

## ANALYZING THE MOUNTAIN TOURISM DEMAND IN ROMANIA OVER THE LAST TWO DECADES

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**Abstract:** *Mountain tourism demand fluctuated predominantly downward in the last two decades, as a result of some complex economic, social, and political changes. Tourism demand for the Romanian mountain destinations in the last two decades has been analyzed in quantity and evolution, by processing (also graphically) and interpreting the specific tourism indicators (tourist arrivals, tourist structure, tourists' preference for accommodation, overnight stays, average length of stay, accommodation occupancy rate), also making comparisons with the situation at national level. Mountain tourism demand is an important segment of tourism demand (domestic and international) in Romania, with shares between 13.19% (minimum in 1994) and 15.63% (maximum in 2013). The mountain area is ranked second most popular for the Romanian tourists and third place for the foreign tourists. Tourist arrivals in the mountain area recorded the following variations: a period of sharp decline (1994-2002) with a minimum in 2002 (700,000 tourists), a period of growth (2003-2008) with values around 1 million tourists in 2007 and 2008, a decrease of 100,000 tourists corresponding to the economic crisis in 2008-2009, followed by a period (2010-2014) of strong revival with the maximum value of the entire analyzed period (nearly 1,3 million tourists in 2014). The fluctuations of overnight stays were directly proportional to those of arrivals. The increasing demand for mountain destinations resulted from a better promotion of winter sports in recent years, a revival ("fashion") of Romanians' preferences for winter sports practicing; in parallel, a number of ski areas were arranged or redesigned in many traditional 'white' resorts, and several smaller centers for winter sports emerged or were re-launched. Tourists' preferences for the mountain accommodation units such as boarding houses, villas and chalets reflected the characteristics of the mountain tourism activities and the corresponding accommodation facilities. In case of accommodation comfort degree, most tourists preferred the 3 or 4 star units. The average length of stay in mountain destinations recorded a downward trend, from more than 3 days in the period 1994-1998, to a long period of stagnation at 2.2 days in the past 7 analyzed years (2008-2014). Tourism density in the Romanian Carpathians in 2014 registered almost 2 tourists / sq.km. The accommodation occupancy rate showed a decreasing trend with stagnant periods in the analyzed period, reaching 18% in 2014. That decrease was the result of reducing travel demand until 2003, but after that period there were many and complex causes: management changes in many resorts, poor management of the companies and stakeholders involved, as well as tax evasion in tourism.*

**Keywords:** *tourism indicators; mountain tourism demand; Romanian mountain destinations.*

**JEL classification:** L83

### 1. Introduction

The demand for mountain areas represents an important segment of tourism demand in Romania. It has fluctuated predominantly downward in the last two decades, as a result of some complex economic, social, and political changes. The purpose of this paper is to analyze in terms of quantity and evolution the specific indicators of tourism demand for the Romanian mountain area in the last two decades, to draw relevant conclusions on the causes of its oscillations, and to make comparisons with the situation at national level.

The information derived from statistical sources are the starting point in the documentary process requested by a prospective study of tourism demand, especially regarding the quantitative side (Cocean and Dezsi, 2001). The statistical analysis of tourism demand is a method that traces the evolution of some indicators (volume, structure, distribution, density, territorial distribution and evolution of tourism demand over time, noticed trends and changes), but it is also useful in researching the origin and destination of tourists, the travel motivation, the average stay, or their loyalty to a particular destination.

The indicators of tourism demand are part of the system of tourism flow indicators and include: the number (arrivals) of tourists, the number of days-tourist (overnight stays), the average length of stay, the tourism flow density, the seasonality of tourism activity, the relative preference of tourists (Niță and Niță, 2008; Stănciulescu and Micu, 2009).

## **2. Materials and Methods**

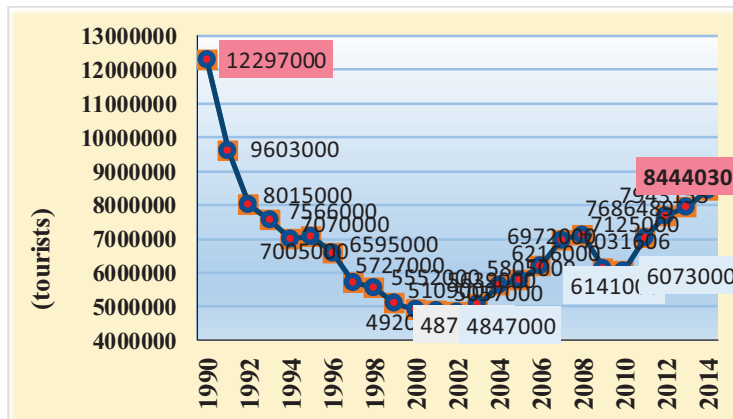
This approach is a first step in analyzing the tourism activity in the Romanian Carpathians over the last 25 years. This paper relies on studying the mentioned references and on processing the statistical data published by the National Institute of Statistics (the chapters referring to tourism in the Romanian Statistical Yearbooks; Romanian Tourism. Statistical Compendium, 2014; Travel Series, No.4/2014), into pertinent conclusions. In this study, we analyzed, processed and interpreted the most significant indicators of tourism demand (tourist arrivals and their structure, overnight stays, average length of stay, tourism flow density), as well as indicators of the relation supply-demand (accommodation occupancy rate). For each calculated indicator we made suggestive diagrams using the method of graphical modeling and the application Microsoft Office Excel. Then we interpreted the graphs and data tables to conclude on the evolution and structure of the main indicators for the mountain tourism demand, while making comparisons with the situation at national level.

## **3. Research Results**

The *number of tourists* (visitors) or *tourist arrivals* is the most important indicator of tourism flow (Stănciulescu and Micu, 2009). This is a physical, quantitative indicator, analyzed in evolution (over a period of 25 years) at national level and structured by types of destinations (to make comparisons with the mountain area), by origin of tourists (domestic and international), or by their preference for accommodation.

This indicator recorded some noticeable oscillations over the past 25 years (Figure 1, Table 1). It decreased significantly between 1990-2003: from a peak of 12.2 million tourists in 1990, to almost two-thirds lower values in the coming years (1992-1995), followed by another period of constant decline from year to year (1996-2002), with values fluctuating at around 5 million tourists to the end of that period (and a minimum of 4.8 million tourists in 2002). The causes were complex - economic, social and political – and related to the post-communist transition period: decreasing standard of living for the resident population (unemployment, low income) higher tourism tariffs, decreasing quality of services in many Romanian resorts, political instability, insufficient promotion of tourism on foreign markets (Țigu G., 2001), improper coordination of tourism nationally (frequent changes within the Ministry of Tourism, incomplete tourism legislation).

Since 2003 there has been a steady increase in tourist arrivals to more than 7 million tourists in 2008. Growth in the period 2003-2008 was due to rising incomes and living standards of the resident population. In 2009 and 2010, the value dropped suddenly with 1 million tourists compared to previous years, due to the economic crisis.



**Figure 1:** Evolution of tourist arrivals in Romania over the last 25 years (1990-2014)  
 Source: own processing using the application Microsoft Excel

There was a significant increase of arrivals (over 0.5 million tourists yearly) starting with the year 2011 (a worldwide trend, noting that only in 2009 there was a fall in international tourist arrivals). Thus, 2014 recorded the highest value of the last 23 years: 8.4 million tourists (a value close to the period 1991-1992), a surprising revival of the Romanian tourism. In 2014, the annual growth rate of arrivals was also high: 6.3% overall, 5.3% for the Romanian tourists and 11.5% for the foreign tourists. In the period 2011-2014, the annual growth rate of arrivals in mountain destinations was significantly higher (from 10.72% to 19.76%) than the national average, an encouraging fact for the Romanian mountain tourism. This high demand for mountain destinations resulted from a better promotion of winter sports in recent years, a revival ("fashion") of Romanians' preference for winter sports practicing; in parallel, a number of ski areas were arranged or redesigned in many traditional 'white' resorts (Poiana Braşov, Sinaia, Predeal, Buşteni, Păltiniş), with the emergence or re-launching of several smaller centers for winter sports (Râncea, Vidra, Arieşeni, Şuitor, Parâng, Straja, etc.).

**Table 1:** Evolution and structure of tourist arrivals in Romania compared to the mountain destinations, over the last 20-25 years (1990 / 1994-2014)

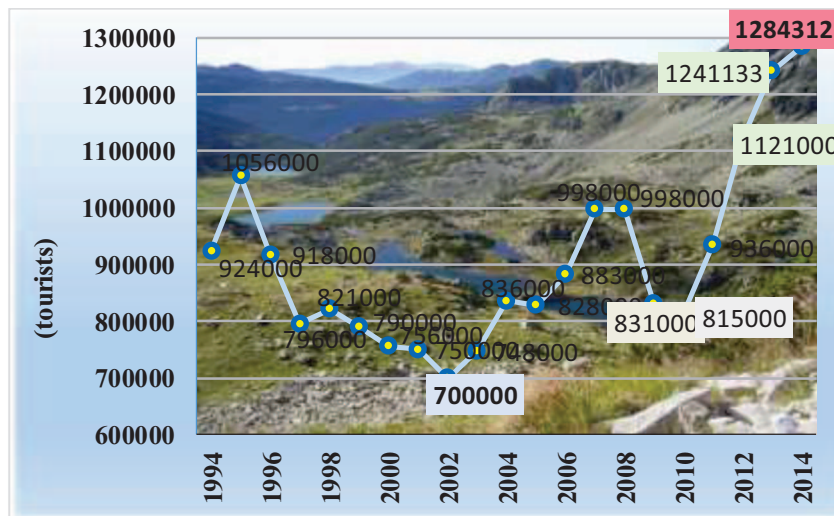
Tourist arrivals in Romania					Tourist arrivals in mountain destinations					
Year	Total tourist arrivals in Romania	Annual change (%)	Romanian tourist arrivals	Foreign tourist arrivals	Year	Total tourist arrivals in mountain destinations	Annual change (%)	Share of total tourist arrivals in Romania	Romanian tourist arrivals	Foreign tourist arrivals
1990	12,297,000	-	10,865,000	1,432,000	1990	*	*	*	*	*
1991	9,603,000	-21.91	8,309,000	1,294,000	1991	*	*	*	*	*
1992	8,015,000	-16.54	6,830,000	1,185,000	1992	*	*	*	*	*
1993	7,566,000	-5.60	6,718,000	848,000	1993	*	*	*	*	*
1994	7,005,000	-7.41	6,149,000	856,000	1994	924,000	*	13.19	859,000	65,000
1995	7,070,000	0.93	6,310,000	760,000	1995	1,056,000	14.29	14.94	984,000	72,000
1996	6,595,000	-6.72	5,833,000	762,000	1996	918,000	-13.07	13.92	856,000	62,000
1997	5,727,000	-13.16	4,894,000	833,000	1997	796,000	-13.29	13.90	723,000	73,000
1998	5,552,000	-3.06	4,742,000	810,000	1998	821,000	3.14	14.79	744,000	77,000
1999	5,109,000	-7.98	4,314,000	795,000	1999	790,000	-3.78	15.46	718,000	72,000

2000	4,920,000	-3.70	4,053,000	867,000	2000	756,000	-4.30	15.37	668,000	88,000
2001	4,875,000	-0.91	3,960,000	915,000	2001	750,000	-0.79	15.38	662,000	88,000
2002	<b>4,847,000</b>	-0.57	3,848,000	999,000	2002	<b>700,000</b>	-6.67	14.44	602,000	98,000
2003	5,057,000	4.33	3,952,000	1,105,000	2003	748,000	6.86	14.79	650,000	98,000
2004	5,639,000	11.51	4,280,000	1,359,000	2004	836,000	11.76	14.83	720,000	116,000
2005	5,805,000	2.94	4,375,000	1,430,000	2005	828,000	-0.96	14.26	715,000	113,000
2006	6,216,000	7.08	4,836,000	1,380,000	2006	883,000	6.64	14.21	786,000	97,000
2007	6,972,000	12.16	5,421,000	1,551,000	2007	998,000	13.02	14.31	879,000	119,000
2008	7,125,000	2.19	5,659,000	1,466,000	2008	998,000	0.00	14.01	893,000	105,000
2009	6,141,000	-13.81	4,865,000	1,276,000	2009	831,000	-16.73	13.53	750,000	81,000
2010	<b>6,073,000</b>	-1.11	4,727,000	1,346,000	2010	<b>815,000</b>	-1.93	13.42	728,000	87,000
2011	7,031,606	15.78	5,514,907	1,516,699	2011	936,000	14.85	13.31	839,000	97,000
2012	7,686,489	9.31	6,030,053	1,656,436	2012	1,121,000	19.76	14.58	1,008,000	113,000
2013	7,943,153	3.34	6,225,798	1,717,355	2013	1,241,133	10.72	15.63	1,113,959	127,174
2014	<b>8,444,030</b>	6.31	<b>6,532,213</b>	<b>1,911,817</b>	2014	<b>1,284,312</b>	3.48	15.21	<b>1,152,298</b>	<b>132,014</b>

Source: own processing of the data taken from the Romanian Statistical Yearbooks (2005-2014), National Institute of Statistics ([www.insse.ro](http://www.insse.ro)); \* Not available data

Mountain tourism demand is an important segment of tourism demand (domestic and international) in Romania (Țigu G., 2001), with shares between 13.19% (minimum in 1994) and 15.63% (maximum in 2013). The mountain area is ranked second most popular for the Romanian tourists and third place for the foreign tourists. The evolution of tourist arrivals in the mountain area was oscillating (Figure 2, Table 1) in the analyzed period (1994-2014), corresponding to the situation at national level stated above: a period of sharp decline (1994-2002) with a minimum in 2002 (700,000 tourists), a period of growth (2003-2008) with values around 1 million tourists in 2007 and 2008, a decrease of 100,000 tourists corresponding to the economic crisis in 2008-2009, followed by a period (2010-2014) of strong revival with the maximum value of the entire analyzed period (nearly 1,3 million tourists in 2014).

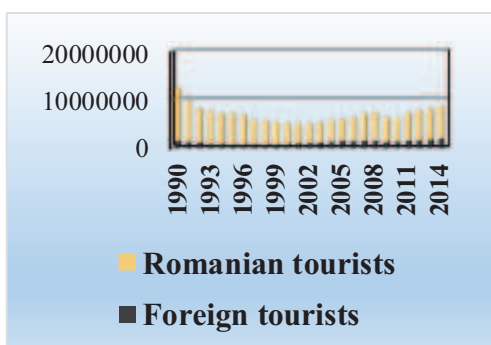
Tourism flow to mountain area has higher values than those in the official statistics, since we should add other categories such as trippers, tourists staying in their own accommodation facilities, unauthorized and unapproved facilities, at their relatives or friends, etc. (Țigu, 2001).



**Figure 2:** Evolution of tourist arrivals in Romanian mountain destinations, over the last 21 years (1994-2014)

Source: own processing using the application Microsoft Excel; own photo of the glacial lakes Lia, Ana, Viorica, Florica in Retezat Mountains National Park

There were also differences between the Romanian and foreign tourists' preferences by destination (Figures 3, 4; Tables 1, 2): the foreign tourists preferred urban destinations (77.72%) and only 6.91% mountain destinations, while the Romanian tourists' preferences were more diversified (43.17% urban tourism, 17.64% mountain destinations, 10.96% seaside resorts, 9.51% spa resorts). The share of foreign tourists in mountain areas was considerably lower than that on national level, even half this value from 2006 until 2014, suggesting their lowering demand for the Romanian mountain areas (compared to the urban destinations they preferred). The Romanian mountain destinations recorded over 100,000 foreign tourists only in 2004, 2005, 2007, 2008 and in the last three analyzed years - 2012, 2013 and 2014 with 132,014 arrivals (the historical peak, registered not only for the mountain tourism, but also for the entire country). In consequence, the mountain is ranked second most popular destination for the Romanian tourists and third for the foreign ones.



**Figure 3.** Evolution and structure of tourist arrivals in Romania over the last 25 years (1990-2014)

Source: own processing using the application Microsoft Excel; own photo of upper ski area in Azuga mountain resort



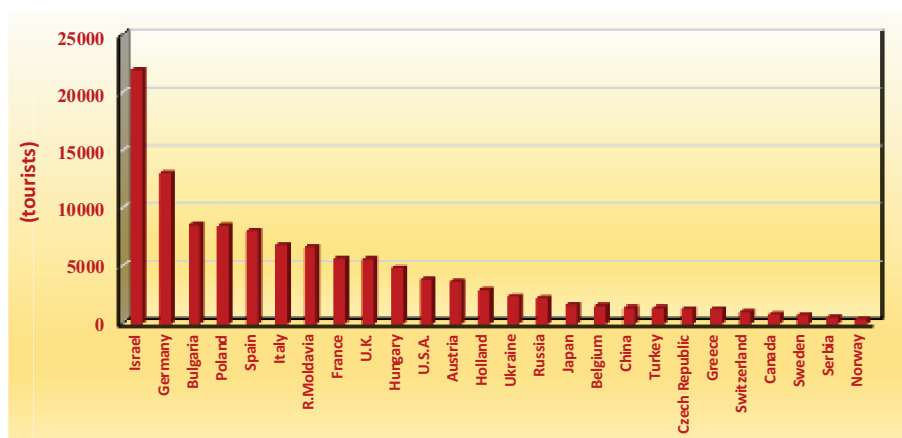
**Figure 4.** Evolution and structure of tourist arrivals in mountain area, in the period 1994-2014

**Table 2: Structure of tourist arrivals by destination in Romania (2014)**

2014	u.m.	Total	Sea resorts (except for Constanța)	Spa resorts	Mountain resorts	Danube Delta, including Tulcea	Bucharest and county capitals	Other destina- tions
Arrivals	thou	8,444,030	747,103	654,519	1,284,312	65,604	4,306,134	1,386,358
	%	100	8.85	7.75	15.21	0.78	51.00	16.42
Foreign tourists	thou	1,911,817	31,325	33,562	132,014	13,482	1,485,908	215,526
	%	100	1.64	1.76	6.91	0.71	77.72	11.27
Romanian tourists	thou	6,532,213	715,778	620,957	1,152,298	52,122	2,820,226	1,170,832
	%	100	10.96	9.51	17.64	0.80	43.17	17.92

Source: own processing of the data taken from Tourism Series, No. 4/2014

Regarding the *origin of foreign tourists* who visited the mountain area in 2014 (Figure 5, Table 3), most came from Europe (64.88%), with higher shares from Germany, Bulgaria, Poland, Spain, Italy, Republic of Moldavia. A significant share of 20% of foreign tourists came from Asia (mostly from Israel with 17%, then Japan, China, and Turkey). Compared with the previous year, the accommodation capacity increased in 2014 (Table 4). Analyzing the *structure of tourist arrivals in the mountain area by accommodation* in 2014, we noticed that most tourists preferred the hotels (56.86%, compared to the national average of 74.92%), followed by rural boarding houses (15.36% versus 6.38% national average), urban boarding houses (9.94% versus 8.24% national average), villas (6.97% versus 2.73% national average) and chalets (6, 67% compared to 1.11% national average). Tourists' preferences for the mountain accommodation units such as boarding houses, villas and chalets reflected the characteristics of the mountain tourism activities (hiking, climbing, adventure tourism, speleology, ecotourism, rural tourism and so on) and the corresponding accommodation facilities.



**Figure 5. Structure of tourist arrivals in the mountain area by country of origin (2014)**

Source: own processing using the application Microsoft Excel

**Table 3. Structure of tourist arrivals in the mountain area by country of origin (2014)**

Country of origin	Foreign tourists	Share of total	Country of origin	Foreign tourists	Share of total	Country of origin	Foreign tourists	Share of total
Total tourists in the mountain area	132,014	100	U.K.	5,579	4.23	Turkey	1,368	1.04

Israel	21,939	16.62	Hungary	3,839	2.91	Czech Republic	1,308	0.99
Germany	13,015	9.86	U.S.A.	3,640	2.76	Greece	1,303	0.99
Bulgaria	8,544	6.47	Austria	2,923	2.21	Switzerland	1,029	0.78
Poland	8,500	6.44	Holland	2,379	1.80	Canada	826	0.63
Spain	8,040	6.09	Ukraine	2,216	1.68	Sweden	749	0.57
Italy	6,835	5.18	Russia	1,601	1.21	Serbia	535	0.41
Republic of Moldavia	6,662	5.05	Belgium	1,557	1.18	Norway	385	0.29
France	5,640	4.27	China	1,387	1.05	Other countries	15,398	11.66

Source: own processing of the data taken from the Press release no. 24 of February 3, 2015, National Institute of Statistics

We also noticed some differences in foreign tourists' preferences for accommodation in mountain areas: higher shares for hotels (76.68% foreign tourists versus 54.82% Romanian tourists, reflecting their higher expenses for accommodation) and campsites (1.25% foreign tourists versus 0.13% Romanian tourists, reflecting their preference for hiking, climbing, mountain biking and implicitly camping – we should mention the considerable number of foreign tourists hiking the trails that cross the Romanian Carpathians, especially their ridges).

**Table 4.** Structure of tourist arrivals in the mountain area by type of accommodation and by origin of tourists (2014)

<i>Accommodation type</i>	<i>Total arrivals</i>	<i>Romanian tourist arrivals</i>	<i>Foreign tourist arrivals</i>	<i>Share of total %</i>	<i>Arrivals mountain area</i>	<i>Romanian tourist arrivals mountain area</i>	<i>Foreign tourist arrivals mountain area</i>	<i>Share of total %</i>
<b>Total</b>	<b>8,444,030</b>	<b>6,532,213</b>	<b>1,911,817</b>	<b>100</b>	<b>1,284,312</b>	<b>1,152,298</b>	<b>132,014</b>	<b>100</b>
Hotels	6,326,198	4,599,891	1,726,307	74.92	730,301	631,710	98,591	56.86
Hostels	188,810	162,353	26,457	2.24	17,885	16,918	967	1.39
Motels	231,740	216,068	15,672	2.74	25,059	21,387	3,672	1.95
Inns	1,336	1,336	0	0.02	0	0	0	0.00
Villas	230,373	206,495	23,878	2.73	89,471	82,420	7,051	6.97
Chalets	93,412	88,108	5,304	1.11	72,853	69,959	2,894	5.67
Urban boarding houses	696,135	628,210	67,925	8.24	127,719	120,900	6,819	9.94
Rural boarding houses	538,388	498,469	39,919	6.38	197,291	187,749	9,542	15.36
Campsites	30,763	26,827	3,936	0.36	3,113	1,460	1,653	0.24
Touristic halting places	14,482	13,935	547	0.17	2,347	2,264	83	0.18
Holiday villages	3,348	3,179	169	0.04	2,809	2,640	169	0.22
Bungalows	17,780	17,084	696	0.21	4,750	4,334	416	0.37
School and pre-school camps	59,523	58,774	749	0.70	9,673	9,530	143	0.75

Source: own processing of the data taken from Tourism Series, No. 4/2014

In case of *accommodation comfort degree*, most tourists preferred 3 star (48%) and 4 star (28%) units (Table 5) in 2013 (the latest data provided by the National Institute of Statistics).

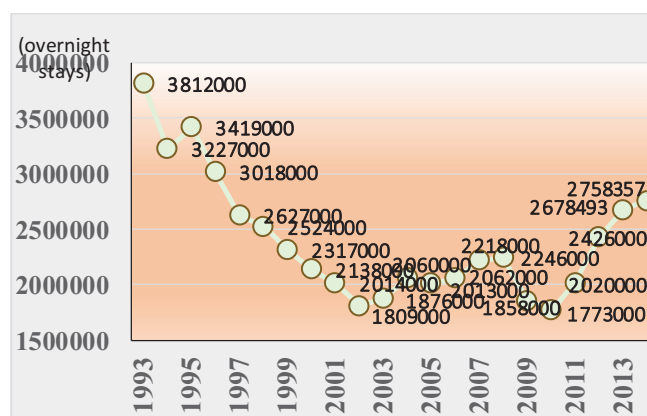
**Table 5.** Structure of tourist arrivals in the mountain area, by accommodation comfort degree (2013)

	Total	5 stars	4 stars	3 stars	2 stars	1 star	unclassified
Arrivals in mountain destinations	1,241,133	26,902	353,237	592,898	216,275	31,902	19,919
Share of total arrivals in mountain area (%)	100.00	2.17	28.46	47.77	17.43	2.57	1.60
Romanian tourist arrivals in mountain area	1,113,959	25,161	299,570	543,254	195,343	31,590	19,041
Share of total Romanian arrivals in mountain area (%)	100.00	2.26	26.89	48.77	17.54	2.84	1.71
Foreign tourist arrivals in mountain area	127,174	1,741	53,667	49,644	20,932	312	878
Share of total foreign arrivals in mountain area (%)	100.00	1.37	42.20	39.04	16.46	0.25	0.69

Source: own processing of the data taken from Tourism Series, No. 4/2014

Another important indicator of tourism demand we analyzed was the number of *overnight stays* or *days-tourist*. It is calculated as the sum of multiplications between tourist arrivals and tourism duration expressed in days. The fluctuations of this indicator correspond (of course) to those of tourist arrivals (Figure 6):

- highest values in the period 1993-1995 (more than 3 million overnight stays);
- lowest values in 2002 (1.8 million overnight stays) and 2007 (1.7 million overnight stays);
- an upward trend in the period 2011-2014 (when the overnight stays in mountain destinations registered 2.8 million days-tourist).



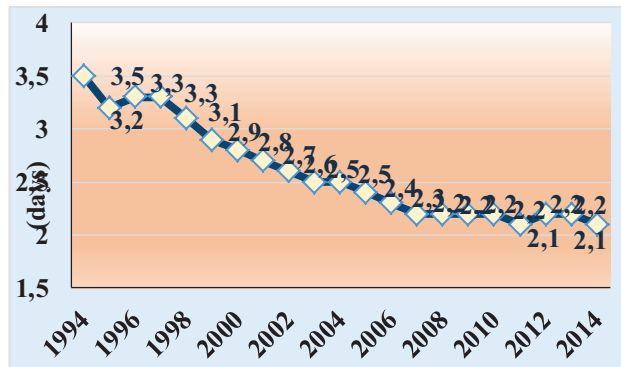
**Figure 6.** Evolution of overnight stays in mountain accommodation units in the period 1993-2014

Source: own processing using the application Microsoft Excel

The *average length of stay* represents the number of days spent by a tourist in a particular destination or accommodation unit. The average stay results from dividing the overnight stays by tourist arrivals. The length of stay depends on several factors: travel motivation, disposable income for tourism, tourist attractions, service quality (Stănculescu and Micu, 2009).

The average length of stay in the mountain area recorded a downward trend, from more than 3 days in the period 1994-1998, to a long period of stagnation with values of about 2.2 days in the last 7 years we analyzed (Figure 7).



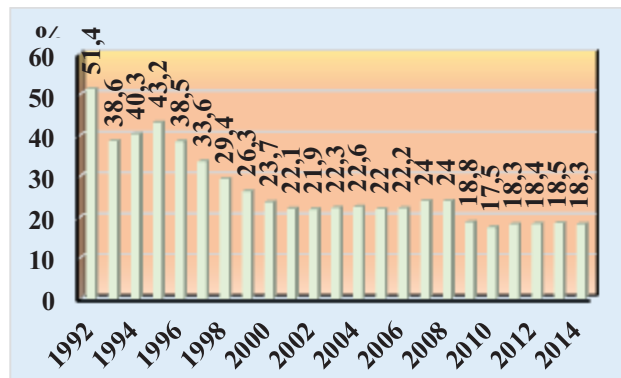


**Figure 7.** Evolution of the average length of stay in mountain destinations, from 1994 to 2014

Source: own processing using the application Microsoft Excel

*Tourism flow density* provides information on how solicited a destination is, and on the indirect measures that should be taken to ensure tourists' satisfaction without disrupting residents' activity or having undesirable effects on the environment. This indicator was calculated by reporting the number of tourists to the surface of the Romanian Carpathians (Tourism flow density<sub>2014</sub> = 132,014 tourists : 66,300 sq.km = 1.99 tourists / sq.km). Tourism density in 2014 for the Romanian Carpathians registered almost 2 tourists / sq.km, a low value compared to the national average of 25 tourists / sq.km (due to the large extent of these mountains on 28% of the national territory).

Our analysis of tourism demand in the mountain area is supplemented by an indicator of the relation between supply and demand, the accommodation occupancy rate (Stănciulescu and Micu, 2009). The *occupancy rate* expresses the economic efficiency of mountain tourism (Țigu, 2001). It showed a downward trend with stagnant periods since 1992 until 2014 (Figure 8): from 51.4% in 1992, to 40% in the period 1993-1996, followed by another decline and stagnation at 22-23% in the period 2000-2006, a slight increase from 24% in 2008-2009, and a steady 18% until 2014 (18.3%).



**Figure 8.** Evolution of the occupancy rate in mountain accommodation units, from 1992 to 2014

Source: own processing using the application Microsoft Excel

That decrease was the result of reducing travel demand until 2003, but after that period (when the tourism demand for the mountain destinations grew) there were many and complex causes: management changes in many resorts, poor management of companies and stakeholders involved, as well as tax evasion in tourism (estimated at 40%, in a statement of Elena Udrea, the Minister of Regional Development and Tourism, in 2010). We consider necessary the analysis of this indicator for each tourist resort, since this is an average value at national level and does not reflect properly the different situations

between the large and crowded resorts (like those on Prahova Valley) and the small, local resorts situated in other mountain areas.

#### 4. Conclusions

Tourism demand for the Romanian mountain destinations in the last two decades has been analyzed in quantity and evolution, by processing (also graphically) and interpreting the specific tourism indicators (tourist arrivals, tourist structure, tourists' preference for accommodation, overnight stays, average length of stay, accommodation occupancy rate), also making comparisons with the situation at national level.

Mountain tourism demand is an important segment of tourism demand (domestic and international) in Romania, with shares between 13.19% and 15.63%. Although it fluctuated downwards in the post-communist period, the most important indicator of tourism demand for mountain destinations, tourist arrivals, has increased in recent years up to 1,3 million tourists (in 2014). This increasing demand for mountain destinations resulted from a better promotion of winter sports in recent years, a revival of Romanians' preference for winter sports practicing; in parallel, a number of ski areas were arranged or redesigned in many traditional 'white' resorts, and several smaller centers for winter sports emerged or were re-launched.

The mountain area is ranked second most popular for the Romanian tourists and third place for the foreign ones. Most foreign tourists who chose the Romanian mountain destinations came from Europe. The low values of the accommodation occupancy rate was the result of reducing travel demand until 2003, but after that period there were many and complex causes: management changes in many resorts, poor management of the companies and stakeholders involved, as well as tax evasion in tourism.

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