

TOURISM GLOBALIZATION. THE CASE OF ROMANIA

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ABSTRACT. Travel & Tourism is one of the largest industries in the World, its total contribution to world GDP in 2014 was US\$7 58 trillion (9.8%) and sustained over 276 million jobs (including indirect and induced employment). Increased mobility of people, ideas, capital, products, services and information which characterize the phenomenon of globalization affect all spheres of activity especially tourism – the activity that implies movement of people. The purpose of our paper is to analyse the international tourism in the case of Romania both from the perspective of demand and supply. The share of international tourists increased in the period under review, the main source for foreign tourist being the neighbouring countries. Thus, Romania failed to attract an important number of tourists from the countries included in top 10 spender countries (according to a ranking of UNWTO from 2015). The fact that foreign tourists come mainly from neighbouring countries and that the main destinations are the capital and the county residence towns (indicating business travel and also the accessibility of these destinations) leads us to the conclusion that Romania as a tourist destination is not very popular despite the high touristic potential (possessing important natural and cultural resources).

Keywords: globalization, tourism, Romania

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Introduction

Globalization can refer to a variety of phenomena: politics, technology, consumer behaviour, firm strategy, markets, trade flows and capital flows (Nooteboom 1999 in Mazilu, 2011) that has increased the interdependence between countries, economies and people (Peric, 2005). According to the International Monetary Fund (2000) globalization refers to the increasing integration of economies around the world, particularly through trade and financial flows. It includes as well the movement of people (labour) and knowledge (technology) across international borders.

Due to the geographical scale of the travel & tourism industry, and to increased spatial linkages between places and people from different locations, the tourism sector can be considered one of the exemplars of the phenomenon of globalization (Mpofu, 2009).

The geographical widening of linkages between places has become a major factor in the development of international tourism, leading to the internationalization of tourism, leisure 'culture', a more global flows of tourists, and increased competition (Tribe, 1997; Youell, 1998, in Mpofu, 2009).

There are several driving forces of globalization with a clear impact on tourism, travel and hospitality industries: the liberalization of air transport, the liberalization of trade in services, the economic integration, information and communication technologies, the emerging use of internet for marketing and sales, the regionalization, the multinational and transnational companies, the country image (ILO, 2001; Mpofu, 2009).

The importance of tourism to national economies is well recognized due to its benefits. Many benefits are mentioned in the literature at different levels: social, cultural, economic, political and environmental. From all of these, the economic impact is the most researched and studied (Negrusa et al. 2010). Tourism is frequently viewed as an important engine for the economic growth and development of countries (Brida &

Risso, 2009; Tang & Tan, 2013). The benefits associated with a healthy development of tourism industry are numerous such as revenue income, job opportunities, development of rural areas, infrastructure development, enhanced efficiency through competition, and exploitation of scale of economies at a local level (Choi, Sirakaya, 2005; Cursoy and Rutherford, 2004; Helpman, Krugman, 1980, Krueger, 1980; Li, 2008; Vorlauffer, 1997; Zhang, Gao, 2016).

Despite occasional shocks, international tourist arrivals have shown virtually uninterrupted growth – from 277 million in 1980 to 528 million in 1995, and 1,133 million in 2014, accounting for almost US\$1245 billion of receipts worldwide in 2014. The number of international tourist arrivals worldwide is expected to increase by 3.3% a year on average from 2010 to 2030, reaching a total of 1.4 billion in 2020 and 1.8 billion arrivals by 2030 (UNWTO, 2015).

According to UNWTO (2015) forecasts of the year 2030 arrivals in emerging destinations (Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa), these are expected to surpass the advanced economies, growing at double the rate (+4.4% a year) compared to advanced economy destinations. In 2030, 57% of international arrivals will be in emerging economy destinations (versus 30% in 1980) and 43% in advanced economy destinations (versus 70% in 1980).

By regions, the largest growth will be seen in Asia and the Pacific, where arrivals are forecast to increase by 4.9% per year (reaching 535 million in 2030). The arrivals will double until 2030 in The Middle East (from 61 million to 149 million) and Africa (from 50 million to 134 million) while Europe (from 475 million to 744 million) and the Americas (from 150 million to 248 million) will register a comparatively slower growth rate.

This paper will investigate the international tourism in the case of Romania. Further this paper is structured as follows: section 2 describes

the methodology used; section 3 provides a discussion of the key findings regarding Romania's Travel and Tourism sector, international tourism demand and supply; section 4 concludes.

Material and method

The purpose of our paper is to analyse the international tourism in the case of Romania both from the perspective of demand and supply. For this purpose we used data from the World Travel and Tourism Council and the Romanian National Institute of Statistics and we used Excel Office program to process it. The period considered was 2000-2014. For a general overview of Romania's Travel and Tourism we analysed its contribution to GDP and to employment. The touristic demand was analysed considering international tourists' flow, in terms of types of preferred accommodation establishments, number of tourists, touristic destinations, continents and countries of origin, and means of transport used. The data referring to the touristic supply include the capital investment in travel and tourism and the existing number of tourist structures and accommodation places. We have analysed both the evolution of the indicators and their variation from one year to the next and in some cases the variation of 2014 relative to 2000 in order to notice the existing trend.

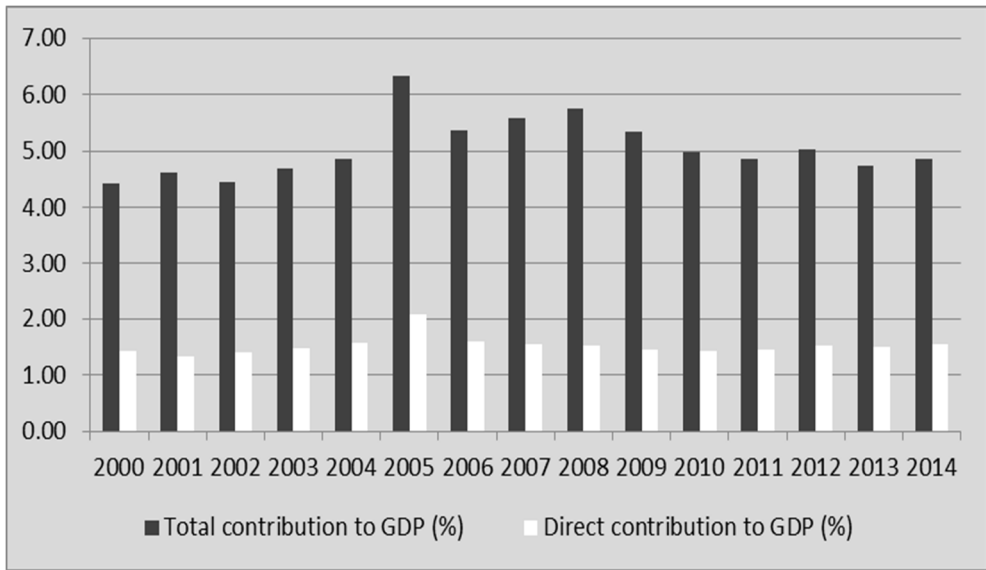
Results and discussion

General overview of Romania's Travel & Tourism

According to the World Travel and Tourism Council, Romania's Travel & Tourism direct contribution to GDP was RON 10.7 bn. (1.6% of total GDP) in 2014, and is forecast to rise by 2.6% to 10.9 bn. in 2015, and to rise by 3.8% pa (per annum), from 2015-2025, to RON 15.9 bn. in

2025. The total contribution of Travel & Tourism to GDP was RON 33.1 bn. (4.8% of GDP) in 2014, and is forecast to rise by 4.5% in 2015, and to rise by 3.8% pa to RON 50.0 bn. in 2025 (5.1% of GDP).

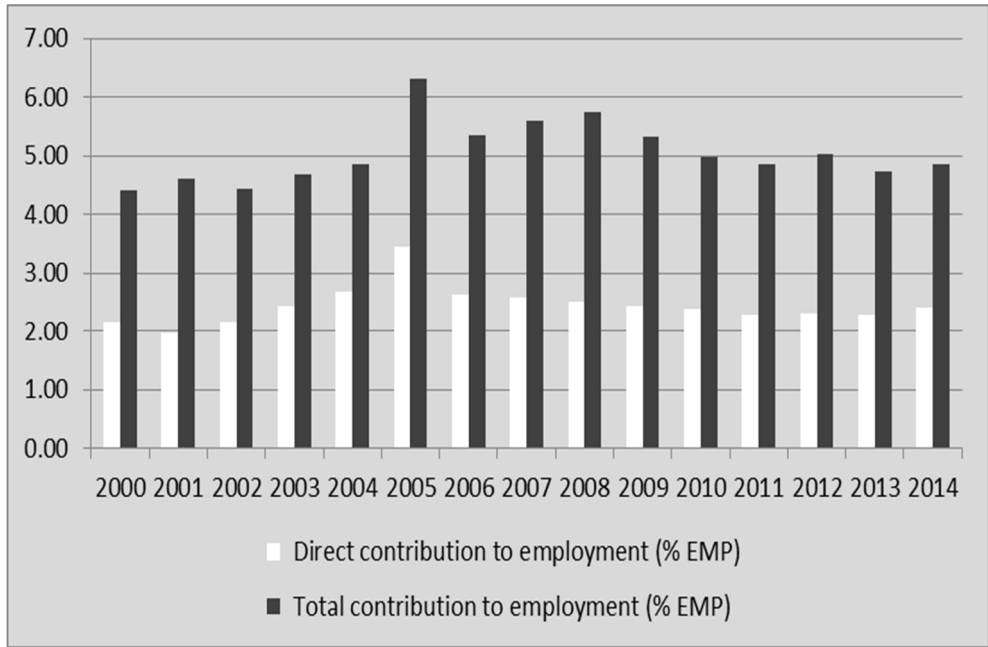
Figure 1. *Evolution of Travel & Tourism contribution to GDP*



Source: WTTC

In 2014 Travel & Tourism directly supported 205,000 jobs (2.4% of total employment). This is expected to rise by 0.6% in 2015 to 206,000 jobs and to 207,000 jobs by 2025. The total contribution of Travel & Tourism to employment was 5.9% of total employment (467,500 jobs). This is expected to rise by 2.7% in 2015 to 485,000 jobs and rise by 0.1% pa to 485,000 jobs in 2025 (5.9% of total).

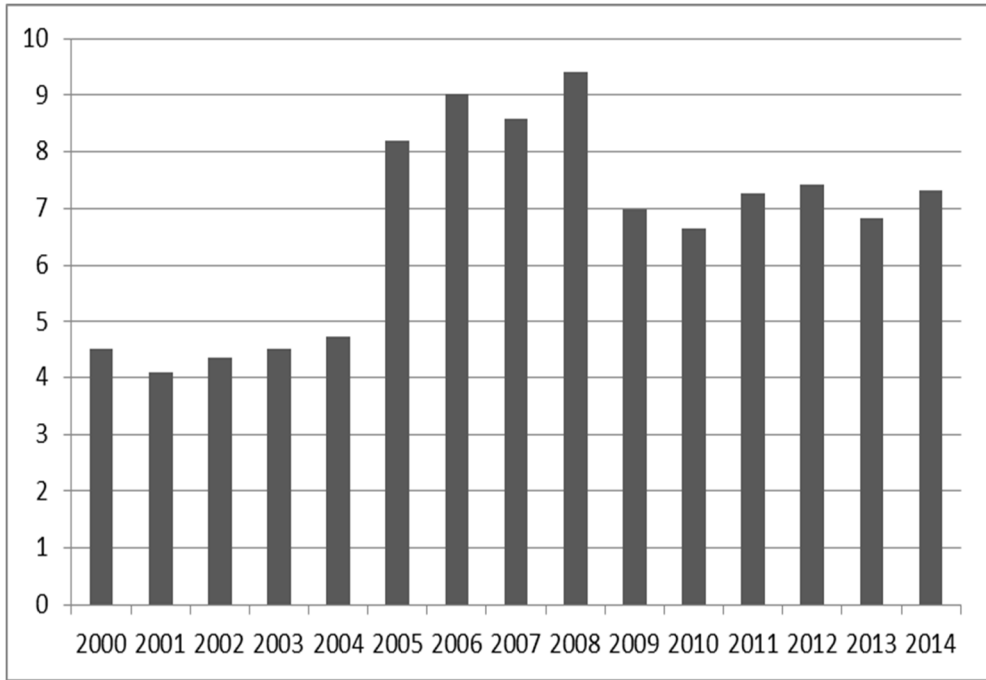
Figure 2. *Evolution of Travel & Tourism contribution to employment*



Source: WTTC

Touristic demand

The data provided by the Romanian National Institute of Statistics shows that foreign visitor arrivals grew with 60.3% between 2000 and 2014 from 5.26 mil to 8.44 mil tourists. According to WTTC, by 2025 international tourist arrivals are forecast to a total of 10.20 million. Visitor exports generated 37.3% of direct Travel & Tourism GDP in 2014 compared with 62.7% for domestic travel spending. Visitor exports generated RON 7.3 bn. in 2014. This is forecast to grow by 7.2% in 2015, and to grow by 6.3% pa, to RON 14.4 bn. in 2025.

Figure 3. *Evolution of visitor exports*

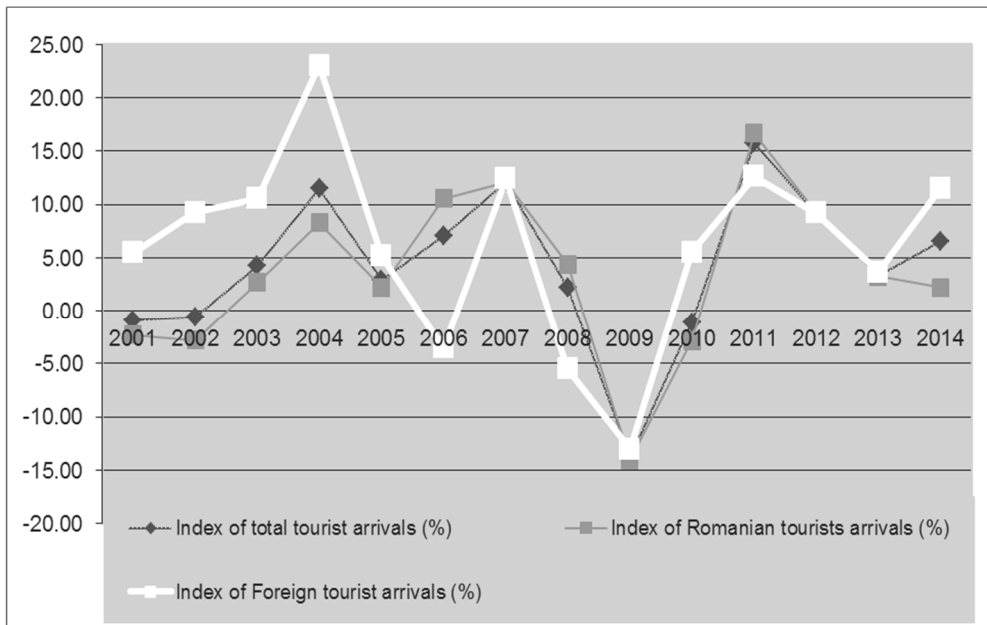
Source: WTTC

The total number of accommodated tourist, increased in 2014 compared to 2000 by approximately 72%, the increase in the number of foreign tourists is almost two times higher than of Romanian tourists (120.2% for foreigners versus 61.6% for Romanians). The increasing number of foreign tourists is distinguished both in absolute terms and as share of total number of tourists, the increase being from 17.62% in 2000 to 22.62% in 2014. The largest share of Romanian tourists was recorded in 2000 (82.38%) while the highest rate of foreign tourists was recorded in 2005 (24.63%).

The analysis of the evolution of the total number of tourists, including Romanian and foreign tourists, between 2000 and 2014, reveals that its dynamic is explained in greater extent by the flow of

foreign tourists. Between 2003 and 2005 the growing trend of the indicator total number of tourists falls between the growing trend of foreign tourists and that of the Romanian tourists. Once the global financial crisis began the indicator total number of tourists marked a sharp decline, the decrease being more pronounced for foreign tourists indicator, the downward trend of Romanian tourists indicator being smaller than the overall index. After an upward trend in the number of tourists in 2010 and 2011, and a decline of the growth rate of the number of both Romanian and foreign tourists in approximately the same pace for 2012 and 2013, the last year of the analysed period shows an important increase of the indicator foreign tourist (more than 11%) and a less significant increase of the total number of tourists while the indicator Romanian tourist arrivals marked a slight decrease of 2.23%.

Figure 4. *Evolution of tourist flow*



Source: National Institute of Statistics

The majority of the foreign tourists who visit Romania are from Europe (92.57% in 2014) followed by tourists from North America (3.48% in 2014), but the differences between the two categories are significant. The most significant increase in the period 2000-2014 is registered in the case of North American tourists (309.47%) and that of African tourists (280%), although in both cases the absolute number of tourists is small (Table 1).

As for the foreign tourists from Europe, most of them come from the European Union (63.92% in 2014). In terms of European Union countries, those with the highest weight are the following: Hungary (19.13% - 2014), Republic of Moldova (16.34% - 2014) and Republic of Bulgaria (15.47% - 2014). At the opposite pole are countries of origin like: Luxemburg (0.02% - 2014), Malta (0.03% - 2014), Estonia and Finland (0.08% - 2014). Considering the growth of the number of foreign tourists between 2000 and 2014 we can observe that the most important increases were in the case of Portugal (2066.67%), Estonia (700%) and Spain (633.33%); thus these extreme figures can be explained by the absolute number of tourists being very small in all three cases mentioned. A decreased number of tourists in 2014 compared with 2000 was recorded only for Russian Federation (12.05%) and Republic of Moldova (11.07%).

Table 1. Arrivals of foreign visitors by continents (%)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Europe	95.44	95.10	94.93	95.51	95.55	94.57	94.25	94.39	94.90	95.09	94.67	94.34	94.15	93.85	92.57
Africa	0.19	0.16	0.19	0.18	0.18	0.21	0.23	0.21	0.20	0.22	0.28	0.29	0.30	0.31	0.33
North America	1.80	1.94	2.15	2.06	2.11	2.64	2.85	2.45	2.17	2.23	2.28	2.39	2.61	2.61	3.48
Asia	2.39	2.63	2.57	2.13	2.05	2.43	2.50	2.75	2.53	2.26	2.60	2.77	2.72	3.01	3.37
Australia and Oceania	0.13	0.12	0.13	0.11	0.11	0.14	0.15	0.18	0.18	0.18	0.17	0.20	0.20	0.21	0.22

Source: National Institute of Statistics

Foreign tourists visiting Romania prefer, at a rate of about 90%, to accommodate in hotels. The largest increase has been recorded in the case of the hostels, due to the fact that a lot of foreign tourists are especially young people who come nowadays in Romania, either to study or to visit. Other accommodation establishments that recorded an increase are the touristic and the agro-touristic boarding houses due to the change in the type of vacation preferred.

Table 2. Foreign tourist arrivals by type of accommodation establishment (%)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Hotels	91.85	90.66	90.08	89.92	89.40	89.30	89.15	88.94	88.18	89.16	89.75	90.13	89.60	89.38	89.99	88.23
Hostels	0.05	0.18	0.56	0.38	0.45	0.23	0.23	0.20	0.28	1.19	1.11	0.92	1.20	1.15	1.38	1.80
Motels	2.46	2.11	2.42	1.96	1.94	1.55	1.31	1.46	1.33	1.13	0.99	1.08	0.92	0.93	0.82	0.73
Touristic villas	1.55	1.60	1.58	1.59	1.44	1.55	1.94	1.68	1.78	1.51	1.67	1.42	1.28	1.24	1.25	1.32
Touristic chalets	0.29	0.42	0.45	0.43	0.35	0.33	0.22	0.22	0.22	0.27	0.19	0.21	0.36	0.31	0.28	0.33
Camping sites	0.69	0.98	0.86	1.08	0.98	0.59	0.51	0.49	1.05	0.80	0.74	0.76	0.68	0.46	0.21	0.34
Touristic boarding houses	1.59	2.07	2.23	2.58	2.80	3.27	3.59	4.10	4.12	3.41	3.17	3.04	3.43	3.69	3.60	4.08
Agro-tourist boarding houses	0.37	0.62	0.86	1.12	1.28	1.23	1.31	1.32	1.35	1.51	1.46	1.63	1.82	2.22	2.16	2.11
Ship places	0.73	0.80	0.59	0.47	0.58	0.51	0.48	0.46	0.56	0.63	0.60	0.52	0.40	0.33	0.0018	0

Source: National Institute of Statistics

Bucharest and county residence towns are the most popular destinations for foreign tourists (77.62% in 2014) followed by other cities and touristic routes (11.37% in 2014) and mountain resorts (6.91% in 2014). We need to stress the significant decrease in preference of foreign tourists for mountain resorts, from 10.13% in 2000 to 6.91% in 2014 and the increase of their preference for other cities and touristic

routes, from 6.71% in 2000 to 11.37% in 2014. The highest increase, between 2000 and 2014, in the number of foreign tourists was registered in the case of other cities and touristic routes (about 274%), followed by Danube Delta (193%) and Bucharest and county residence towns (approximately 126%). The only decrease was recorded in the case of seaside (4.45% in 2014 compared to 2000).

Table 3. Arrivals of foreign tourists by destination type (number of persons)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Spas	25512	26383	32635	36979	45080	36372	36337	36252	27236	22724	22189	26729	29487	32308	33599
Seaside, excluding Constanta	32783	44469	57806	67438	83567	88182	61812	58191	41569	31607	31384	28999	36368	31540	31325
Mountain resorts	87859	87903	98305	98068	116181	112722	96605	118706	105403	81064	86653	97330	113446	127174	132271
Danube Delta, including Tulcea	4594	5552	7049	8379	16566	22887	11789	20445	17438	15888	14208	23012	31299	22790	13482
Bucharest and county residence town	658090	686078	721042	791440	968795	1019585	1016107	1143916	1100733	979858	1047223	1176524	1261442	1308437	1486136
Other localities and touristic routes	58186	64124	82371	102671	129305	150163	157182	173447	173512	144449	144686	164105	184394	195106	217757

Source: National Institute of Statistics

For the foreign tourists the road transport prevails and there are no significant differences from year to year. Regarding the air transport, in the case of the foreigners it cannot be observed the same increasing trend as for the Romanian tourists. This may be due either to the already existing flights to Romania or to the correlation with the foreigners' origin countries. Since the largest percentage of foreign tourists is from neighbouring countries is more advantageous for them to turn to the road transport.

Table 4. Foreign tourist arrivals by means of transport used (%)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Road means of transport	72.34	73.35	74.97	77.62	81.83	75.83	72.72	74.50	77.69	78.23	78.77	74.58	75.94	77.87	75.69
Railway means of transport	12.54	9.64	7.80	6.22	4.67	5.22	5.23	3.56	2.85	2.75	2.96	3.39	3.21	2.89	2.05
Air means of transport	12.44	14.28	14.37	13.44	10.68	15.74	18.59	18.91	16.50	16.86	16.22	19.83	18.51	16.80	20.02
Naval means of transport	2.68	2.73	2.86	2.72	2.82	3.20	3.46	3.03	2.96	2.17	2.05	2.21	2.34	2.44	2.24

Source: National Institute of Statistics

In comparison, regarding the type of transport used by Romanian visitors abroad we can notice a decrease of railway and sea forms of transport throughout the period 2000-2014. In terms of road and air transport, if before 2004 we have an increase of road transport, for the rest of the analysed period air transport registers an increasing trend. This could be explained by the entry on the market of low-cost flights (BlueAir, Wizz Air, Ryanair, Germanwings, Scandinavian Airlines, Carpatair, Vueling, Tuifly, HOP!, Niki, Pegasus, Romavia), of charter flights, which led to the modernization of Airports in the big cities.

Table 5. Romanian tourist departures by means of transport used (%)

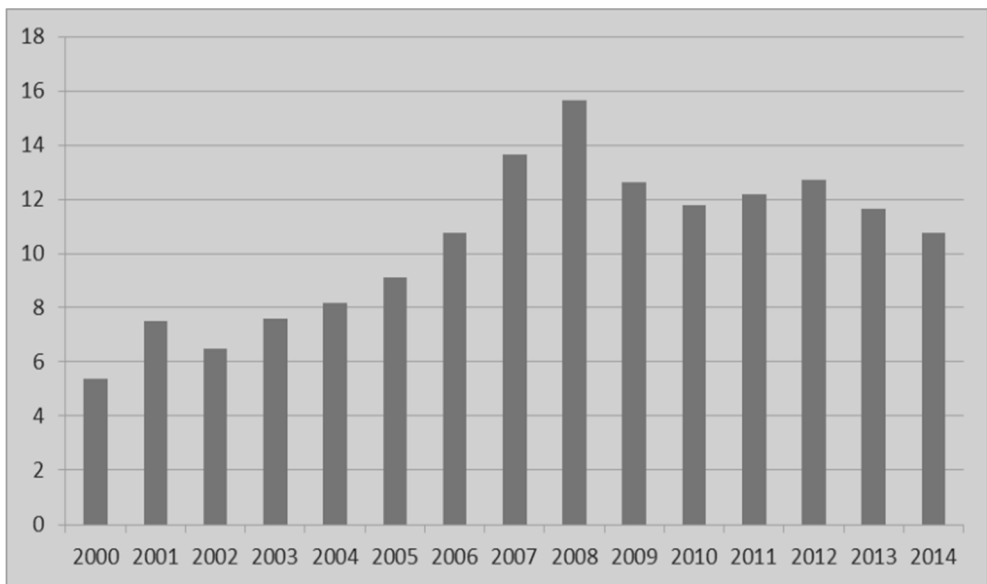
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Road means of transport	78.55	79.37	84.87	85.95	86.20	84.03	83.29	79.80	79.41	79.68	75.75	72.42	75.92	77.38	76.12
Railway means of transport	10.75	10.11	4.36	3.94	3.21	3.11	2.66	2.25	1.98	1.83	1.79	1.98	1.80	1.65	1.28
Air means of transport	8.38	8.44	9.15	9.13	9.85	12.34	13.75	17.70	18.39	18.31	22.15	25.42	22.07	20.77	22.41
Naval means of transport	2.32	2.08	1.62	0.99	0.73	0.52	0.29	0.25	0.21	0.18	0.17	0.18	0.21	0.20	0.19

Source: National Institute of Statistics

Touristic supply

In terms of touristic supply we intended to analyse, first of all, the evolution of capital investment in travel and tourism between 2000 and 2014. As the figures provided by the WTTC show, we can distinguish a favourable period for investments between 2002 and 2008 followed by a decrease between 2008 and 2010. The last four years of the period under review are equally divided between increases (2011-2012) and decreases (2013-2014).

Figure 5. *Evolution of capital investment in Travel & Tourism (RON bn.)*



Source: WTTC

During the time span 2000-2014 the number of accommodation establishments increased with over 96% across the country. If we analyse the evolution of accommodation establishments by type during this time span the highest increase has been registered among hostels

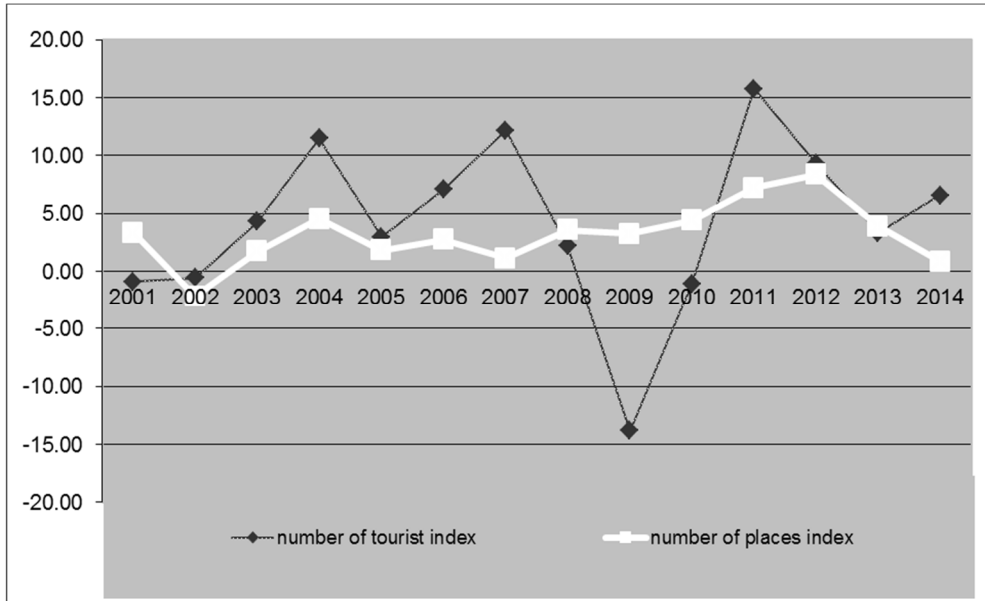
(from 2 in 2000 to 204 in 2014), apartment hotels (from 1 in 2000 to 23 in 2014), touristic halting places (from 6 in 2000 to 35 in 2014) and touristic boarding houses (an increase of more than 6 times). Decreases were recorded for inns (from 23 in 2000 to 5 in 2014), school and pre-school camps (with over 60%) and camps (about 30%).

Except 2002 when accommodation capacity decreased 2% from the previous year, the number of accommodation places increased each year, the largest increase being recorded in 2012 (8.36% compared with 2011). The growth of accommodation capacity throughout the period under review was 54.74%. By type of accommodation, the most significant increase in the period of analysis, occurred in the case of hostels (with 7249% times larger), followed by agro-touristic boarding houses (920.33%) and touristic boarding houses (857.59%). The largest decrease in the number of accommodation places was recorded for ship accommodation spaces, with 92.4% decrease of capacity in 2014 compared with the beginning of interval and camps with 86.62% decrease for the same interval.

We cannot talk about a correlation between demand (expressed as number of tourists) and supply (expressed as number of accommodation places) between 2002 and 2011. In the 2002-2004 period both the number of tourists and the number of places have increased, while in 2005 both indices recorded a decline although we would have expected the latter to remain constant or to increase. Starting with 2008 until 2011 the evolution of supply and demand goes hand in hand, the two indexes showing the same trend.

A possible explanation could be that demand was influenced by accommodation capacity or that supply adapted very quickly to demand. There might be a correlation between supply and demand starting with 2011 and until 2014 considering the fact that a decrease of the number of tourist indicator determines a decrease in the following year of the indicator number of accommodation places. It remains to see if the future years will confirm or not this correlation signifying an improvement of tourism administration.

Figure 6. Evolution of demand and supply



Source: National Institute of Statistics

Conclusions

Until present the Romanian tourism sector has not reached its full economic impact potential, in terms of total contribution to GDP (4.8% compared to 9.8% at global level in 2014, ranking 157 in the World) and employment (5.5% compared to 9.4% at global level in 2014, ranking 148 in the World) being below World and Europe averages. In terms of visitors exports contribution to total exports, Romania's ranking is 157, also below World and Europe averages. A positive aspect is that our country's ranking is higher than Europe and World averages when it comes to Travel and Tourism investment contribution to total capital investment in 2014, ranking 66 in the World (WTTC b., 2015).

More importantly, the forecast for 2025 is not promising for Romanian tourism, with a total contribution to GDP of 3.8%, ranking 109 in the World in terms of growth rate, and to employment of 2.7%, ranking 175 in the World in terms of growth rate, while the contribution of the travel and tourism sector to GDP at global level is forecast to reach 10.5% and to employment is estimated for 10.7% (WTTC b., c., 2015).

The share of international tourists increased in the period under review, the main source for foreign tourist being the neighbouring countries. Thus, Romania failed to attract an important number of tourists from the countries included in top 10 spender countries (according to a ranking of UNWTO from 2015). Considering visitor exports contribution to total exports, Romania ranked 157 in the World in 2014, below World and Europe average and also below Bulgaria (ranked 77) and Hungary (ranked 115) (WTTC b., 2015). The forecast for the period 2015-2025 (WTTC b., 2015) for the growth rate of visitor exports, places Romania on 23th place above Hungary and Bulgaria.

The fact that foreign tourists come mainly from neighbouring countries and that the main destinations are the capital and the county residence towns (indicating business travel and also the accessibility of these destinations) leads us to the conclusion that Romania as a tourist destination is not very popular despite the high touristic potential (possessing important natural and cultural resources). There are examples of good practices when it comes to attracting foreign tourists but they are too geographically dispersed and they have a positive economic impact on very small areas. We consider this to be a consequence of the lack of a coherent strategy for Romanian tourism development that should include promotion and infrastructure development. The policy makers (government, tourism associations and tourism operators) have yet failed to identify the competitive advantages that Romania has as a tourist destination and to come up with a plan to capitalize on the opportunities of tourism development (especially international tourism).

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