tourism industry.³ Tourism in Maramures⁴ county has faced important difficulties for incoming, as tourists are concerned regarding the proximity to Ukraine border. In Bucharest case, the situation has rapidly straightened and tourism has been slightly influenced, as the entire country. The accommodations of Ukraine refugees, subsidized by European funds, have diminished the tourism drops determined by the war.

The inflation – a rise in inflation of 17%⁵ for accommodation prices, registered in 2022. The negative consequences of the war are expected to be at larger extent on a medium and long term, especially regarding the real economy⁶. In 2022, tourism has undergone considerable change in terms of

¹ https://www.amfiteatruconomic.ro/temp/Articol_2987.pdf; Vol. 23 • Nr. 56 • Februarie 2021

² <https://eonomedia.ro/invazia-ucrainei-a-prabusit-turismul-est-european-romania-si-polonia-cele-mai-afectate-tari-localnicii-vad-o-scadere-mare-in-special-in-jurul-zonei-deltei-dunarii-cea-mai-apropiata-de-uc.html>

³ <https://www.romania-actualitati.ro/stiri/romania/atacurile-rusiei-asupra-porturilor-dunarene-din-ucraina-afecteaza-turismul-din-delta-dunarii-id182568.html>

⁴ <https://www.diacaf.com/stiri/actualitate/turismul-rural-din-maramure-afectat-de-r-zboiul-din-124126049.html>

⁵ <https://www.infofinanciar.ro/cum-a-afectat-razboiul-din-ucraina-turismul-romanesc-cazarile-a-u-crescut-cu-17-din-cauza-inflatiei.html>

⁶ <https://www.digi24.ro/stiri/economie/cele-mai-grave-efecte-ale-razboiului-din-ucraina-asupra-economiilor-din-europa-vor-aparea-in-urmatorii-ani-2515213>

prices increase, causing major concerns for Romanian citizens, as gradual return to normality has reported to occur in 2022, after two years of Covid 19 pandemic, with restrictions and prohibition of travel, the main focus becoming the Russian invasion in Ukraine.

The lack of labour force is an issue of international concern. Moreover, tourism industry and its specific seasonality is highly affected, this been the case of Romania as well. Employees from Asia, Republic of Moldova, and recently Ukraine refugees are working in the tourism industry, as a solution to the shortage of labour force.

The lack of access to finance⁷ - one of the specific challenges of the tourism industry resides in the lack of the spending opportunities and the difficulties of identifying them; this is generated by a series of factors, such as private sector's limited access to funding, for cooperation, innovation, renewal, creating activities, packages, souvenirs, and improvement of culinary offer, activities which are not consisted with the current tourist trends, the instability of the legal framework for developing and promoting tourist activities.

The Israel war has had a massive effect on Romanian tourism, as Romanian-Israeli bilateral tourism, has been a commune practice for many years, both well known for incoming and outgoing tourism activities between the two countries. Not so long ago, regarding the number of tourists arrivals in Romania, the Israeli tourists were placed second (234.500 arrivals in 2019), but at the same time, most foreign visitors in Bucharest were from Israel. Before the war, the average expense of an Israeli tourist in Romania was around 580 de euros, with the addition of 100 euro daily for food, shopping etc.; the average length of stay was five nights. In conclusion, every Israeli tourist spent around 1.100 de euro, generating over 1.2 billion RON revenues in Romania, from over 230.000 Israeli visitors, in 2019, representing the number one spenders in Romania. Romanian visitors were situated on top ten incoming visitors to Israel at a global scale and on top five at European level. They were representing 17.5% of incoming to Israel, from Central and Eastern Europe, ranking first in the region, surpassing Poland, even Canada and Brazil, at an international level⁸.

According to Forbes⁹, Bucharest has registered the third most negative performance, in terms of foreign tourists in 2020, (-83%), from a number of 15 European cities from East and South East Europe. As the number of tourist arrivals has increased in January 2023 compared to January 2022 with 67.6%,

⁷ <https://www.dailybusiness.ro/stiri-interne/retrospectiva-2022-turismul-romanesc-ingenuncheat-de-covid-si-razboiul-din-ucraina-320678/>

⁸ <https://www.fanatik.ro/cati-bani-pierde-turismul-romanesc-din-precina-razboiului-din-israel-suma-depaseste-miliardul-20509559>,

⁹ <https://www.forbes.ro/poate-deveni-bucurestiul-o-destinatie-populara-randul-turistilor-straini-post-pandemie-227725>

Forbes study¹⁰ underlines the factors contributing to this spectacular recovery and the revival of travel and tourism industry in an adverse context.

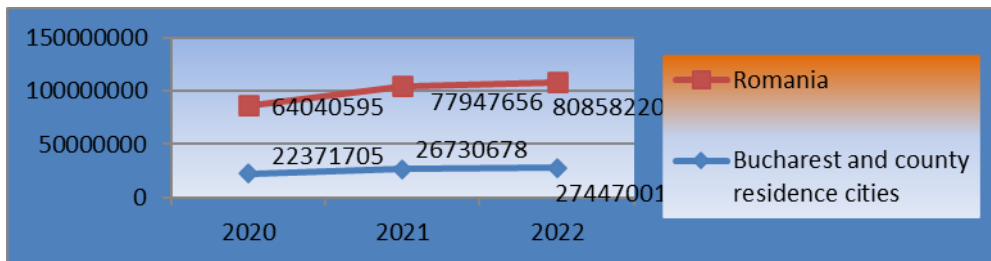
The statistics reported by the accommodation establishments of Romania showcase diminished tourism activity in Romania, with a drop of 54,2% of accommodation units in 2021 compared to 2020, and a slow recovery in 2022, with 138 new units in the entire country (102,95%).

Table 1. Accommodation indicators

Indicators	2020 ¹¹		2021 ¹²		2022 ¹³	
	Bucharest and county residence cities	Romania	Bucharest and county residence cities	Romania	Bucharest and county residence cities	Romania
Establishments of tourists' reception with functions of tourist's accommodation-number	1.582	8610	1.142	4667	1142	4.805
Existing accommodation capacity in use-beds-days	22.371.705	64.040.595	26.730.678	77.947.656	27.447.001	80.858.220

Source: www.insse.ro

Figure 1. Existing accommodation capacity in use-beds-days



As for Bucharest and county residence cities, the numbers are more favourable; only 440 accommodation units were closed in 2021 compared to 2020. In 2022 the number of accommodation units in Bucharest hasn't recorded

¹⁰ <https://www.forbes.ro/ins-a-crescut-numarul-de-sosiri-ale-turistilor-in-bucuresti-si-la-nivel-national-ianuarie-2023-325046>

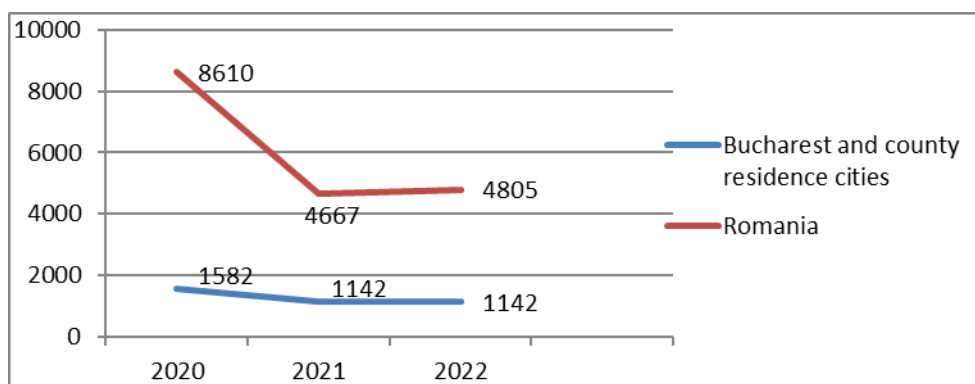
¹¹ https://insse.ro/cms/sites/default/files/field/publicatii/seria_turism_in_anul_2020.pdf

¹² <https://insse.ro/cms/ro/content/seria-turism-%C3%AEn-anul-2021>

¹³ <https://insse.ro/cms/ro/content/seria-turism-%C3%AEn-anul-2022>

any modification, remaining at 1142 units, indicating the investors' reluctance to reopen the existing units or new ones.

Figure 2. Establishments of tourists' reception with functions of tourist's accommodation- number



During the Covid 19 pandemic, tourism arrivals were represented mainly by domestic tourists, this was the case of Romania as well, with a number of only 453.265 foreign tourist arrivals, 80% of them visiting Bucharest and county residence cities. These have significantly grown reaching 176.18% in 2021 compared to 2020, with continues increase at 192.29% in 2022 as opposed to 2021 and at 338.79 % in 2022 in regard to 2020.

Table 2. Arrivals of tourists in the tourist reception establishments with tourist accommodation functions

Indicators	2020 ¹⁴		2021 ¹⁵		2022 ¹⁶	
	Bucharest and county residence cities	Romania	Bucharest and county residence cities	Romania	Bucharest and county residence cities	Romania
Total arrivals	2.355.336	6.335.401	3.654.167	9.276.719	5.020.092	11.299.111
Residents	1.990.402	5.882.136	3.011.208	8.436.145	3.783.702	9.718.046
Foreign Tourists	364.934	453.265	642.959	840.574	1.236.390	1.581.065

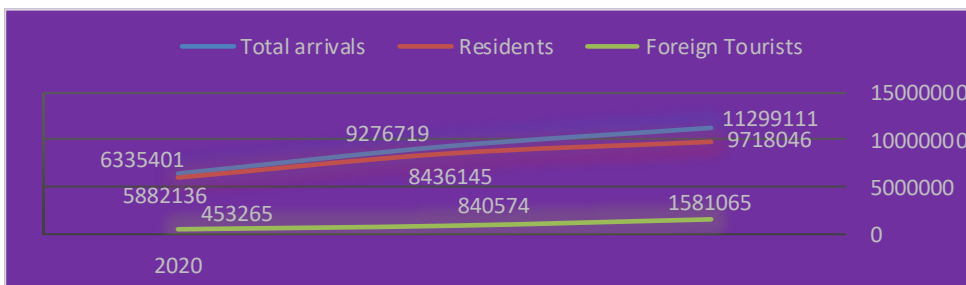
Source: www.insse.ro

¹⁴ https://insse.ro/cms/sites/default/files/field/publicatii/seria_turism_in_anul_2020.pdf

¹⁵ <https://insse.ro/cms/ro/content/seria-turism-%C3%AEn-anul-2021>

¹⁶ <https://insse.ro/cms/ro/content/seria-turism-%C3%AEn-anul-2022>

Figure 3. Arrivals of tourists in the tourist reception establishments with tourist accommodation functions



The National Strategy for Tourism Development 2019-2030 shows that the hospitality industry in Bucharest is generating higher revenues (1.350 billion euros), than the private sector of tourism from all other Romanian localities; with 40.953 employees¹⁷, almost 15% of the jobs in the Romanian tourism industry – the only city where large enterprises represent an important part of the market; The result of the study regarding Bucharest tourism point out that May, September and October are the busiest months, followed by the summer months. August is the less crowded month, accentuating the fact that Bucharest is a business and city break destination.

For the first half of 2023 (January-June 2023) the number of arrivals in tourist reception establishments with tourist accommodation functions (including apartments and rental units) has registered higher values: Bucharest - 867.000 tourists, Brasov - 667.700 tourists and Constanta - 331.600 tourists, as for the overnight stays, the situation is similar: Bucharest (1,745 millions), Brasov (1,246 millions) and Constanta (897.800). In term of country of origin, the foreign tourists mainly arrive from: Germany (94.400 tourists), Italy (87.300 tourists) and Israel (77.500 tourists)¹⁸.

2. Bucharest tourism trends in the new geo-political context

To underline the importance and strength of Romanian tourism, its recovery and development, active tourism types can be mentioned: cultural tourism cultural, extreme and adventure tourism, wellness and spa tourism, clubbing tourism, medical tourism, sport tourism, culinary tourism, communist/red tourism, dark tourism, event tourism, transit tourism, shopping

¹⁷ <http://sgg.gov.ro/1/wp-content/uploads/2020/09/Strategia-de-Dezvoltare-Turistica-C4%83-a-Roman%C3%A2niei-volumul-1-Raport-privind-Evaluarea-rapid%C4%83-a-sectorului-turistic.pdf>

¹⁸ https://www.dcbusiness.ro/crestere-a-numarului-de-turisti-in-romania-in-2023-bucuresti-brasov-si-constant-a-cele-mai-cautate-destinatii_657416.html

tourism, political event tourism, business (MICE), urban tourism, gambling tourism.

Cultural tourism refers to travelling in order to meet the cultural and spiritual needs, to visit art and architecture monuments, historic places, museums, art galleries etc. Based on its motivations, venue and organising frame, the cultural tourism, is consisted with the urban tourism, and also leisure and business one.¹⁹

Regarding the museums and public collection displays, 20% can be found in the Central Region (centre of Transylvania – counties of Alba, Brasov, Covasna, Harghita, Mures, Sibiu), 17.21% are located in North West Region (including Iasi and Suceava – Bucovina Region), 15.45% in the South Region (including Prahova County). The ranking of regions, according to the number of museum visitors outlines that the first two are also the regions with the higher numbers of museums. ***On third place, based on the number of museums and visitors in the region, Bucharest-Ilfov represents the cultural centre of the Country***²⁰ (the region includes Bucharest and the metropolitan area – Ilfov County, a much smaller territory than the other regions).

Extreme and adventure tourism – adventure theme parks represent the perfect alternative to enjoy free time by experiencing thrilling sensations. Located in the nearby woods of Bucharest, these parks offer cater for both adults and children, as they provide routes with different degrees of difficulty. Helicopter rides over Bucharest and Ilfov County are also part of adventure tourism, as well as the equestrian tourism, with riding centres around Bucharest and Petricani area.

Wellness and spa tourism – Wellness and spa are one of the major global trends with increase attractively among tourists, based on the need to proper balance the work and personal life, with more time for relaxation and individual wellbeing. Bucharest is an important destination for wellness and spa. It is situated first in the top for European destinations with the highest development potential, according to Mastercard Global Index of Urban Destination 2019, with over 1.4 million tourists using the accommodation services. Important publications such as Trip Advisor and Culture Trip recommend Therme for the uniqueness of the experience, as well as for visiting Romania. Therme, the largest centre for wellness and relaxation in Europe, and the most exotic Romanian destination, all year round, attracts tourists not only from Bucharest and other cities, but also many foreign tourists, over 25 %²¹ visitors coming

¹⁹ <https://www.studocu.com/ro/document/universitatea-transilvania-din-brasov/turism-international/forme-de-turism-clasificare/21604169>

²⁰ <http://sgg.gov.ro/1/wp-content/uploads/2020/09/Strategia-de-Dezvoltare-Turistica-C4%83-a-Rom%C3%A2niei-volumul-1-Raport-privind-Evaluarea-rapid%C4%83-a-sectorului-turistic.pdf>

²¹ <https://www.europafm.ro/bucurestiul-pe-harta-turismului-de-relaxare-si-wellness-la-nivel-mondial-p/>

from Italy, Bulgaria, Israel, UK, Germany or USA. Ever since the beginning, at least two operating flights a day from Tel Aviv, were visiting Therme.²²

Clubbing tourism represents an attraction on its own for foreign tourists. In the last years, Bucharest has been well known abroad²³, especially for clubbing and pub facilities.

Medical tourism - In Romania, in larger cities and therefore Bucharest, the medical tourism has been developing considerably, in the last years. Patients from all over the country and abroad have begun using complete medical services in Bucharest, on public or private clinics. There are four major categories of tourists that choose Bucharest for medical services: serious health problems, aesthetic surgery, dental treatments, and obesity surgery²⁴. Bucharest offers numerous hospitals and modern clinics, highly professional doctors and up to date medical technologies. Horse therapy²⁵ can be considered an important component of medical tourism.

Sport tourism – a specific type of leisure tourism, it's mainly represented by summer water sports, winter sports, fishing and also other occasional sportive events. Bucharest is organising numerous international sporting events, for athletics, cross country, football, rugby, handball, fencing, swimming etc.

Culinary tourism – it refers to culinary experience of a geographical region and it's considered to be an important component of tourism and particularly of agritourism.²⁶ The culinary experience has become a significant factor in choosing a destination, as tourists are searching for memorable food experiences and have developed a culture of F&B tasting. Social media plays an important part in arousing interest and enthusiasm for culinary experiences. It has become more popular around Millennials, which are sharing their culinary experience on social media. This is why, promoting this type of tourism is using food festivals, brunches, cooking workshops and others encouraging Millennials to share their experience online. Such trends include food bloggers, special food videos, Instagram specialised accounts, reviews and recommendations, millions of Instagram pictures with tags #foodie, #foodporn or #nom.²⁷ Sharing the experience online is generating thousands of followers, drawing attention to the visited destination, increasing the brand awareness of the particular destination, and therefore improving the tourism industry. The

²² https://www.dcnews.ro/bucurestiul-sta-o-resursa-extrem-de-valoroasa-din-tel-aviv-veneau-cate-doua-avioane-pe-zi-pentru-asta-investitorii-israelieni-au-vrut-chiar-sa-si-faca-sate-turistice_936610.html

²³ <https://turismclub.ro/tag/club/>

²⁴ <https://www.romedic.ro/turismul-medical-in-bucuresti-0F27693>

²⁵ <https://coltisorderomania.ro/2023/07/03/turismul-ecvestru-cel-mai-frumos-mod-de-a-descoperi-natura/>

²⁶ <https://www.galzonasatmarului.ro/turismul-gastronomic>

²⁷ <https://blog.eventya.ro/cum-poate-turismul-gastronomic-sa-ajute-industria-ospitaliera-din-romania/>

food tours are rural ones (so called green)²⁸ or urban ones. Culinary tours²⁹ in Bucharest are also promoted in the online environment, for instance, the site *Get your Guide*. The festivals and culinary markets play an important part for the culinary tourism of Bucharest.

Communist tourism – The communist tourism from Central and Eastern Europe stands apart from the Red tourism in China, by numerous elements, among which, the lack of authority planning and control of tourism activities, target audience being represented by adults and seniors of Occident and a less developed educational side. Based on these significant differences, communist tourism is considered to be an independent part of cultural tourism, separated from China's red tourism.³⁰ In Eastern Europe, the communist tourism has been developing after 1990, when a considerable number of occidental tourists have chosen to visit Central and Easter European ex-communist destinations. A decade later, the accession to European Union of these ex-communist states has determined the increase of tourist arrivals.

Dark tourism – implies visiting places that are well known for tragic events in history. Following the international trend, the dark tourism attractions of Bucharest are represented by Belu Cemetery, Heroes of Revolution Cemetery, Foreign Heroes from the Second World War Cemetery etc.

Events tourism – Festivals are major events that are appealing to a large number of tourists searching for experiencing different cultures, take part in colourful events, with allegorical chariots, specific dancing, and other activities. More than that, tourists are able to interact with the local community, immerse into their culture, having a unique and authentic experience. In this category, there can be presented music, theatre, film, literature, dance, art and fashion festivals in Bucharest³¹, with around 230 festivals, such as: National Theatre Festival, Green Sounds Festival, Summer Well Festival, Film and Animation International Festival, B'ESTFEST, Metropolis, Asia Fest, WishFest etc.³².

Transit tourism – the proximity to Henri Coanda International Airport and many consular representations in Bucharest³³ are stimulating the transit tourism. The geographical localization, as a connection between west and east and between north and south also determines Bucharest as a destination for transit tourism. (Bucharest as a connection to Bucovina, Maramure, mountain

²⁸ https://www.amfiteatrueconomic.ro/temp/Articol_2583.pdf

²⁹ <https://www.getyourguide.com/ro-ro/bucuresti-l111/bucuresti-turul-gastronomic-pe-jos-t325528/>

³⁰ https://www.academia.edu/2023861/VALORIFICAREA_%C3%8EN_TURISM_A_PATRI_MONIULUI_COMUNIST_DIN_MUNICIPIUL_BUCURE%C5%9ETI

³¹ <https://www.bucuresteni.ro/info/festivaluri/>

³² <https://www.helloromania.com/blog/unde-te-distrezi-in-bucuresti-evenimente-si-festivaluri/>

³³ <https://travelblog.md/bucuresti-mic-ghid-de-vizitare-ceea-ce-mi-place-in-bucuresti/>

areas, seaside and Danube Delta). 3600 of Israeli tourists³⁴ were using weekly charters for accessing mountain areas or the seaside, Bucharest representing in this case, a transit destination.

Shopping tourism consists in visiting different cities or countries in order to experience purchasing activities. It has become one of the most important motivations for travel, for millions of people,³⁵ a main transformation factor for the *destinations promotion strategies* around the world. Bucharest shopping tourism was a strong segment for Israeli tourists which combined gambling, transit and city break tourism.

Business tourism/MICE – travelling for work purposes, including: participating to business meeting, fairs and exhibitions, conferences and meetings. Nowadays, business tourism is representing around 20% of international travelling and almost ¼ of tourism receipts³⁶, with important differences from one country to another, in terms of tourism and economic development.

Political events tourism is represented by participating at political events/summits. One of the important trends of tourism development at international level and in Romania as well, consists of congress tourism.³⁷ Related services, visits for participants, entertainment programs etc. can also be provided, so the offers become more complex, generating higher revenues.

Urban tourism refers to spending free time for visiting cities or different activities, such watching shows, exhibitions etc. Due to this acceptance, it has an extremely wide coverage and is therefore quite difficult to particularize in relation to other types of tourism. As a rule, the proportion of domestic urban tourism is higher than international one. To all of this, it is necessary to add that around 80%³⁸ of city travelling consists only of urban tourism.

Gambling tourism - over the years, by historic cities, like Constanta or Sinaia have been known for gambling tourism, Bucharest being the representative destination for this type of tourism and the Israeli tourists were the major segment of this market.

3. Conclusions

Romanian tourism has faced a negative impact, starting with the Covid 19 pandemic, followed by the Ukraine war and, most recently, the Gaza war. The

³⁴ <https://www.dailybusiness.ro/turism/bucurestiul-destinatie-de-city-break-pentru-3600-de-turisti-israelieni-ce-vor-sa-vada-99454/>

³⁵ https://evisionturism.ro/turismul-shopping-instrument-cheie-marketingul-destinatiilor/#google_vignette

³⁶ <https://www.studocu.com/ro/document/universitatea-transilvania-din-brasov/turism-international/forme-de-turism-clasificare/21604169>

³⁷ <http://politici.weebly.com/turism/turismul-de-conferinte-si-evenimente>

³⁸ <https://www.studocu.com/ro/document/universitatea-transilvania-din-brasov/turism-international/forme-de-turism-clasificare/21604169>

policies and strategies for tourism development required permanent adjustments, creating new strategies for shorter periods of time, analysing the necessary resources and reaching new markets or segment of tourists. The private-public partnership must coordinate its initiatives in order to find the proper way not only of dealing with the crisis, but also to influence the development of tourism.

Even though there are numerous types of tourism in Bucharest and other Romanian cities, there is no overtourism, the tourism industry can have a substantial contribution to GDP. In Romanian struggling economy, the tourism industry is to become more important, based especially on the notoriety of cities such as Bucharest, Sibiu, Timisoara, Brasov, Constanta and Cluj as cultural, event or city break tourism.

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