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Comparative Analysis between Romania, Bulgaria and Hungary's Tourism Activity

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Abstract *The tourism industry is composed of a set of organizations involved in meeting the needs of tourists. These organizations are extremely diverse and are part of several categories, including the public sector, the private sector, and professional associations. Thus, the main structures involved in the tourism industry are transportation, accommodation, tour operators and retail travel agents, restaurants, entertainment, leisure facilities. The importance of the tourism industry is reflected in its contribution to the country's economic development through GDP growth and employment. The present article aims to carry out a comparative analysis of Romania, Bulgaria and Hungary on tourism activity. The balance of payments for tourism, the analysis of the tourists' receipts and expenditures, their strengths in tourism and the calculation of the relative tourism preferences, for the three countries are considered.*

Key words Tourism, arrivals, receipts, tourism balance of payments, preferences

JEL Codes: L83, Z3, Z32

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1. Introduction

Recent developments in the tourism sector from CEE have increased competition in the region. Among the many countries which tried to diversify their tourism activities we focused on Romania, Hungary and Bulgaria. Our interest lies in the fact that these three countries have a strategic location in the South East part of Europe, Bulgaria and Romania having a strategic location to the Black Sea. From the tourism point of view economic development prospects are under consideration with positive effect on local communities, work force and local authorities. For the realization of the paper we have chosen for the comparative analysis, countries of comparable economic power, which present the possibility of practicing different forms of tourism, countries of the European Union that compete for the attraction of potential tourists. Romania can learn, and in turn it can be an example to be followed for the analysed countries, Bulgaria and Hungary.

In Central and Eastern Europe, arrivals increased by 4% in 2016 (UNWTO Tourism Highlights, 2017). Many destinations in this area of Europe enjoyed strong growth in 2016. This is the case for Romania (11% growth over 2015), Hungary (+ 16%) and Bulgaria (+ 7%). International tourists' arrivals in 2016 were estimated at 2.5 million for Romania, 8.2 million for Bulgaria and 13.4 million for Hungary (UNWTO World Tourism Barometer, 2017). Only one year later, in 2017, the international tourists' arrivals were estimated at 2.8 million for Romania, 8.9 million for Bulgaria and 16 million for Hungary (UNWTO World Tourism Barometer, 2018).

2. Literature review

Romania

Tourism in Romania focuses on several forms of tourism, such as seaside tourism, mountain tourism, balneary tourism, and cultural tourism. Romania has an area of 238397 km² and a population of 19.71 million inhabitants. Located in South-Eastern Central Europe, on the lower course of the Danube, north of the Balkan Peninsula and on the northwest shore of the Black Sea, we find the Danube Delta and the southern and central part of the Carpathian Mountains (Iorio and Corsale, 2010). The climate is a basic condition for practicing some forms of tourism: winter sports through presence, consistency and maintenance of the snow layer, heliomarine cure, climatotherapy (Zaharia *et al.*, 2018). Mineral waters are the main natural cure factor in Romania, to which an important part of Romania's spa activity is connected. They are mainly located between the hill contact area and the mountain ranges (Covasna, Tusnad, Călimănești, Baile Herculane, and Vatra Dornei).

Romania disposes of important reserves of therapeutic sludges, which according to their origin and their physical and chemical qualities are divided into three categories: sapropelic - black, sulphurous, specific to the lakes: Techirghiol, Amara, Lacul Sarat, Sovata, Ocna Sibiului, Ocnele Mari and the Black Sea, spring minerals from Sângeorz-Bai, Baile Felix; chemically decomposed peat: Borsec, Tusnad, Mangalia (Botezat and Benea, 2012).

Rich in aero-ionization, predominantly negative, has beneficial effects on the human body primarily by sedation, thus increasing the spa value of a resort. In Romania, aero-ionization has moderate values, but there are areas where they are much higher (Baile Felix, Borsec, Moneasa, Baile Herculane). The main attractions are the fortified churches of Transylvania (included in UNESCO's patrimony): Biertan (Birthälm), Calnic (Kelling), Darjiu (Dersch), Prejmer (Tartlau), Saschiz (Keisd), Valea Viilor (Wurmloch) and Viscri (Deutschweisskirch) (Cristea et al. 2015); Bucharest (the capital, with Parliament Palace); Monasteries of Bucovina, Sibiu, Sighisoara, Alba-Iulia fortress, Peles Castle. The forms of tourism that can be practiced: relaxation and recreation tourism (Sinaia), mountain hikes (on trails marked up to 1400, Poiana Stanei, Varful cu Dor, Valea Dorului, Piatra Arsă, Cota 2000, Piatra Arsă, Piscu Câinelui), summer and winter sports on the Prahova Valley, cultural tourism, business tourism, transit tourism, city breaks, spa tourism (Jucu, 2014).

Bulgaria

It features 30,000 historical monuments, out of which 7 are included in the UNESCO World Patrimony, 36 cultural sites, 160 monasteries, 330 museums and galleries. The area of Bulgaria is 110,994 km² and the population of this country is of 7, 13 million inhabitants. Tourism is an important economic sector of Bulgaria, contributing with approximately 5% to the Gross Domestic Product. The Bulgarian Black Sea seafront, 380 km long, is famous for its fine and wide beaches, golden sands, bays with steep banks and submarine caves. The mountains occupy 28% of Bulgaria's territory, and in the southwest of the country there are three famous winter resorts around the world (Bansko, Borovets, Pampovo). Other forms of tourism in continuous development are rural, ecological and spa.

Bulgaria has always been on the TUI map, Thomas Cook-Neckermann, Dertour or ITS. These tour operators have granted loans for the renovation of some hotels (in Albena), guaranteed a great flow of tourists, at very good prices, and advise the Bulgarians on introducing attractive all-inclusive services (Bachvarov, 1997). Bulgaria has a coastline with a total length of approximately 370 km, out of which not less than 130 km of sandy beaches. Romania has 244 km of shoreline of the Black Sea, out of which only 70 km are usable for the seaside tourism, namely "Romanian Black Sea Riviera", from Vama Veche to Năvodari, because the rest of the shore is in the Delta area, unusable, with few exceptions (Gura Portiței) for seaside tourism. Bulgaria's geographic benefits do not stop at the shoreline and beaches, but also at temperatures. In Bulgaria, the average annual seas temperatures are about 3 degrees higher in winter - spring and with 1-2 degrees higher in summer-autumn, compared to the Romanian seaside.

In addition, in the southern part of Burgas, up to the border with Turkey, the Bulgarian seaside already has a Mediterranean climate. This diversity is good for tourism, especially south or south-west orientation is very good for coastal tourism, for many reasons, such as permanent sun exposure, but also to protect beaches from cooler and windy temperatures. The Black Sea bays are non-existent in Romania, but quite widespread on the Bulgarian seaside (at Balchik, Varna, Burgas, Sozopol, Nessebar, Chernomoreet or Pomorie) and allows for pleasant boats or yachts trails, and "natural harbours" to anchor. Regarding the tourist attractions of Bulgaria, the first on the list is Veliko Tarnovo, the town of the tsars (180 km away from Bucharest), the Hotnitsa Paradise, Bansko and Borovets mountain resorts, the Rila Monastery, the spiritual centre of Bulgaria, Golden Sands (Zlatni Pyasatsi), Krupetz Beach, Balchik, Albena and Sofia.

The program of most clubs, restaurants and terraces is quite small and this can be a pretty serious problem, especially among young people who are basically dependent on nightlife, especially when they are on vacation. Over time, there was a rather low degree of tourists' security. A problem that most tourists face is the absence of road signs in English. It is quite difficult for foreign tourists to travel on Bulgarian roads, given that most traffic signs are not translated into the international language. Thus, the only solution for drivers is GPS to reach the desired destination. Also in the communication chapter is the difficulty of communicating with the Bulgarians because there are not many that who know English. Such a problem is very affecting on the Bulgarian tourism because it is proved that the problems of communication are those that have the greatest impact on the inter-human relations, especially in the tourism field (Vladimirov, 2012).

Hungary

Hungary is a state located in the centre of Europe, in the Pannonian Plain and at the southern foothills of the Inner Western Carpathians, at an equal distance from the Atlantic Ocean, the Ural Mountains, the Mediterranean Sea and the North Sea respectively. In its territory is located almost the whole area of the Pannonia Plain, which includes Hortobágy National Park, listed on the UNESCO World Heritage List. Hungary has an area of 93030 km² and a population of 9.818 million inhabitants. Crossed by the Danube, which crosses the capital of Budapest, dividing the city into two areas with distinct personalities, Hungary also provokes the visitor with other places and beautiful areas that many Romanians, especially from the west and the centre of the country, had the opportunity to visit either on vacations, or going to other Western countries (Ujházy and Biró, 2018).

Hungary has a varied landscape, including medium-altitude mountains, classical regions such as Lake Balaton, the Tokaj wine region and the Hortobágy National Reserve, which is one of Europe's well-kept plains. A special role in tourism in Hungary is the form of rural tourism, which highlights the multi-sectoral traditions of well-preserved rural areas (Perrone *et al.*, 2018). The special tourist attractions in Hungary are: Cave Bath from Miskolctapolca, Gyula Aqua Palace Baths, Eger Castle (only 90 minutes from Budapest), Budavári Labirintus. Hungary is undoubtedly a country of contrasts. It is the host of many festivals that help us realize that these contrasts exist. It is a country where you will find festivals in small villages and rituals that have not changed almost at all through the centuries. But it is still the country that has offered to the world some illustrious musicians, artists with a pleasing impact on the world. For many tourists from other continents, Hungary is largely Budapest, and this capital offers among the finest European festivals.

For example, every two years (only in the even years), in January and February, you can find the International Circus Festival in Budapest. It's a breath taking show, especially if you love a real show of entertainment. In March or April, you will find the Titanic International Film Festival, which brings together world-renowned names. But Budapest is not the only city in Hungary where you can enjoy such events. The country has an extended tradition in folk music and is very proud of this culture that is reflected in a multitude of other festivals. In fact, every part of Hungary has its own folklore.

3. Methodology of research

The methodology of the research was based on the collection and interpretation of statistical data provided by specialized entities in the field of tourism: WWTC (World Travel & Tourism Council), UNWTO (The World Tourism Organization), Romanian Statistical Yearbook different editions. There are secondary data used for the project collected and interpreted, statistical and mathematical formulas: relative tourism preference and annual averaged growth. Calculations made by authors were done in excel Microsoft.

4. Results and discussions

4.1. Comparative analysis of receipts, expenditure and balance of payments for Bulgaria, Hungary and Romania

First of all, we take into consideration the receipts from international tourism for the three countries. Hungary ranks first with 5 billion Euros in international tourism, Bulgaria ranks second with 3 billion euros and Romania comes up with 1.6 billion Euros. The question is: *Why does Romania receive modestly from international tourism?* Among the main arguments would be: slow development of infrastructure to tourist resorts, labour force without specialized studies in the field, seasonal and uninvolved, precarious legislation and burdened by restrictions, taxes, tolls, fiscal policy (Marin-Pantelescu, 2009).

Table 1. Travel receipts and expenditure in balance of payments, 2011–2016

	Receipts		Expenditure		Balance	
	(million EUR)		(million EUR)		(million EUR)	
	2011	2016	2011	2016	2011	2016
EU	86767	112299	87031	99054	-264	13245
Bulgaria	2669	3285	647	1227	2022	2058
%	3.07	2.9	0.7	1.2		
Ungaria	4243	5121	1781	1954	2462	3167
%	4.9	4.6	2.0	1.97		
Romania	1019	1568	1408	1930	-389	-362
%	1.2	1.4	1.6	1.95		

Source: data retrieved and processed after Eurostat (2017). http://ec.europa.eu/eurostat/statistics-explained/images/f/f2/Travel_receipts_and_expenditure_in_balance_of_payments%2C_2011%E2%80%932016.png

In terms of spending, Romania is close to Hungary with 1.9 billion Euros in 2016, while Bulgaria has 1.2 billion Euros. The tourism payroll balance is minus for Romania with 362 million Euros, while the tourism balance for Hungary is up by about 3 billion euros, and for Bulgaria another plus of 2 billion Euros. At the level of 2016, Hungary held 4.6% of total international tourism revenues from EU countries, Bulgaria 2.9%, and Romania 1.4%. In terms of spending on international tourism, Romania held 1.95% of total tourism spending in the European Union in 2016.

4.2. Comparative analysis of arrivals of international tourists in Romania, Bulgaria and Hungary

Our analysis is based on the calculation of the Compound Annual Growth Rate. The compound annual growth rate (CAGR) shows how much the international tourist arrivals needs to grow every year to get from the initial value to the ending value, assuming that compounding occurs. The formula for the CAGR is:

$$CAGR = [(Ending\ value / Beginning\ value)^{(1/n-1)}] - 1 \tag{1}$$

Where n represents the number of years taken into consideration for statistical analysis

Using the above example, the CAGR for Hungary equals:

$$CAGR = [(13,474/ 10,250)^{1/(6-1)}] - 1 = 1.0562 - 1 = 0.0562, \text{ or } 5.62\%$$

The CAGR for Bulgaria equals:

$$CAGR = [(8,252/ 6,328)^{1/(6-1)}] - 1 = 1.0545 - 1 = 0.0545, \text{ or } 5.45\%$$

The CAGR for Romania equals:

$$CAGR = [(2,471/ 1,515)^{1/(6-1)}] - 1 = 1.1028 - 1 = 0.1028, \text{ or } 10.28\%$$

Table 2. International tourist arrivals, 2011-2016

Countries	Type of indicator	2011	2015	2016	Compound Annual Growth Rate 2011 to 2016	Growth rate 2015 to 2016
		Thousand	Thousand	Thousand	%	%
Hungary	Tourists	10 250	14 316	13 474	5.62	-5.88
Bulgaria	Tourists	6 328	7 099	8 252	5.45	16.24
Romania	Tourists	1 515	2 235	2 471	10.28	10.56

Thus, the compound annual growth rate of Hungary International tourist arrivals is equal to 5.62%, representing the smoothed annualized tourists Hungary gain during 2011-2016. The highest annual average increase was registered in Romania (10.28%) for the period of 2011-2016. Bulgaria and Hungary have a close average annual growth (5.45% and 5.62% respectively). In the top of tourism preferences Romania comes strongly from behind.

Calculating the year-to-year increase, respectively 2016/2015, there is a significant increase of 16% for tourism in Bulgaria, an important increase of 10.56% for Romania and a 6% decrease for Hungary. The tourist flows are constantly looking for new, unique places and experiences. Bulgaria has always been noted for its all-inclusive seaside holidays (Albena, Golden Sands), mountain resorts for ski slopes (Bansko), Romania is also very strong with the seaside, mountain area, cultural tourism (such as Transylvania and Maramures), a combination of religious and cultural tourism (see Bucovina), Hungary is famous for its spa and wellness tourism, as well as business tourism, and cruises on the Danube. Romania has to learn from the example of neighbouring countries: from Bulgarians to perfect their seaside tourism offers, from Hungary to improve their Danube cruise tourism and spa tourism.

4.3. Relative preference for tourism (comparison between Romania, Bulgaria and Hungary)

Tourism indicators show in mathematical expression information on various aspects of tourism activity, useful information for measuring the phenomenon and its effects. Anticipation of trends in tourism development is explained by the relative tourism preference indicator (Pr). The relative preference for tourism renders accurate analysis of touristic activities and expresses the proportion - compared to the total tourist issue of a country- of those who choose a particular country as a holiday destination (Moyle *et al.*, 2017). For each country, there are executed judgements on several years, series of indicators (relative preferences) are built, and with the help of their trend, forecasts of the orientation of tourist flows can be made. The relative preference for tourism or for a tourist destination is an expressive indicator for international circulation. It is an indicator that characterizes the flow of tourists between two countries.

$$P_r = \frac{\text{the number of tourist from X country who arrived in Y country}}{\text{the total number of tourists who left X country}} \times 100$$

Regarding outbound tourism, Hungary annually sends 1 million tourists across borders, with tourism as the main reason. The most popular destinations for Hungarian tourists include Germany (956,000 tourists), Austria (848,000 tourists), Romania (793,000), Slovakia (674,000 tourists) and Czech Republic (544,000).

Furthermore, we calculated the relative tourism preference of tourists from Hungary to Romania at the level of each year (2012-2016). Data is centralized in Table 4. The preference of Hungarian tourists for Romania in 2012-2016 has fluctuated from year to year, so in 2016, 12 out of 100 Hungarian tourists preferred Romania as a holiday destination. On average, 10 out of 100 Hungarian tourists prefer Romania as a holiday destination. It is a favourable thing and we want to make every effort to attract as many tourists from Hungary.

Table 3. Hungary: Outbound tourism

Tourism flows, thousand

Outbound tourism	2012	2013	2014	2015	2016
Total international departures	7 737	8 191	8 933	9 705	10 168
Overnight visitors (tourists)	4 267	4 339	4 927	5 720	6 303
Same-day visitors (excursionists)	3 470	3 852	4 006	3 985	3 865
Top destinations					
Austria	571	602	741	818	848
Germany	610	640	686	812	956
Slovak Republic	226	356	476	642	674
Romania	432	362	437	619	793
Czech Republic	324	398	522	473	544

Source: OECD Tourism Statistics (Database). OECD Tourism Trends and Policies (2018)

Table 4. Tourist preference from Hungary for Romania

	2012	2013	2014	2015	2016
P_r = Hungarian tourists who visit Romania/ Hungary overnight visitors (tourists)	432/4267	362/4339	437/4927	619/5720	793/6303
%	10.10	8.34	8.87	10.82	12.58
Average P_r	10.14				

Source: calculated by the authors using data from Table 3

Table 5. Bulgaria: Outbound tourism

Tourism flows, thousand

Outbound tourism	2012	2013	2014	2015	2016
Total international departures					
Overnight visitors (tourists)	3 758	3 930	4 158	4 632	5 392
Same-day visitors (excursionists)					
Top destinations					
Turkey	1 091	1 061	1 107	1 242	1 219
Greece	790	829	867	1 043	1 201
Romania	318	308	322	333	423
Serbia	302	300	316	315	405
Former Yugoslav Republic of Macedonia	362	316	327	316	360

Source: OECD Tourism Statistics (Database). OECD Tourism Trends and Policies (2018)

Table 6. Tourist preferences from Bulgaria for Romania

	2012	2013	2014	2015	2016
P_r = Bulgarian tourists who visit Romania / Bulgaria overnight visitors (tourists)	318/3758	308/3930	322/4158	333/4632	423/5392
%	8.46	7.84	7.74	7.19	7.84
Average P_r	7.81				

Source: calculated by the authors using data from Table 5

Table 7. Romania: Outbound tourism

Tourism flows, thousand

Outbound tourism	2012	2013	2014	2015	2016
Total international departures	9 874	10 608	11 307	11 153	9 895
Overnight visitors (tourists)	9 474	10 228	11 021	10 988	9 782
Same-day visitors (excursionists)	399	380	286	165	113
Top destinations					
Greece	147	98	106	137	136
Bulgaria	139	101	86	111	133
Turkey	197	117	105	99	103
Spain	122	53	56	60	65
Italy	..	45	37	47	52

Source: OECD Tourism Statistics (Database). OECD Tourism Trends and Policies (2018)

The Bulgarians' preference for Romania is higher than the Romanians' preference for Bulgaria as shown in the calculations. If, on average, 8 out of 100 Bulgarians prefer Romania as a holiday destination, only 1.12 out of 100 Romanians prefer Bulgaria as a holiday destination.

Table 8. Tourist preference from Romania for Bulgaria

	2012	2013	2014	2015	2016
P_r = Romanian tourists who visit Bulgaria/ Romania overnight visitors (tourists)	139/9474	101/10228	86/11021	111/10988	133/9782
%	1.47	0.99	0.78	1.01	1.36
Average P_r	1.12				

Source: calculated by the authors using data from Table 7

The total Romanian Travels abroad for holidays and business, by destination country was 1,186,452 in 2015 and 1,092,722 in 2016. Annually more than 152 thousand Romanian tourists travel abroad for holidays and business in Bulgaria according to Romanian Statistical Yearbook 2017 (National Institute of Statistics). As we can observe in table no.9, we had in 2017 118 thousand Romanian travels abroad for holidays and business in Hungary. In 2016, Romanian Travels for holidays in Bulgaria were 150 thousand and in Hungary 106 thousand.

When we calculate the Romanians' preference for Bulgaria using the data from Sample statistical survey "Tourism demand of the residents in Romania", Romanian Statistical Yearbook 2017, we can notice that around 17 out of 100 Romanians prefer Bulgaria as a holiday destination in 2015, and 15 out of 100 Romanians prefer Bulgaria as a holiday destination in 2016. Romanian Travels for business in Bulgaria in 2016 only 1.41%, on the other hand Romanian Travels for business in Hungary in 2016 were 13%.

Table 9. Romanian Travels abroad for holidays and business, by destination country

	Total Romanian Travels (no.)		Romanian Travels for holidays (no.)		Romanian Travels for business (no.)	
	2015	2016	2015	2016	2015	2016
Total	1186452	1092722	1065010	1000025	121442	92697
Bulgaria	184617	152427	180693	150546	3772	1304
P_r	15.56	13.95	16.97	15.05	3.11	1.41
Hungary	102718	117934	93607	105920	9111	12014
P_r	8.66	10.79	8.79	10.59	7.50	12.96

Source: Sample statistical survey "Tourism demand of the residents in Romania", Romanian Statistical Yearbook 2017, National Institute of Statistics, printed in 2018

Between Romania and Bulgaria in 2011, strategic partnerships were signed between the tourism and culture sectors. We mention: European Cultural Routes in the Middle and Lower Danube Region - a project to create the Roman Emperors Route and the Danube Wine Route linking points of cultural and ethnological heritage in Bulgaria, Croatia, Romania and Serbia; Collaboration between Bulgaria and Romania in establishing a joint tourism information centre in China, focusing on cultural and historical tourism, wellness tourism and festivals. Bulgaria is also further strengthening cross-border cooperation with Greece and Romania in the sustainable use of heritage and natural resources through the Interreg V program, with the Former Yugoslav Republic of Macedonia, Serbia and Turkey through the European Union Pre-Accession Assistance.

5. Conclusions

In terms of international tourism receipts, Hungary ranks first, with € 5 billion in international tourism; on the second place is Bulgaria, with € 3 billion, followed by Romania with 1.6 billion Euros. In terms of spending, Romania is close to Hungary with 1.9 billion Euros in 2016, while Bulgaria has 1.2 billion Euros. The tourism payroll balance is on minus for Romania with 362 million Euros, while the tourism balance for Hungary is up by about 3 billion Euros, and for Bulgaria another plus of 2 billion Euros. The arrivals of international tourists are 13 million for Hungary, 8 million for Bulgaria and 2.5 million for Romania. The highest annual average increase was registered by Romania (10.28%) for the period 2011-2016. Bulgaria and Hungary have a close average annual growth (5.45% and 5.62% respectively). In the top of tourism preferences Romania comes strongly from behind. The entire tourist activity in Romania is on an upward trend both in arrivals and receipts from international tourism and it is up to all actors involved in this field to collaborate for the development and sustainability of tourism in Romania.

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