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# A Bottom-Up Approach for Estimating the Size Of Rural Tourism in Romania

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## ABSTRACT

### **Purpose**

*The purpose of this research is to present some estimates regarding the size of rural tourism in Romania based on the existing data from official tourism statistics provided by the National Institute of Statistics (INS).*

### **Design/Methodology/approach**

*A bottom-up approach was used by aggregating INS data from more than 1,000 - 1,200 rural localities (ro. comune) in Romania that have tourism statistics in the period 2019-2023. Based on the assumption that rural tourism occurs in these rural localities, some statistical indicators were calculated for the rural area of Romania: accommodation capacities (existing capacity and functioning capacity), arrivals, overnight stays, length of stay and bed-places occupancy. However, as a limitation, due to the fact that in Romania some urban localities comprise also villages where rural tourism might occur, some adjustments are possible to be made in the estimates to include agro-tourism boarding houses (ro. pensiuni agroturistice) of the urban localities.*

### **Main findings**

*The results show that even rural area concentrates half of the accommodation establishments and over 30% of the accommodation capacity in Romania it attracts only 21-22% of total tourists registered in accommodation establishments. This illustrates a lower capacity of the rural area to constitute a real driver to boost Romanian tourism.*

### **Originality/value**

*This paper proposed a new method to unveil statistics on rural tourism in Romania based on data aggregation from Local Administrative Units (LAUs) in a pragmatic approach to define rural space based on the classification of localities (ro. UAT-uri – comune, orașe, municipii) as used in the official statistics in Romania.*

### **Conclusions/Recommendation**

*Within accommodation statistics, National Institute of Statistics might start publish data with the breakdown Rural vs. Urban localities (out of which, agritourist boarding houses from urban localities).*

**Keywords:** rural tourism, tourism statistics, rural area, Romania

**JEL Classification:** Z30, C81

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## 1. INTRODUCTION

Measuring tourism as an economic activity is most commonly made at the sectorial level since tourism is from supply-side seen as a set of economic activities that are providing goods and services to visitors be it overnight visitors (tourists) or day-visitors (with no overnight stays). However, when different types of tourism (i.e. cultural tourism, ecotourism, rural tourism, urban tourism, mountain tourism, coastal tourism, business tourism, health tourism etc.) are subject to statistical measurement, the approach should be somehow different.

Rural tourism is entirely related to the rural space which has its own particularities and characteristics. But the rurality concept is a complex one with different approaches in Europe and also worldwide. The distinction between rural and urban areas is not easy to be made especially when small localities and/or periurban areas are involved. In these circumstances, it is necessary to have a pragmatic approach to define rural areas. So, in the case of Romania, in order to delineate the rural area one can use the classification of localities as used by official statistics which is provided by the National Institute of Statistics (INS). Measuring tourism in rural area can be therefore related to this national classification of localities and this is what this paper tries to propose as practical approach based on existing official data.

United Nations World Tourism Organization, UNWTO (2024) posts the following definition of rural tourism as ‘a type of tourism activity in which the visitor’s experience is related to a wide range of products generally linked to nature based activities, agriculture, rural lifestyle / culture, angling and sightseeing’. Moreover, it is stated that rural tourism occurs in non-urban (rural areas) with the three characteristics: low population density, landscape and land-use dominated by agriculture and forestry and traditional social structure and lifestyle. However, this definition is far from being straightforward since the concept of rurality is not easy be defined and it differs from country to country.

At European level, in the field of tourism statistics Eurostat disseminates data for some variables with the breakdown called <degree of urbanisation – abbreviation DEGURBA>. According to this approach, Local Administrative Units (LAUs) (which is the lowest administrative level for a country) are classified into three categories: Cities, Town and suburbs and Rural areas and are “based on a combination of geographical contiguity and population density, measured by minimum population thresholds applied to 1 km<sup>2</sup> population grid cells” (Eurostat, 2024a). In other words, LAUs are used to divide up the territory of the EU for the purpose of providing statistics at a local level (Eurostat, 2024b).

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More precisely, with reference to tourism statistics, at European level, data on capacity and occupancy is presented broken down by the following three categories: Cities, Towns and suburbs and Rural areas. However, referring to the later, an in-depth investigation on Eurostat (2024c) data regarding the lists of LAUs for Romania for the year 2021 revealed that not all localities in Romania titled as communes (ro. comune) were included in the category the rural area. According to Eurostat (2024c) there were 2,740 LAUs defined as DEGURBA code 3 for rural areas. At the same time, 81 towns in Romania were allocated to DEGURBA code 3 for rural areas while 204 communes were allocated to the DEGURBA 2 for towns and suburbs. This is in contrast with MDLPA (2024) data that accounts for 2,862 localities as communes (rural localities) which might have an impact of tourism statistics in Romania's rural space.

Also some studies carried out at EU level emphasize the modest position of Romania as regards tourism in the rural area. For instance, it is stated that Romania, together with Hungary, part of Poland, Germany, Finland and Lithuania have low rural accommodation capacity (Barranco et al., 2021). More, some anomalies were obtained when clustering some destinations in Romania, particularly in defining Mountain and nature category for some regions (i.e. Ialomita county as part of this category) as in the paper of Batista et Silva et al. (2021).

In Romania, when quantifying the size of rural tourism, traditionally some types of accommodation units have been used namely agritourist boarding houses (and in the past rural boarding houses – but now agritourist boarding houses include also rural boarding houses (INS, 2024a). The approach of using types of accommodation for rural tourism is more recently found in Bogdan and Simon (2019) when presented data on tourism flows in the rural areas in Romania. But this approach is far from being accurate since agritourist boarding houses as types of accommodation units could also be found in the urban localities.

Moreover, when referring to rural areas there are also other types of accommodation units besides agritourist boarding houses. Therefore, if considering only agritourist boarding houses, a significant under-evaluation would occur. This is the reason why aggregating tourism data for 1,000 - 1,200 communes (rom. comune) for the rural area was considered a much better option in order to precisely identify the tourism in the rural area.

As a personal contribution, this paper proposes a new method to unveil statistics on rural tourism in Romania based on data aggregation from LAUs defined as communes. This method can be embraced also in the official tourism statistics in Romania and National Institute of Statistics can start to regularly

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publish data on tourism in the rural areas in Romania. A new category can be created when disseminated tourism statistics considering the urban vs. rural dichotomy thus tourism in communes vs. tourism in town and cities (rom. turismul din comune vs. turismul din orașe și municipii) or more commonly being labelled as tourism in the rural areas vs. tourism in the urban areas.

## 2. METHODOLOGY

The main assumption of this paper is that rural tourism is defined as being tourism that occurs in the rural areas as defined by the official status of the locality as commune (ro. comună) according to the national regulations in Romania. There is also an official act endorsed by the Ministry of Agriculture, Forests and Rural Development and the Ministry of Administration and Internal Affairs in 2005 that define rural space as being those areas belonging to communes as well as to periurban areas of towns and municipalities (MAPDR and MAI, 2005). The lowest territorial entity in Romania is represented by village that can be either part of commune (the most common situation) or part of a town or a municipality (ro. oraș sau municipiu). In some cases, some periurban areas of towns or municipalities can form a village, but this cannot be always the case. At the same time, it is important to mention that in Romania there are no official data at the level of villages that are part of towns or municipalities. In 2023 according to INS (2024a) there were 467 villages that belong to towns or cities representing 3.6% of total villages in Romania.

Therefore, in a practical manner, rural area could be defined as localities represented by communes (rom. comune). These represent local administrative units (LAUs) and are compatible with NUTS classifications (Eurostat, 2024b). NUTS which is the Nomenclature of Territorial Units for Statistics is a classification developed in the European Union. In fact, LAUs are a subdivision of NUTS 3 regions covering the EU's whole economic territory. An aggregation of data for all the communes in Romania that have tourism statistics has been carried out. Data were collected from between 1,000 - 1,200 localities (ro. comune) that have data on tourism statistics. Data was extracted from Tempo database in the period March-April 2024 (INS, 2024). For each county in Romania (there are 41 counties), data in the Tempo database are available at the locality level (at LAUs level). It is important to say that in Romania in total there are 2,862 communes according to Ministry of Development, Public Works, and Administration, MDLPA (2024).

The following statistical indicators have been aggregated to cover the evolution of tourism in the rural area in Romania in the last 5 years (2019-2023), covering both the pre-pandemic period (2019) and also pandemic and post-pandemic years (2020-2023):

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- Number of tourist accommodation units (number of establishments)
  - The existing accommodation capacity (number of bed-places)
  - The functioning accommodation capacity (number of days bed-places)
  - Number of arrivals (number of tourists)
  - Number of overnight stays (nights spent at tourist accommodation establishments)
  - Average length of stay
  - Occupancy rate (of bed-places) (ro. indicele de utilizare netă a capacității de cazare în funcțiune)

It is important to note that these indicators are produced by INS monthly and annually and are collected from accommodation establishments that are authorized (classified) by the national competent authority namely Ministry of Economy, Entrepreneurship and Tourism. There are two surveys from which data are collected by INS: the survey entitled “The occupancy of accommodation establishments in Romania (ro. Frecventarea structurilor de primire turistică cu funcțiuni de cazare turistică)” – a monthly and yearly survey and the survey entitled “Existing accommodation capacity at 31<sup>st</sup> of July (ro. Capacitatea de cazare existentă la 31 iulie)” – a yearly survey. In addition, from another survey carried out by INS, a relevant indicator from demand side was analysed namely “Number of trips taken by residents for holidays and business purposes (having rural area as main destination of the trip)” for illustrative purposes. This indicator is derived from the survey entitled “Tourism demand of residents in Romania (ro. Cererea turistică a rezidenților)”.

However, it has to be admitted that considering only communes as localities for defining rural area in Romania has some obvious limitations since there are also towns or cities that includes also villages as subcomponent territorial unit. Since tourism occurs also in these villages that are part of urban area, rural tourism would be underrepresented if it is limited only to communes. But the highest level of data disaggregation at territorial level is at municipality level (LAUs level) in Romania (not at the level of subcomponents of LAUs). Therefore, as a practical solution, it was possible to extract also data on agritourist boarding houses from urban localities under the assumption that all these agritourist boarding houses are all located in villages that are officially part of town and cities. This assumption is based also on the law provisions (MAPDR and MAI, 2005) that stipulate that tourism and rural leisure services are activities occurring also in the periurban area of towns and cities as part of the rural space. Moreover, according to the Romanian legislation, agritourist boarding houses must have at least one activity related to agriculture, fish

farming, fishing, reed harvesting, animal husbandry, cultivation of different types of plants, orchards of fruit trees or a craft activity, with a workshop, from which various handicraft items result (National Authority for Tourism, 2013).

To sum up, data on rural tourism in Romania are added from two sides, on the one hand from communes (defines by the national law as rural localities) and on the other hand, from agritourist boarding houses from towns and cities (rom. orașe și municipii). In this way, it is considered that a better quantification of the size of rural tourism in Romania is undertaken. Not the least, a comparison with Eurostat data is provided in order to outline the differences for some indicators where data is available.

### 3. RESULTS

#### 3.1. Accommodations statistics

In this section accommodation statistics refer to data obtained from accommodation establishments in a supply-side perspective.

In the last 5 years, the number of accommodation establishments from the rural area in Romania has constantly increased from 4,003 in 2019 to 6,445 in 2023. The same is the case of the share of these units from rural area in the total number of accommodation establishments at national level (an increase from 47.6% in 2019 to 50.8% in 2023). Thus, it is evident that rural area accounts for little more than a half of total number of accommodation establishments in Romania (table 1).

#### Number of accommodation establishments in the rural area and at national level, 2019-2023

Table 1

Indicator	2019	2020	2021	2022	2023	+/- 2023 vs. 2019 (%)
Number of accommodation establishments from communes	3,842	4,033	5,663	5,967	6,253	+62.8
Number of agritourist boarding houses from towns and municipalities	161	182	168	174	192	+19.3
<b>Total rural area</b>	<b>4,003</b>	<b>4,215</b>	<b>5,831</b>	<b>6,141</b>	<b>6,445</b>	<b>+61.0</b>
Number of accommodation establishments at national level	8,402	8,610	11,736	12,201	12,697	+51.1
Share of rural area	47.6%	49.0%	49.7%	50.3%	50.8%	-

Source: INS (2024a) and own calculations

One can note also the growth rate (2023 as compared with 2019) which is higher in the case of rural area in comparison with the national level (61.0% vs. 51.1%) denoting a greater appeal of rural area for investments in accommodation establishments. However, in both cases, this high rate is explained also by some methodological issues, more precisely the data coverage starting with 2021 with the new accommodation typology named “rooms and apartments for rent”, that was not included in 2019.

If we refer to accommodation capacity, namely number of accommodation bed-places, in 2023, rural area in Romania accounts for little less than 30% of total bed-places in the country. It is important to mention that at the European Union (EU27) level this percentage was even higher reaching to 43.9% (own calculations based on Eurostat data).

In absolute values, over 135 thousand accommodation bed-places were allocated to rural area in Romania, increasing with 38.6% as compared with 2019. Not surprisingly, this growth rate is superior to the growth rate registered at national level (+21.6%) in the same period. This impacts also the share of rural area in total accommodation capacity in Romania which increases with four percentage points in 2023 compared with 2019 (from 27.4% in 2019 to 31.2% in 2023) (table 2).

**Existing accommodation capacity (number of bed-places) in the rural area and at national level, 2019-2023**

*Table 2*

Indicator	2019	2020	2021	2022	2023	+/- 2023 vs. 2019 (%)
Number of bed-places <u>from communes</u>	94,312	97,809	120,630	126,879	131,545	+39.5
Number of bed-places in agritourist boarding houses <u>from towns and municipalities</u>	3,287	3,279	3,163	3,470	3,748	+14.0
<b>Total rural area</b>	<b>97,599</b>	<b>101,088</b>	<b>123,793</b>	<b>130,349</b>	<b>135,293</b>	<b>+38.6</b>
Number of bed-places <u>at national level</u>	356,562	358,119	410,291	422,114	433,487	+21.6
Share of rural area	27.4%	28.2%	30.2%	30.9%	31.2%	-

*Source: INS (2024a) and own calculations*

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It is important to note that the existing accommodation capacity did not decline in the first pandemic year neither in the rural area nor at the national level. But one has to admit that this is due strictly to the nature of the indicator which measures the physical existence of a capacity (in Romania, at 31<sup>st</sup> of July) which is the peak tourism season. In both cases (both for rural areas and at national level), one can note a continuous growth of the existing accommodation capacity from year to year which denotes a development of the sector from the accommodation supply perspective.

Also in this case, data comparability 2023 vs. 2019 is affected by the coverage since starting 2021 introduction of the accommodation typology named “apartments and rooms for rent” obviously influenced the data series. For example, in 2021 there are added more than 52 thousand bed-places at national level and more than 22 thousand in the rural area.

From this perspective, it is important to see also the distribution of accommodation capacities by typologies in 2019 as compared with 2023, in other words, in a pre-pandemic and post-pandemic year (figure 1).

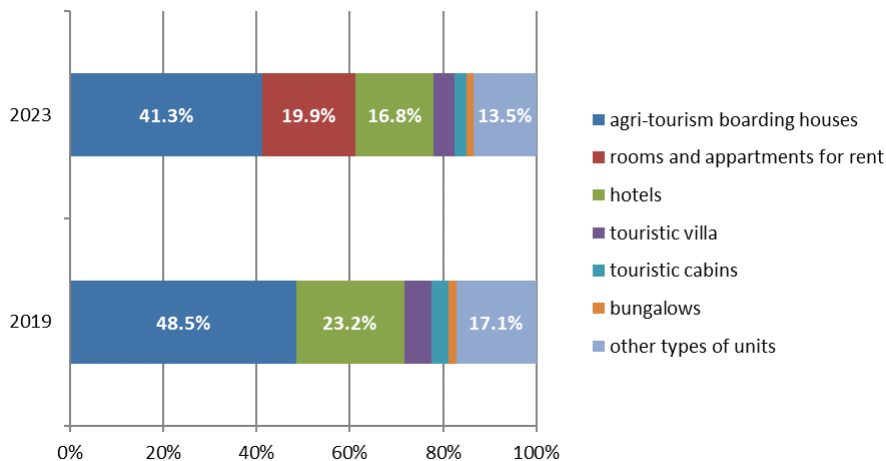
One can see that in the pre-pandemic year 2019, almost a half (48.5%) of accommodation capacities was located in agritourist boarding houses. However, due to inclusion of rooms and apartments for rent category, the share of agritourist boarding houses is lower in 2023 as compared with 2019 (41.3%); Rooms and apartments for rent occupies the second position with a share of almost 20% but also hotels have also important shares (23.2% in 2019 and 16.8% in 2023). Touristic villas account for around 5% and the rest of accommodation typologies from rural area accounts together for below 20% in 2023 and a little above 20% in 2019. Overall, it is to be noted the dominance of agritourist boarding houses as type of accommodation both in 2019 and 2023.



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## Number of bed-places in the rural area by typologies in 2019 and 2023

Figure 1



Source: own calculations based on INS (2024a)

As regards functioning accommodation capacity, rural area had almost 32 million days-bed-places in 2023, representing little over 30% (30.6%) from the total functioning accommodation capacity in Romania. What is significant is the growth rate of functioning accommodation capacity in rural area in 2023 compared with 2019 which is more than double than the similar growth rate at national level (36.4% vs. 17.5%). This means that the accommodation offer in the rural area has constantly increased at a rate superior to the national level. Also, to note that in the rural area, in the pandemic year 2021 more accommodation offer is put on the market than compared with the pre-pandemic year 2019. In other words, a return of the tourism offer in the rural area occurs in 2021 in contrast with the return of the tourism offer at national level that occurs only in 2022 when the pre-pandemic levels are exceeded. Also, starting 2021 the share of rural area in total functioning accommodation capacity in Romania constantly grows from 27.8% in 2021 to 29.2% in 2022 and 30.6% in 2023 (table 3).

**Functioning accommodation capacity (number of days-bed-places) in the rural area and at national level, 2019-2023**

*Table 3*

<b>Indicator</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>+/- 2023 vs. 2019 (%)</b>
Number of days-bed-places <u>from communes</u>	22,550,679	15,798,497	23,329,536	26,213,148	30,893,563	+37.0
Number of days-bed-places in agritourist boarding houses <u>from towns and municipalities</u>	877,285	658,364	935,013	942,066	1,058,971	+20.7
<b>Total rural area</b>	<b>23,427,964</b>	<b>16,456,861</b>	<b>24,264,549</b>	<b>27,155,214</b>	<b>31,952,534</b>	<b>+36.4</b>
Number of days-bed-places <u>at national level</u>	88,789,656	64,040,595	87,217,823	93,007,230	104,348,563	+17.5
Share of rural area	26.4%	25.7%	27.8%	29.2%	30.6%	-

*Source: INS (2024a) and own calculations*

At the same time, due to sanitary restrictions in 2020, the accommodation supply (functioning accommodation capacity) declined in the rural area with almost 30% compared with 2019 which is with more than 2 percentage points lower than the same decline rate at national level. This proved a lower capacity of the accommodation establishments in the rural area to adapt to the new pandemic realities.

The size of tourism flows in the rural area of Romania in the period 2019-2023 is represented in absolute values between 1.4 and 2.8 million tourists (arrivals) which represents around 19-23% from the total number of tourists registered in Romania (table no. 4). The first pandemic year (2020) is characterized by a sharp decline of arrivals as compared with the previous year (-43%) but still lower than the decline registered at country level (-52%) which shows a slightly better position than the one of rural tourism.

One has to note that the pandemic years 2020 and 2021 are characterized by an increase of the share of rural area with 2 percentage points compared with 2019, a share that is moderating in 2022. In other words, undoubtedly there was a relative increase of tourist preferences for rural area in Romania after 2020. In absolute values, in 2023, over 2.8 million tourists were registered in accommodation establishments in rural area, increasing with 12.7% compared with 2019 while at national level a decline was posted in the same period (-2.9%). One has to note the continuous growth of number of tourists in rural area starting 2021 onwards.

More, starting with 2022, tourism in the rural area has exceeded the level before pandemics (2019) showing a better resilience capacity as compared with the evolution of tourism at national level which did not completely recovered after the pandemic period not even in 2023 (table 4).

**Number of tourists (arrivals) in accommodation establishments in the rural area and at national level, 2019-2023**

*Table 4*

<b>Indicator</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>+/- 2023 vs. 2019 (%)</b>
Number of arrivals from communes	2,436,567	1,388,561	2,273,302	2,610,893	2,759,003	+13.2
Number of arrivals in agritourist boarding houses from towns and municipalities	89,893	52,374	86,167	84,696	87,789	-2.3
<b>Total rural area</b>	<b>2,526,460</b>	<b>1,440,935</b>	<b>2,359,469</b>	<b>2,695,589</b>	<b>2,846,792</b>	<b>+12.7</b>
Number of arrivals at national level	13,374,943	6,398,642	10,205,322	12,588,333	12,852,156	-2.9
Share of rural area	18.9%	22.5%	23.1%	21.4%	22.2%	-

*Source: INS (2024a) and own calculations*

The same characteristics as in the case of arrivals can be seen also in the case of overnight stays (nights spent at tourist accommodation establishment) having in mind that the growth rate in 2023 as compared with 2019 is less than a half compared with the one for arrivals (+5.4% versus 13.2%), while at national level, the same rate is two times higher (-8,4% versus -2.9%). In absolute terms, in rural area in 2023 more than 6 million overnight stays have been registered compared with 5.8 million in 2019. Starting 2020, rural area in Romania concentrates around 21-22% from the total number of overnight stays registered in Romania (table 5).

**Number of overnight stays in accommodation establishments in the rural area and at national level, 2019-2023**

*Table 5*

<b>Indicator</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>+/- 2023 vs. 2019 (%)</b>
Number of overnight stays_ from communes	5,702,286	3,077,781	5,035,771	5,709,790	6,011,427	+5.4
Number overnight stays in agritourist boarding houses from towns and municipalities	151,493	87,665	142,986	138,828	143,854	-5.0
<b>Total rural area</b>	<b>5,853,779</b>	<b>3,165,446</b>	<b>5,178,757</b>	<b>5,848,618</b>	<b>6,155,281</b>	<b>+5.2</b>
Number of overnight stays at national level	30,086,091	14,579,140	22,747,562	27,044,372	27,565,092	-8.4
Share of rural area	19.5%	21.7%	22.8%	21.6%	22.3%	-

*Source: INS (2024a) and own calculations*

As regards the average length of stay in the rural area, there are no significant changes in the period 2019-2023. This is relatively similar starting 2020 at around 2.2 days, registering a slow decline compared with 2019 (-6.7%). At national level, the average length of stay is oscillating around 2.1 - 2.3 days in the period 2019-2023. One can see that there are no significant changes between length of stay in the rural area and length of stay at national level (table 6).

**Average length of stay in accommodation establishments in the rural area and at national level, 2019-2023**

*Table 6*

<b>Indicator</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>+/- 2023 vs. 2019 (%)</b>
Average length of stay in the rural area	2.3	2.2	2.2	2.2	2.2	-6.7%
Average length of stay at national level	2.2	2.3	2.2	2.1	2.2	-4.7

*Source: INS (2024a) and own calculations*

Known as the indicator of the relation between tourism demand (overnight stays) and tourism supply (functioning accommodation capacity),

the occupancy of accommodation establishments in the rural area is lower than occupancy at national level, generally this difference ranging between over 3 percentage points in 2020 to over 8 percentage points in 2019. In both situations (at rural level and at national level), the evolution of this indicator is similar in 2023 as compared with 2019. In other words, one can see that the occupancy rate in 2023 is still far behind the level reached in 2019, being with 23% lower in the case of rural area and with 22% lower for total accommodation units in Romania. For rural area, the occupancy drops below 20% in 2023 being somehow similar with the level registered in 2020. At national level, however, the occupancy registered in 2023 is superior to the level registered in 2020 with almost 4 percentage points (table 7).

**Occupancy (of bed-places) in accommodation establishments in the rural area and at national level, 2019-2023 (%)**

*Table 7*

Indicator	2019	2020	2021	2022	2023	+/- 2023 vs. 2019 (%)
Occupancy (of bed-places) <u>in the rural area</u>	25.0%	19.2%	21.3%	21.5%	19.3%	-22.9
Occupancy (of bed-places) <u>at national level</u>	33.9%	22.8%	26.1%	29.1%	26.4%	-22.0

*Source: own calculations based on INS (2024a)*

**3.2. Tourism demand of residents for the rural area in Romania**

From a different perspective, that of tourism demand of residents (for trips for holidays and business purposes), one can see that rural area accounted for around 23-28% from the total number of trips undertaken by residents in Romania. Also in this case, the pandemic years 2020 and 2021 are characterized by an increase with some percentage points of the share of rural area in total Romania as compared with 2019 while in the period 2022-2023 this share is around 25%. One can see that in all period 2019-2023, the rural area ranks third in the destination options of Romanian tourists travelling inside the country after cities and mountain area. Also, in all this period the rural area is better represented compared with the seaside area.

In absolute terms, in the period 2019-2023 the highest number of trips in the rural area is registered in 2021 (4.17 million), at the opposite end being year 2020 with almost 3.2 million trips in the rural area. Not the least, it is to note that the first pandemic year brings a significant decline also in the rural area but the rate of decline is lower than the national level (-19% compared with 34.2%), in other words, rural area has been affected to a lesser extent

as compared with other regions such as cities, seaside and mountain area. Moreover, one has to note that the pandemic year 2021 brings a full recovery of the tourism demand for the rural area in Romania which was not the case at national level where the pre-pandemic levels were not exceeded yet. Also to note, in 2023 there is a decline of tourism demand for domestic trips both for rural areas and at national level due to removal of travel restrictions and increase preference of Romanians to travel abroad (table 8).

**Number of domestic trips taken by residents for holidays and business purposes by destination area, 2019-2023**

*Table 8*

Destination in Romania	2019	2020	2021	2022	2023	+/- 2023 vs. 2019 (%)
Total	16,863,013	11,087,663	16,044,913	16,261,236	14,501,236	-14.0
Cities	5,343,296	3,241,753	4,524,374	4,637,966	3,903,058	-27.0
Seaside	2,693,903	1,354,477	2,471,592	2,662,009	2,264,318	-15.9
<b>Rural area*</b>	<b>3,895,855</b>	<b>3,155,442</b>	<b>4,165,158</b>	<b>4,136,982</b>	<b>3,727,128</b>	<b>-4.3</b>
Cruise	12,846	-	13,481	4,906	1,031	-92.0
Mountain area	4,871,541	3,272,349	4,812,718	4,792,738	4,575,617	-6.1
Other areas	45,572	63,642	57,590	26,635	30,084	-34.0
Share of rural area	23.1%	28.5%	26.0%	25.4%	25.7%	-

\* “Including lakes and rivers” – this is the terminology used by National Institute of Statistics in its survey

*Source: INS (2019, 2020, 2021, 2022, 2023) and own calculations*

If we compare the share of rural area from table 8 (from demand side) with the share of rural area obtained from accommodation statistics (table 4) one can see a higher share in the case of demand side with at least almost 3 percentage points in each year in the period 2019-2023. This difference might be explained by the perception of tourists (from demand) for the rural area. In addition, from supply-side, other factors might be envisaged as well for this difference such as underreporting of accommodation providers in order to avoid taxes or lack of proper coverage of the rural space defined in this case only through communes and agritourist boarding houses in towns and municipalities.

### 3.3. Eurostat statistics on tourism in the rural areas

As mentioned before, the European Statistical Office Eurostat is using the classification of local administrative units (LAUs) by degree of urbanization using three categories:

- Cities
- Towns and suburbs
- Rural areas

Obviously, the last category has been considered for identifying the rural areas in Romania respectively of rural tourism.

Unlike national statistics, European statistics is providing complementary a breakdown of the tourism activity (namely number of overnight stays – number of nights spent) by residents (Romanian tourists) and non-residents (foreign tourists). According to Eurostat data, the rural area of Romania accounts for low shares in total number of overnight stays of non-residents registered in Romania (7-8% in 2017-2019 and 5-6% in 2020-2021). Also in case of resident tourists, the share of rural area (in total overnight stays of residents in Romania) is one more significant (26-28%) (table 9).

#### Number of overnight stays in the rural area in Romania by types of tourists, 2019-2023

Table 9

Destination in Romania	2019	2020	2021	2022	2023	+/- 2023 vs. 2019 (%)
<b>Total number of overnight stays</b>						
Rural area	7,221,157	3,758,224	5,480,655	6,894,428	7,627,581	5.6%
Total Romania	29,889,894	14,454,464	20,657,965	26,614,221	29,205,568	-2.3%
Share of rural area	24.2%	26.0%	26.5%	25.9%	26.1%	-
<b>Number of overnight stays of foreign tourists</b>						
Rural area	378,759	50,994	112,233	207,088	310,799	-17.9%
Total Romania	5,269,053	996,134	1,828,443	3,638,152	4,467,102	-15.2%
Share of rural area	7.2%	5.1%	6.1%	5.7%	7.0%	-
<b>Number of overnight stays of residents</b>						
Rural area	6,842,398	3,707,230	5,368,422	6,687,340	7,316,782	6.9%
Total Romania	24,620,841	13,458,330	18,829,522	22,976,069	24,738,466	0.5%
Share of rural area	27.8%	27.5%	28.5%	29.1%	29.6%	-

Source: Eurostat (2024d) and own calculations

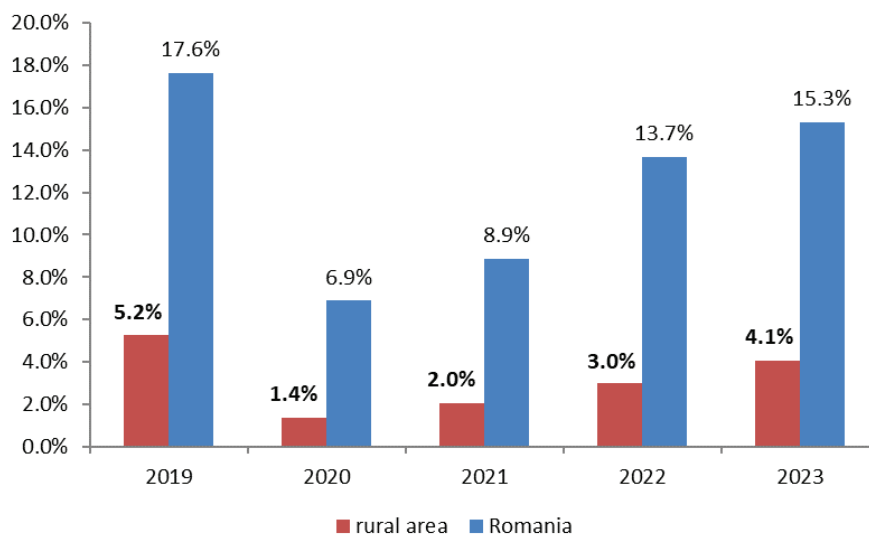
In the first pandemic year (2020), only little than 50,000 thousand overnight stays of non-residents were registered in the rural area, while for Romanian tourists, in the same year over 3.7 million of overnight stays in the rural area were registered. The second pandemic year (2021) brings a double number

of overnight stays of foreign tourists compared with 2020, while in the case of Romanian tourists the number of overnight stays increases with 49% in the rural area. One has to note the rate of decline in the first pandemic year for the number of overnight stays of foreign tourists which is much higher (-86.5%) as compared with the number of overnight stays of Romanian tourist in the rural area (-45.8%).

Due to the fact that foreign tourists choose in large extent cities as their main destination (including for business related purposes), the Romanian rural area attracted in the pre-pandemic period only 5.2% from the total number of overnight stays of foreign tourists in Romania. In the pandemic period, this share becomes extremely low (1.4% in 2020, 2% in 2021) due to travel restrictions that occurred at that time; in 2022 and 2023 this share increase up to 3% and respectively 4.1%. At national level, the share of non-residents in the total number of overnight stays in accommodation establishments in Romania is one much higher, both in the pre-pandemic period (17.6%) but also in the pandemic period (6.9% in 2020 and 8.9% in 2021); in 2023 one can see an increase of this share to 15.3%. These figures demonstrate a low capacity of rural area to attract foreign tourists despite its great potential and tourist attractions that are found in the rural space (figure 2).

**Share of non-residents (foreign tourists) in total overnight stays in the rural area and in total Romania, 2019-2022**

*Figure 2*



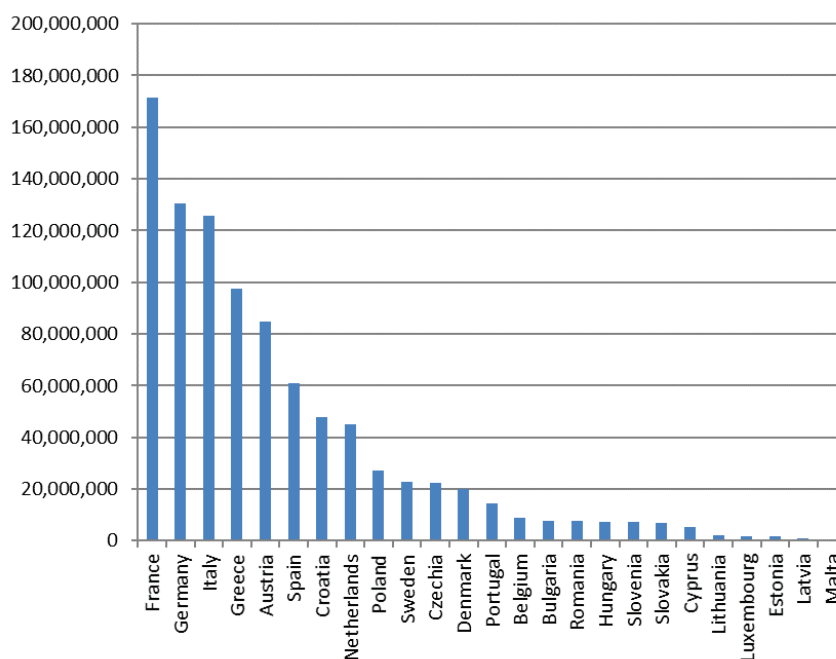
*Source: Eurostat (2024d) and own calculations*



At the same time, Eurostat data allows also the comparability of Romania with the other EU countries. In this endeavour we will take into consideration year 2023 (the last year with available data). Out of 27 EU member states, Romania ranks 16<sup>th</sup>, ahead of Hungary, but after Bulgaria in terms of absolute number of overnight stays in the rural areas. By far, France ranks first followed by Germany and Italy. Indeed, some rural regions from France, Italy and Spain have a considerable capacity to accommodate visitors (Barranco et al, 2021). At the opposite end, the lowest number of overnight stays in the rural area was recorded by Malta followed by Latvia and Estonia (figure 3). Overall, one can see that small countries are occupying the last position in this ranking, but considering its territory and its tourism resources, Romania should have been at least in the first part of this ranking of the EU countries. There is high potential for Romania to go ahead in this ranking of the EU countries from this perspective.

### Overnight stays of the rural areas in the EU countries in 2023

Figure 3



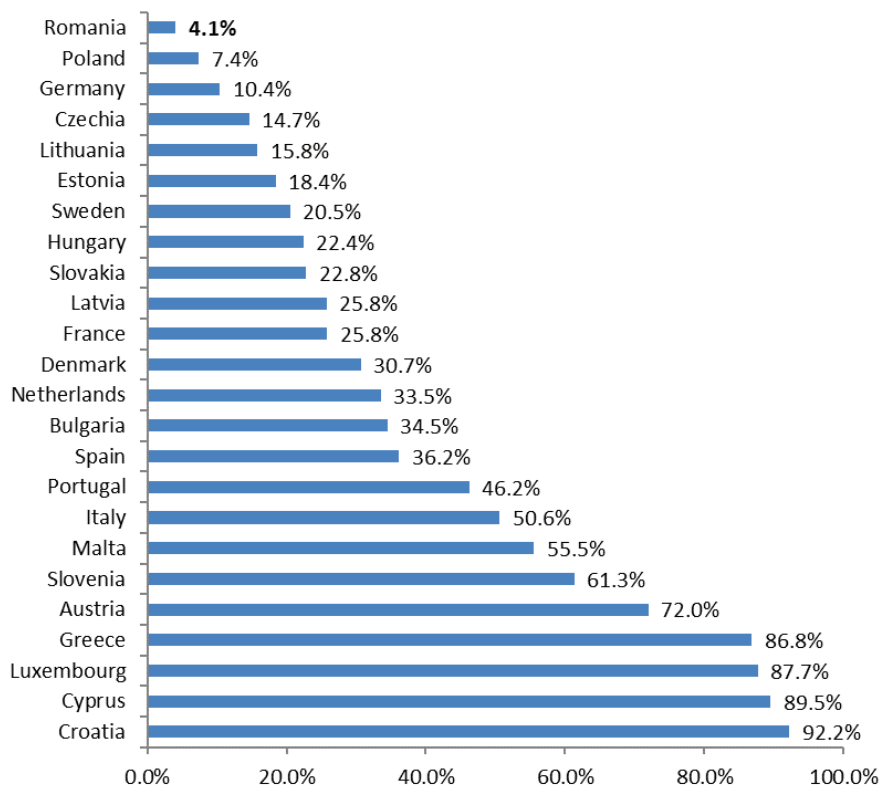
Source: Eurostat (2024d) and own calculations. No data for Finland and Ireland

Unfortunately, Romania is the EU country with the lowest share of its tourism based on foreign tourists (share of non-residents in total overnight stays) in the last year with available data (2023): it was only 4.1% which is

far below the EU average of 40.2%. Along with our country in this hierarchy, there are also Poland (7.4%) and Germany (10.4%), also with relatively small percentages of overnight stays by foreign tourists in the rural areas. At the opposite pole, Cyprus, Croatia and Greece, in their rural areas, rely to a very large extent (over 80%) on foreign tourists. Overall, there are eight EU countries that have rural areas with a predominance of inbound tourism (share of foreign tourists in total number of overnight stays higher than 50%). At the same time, for 6 EU countries, located most of them in the Central and Eastern Europe, the predominance of domestic tourism in their rural areas is more than evident since the share on foreign tourists in the total number of overnight stays is below 20% (figure 4).

**Share of non-residents (foreign tourists) in the total number of overnight stays in the rural areas in the EU countries, in 2023**

*Figure 4*



Source: Eurostat (2024d) and own calculations. No data for Belgium, Finland and Ireland

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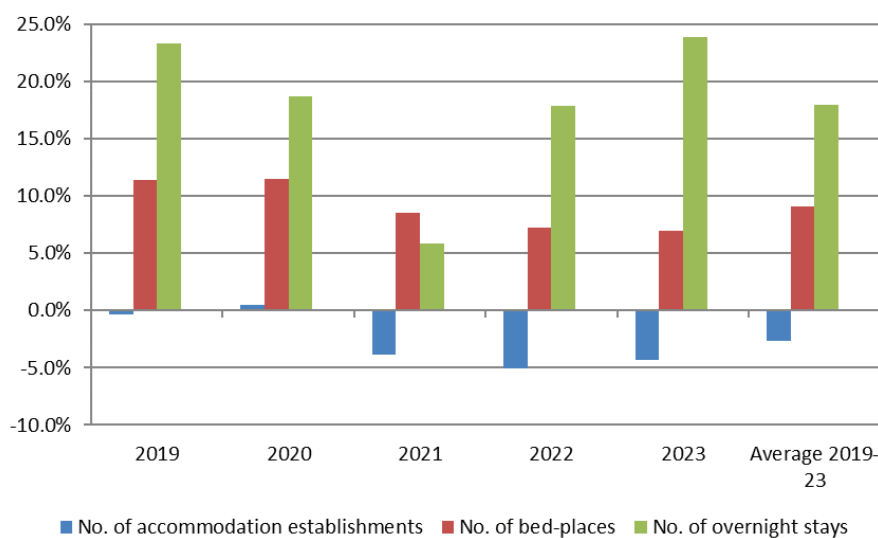
### 3.4. A comparison with Eurostat statistics on tourism in the rural areas

Comparing the proposed approach in this paper (subsection 3.1.) with Eurostat statistics on tourism in the rural areas is possible only for three statistical indicators: number of establishments, number of bed-places and number of overnight stays (nights spent at tourist accommodation establishments) since only for these indicators, Eurostat disseminates data on degree on urbanization. In order to have a common approach for all these three indicators, relative figures of measuring this difference have been used.

This comparison gives mixed results: while in the case of number of establishments Eurostat data provided lower figures (in average with -2.6% in the period 2019-2023), for the number of bed-places and number of overnight stays Eurostat data are higher in average with 9.1% respectively 17.9% (figure 5).

#### Differences (in percentage) between Eurostat data and the proposed approach in quantifying tourism in the rural area in Romania

Figure 5



Source: own calculations based on Eurostat (2024d) and INS (2024a)

In explaining these differences, it should be reminded that Eurostat (2024d) included a number of 81 LAUs as part of Rural areas category even if these LAUs are seen as towns according to Romanian national regulations. In contrast, the approach proposed in this paper (subsection 3.1) was to include only communes (thus excluding towns with the exception of agritourist

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boarding houses). Moreover, some of the towns (as in Romanian legislation) that according to Eurostat (2024d) were part of rural area have the official national status of tourist resorts where tourism activity is very well represented (e.g. Azuga, Băile Govora, Băile Herculane, Băile Olănești, Băile Tușnad, Borsec, Buziaș, Geoagiu, Ocnele Mari, Ocna Sibiului, Slănic Moldova).

## 5. CONCLUSIONS

Even the pandemic period was characterized by a sharp decline of tourism both at national level and in the rural areas, the latter (rural area) experienced higher dynamics as compared with the national level, with 2022 being the year in which the pre-pandemic levels (2019) were exceeded. Instead, at national level, in 2023, tourism still has not recovered the levels reached in 2019 (-2.9% at arrivals and -8.4% at overnight stays).

The better performances recorded by tourism in the rural area in Romania can be explained indeed by the increase of tourist's preferences for these destinations (the growth of demand) but, at the same time, one cannot neglect the positive developments from the supply side perspective. Thus, both functioning accommodation capacity and existing accommodation capacity in the rural area grew at a double respectively almost double rate compared with the national level in the period 2019-2023.

Another important characteristic from the supply perspective is given by the usually low size of accommodation establishments in the rural area (having an average number of 21 beds in 2023), and this kind of establishments has been preferred to a greater extent particularly in the pandemic years 2020-2022. One has to note that rural area had in 2023 a half of total number of accommodation establishments in Romania, and regarding the existing accommodation capacity (number of bed-places), rural area concentrates over 30% of the total number of bed-places in the country in the same year; however, the rural area attracted only 21-22% from the total number of tourists and overnight stays in Romania. This proves a lower appeal and performance of rural area as compared with other destinations in Romania which has some strategic impacts at the level of tourism forms in Romania illustrating a lower capacity of the rural area to constitute a real driver to boost Romanian tourism.

As regards the typology of tourists (residents vs. non-residents), Eurostat data for the rural areas in Romania shows an over-predominance of resident tourists in the rural area both in the period before the pandemics (almost 94%) but also during pandemic years (98-99%). Of course, the travel restrictions from 2021-2022 greatly influenced these figures but even so, it is undoubtedly that domestic tourism strongly supported the tourism demand in the rural area.

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Another important characteristic showed by Eurostat data is given by fact that rural area in Romania attracts foreign tourists to a lesser extent compared with the national level, the difference being over 12 percentage points in the pre-pandemic years and 5-7 percentage points in the pandemic years. The explanation is given by the fact that urban area, especially cities usually attracts important foreign tourist flows due to their accessibility and great events but also for business purposes while rural area by its nature is less profiled on this tourism segment (business tourism also known as MICE tourism – Meetings, Incentives, Conferences and Events).

Not the least, one has to outline the nature of aggregated data (number of accommodation establishments, their capacity, number of arrivals and overnight stays, length of stay) for tourism in the rural area of Romania (data provided by the National Institute of Statistics through Tempo database) which refers exclusively to localities that have the administrative status of communes and do not separately account for rural area that be part of small towns and municipalities (more precisely villages that are part of town and municipalities). The lack of data for this level (villages) – it should be noted that the territorial level for data breakdown of INS is just at LAUs level namely municipality, town and commune – constitutes a major limitation to have a more accurate demarcation of the Romanian rural space and consequently of tourism in the rural area. In order to overcome this major limitation, the solution proposed in this paper was to add a supplementary component namely the agritourist boarding houses located in municipalities and towns considering the hypothesis (which is highly likely) that all agritourist boarding houses are located in villages (and thus in the rural area) that belongs to towns and municipalities. However, one has to admit that this proposed approach does not solve the issue of other types of accommodation units that can be located in villages that belong to towns and municipalities and that can as well constitute an important component of rural tourism.

As a future perspective, using geo-referential data of accommodation units where the location of each establishment can be clearly allocated (for instance to rural areas) in combination with existing tourism statistics seems to be a promising future solution. In this regard the approach proposed by Batista e Silva et al (2018) that derived geographic coordinates from online booking services (as big data source) and used Eurostat's tourism statistics seems to be a feasible approach but still, also in this case, there are some evident limitations that should be overcome in time.

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