

MAPPING ROMANIA'S COMPETITIVENESS WITHIN THE EU-27: A QUANTITATIVE ASSESSMENT OF TOURISTS FLOW

Gheorghe Camelia-Monica¹

Abstract

This paper analyses the position and dynamics of Romania's international tourism within the European context, focusing on the period 1995–2024 and on comparisons with EU-27 Member States. Using harmonized statistical series from Eurostat and national sources, the study examines both absolute indicators – the number of foreign tourist arrivals (NSTS) and overnight stays (NITS) in tourist accommodation establishments – and relative indicators, such as fixed-base and average annual indices, average annual growth rates, and tourist traffic density. The results reveal a strong concentration of international tourism flows in a small group of Western and Southern European countries, while Romania remains in the group of Member States with low NSTS and NITS levels, despite a marked post-pandemic recovery. Comparative analyses with neighboring countries (Bulgaria and Hungary) highlight Romania's structural lag, especially in terms of foreign tourist arrivals per 1,000 inhabitants and summer-season intensity. The findings underscore the importance of effectively leveraging tourism potential and of consistent policy measures aimed at improving Romania's attractiveness on the international tourism market.

Keywords: international tourism; foreign tourist arrivals; overnight stays; tourist traffic density; growth indices; Romania; EU-27; Eurostat data; tourism concentration; comparative analysis.

JEL Classification: Z32.

1. Introduction:

Economic development, increased labour productivity, the reduction of the length of the working week, and the gradual expansion of freedom of movement for persons, both within the European Union and worldwide, are just some of the factors that, in recent decades, have led to an intensification of international tourism in the European states of the current EU-27, from 274,237,319 tourist visits in 2005 to 435,635,578 tourist visits in 2024 (an increase by a factor of 1.84), as well as at the level of individual member states, the most significant increase, by a factor of 3.73, being recorded in Portugal, while in Romania the increase was only by a factor of 1.65, from 1,429,911 tourist visits in 2005 to 2,387,632 tourist visits in 2024. These developments have had direct effects on the sustainable development of destination countries, boosting economic growth and acting as a driver of their development (Nemec Rudež, 2020; Gómez & Cándano, 2023).

¹ Gheorghe Camelia Monica is Lecturer at the Romanian-American University, Bucharest, e-mail: camelia.gheorghe@rau.ro;

On the other hand, in the last decade, international tourism has been influenced by crises and conflicts, the most important in terms of its impact being the Covid-19 pandemic. In April 2020, the aviation industry, a particularly important vector for international tourism, reported an 80% decrease in the number of flights compared to the same period in 2019 (Gaydarov, 2021), so that the negative impact, although gradually reduced, affected both the aviation industry itself and international tourism. At the level of the EU-27, the number of international tourist visits fell from 407,052,323 in 2019 to 114,039,015 in 2020 (a decrease of 71.98%), while in Romania it decreased from 2,683,748 visits in 2019 to 453,867 visits in 2020 (INS Tempo-online TUR104D, 2025), a reduction of 83.09%. Nevertheless, due to the resilience of the tourism industry and as a result of the policies and measures implemented by governments, 2023 saw a significant recovery in terms of revenues and employment. In Romania, revenues generated by international tourism amounted to 311.63 million US dollars compared to 178.42 million US dollars in 2020 (UN Tourism TSC, 2025).

These developments highlight, on the one hand, the resilience of the highly complex and diverse international tourism industry within the global economy and, on the other hand, the existence of a positive relationship between tourism development and economic growth and quality of life (Băndoi et al., 2020), although differences between European Union member states remain significant. By comparison, in 2024, in 12 of the 27 member states the number of international tourist visits (Eurostat ATAE, 2026) per 100 inhabitants of the destination countries (Eurostat PJAN, 2026) exceeded the resident population, while in the remaining states it ranged between 13 and 96 international visitors per 100 inhabitants. Unfortunately, Romania ranked last, with 13 visits per 100 inhabitants, compared with 58 visits per 100 inhabitants in Bulgaria and 67 in Hungary. Starting from these aspects, the main objective of this paper is to identify the position of Romania's international tourism compared with that of the other current member states of the European Union.

2. Literature review

The evolution of tourism in general, and of international tourism in particular, is interconnected with economic developments. A study of the dependence between tourism demand and economic growth, the real exchange rate and economic policy uncertainty was conducted by Gómez and Cándano (2023) for nine OECD member states over a 20-year period (1998–2018). The research showed that, in the long run, there is a causal relationship between tourism revenues, the exchange rate, GDP and economic policy uncertainty, in the sense that changes in these variables affect the behaviour of tourism demand and, implicitly, the economic performance of host countries. On the other hand, Li et al. (2025) show that the prosperity of tourism significantly promotes

high-quality economic development, with the relationship between them operating through industrial upgrading and infrastructure development, while the digital economy acts as a critical moderator that amplifies the transformative effects of tourism.

Studies based on economic modelling of the ways in which international and inter-regional tourism interact with national economic development have also been carried out by Zhang (2020) and Sanchez-Rivero (2020). In order to analyse the complex relationship between tourism and economic growth, Zhang proposes a simulation model that incorporates changes in the interest rate, foreigners' preferences for visiting a region, the total productivity of the regional services sector, domestic consumers' preferences for visiting a region, as well as the propensity to save and the propensity to consume regional services. By contrast, using a logistic model, Sanchez-Rivero concludes that tourism flows are not the most appropriate measure for assessing the contribution of tourism to economic growth; instead, the volume of revenues generated by tourists should be taken into account, challenging the widespread belief that an increase in tourist arrivals is a clear sign of success for destination managers.

In the diverse and complex global economy, international tourism plays an important role (Alsabhan et al., 2025; Bode, 2018); the evolution of tourism has been reflected both in the number of international tourist departures and visits, and in the volume of international tourism expenditure, as a result of changing consumer preferences for tourist destinations, the significant increase in the number of countries and geographical areas included in tourist circuits, and the improvement of national legislation to stimulate tourism. It has also emerged that, during the global economic crisis or in other turbulent periods of political and social instability, tourism has proved to be one of the most effective drivers of the economy in many countries, particularly in developing ones, but due to recent environmental and economic uncertainty, the sustainability of tourism growth has become a global concern that requires the attention of current research, as well as that of policy-makers (Kalogiannidis et al., 2025).

The global crisis of 2008–2009, as well as the crisis generated by the Covid-19 pandemic in 2020, represented unexpected external shocks that tested the resilience and, respectively, the economic vulnerability of the affected countries. A comprehensive analysis of the role of international tourism in reducing vulnerability, carried out by Wang et al. (2022), showed that the development of international tourism can reduce the magnitude and likelihood of external risks and structural exposure to shocks by promoting economic growth and adjusting the industrial structure, while the stable development of tourism can contribute to the stability of exports and exchange rates, which is particularly significant for developing countries.

The effects of the outbreak of the Covid-19 pandemic on international tourism have been the subject of analysis in numerous economic studies. Drawing on data provided by the World Tourism Organization, Korinth (2022) proposes a specific classification of subregions and of the main destination and origin countries that generate the largest tourism flows and concludes that the sharpest percentage declines in international tourism revenues in 2020, compared with 2019, were recorded in Hong Kong, Malaysia, Greece and Spain.

In addition to tourism, passenger air transport is among the sectors most severely affected by the Covid-19 crisis (Sobczuk & Borucka, 2025). Based on statistical data and strategic documents, particularly those of the World Tourism Organization, the World Travel and Tourism Council and the International Civil Aviation Organization, Ploch (2021) analyses the methods and procedures that can be implemented to mitigate the consequences of such crises and to revive air transport, and proposes, among other tools for strategic crisis management: the development of a strategic long-term vision for the sector supported by appropriate financial resources; new business models in the private sector; changes in the marketing mix and product development; digitalization in both the public and private sectors; as well as innovation and education.

However, due in part to the continued involvement of the World Tourism Organization, other relevant organizations and national governments in supporting tourism during the Covid-19 pandemic (Mihai & Toma, 2020), as well as to the overall resilience of tourism in general and international tourism in particular, international tourism recorded a significant rebound in 2023 in terms of revenues and employment. This recovery was driven not only by the policies and measures implemented by governments, but also by changes and subsequent improvements in consumers' travel behavior, with the overall trend pointing towards a full recovery and even surpassing pre-pandemic levels (Nicula, 2024).

Tourism should not be viewed only in relation to economic development, but also as a factor that improves quality of life (Slusariuc, 2025). Based on a cluster analysis and several variables, Băndoi et al. (2020) identified relevant groups of countries in which there is evidence of a positive relationship between tourism development and the improvement of quality of life, as well as between the level of sustainable performance and the intensity of tourism. In this configuration, in 2015 Romania formed a cluster together with Bulgaria, while in 2018 Romania was included in a cluster with Italy, Latvia, Lithuania, Poland and Slovakia, with higher values in terms of tourism's contribution to GDP, quality of life and sustainable development performance.

As a global economic phenomenon, tourism facilitates international cooperation and shapes the development of international relations (Tileagă &

Cristian, 2025). In this context, attention needs to be paid to global education, to raising community awareness of long-term sustainability, and to fostering active engagement in international cooperation. Today's tourism has become a distinctive phenomenon, being recognised as a global industry, and the global nature of tourism trends is reflected in the international transfer of ideas, information, capital and people from different cultures (Zhubi et al., 2024).

On the other hand, an excessively high volume of tourist flows can become harmful to local communities, as is already the case in some of the most popular destination cities, which has led to the introduction of restrictions on the number of foreign visitors. The intensity of international tourism, and especially its growth, significantly increases risks to biodiversity, with these effects displaying both delayed and cumulative characteristics, and the magnitude of the impact varying depending on the tourism model and the specific destination (Chen et al., 2025). Government regulations and international financial assistance play an important role in reducing these negative effects.

With regard to the future development of tourism, Georgieva (2024) points out, on the one hand, a reorientation of tourists towards health-related tourism products and towards destinations offering conditions for ecotourism and a clean natural environment, with greater emphasis on the tourism experience and on the search for new dimensions of travel, and, on the other hand, the widespread application of digitalisation as an opportunity to facilitate processes and respond to consumer needs, as well as the standardisation of positioning policies adopted by tourism enterprises on the global market in order to ensure a level playing field in a competitive environment.

3. Research methodology

In preparing this paper, I used several data series describing the evolution of international tourist movements in the 27 current member states of the European Union (EU-27), namely: Arrivals at tourist accommodation establishments (Eurostat ATAE, 2026), Arrivals at tourist accommodation establishments – monthly data (Eurostat MDTA, 2026), Nights spent at tourist accommodation establishments (Eurostat NSTA, 2026) and Population on 1 January by age and sex (Eurostat PJAN, 2026). Based on these datasets, five main variables were selected (Table 1), from which a significant number of derived variables were constructed for each EU-27-member state, in line with the specific objectives of the analyses carried out.

Table 1. Identifiers and definitions of the main variables used in the paper

Ind.	Semnificație	U.M
NSTS	Annual number of international tourist arrivals to tourist accommodation establishments with lodging facilities	number
NLSTS	Monthly number of international tourist arrivals to tourist accommodation establishments with lodging facilities	number
NITS	The annual number of overnight stays of foreign tourists in tourist accommodation establishments with lodging facilities	number
DMSTS	The average length of stay of foreign tourists in accommodation establishments with lodging functions	days
DCTS	Tourist traffic density	$\frac{NSTS}{loc.} \cdot 1000$

For the analysis of the evolution characteristics of the processes under study, the data series were arranged in matrices of the form:

$$Y = \|y_{ij}\|_{i=\overline{1,n}, j=\overline{1,m}} \cdot (1)$$

In expression (1), (Y) denotes the process under analysis (visits, nights spent, length of stay), (n) is the number of countries included in the analysis, and (m) is the number of time points (years or months) in the period under review. Starting from matrix (1), several indicators were computed and analysed, including:

- **Dynamic indicators:** Let $Y_i = \|y_{ij}\|_{j=\overline{1,m}}$ be the vector corresponding to country i, and $k \in [2, m]$, for a given time point, the dynamic indicators used are the following:

- the fixed–base index
$$I_{k/0}^{y_i} = \frac{y_{t=k}}{y_{t=0}} \quad 2)$$

- the average annual index
$$\bar{I}_{k/0}^{y_i} = \sqrt[m-1]{\frac{y_{t=k}}{y_{t=0}}}, k > 1 \quad 3)$$

- the average annual growth rate
$$\bar{R}_{k/0}^{y_i} = \bar{I}_{k/0}^{y_i} - 1 \quad 4)$$

- the average annual increase
$$\bar{\Delta}_{k/0}^{y_i} = \frac{y_{t=k} - y_{t=0}}{k - 1}, k > 1 \quad 5)$$

- **Territorials indicators:** Let the individuals values be y_i and y_j individual values of the process y (the number of international tourist arrivals) in the destination countries $i \neq j, i \neq j$ the territorial indicators used are:

- the tourist traffic density
$$DCT_i^y = \frac{y_i}{L_i} \cdot 1000 \quad 6)$$

Data processing and the presentation of results, including charts and geographical representations, were carried out using the functionalities provided by Excel 19.

4. Analysis of Romania's international tourism in Europe based on foreign tourist arrivals

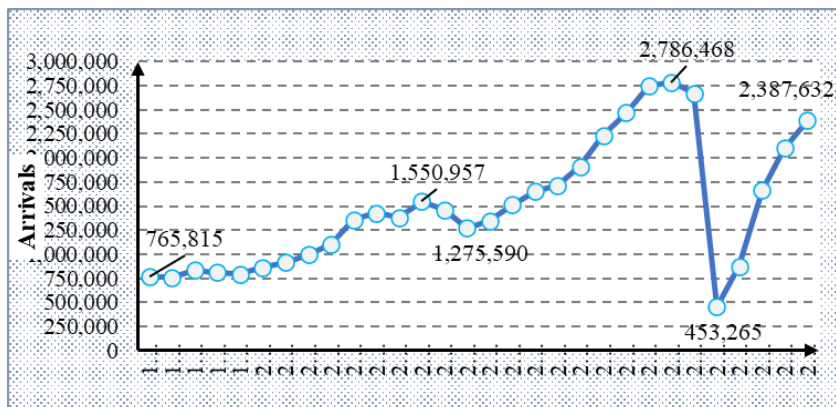
The intensity of inbound foreign tourist flows to a country, beyond their economic and social implications, is also an indicator of the attractiveness of tourist destinations and a measure of tourism performance compared with other states. This section analyzes the characteristics of the evolution of the number of arrivals of foreign tourists in tourist accommodation establishments (NSTS) in the current Member States of the European Union (EU-27).

4.1. Evolution of foreign tourist arrivals in Romania, 1995–2024

At the level of Romania, during the period 1995–2024, the annual number of arrivals of foreign tourists increased from 765,815 arrivals in 1995 to 2,387,623 arrivals in 2024 (Figure 1). The evolution of this number was, however, significantly influenced by the financial crisis of 2008–2009 and, even more strongly, by the Covid-19 pandemic that broke out in 2020. Taking these into account, three periods of growth in NSTS can be identified, characterized on the basis of three statistical dynamic indicators: the average annual index of NSTS (relation (3)), the average annual rate (relation (4)), and the average annual increase of NSTS (relation (5)).

Between 1995 and 2007, NSTS in Romania increased slightly from 765,815 arrivals in 1995 to 1,550,957 arrivals in 2007. Although they did not alter the overall upward trend, small decreases in foreign tourist arrivals were recorded in 1998, 1999, and 2006 compared with the previous year, by 22,862 arrivals in 1998, 14,801 arrivals in 1999, and 50,079 arrivals in 2006. Over this period, the evolution of foreign tourist arrivals in Romanian tourist accommodation establishments ($NSTS_{RO}$) was characterized by an average

annual index of $\bar{I}_{2007/1995}^{NTS_{RO}} = \sqrt[12]{\frac{1550957}{765815}} = 1,0606 = 106,06\%$, an average annual growth rate of $\bar{R}_{2007/1995}^{NTS_{RO}} = 0,0606 = 6,06\%$ and an average annual increase of $\bar{\Delta}_{2007/1995}^{NTS_{RO}} = \frac{1550957 - 765815}{12} = 65428$ arrivals of foreign tourists to Romania.

Figure 1. Evolution of NSTS in Romania over the period 1995–2024

Source: elaborated by the author based on Eurostat ATAE data series, 2026

The second growth period follows the 2009–2010 financial crisis and lasts until 2018, when the highest value of the foreign tourist flow is recorded (2,786,468 arrivals) for the entire period analyzed. This period is marked by a stronger increase in the number of foreign tourist arrivals in Romania than in the previous one, namely by an average annual increase of $\bar{\Delta}_{2018/2009}^{NTST_{RO}} = \frac{2,786,468 - 1,275,590}{9} = 167.875$ arrivals, an average annual index of $\bar{I}_{2018/2009}^{NTST_{RO}} = \sqrt[9]{\frac{2,786,468}{1,275,590}} = 1,0907 = 109,07\%$, and an average annual growth rate of $\bar{R}_{2018/2009}^{NTST_{RO}} = 0,0907 = 9,07\%$ (3.01 percentage points higher than in the previous period). Under these conditions, the number of foreign tourist arrivals in tourist accommodation establishments in Romania increased from 1,275,590 arrivals in 2009 to 2,786,468 arrivals in 2018.

Travel restrictions on the free movement of tourists in 2020 practically led to the collapse of inbound foreign tourist flows to Romania, from 2,672,887 arrivals in 2019 to only 453,265 arrivals in 2020 (a decrease of 83.05%). Compared to the number of foreign tourist arrivals recorded in January 2020 (127,620 arrivals), by March this figure had fallen to 34,220 arrivals (a decrease of 73.18%), and in May – when the minimum value of the entire period was reached (1,307 arrivals) – the reduction was 98.97%. Although starting in June, when 12,986 foreign tourist arrivals were registered, their number began to increase, reaching a maximum of 32,750 arrivals in September, by December 2020 the number of foreign tourist arrivals in tourist accommodation establishments in Romania represented only 11.05% of the level recorded in December 2019.

Starting in 2021, international tourism recovered rapidly, so that the number of foreign tourists arriving in Romania increased from 453,265 in 2020 to 2,387,632 in 2024 (14.38% less than in 2018). The rebound was very strong, being characterized by an average annual index of

$$\bar{I}_{2024/2021}^{NTST_{RO}} = \sqrt[3]{\frac{2.387.623}{453.265}} = 1,3980 = 139,80\%, \text{ an average annual growth rate}$$

of $\bar{R}_{2024/2021}^{NTST_{RO}} = 0,39806 = 39,80\%$, and an average annual increase of

$$\Delta_{2024/2021}^{NTST_{RO}} = \frac{2.387.623 - 453.265}{3} = 504583 \text{ foreign tourist arrivals in Romania.}$$

4.2. Romania's position within foreign tourist arrival flows in the EU-27: a relative-indicator perspective

The analysis of international tourism characteristics using relative indicators provides a picture of the intensity of increases or decreases in tourist flows from one year to the next, either in relation to a base year or as an average over a given period. For this purpose, we used four indicators: the fixed-base index of the increase in the number of arrivals of foreign tourists (IFNSTS), relation (2); the average annual index of the increase in the number of arrivals of foreign tourists (IMNSTS), relation (3); the average annual growth rate of the number of arrivals of foreign tourists (RMNSTS), relation (4); and the tourist traffic density (DCT), relation (6).

In the period analyzed (2005–2024), the intensity of foreign tourist flows in tourist accommodation establishments in the EU-27 countries increased at different rates.

Taking 2005 as the base year and excluding Ireland, for which data on foreign tourist arrivals are not available for 2005–2008, in 2024 the fixed-base index of foreign tourist arrivals (IFNSTS) in the other 26 EU-27 Member States shows increases ($I_{2024/2005}^{NTST,i} = \frac{NTST_{t=2024}}{NTST_{t=2005}}$, $i = \overline{1,26}$) in NSTS (Table 2) ranging from 3.7254 (372.54%) in Greece (a 3.73-fold rise, from 7,384,706 arrivals in 2005 to 27,367,693 arrivals in 2024) to 1.2763 (127.63%) in Estonia (a 1.28-fold rise, from 1,453,418 arrivals in 2005 to 1,855,063 arrivals in 2024). In this ranking, in terms of IFNSTS, Romania ranks 18th, with a value $I_{2024/2005}^{NTST,RO}$ of 1.6698 (166.98%), corresponding to a 1.67-fold increase in NSTS (from 1,429,919 arrivals in 2005 to 2,387,632 arrivals in 2024), while Bulgaria ranks 10th, with a value $I_{2024/2005}^{NTST,BG}$ of 1.9477 (194.77%), reflecting a 1.95-fold increase in NSTS, and Hungary ranks 14th, with a value $I_{2024/2005}^{NTST,H}$ of 1.7740 (177.40%), corresponding to a 1.774-fold increase in NSTS.

Compared with the average IFNSTS value estimated at EU-27 level ($I_{2024/2005}^{NTST,UE27}$) of 1.8427, (184.27%), only 11 states recorded higher IFNSTS values, while the other 15 – including Romania – had lower values.

Table 2. Ranking of EU-27 countries, excluding Ireland, by the ratio between the number of foreign tourist arrivals in 2024 and in 2005 ($I_{2024/2005}^{NST,i}$, $i = \overline{1,26}$)

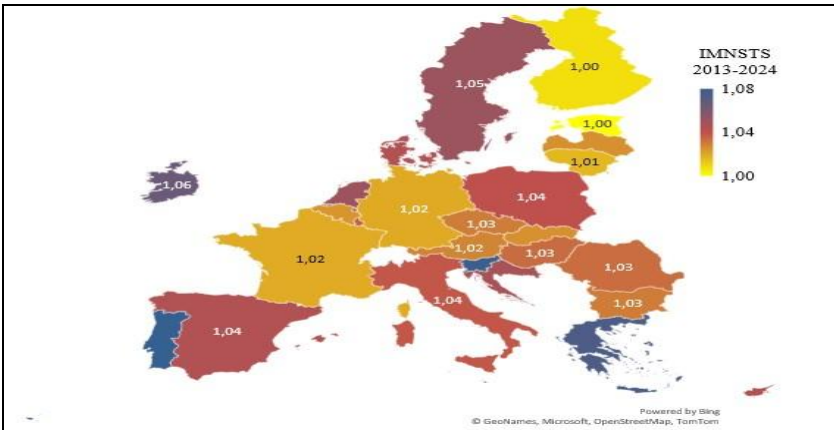
Place	State	$I_{24/05}$	Place	State	$I_{24/05}$	Place	State	$I_{24/05}$
1	Greece	3,7254	10	Bulgaria	1,9477	19	Austria	1,6639
2	Portugal	3,3500	11	Italy	1,9433	20	Czech Republic	1,6536
3	Slovenia	3,3311	12	Poland	1,8271	21	Luxemburg	1,4984
4	Croatia	2,6228	13	Denmark	1,8119	22	Belgium	1,4285
5	Lithuania	2,2355	14	Hungary	1,7740	23	Slovakia	1,4023
6	Malta	2,2113	15	Germany	1,7405	24	Finland	1,3960
7	Latvia	2,1738	16	Sweden	1,7269	25	France	1,3015
8	Netherlands	2,1259	17	Cyprus	1,7191	26	Estonia	1,2763
9	Spain	2,0763	18	Romania	1,6698			

Source: calculations performed by the author based on Eurostat ATAE data series, 2026

Important and relevant information on changes in foreign tourist arrivals in tourist accommodation establishments with lodging functions in the EU-27 is highlighted by the comparative analysis of the average annual indices of NSTS evolution (IMNSTS) and the average annual growth rates (RMNSTS).

From the perspective of IMNSTS, over the period 2013–2024 (a 12-year interval), all EU-27 Member States ($\bar{I}_{2024/2013}^{NSTS,i} = \sqrt[11]{\frac{NSTS_{t=2024}}{NSTS_{t=2013}}}$, $i = \overline{1,27}$) recorded values greater than or equal to 1 (100%), which shows that the crisis generated by the Covid-19 pandemic has been fully overcome (Figure 2). Correspondingly, the values of RMNSTS $\bar{R}_{2024/2023}^{NSTS,i} = \bar{I}_{2024/2023}^{NSTS,i} - 1 \geq 0$, $i = \overline{1,27}$, also confirm this recovery trend.

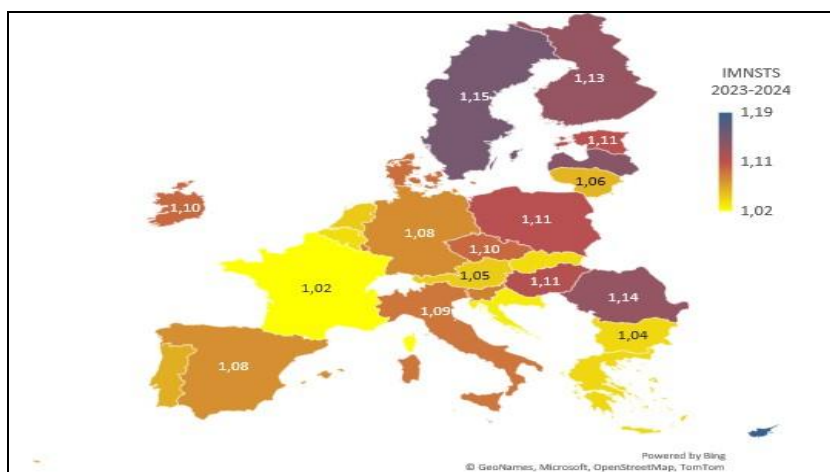
Figure 2. Geographical distribution of IMNSTS values in the EU-27 over the period 2013–2024



Source: Elaborated by the author; own calculations based on Eurostat ATAE data series, 2026

In the period 2013–2024, the lowest IMNSTS values were recorded in Estonia ($\bar{I}_{2024/2013}^{NSTS,EE} = 1,00 = 100\%$), Finland ($\bar{I}_{2024/2013}^{NSTS,FI} = 1,0034 = 100,34\%$) and Lithuania ($\bar{I}_{2024/2013}^{NSTS,LT} = 1,0128 = 101,28\%$), while the highest values were observed in Greece ($\bar{I}_{2024/2013}^{NSTS,GR} = 1,0719 = 107,19\%$) and Slovenia ($\bar{I}_{2024/2013}^{NSTS,SI} = 1,0772 = 107,72\%$).

Figure 3. Geographical distribution of IMNSTS values in the EU-27 over the period 2023–2024



Source: Elaborated by the author; own calculations based on Eurostat ATAE data series, 2026

Romania ranked 16th, with an IMNSTS value $\bar{I}_{2024/2013}^{NSTS,RO}$ of 1.0305 (103.05%), while Bulgaria ranked 17th with a value $\bar{I}_{2024/2013}^{NSTS,BG}$ of 1.0267 (102.67%), and Hungary 15th, with a value $\bar{I}_{2024/2013}^{NSTS,HU}$ of 1.0306 (103.06%). In relation to the average IMNSTS value at EU-27 level, 1.0350 (103.50%), 13 states recorded higher IMNSTS values, whereas the remaining 14 states – including Romania – recorded lower values.

Compared with the average IMNSTS value at EU-27 level, $\bar{I}_{2024/2013}^{NSTS,UE27}$ of 1.0350 (103.50%), 13 Member States recorded higher IMNSTS values, while the other 14 states – including Romania – recorded lower values.

If we focus only on the last two years (2023–2024), the positioning of the EU-27 Member States with respect to IMNSTS values changes fundamentally (Figure 2). Thus, over 2023–2024, the lowest IMNSTS values were recorded in France ($\bar{I}_{2024/2023}^{NSTS,FR} = 1,0221 = 102,21\%$) and Croatia ($\bar{I}_{2024/2023}^{NSTS,HR} = 1,0311 = 103,11\%$), while the highest were observed in Cyprus

($\bar{I}_{2024/2023}^{NSTS,CY} = 1,1943 = 119,43\%$) and Sweden ($\bar{I}_{2024/2023}^{NSTS,SE} = 1,1543 = 115,43\%$).

Table 3. Ranking of the EU-27 Member States by the number of foreign tourist arrivals in tourist accommodation establishments per 1,000 inhabitants ($DCTS_i^{NSTS}$) in 2024

Place	State	DCTS	Place	State	DCTS	Place	State	DCTS
1	Croatia	4.500	10	Estonia	1.349	19	Hungary	638
2	Malta	4.044	11	Italy	1.254	20	Denmark	609
3	Cyprus	3.136	12	Netherlands	1.186	21	Bulgaria	585
4	Austria	3.112	13	Czech Republic	961	22	Finland	518
5	Greece	2.632	14	Letonia	848	23	Lithuania	502
6	Slovenia	2.376	15	Belgium	816	24	Germany	448
7	Luxemburg	2.031	16	Sweden	799	25	Slovakia	387
8	Portugal	1.816	17	France	797	26	Poland	215
9	Spain	1.597	18	Ireland	785	27	Romania	125

Source: calculations performed by the author based on Eurostat ATAE and PJAN data series, 2026

Romania now records a significant leap, ranking 5th with an IMNSTS value $\bar{I}_{2024/2023}^{NSTS,RO}$ of 1.1355 (113.55%), while Bulgaria drops to 23rd place with a value $\bar{I}_{2024/2023}^{NSTS,BG}$ of 1.0410 (104.10%), and Hungary moves to 7th place, with a value $\bar{I}_{2024/2023}^{NSTS,HU}$ of 1.1142 (111.42%).

Compared with the average IMNSTS value at EU-27 level, $\bar{I}_{2024/2023}^{NSTS,UE27}$ of 1.0677 (106.77%), 16 states, including Romania, recorded higher IMNSTS values, whereas the remaining 11 states recorded lower values.

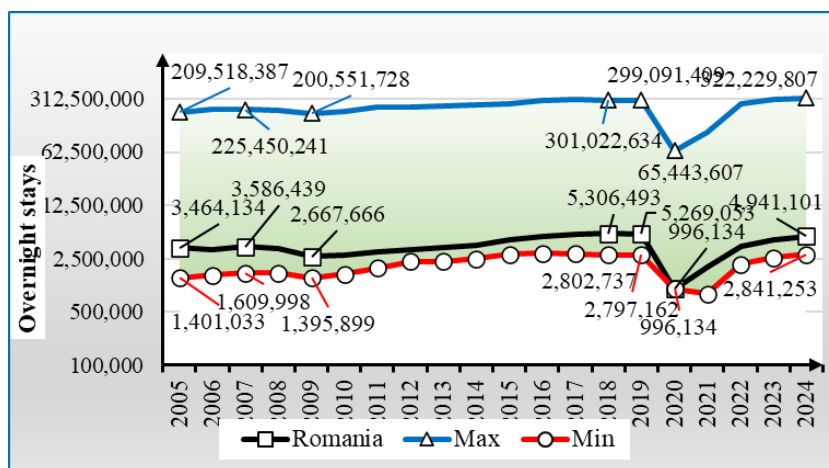
Another indicator that can be used to assess Romania's position among the EU-27 Member States in terms of international tourism is tourist traffic density (relation (6)), in this case the density of foreign tourist arrivals in tourist accommodation establishments per 1,000 inhabitants ($DCTS_i^{NSTS} = \frac{y_i}{L_i} \cdot 1000, i = \overline{1,27}$).

Unfortunately, for 2024 this perspective highlights even more clearly Romania's particularly poor performance in attracting foreign tourists (Table 3). Countries such as Malta and Cyprus, which ranked below Romania in terms of the absolute number of foreign tourist arrivals, move ahead when looking at arrivals per 1,000 inhabitants, occupying 2nd place (4,044 arrivals per 1,000 inhabitants) and 3rd place (3,136 arrivals per 1,000 inhabitants), respectively. In Romania's case, with only 125 arrivals per 1,000 inhabitants, the country ranks last (27th place) in the European Union, while neighbouring countries Hungary and Bulgaria rank 19th (638 arrivals per 1,000 inhabitants) and 21st (585 arrivals per 1,000 inhabitants), respectively.

4.3. Romania's position within EU-27 foreign tourist overnight-stay flows based on absolute indicators

From the perspective of the evolution of the number of overnight stays of foreign tourists in tourist accommodation establishments (NITS), compared with that of the number of foreign tourist arrivals (NSTS), the differences are insignificant, the only distinction lying in the orders of magnitude of the two indicators.

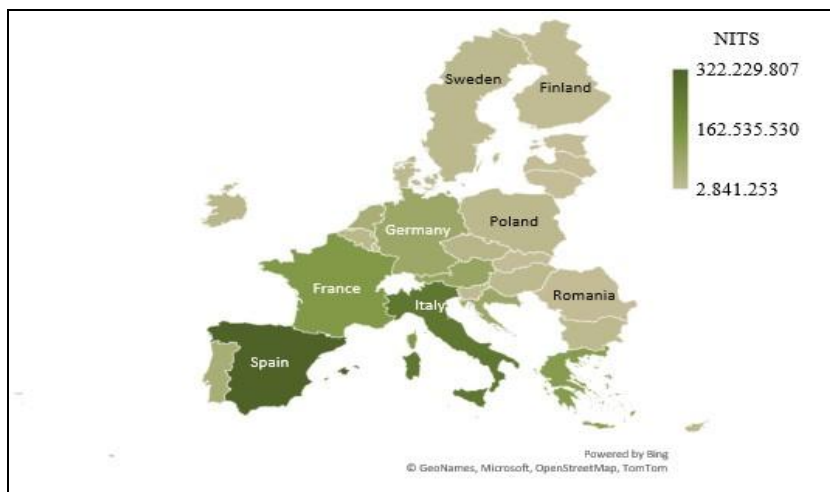
Figure 4. Evolution of NITS in Romania compared with the EU-27 Member States



Source: elaborated by the author based on Eurostat NSTA data series, 2026

This situation is highlighted by the evolution of NITS (Figure 4), which is similar to that of NSTS (Figure 4). In 2005, in terms of NITS, Spain ranked first with 209,518,387 overnight stays, followed by Italy with 148,290,126 and France with 107,951,866 overnight stays, while Romania (3,464,134 overnight stays) ranked 23rd, with the last places, as in the case of NSTS, occupied by Luxembourg (2,451,764 overnight stays), Latvia (1,612,671), and Lithuania (1,401,033 overnight stays). Compared with Bulgaria (11,624,051 overnight stays), in 14th place, and Hungary (10,778,899 overnight stays), in 15th place, Romania's NITS was 3.36 times and, respectively, 3.11 times lower.

By 2024, Spain still ranked first in terms of NITS (322,229,807 overnight stays), followed by Italy (253,948,443) and France (140,608,197 overnight stays), while Latvia ranked last (2,841,253 overnight stays). Romania, with 4,941,101 overnight stays, ranked 22nd, whereas Hungary ranked 17th with 15,224,253 overnight stays and Bulgaria 18th with 15,058,045 overnight stays, their values being 3.08 times and, respectively, 3.05 times higher than those recorded in Romania.

Figure 5. Geographical distribution of NITS in the EU-27 Member States in 2024

Source: elaborated by the author based on Eurostat NSTA data series, 2026

Analyzing comparatively the evolution of NSTS and NITS in terms of absolute indicators shows that, with respect to the ranking of the EU-27 Member States, there are no significant differences. This is also highlighted by the geographical distribution of NITS in 2024 (Figure 4), which is similar to the geographical distribution of NSTS (Figure 1).

5. Results and conclusions

From the analysis of the concentration of foreign tourist arrivals in tourist accommodation establishments in the EU-27 Member States, it appears that there is effectively no competition between countries belonging to different clusters in terms of NSTS values. Romania, both in 2009 and in 2024, was grouped together with 19 and, respectively, 17 other states in the clusters with the lowest NSTS values. Among these, five countries were selected – Bulgaria, Hungary, the Czech Republic, Slovakia, and Slovenia – together with their performance in terms of NSTS.

The results show that, assuming the annual growth indices of NSTS remain unchanged, it would take 5.26 years for Romania to close the gap with Bulgaria, 41.91 years with the Czech Republic, 49.84 years with Hungary, and 16.38 years with Slovenia.

Based on recent specialist literature on international tourism and on the economic realities reflected in quantitative data for the EU-27 Member States, international tourism plays an important role in a country's sustainable economic growth at national, regional, and local levels, at least from three perspectives: foreign currency earnings, employment, and the development of

tourism-related businesses and industries. All these outcomes, however, depend on the intensity of foreign tourist flows, which in turn is shaped by a series of factors: objective ones, such as geographical location, size, tourism potential, and tradition, and policy- and management-related ones, such as the priority given to international tourism, the degree of promotion of tourist attractions, the quality of tourism infrastructure and transport infrastructure in high-potential areas, the quality of services, and, not least, the price–quality ratio. Taken together, these elements make it impossible to expect a convergent trend towards similar tourism flows in all EU-27 countries.

6. Limitations and future research directions:

The study shows that, at least in terms of absolute indicators – namely the number of foreign tourist arrivals (NSTS) and the number of overnight stays of foreign tourists (NITS) in tourist accommodation establishments – there are very large differences between EU-27 Member States, as reflected in the high levels of concentration of both NSTS and NITS. Thus, in 2024, for NSTS, two countries – Spain and Italy – accounting for 7.41% of EU-27 Member States, concentrated 34.80% of total NSTS, and together with France and Germany (in total four countries, i.e. 14.82% of EU-27 states) they accounted for 55.93% of total NSTS, whereas at the opposite end of the spectrum, 18 countries (including Romania) with very low NSTS values (66.67% of EU-27 states) accounted for only 17.94% of total NSTS in the EU-27. A similar situation was observed for NITS.

By contrast, when Romania is compared with two neighboring countries, Bulgaria and Hungary, the values of the absolute indicators (NSTS and NITS) are very telling. In 2024, in terms of NSTS, Romania ranked 21st (2,387,632 arrivals), whereas Hungary ranked 14th (6,113,954 arrivals) and Bulgaria 17th (3,770,036 arrivals), with values 2.26 and, respectively, 1.57 times higher than Romania's. The relatively inefficient use of Romania's tourism potential compared with Bulgaria and Hungary is also highlighted by the amplitude of NSTS during the summer season: in August 2024, the number of foreign tourist arrivals in Bulgaria was 3.13 times higher than in Romania, while in Hungary – a country with a less diversified tourism potential and no seaside – NSTS was 2.87 times higher than in Romania.

The analysis presented in this study is subject to several limitations that should be considered when interpreting the results. First, the empirical approach relies exclusively on official statistical series (Eurostat, INS, etc.), which, although comparable and methodologically harmonized, may incorporate revisions, breaks in series or differences in data collection practices across countries that are only partially documented in the available metadata. Second, the focus on a limited set of quantitative indicators (foreign tourist arrivals, overnight stays, relative and average annual indices, density indicators) does

not fully capture qualitative dimensions of international tourism, such as visitor satisfaction, seasonality patterns beyond annual and monthly aggregates, or the structure of tourism expenditure by segment and product. Third, the analysis is essentially descriptive and comparative; causal relationships between tourism intensity and its potential determinants (infrastructure, policy measures, marketing, geopolitical risks, etc.) have not been formally tested econometrically in this paper.

Future research could therefore proceed in several directions. A first line of inquiry would be to extend the indicator system by integrating additional variables (tourism receipts, average expenditure per visitor, breakdown by purpose of trip and type of accommodation), as well as qualitative indicators derived from surveys or big data sources (online reviews, mobility data). A second direction would be the development of econometric or panel data models to assess the impact of structural and policy factors on the dynamics of international tourism flows, allowing for the identification of the main drivers behind cross-country differences within the EU-27. Third, further studies could adopt a more granular spatial scale (regional or local level) and a finer temporal resolution (seasonal or monthly data) to analyze intra-national disparities and the role of specific destinations or tourism clusters. Finally, scenario-based simulations or forecasting exercises could be used to evaluate alternative policy options aimed at improving Romania's position in the European tourism market, under different assumptions regarding investment in infrastructure, marketing efforts, or changes in global demand.

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