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**Romania's National and Local Tourism Strategies in Global and Regional Context:
Trends, Competitiveness and Performance**

The purpose of this article is to investigate Romania's national and local strategies in tourism field and to compare them with global and regional data. Content analysis and data processing were the methods used. Trends in tourism are identified, with Romania following most of the regional ones and increasing its competitiveness level in the Travel and Tourism Industry (while still needing to improve certain aspects). Strategies in tourism are analyzed and the main markets, forms of tourism and destinations are discussed.

Key words: trends in tourism, competitiveness, strategies, Romania, Cluj-Napoca

JEL code: L83

<https://doi.org/10.32976/stratfuz.2020.6>

Introduction

The Travel and Tourism Industry (T&T industry) continues to build bridges between people, not walls, as evidenced both by the increase in the number of international travelers and the worldwide trends in adopting more permissive visa policies (World Economic Forum, 2017). Nowadays, T&T is growing in importance and is able to provide economic development while facing changes and challenges in keeping up with a series of trends for the following years. In 2018 there were 1.4 billion international tourist arrivals worldwide and it is expected to grow at 1.8 billion by 2030 (World Economic Forum, 2019). This available market, in numerical growth, attracts or should attract the attention of policy-makers and other industry stakeholders and capturing as much of the tourism demand as possible can be realized if T&T competitiveness is developed (World Economic Forum, 2019) and if there advantageous development directions are followed.

At the global level, Europe is still the region that receives the biggest number of international travel arrivals and within this continent the European Union registers the biggest share of them (World Tourism Organization, 2018). Romania has usually followed the tendencies in European's tourism (Ciangă and Pătrașcu, 2010). The opening of this country's tourism to the market economy has gone through three periods: before privatization (1990-1997), the big wave of privatization (1997-2007), and after joining the European Union (Matei et al., 2014). Lately, this country, the Northwest Development Region and Cluj County have registered annual growth regarding international travel arrivals. These are the NUTS 2 and NUTS 3 units where Cluj-Napoca is located, which is one of the principal urban travel destinations of the country. It is a medium-sized old urban center, gaining the rank of city in the 14th century (Benedek, 2006), is considered the hearth of the historical region called Transylvania (Nagy et al., 2018) and is one of the country's main economic poles (Benedek, 2016). Cluj-Napoca's growth in popularity as a travel destination is proved by the fact that in 2016 the number of tourists (recorded by the Romania's National Institute of Statistics) exceeded the number of the inhabitants and, since then, continuous growth has been observed, as shown in Figure 1 (www.insse.ro).

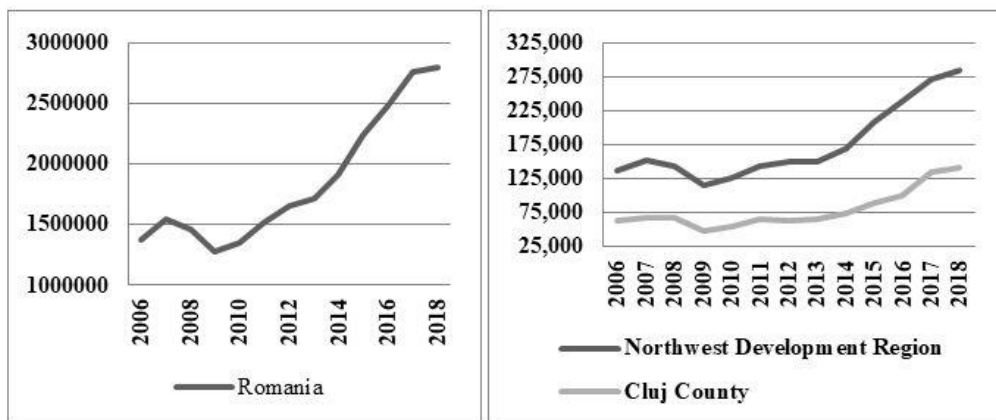


Figure 1: International tourist arrivals in Romania, North-West Development Region and Cluj County

Source: Authors' own work, data from National Institute of Statistics, Romania

In this article the tendencies, competitiveness and performance of Romania's national and local tourism strategies are investigated and compared with global and regional data. It focuses upon tourism in relation to Cluj-Napoca and the wider context in which this occurs. To reach the local level, understanding also the context in which incoming tourism takes place, analysis we carried at various levels such as global, regional and national.

Thus, the global and regional situations regarding international tourism and trends in this field, the extent to which Romania follows the trends and its competitiveness in T&T industry will be considered, the strategic documents and development directions regarding tourism will be analyzed.

In order to create is necessary to be aware of the trends in the field, from worldwide to local level, to follow certain development directions knowing who the tourists are and what their characteristics are. Afterwards, proper travel services and packages can be made and promoted by adequate means.

Thus, this paper has the following questions:

1. What are the trends in tourism and to what extent is Romania following them?
2. What is Romania's level of competitiveness in the T&T field?
3. What are the features of foreign tourist demand in Romania?
4. Which are Romania's directions regarding incoming tourism?
5. How is Romania's tourist offer promoted?

Methodology

Content analysis and data processing were the methods chosen. Information from the Travel and Tourism Competitiveness Index 2019 was examined to present the situation of Romania. Data from Romania's National Statistics Institute, reports, strategic documents and other official papers regarding the topic were consulted. Various indicators related to travel demand were analyzed. Also, there was processed information presented on the website of the World Tourism Market – the biggest business-to-business travel market in the world - that took place in London in November 2019, which was used to analyze the promoted travel destinations, types/forms of tourism and travel packages.

The Travel and Tourism Competitiveness Report 2019 presents the situation of 140 countries, including Romania. The 140 economies represented around 98% of the Travel and

Tourism GDP at world level. In the report, this country was placed in the Balkan and Eastern Europe Region together with Hungary, Moldova, Bulgaria, Slovenia, Poland, Slovak Republic, Montenegro, Albania, North Macedonia, and Bosnia Herzegovina. Data presented in this report are useful for policy makers and other public and private stakeholders in the area (World Economic Forum, 2019).

We consulted documents regarding the actual situation, strategies and trends in T&T field, from the global to local level. Documents including Romania's National Strategy for Tourism Development 2019-2030 (made in 2018 as result of a cooperation between the Ministry of Tourism, General Secretariat of the Government of Romania and World Bank, made in public-private collaboration), the Master Plan for Romania's National Tourism 2007-2026, the Government Programme from October 2019, the Development Plan of Northwest Region 2014-2020, Cluj County Development Strategy 2014-2020 were useful and consulted in order to be aware of the development directions.

Trends and competitiveness in tourism

Worldwide, there are certain trends registered regarding T&T field. They consist of: growth in prioritization of T&T industry sector (government attention, efficient marketing, financial support), growth in international openness, travel becoming safer and cheaper, advancements in sustainable management in T&T field, improvement of infrastructure - especially in air transportation - development of digital services and connectivity and the rise in the number of leisure and business tourists (World Economic Forum, 2019).

According to UNWTO, at the European and European Union level the number of international tourist arrivals is projected to grow. In EU countries, until 2030 it is estimated that the average annual growth will be 1.9 % per year, in the period 2020 - 2030, the growth of this index in the developed countries of the EU is expected to be 1.3% and in emerging economies 2.8% (World Tourism Organization, 2018).

It is important for the actual situation, needs and trends at regional level to be recognized. The countries from the Balkan and Eastern Europe region, where Romania was placed in the T&T Competitiveness Report, have the following features: they need and tend to grow their competitiveness in T&T, they enhance T&T prioritization, their price competitiveness is their most important relative advantage, they have important growth in air infrastructure and need to improve ground infrastructure, they need to improve the enabling environment and to reduce the difference with other regions regarding natural and cultural tourism (World Economic Forum, 2019).

Romania is following the trend of an increasing number of tourists, both domestic and international. In 2019 the number of international tourist arrivals was 2,760,100. In the T&T Competitiveness Index 2019, Romania was in rank 7 in its region for the number of international tourist arrivals. In overall competitiveness in T&T in this region, Romania occupied rank 5 after Slovenia, Poland, Bulgaria and Hungary. Countries from this region need to grow their competitiveness in T&T industry and have one of the fastest rates of developing Travel and Tourism Competitiveness. Romania follows this tendency, occupying rank 66 in 2015, place 68 in 2017 and rank 56 in 2019 (www.weforum.org).

Romania is also registering growth in prioritization of the T&T industry, following this general trend (World Economic Forum, 2019). In comparison with the results of the T&T Competitiveness Index from 2017, in 2019 the overall situation of the international openness remained the same, Romania being at rank 45 at world level (www.weforum.org)

One tendency is that travelling is becoming safer and less expensive and, for the economies belonging to Balkan and Eastern Europe, it is mentioned that their most powerful relative advantage consists of price competitiveness. Regarding the price competitiveness overall index, Romania climbed 34 places in the ranking (ranked 85th in 2017, 51st in 2019). The relative cost regarding accessing international flights and retail diesel fuel prices decreased, the hotel price

index grew slightly and the purchasing power parity' evolution remained static. Also, the level of the safety and security index moved upwards, Romania occupying the 29th rank in 2019 (in 2017 - 39th place), improving the situation regarding business costs of crime and violence, trust in police services, a dropping homicide rate and a good point is the lack of terrorism attacks. In the region there is the trend of improvement in the sustainable practices in travel and tourism field in almost all countries. Romania also follows this improvement tendency (www.weforum.org).

There is a tendency for achieving advances in infrastructure, especially in developing air transportation and this region registers a strong improvement in air transportation infrastructure. Romania improved its situation regarding air transport infrastructure (ranked 82nd in 2017, 72nd in 2019) and recorded improvement in quality of this infrastructure, domestic and international disposable seat kilometers, aircraft departures and number of operating airlines. The regional tendency of needing to improve ground infrastructure is valid also for Romania which needs to continue in this direction because the quality of road infrastructure is in the fourth quarter of the ranking and the railroad infrastructure is in the 61st place. Romania improved its tourist service infrastructure (ranked 62nd in 2017 and 54th in 2019) and development was also recorded in hotel rooms/100 population, quality of this type of infrastructure, and number of automated teller machines. Nevertheless, the quality of tourist services infrastructure needs to improve, being in the last quarter of this ranking (119th place in 2019) (www.weforum.org).

There is a worldwide tendency to achieve improvement in digital services and connectivity. For Romania, the ICT Readiness sub-index has registered growth (ranked 60th in 2017 and 55th rank in 2019) and, with the exception of ICT utilization for biz-to-biz transactions - which remained static - and the mobile network coverage that was already at 99.9%, the other items of this sub-index recorded improvement: the measure of using biz-to - consumer transactions, percentage of adults that utilize the internet, subscriptions - to cellular phones and fixed-broadband Internet or quality of electricity provision. The index regarding the enabling environment recorded development in the last period (ranked 58th in 2017 and 51st in 2019). Nevertheless, for the business environment sub-index, a priority in improving would be regarding the time required to deal with construction permits, the time needed to start a business and the effect of taxation on incentives to work. Regarding the health and hygiene sub-index, the evolution is static (ranked 36th). The human resources labor market sub-index recorded improvement, while remaining one of the aspects that requires development as soon as possible (ranked 73rd in 2019), especially in terms of the qualifications of the labor force (primary and secondary education enrollment, staff training, customer orientation), the ease of finding skilled persons to employ, pay and productivity, or the rate of women being professionally active (www.weforum.org). The other sub-indexes of the enabling environment (safety and security and ICT Readiness) have been previously analyzed.

There is a trend for an increasing number of tourists taking part in leisure and business tourism. According to Romania's National Statistics Institute, in 2018 a bit more than half of foreign tourists have travelled for professional reasons (business and MICE - Meetings, Incentives, Conferences and Exhibitions) - 56.7% - and the rest for particular reasons, of which almost three-quarters were travelling for vacation, this percentage being constant in all 4 – four quarters of the year (Romania's National Statistics Institute press releases 156/2018, 241/2018, 327/2018, 65/2019). The same thing is highlighted by the president of the Incoming Romania Association, Ovidiu Tudor, who mentions that the incoming forms of tourism important in the present are: business, event tourism and leisure (www.wall-street.ro).

Regarding reducing the difference with other regions in natural and cultural tourism, Romania's natural resources overall index improved its situation (ranked 68th in 2017, 56th in 2019) and the cultural resources index remained the same for the number of World Heritage cultural sites and digital requests for both cultural and entertainment forms of tourism, while it grew for the intangible cultural heritage (www.weforum.org).

According to Romania’s National Strategy for Tourism Development 2019-2030, at the moment there are three principal challenges for Romanian tourism: improving the infrastructure used by tourists and the services offered to them, better coordination between public and private tourism stakeholders and better marketing and promotion of travel destinations and experiences (Strategia Nationala a Romaniei pentru Dezvoltarea Turismului 2019-2030)

Tourism international demand, priority directions and promotion of the destination

Regarding the geographic features of the travel demand, according to Romania’s National Statistics Institute, the situation of residence country of the foreign visitors registered at Romania’s border is presented in Figure 2, where it can be noticed that the neighboring countries predominate. This is especially the situation of tourists that choose to arrive in Romania by ground transportation: in 2018 73.7% arrived by road (Activitatea de turism in anul 2018, nr.4/2018). There is a worldwide trend that the biggest part of international travel is realized within the region where the tourist resides (World Tourism Organization, 2018).

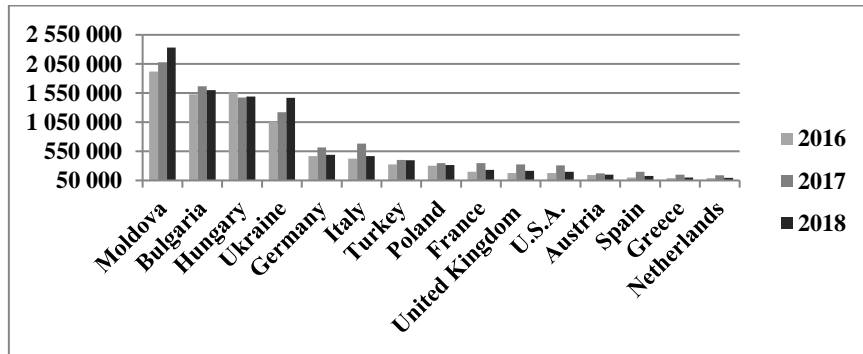


Figure 2: The residence country of the foreign visitors registered at Romania’s border

Source: Author’s own work, data from Romania’s National Statistics Institute (2016, 2017, 2018)

Foreign travelers who consume travel packages from Romanian travel agencies present a somewhat different picture: the top issuing countries (with at least 2,000 tourists in 2018) are presented in Figure 3.

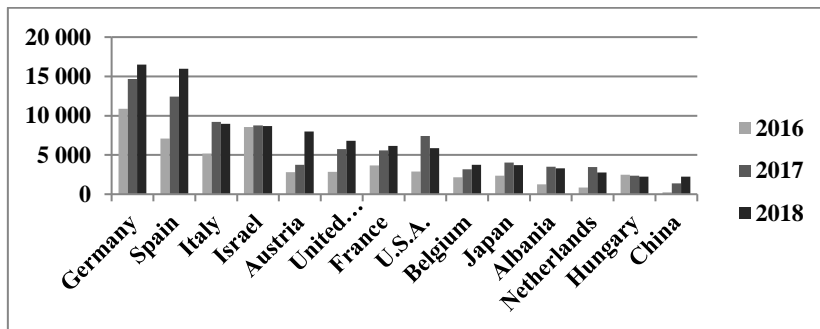


Figure 3: The nationality of foreign tourists participating tourist actions in Romania organized by incoming travel agencies from this country

Source: Authors’ own work, data from Ţacu and Apreutesei (2017); Ţacu et al. (2018), Ţacu et al. (2019)

The principal markets for travel agencies from Romania are: Germany, Spain, Israel, Italy, Austria, United Kingdom, France, USA, Belgium, Japan, Albania, the Netherlands, Hungary and China. Rapid growth can be seen in the situation of Spain. Evidence that this country is an important market for incoming tourists in Romania could be represented by the events organized by the former Ministry of Tourism and Romania’s Embassy in Spain in May 2017. The reasons for the events were to promote Romania as a travel destination, raise its visibility, encourage incoming tourism in Romania and establish easier direct contact between tour operators by a meeting with Romanian and Spanish travel agencies (www.turism.gov.ro).

In 2018 the number of tourists that purchased services from Romanian travel agencies was 111,056 persons. From the total of foreign tourists who consume the travel packages from Romanian travel agencies, the vast majority used the services of Romanian tour operators (96.6% in 2016, 94.3% in 2017 and 94.7% in 2018) rather than retail/intermediary agencies(Tacu and Apreutesei, 2017; Tacu et al. 2018; Tacu et al. 2019).

In collaboration with the World Tourism Organization, a Master Plan was created for Romania’s National Tourism in the 2007-2026 period. This document was intended to be a general framework of policies adopted in order to develop tourism and to implement sustainable management of this economic sector. In this Master Plan, areas of potential development of tourism were identified (Master Planul pentru Dezvoltarea Turismului National 2007-2026). These areas are presented in Table 1.

Table 1

The areas of potential development of tourism according to Romania’s Master Plan for Developing National Tourism 2007-2026

Destination Activities	City-Break In Bucharest	Tourist circuit in Transylvania	Maramureş	Bucovina	The Black Sea Coast	Danube Delta
MICE	X					
Culture	X	X	X	X	X	
Entertainment	X				X	X
Ecotourism		X	X	X		X
Nature		X	X	X		X
Adventure tourism		X	X	X		
Skiing		X	X	X		
Beach					X	
Cruises					X	X
Health and treatment		X		X	X	

Source: Author’s own work,

Data from Master Planul pentru Dezvoltarea Turismului National 2007-2026

In Romania’s National Strategy for Tourism Development, the main forms of tourism that can be practiced in this country were grouped as follows: nature and adventure, winter sports and skiing, culture and history, health and wellness, sea & sun, city-breaks, MICE, and gastronomy. After analyzing Romania’s T&T Competitiveness Index 2017 making comparisons between Romania and other competing countries, and taking into consideration the tendencies in tourism, it was concluded that this country should focus on four segments: adventure and nature (with a focus on rural tourism and ecotourism); cultural heritage, culture and history (with gastronomic experiences); MICE; and health and wellness. Also, they are followed by three

other forms of tourism that should be prioritized in the future – city-breaks, winter sports, and sand and sea tourism (Strategia Nationala a Romaniei pentru Dezvoltarea Turismului 2019-2030).

For comparison, a content analysis was carried out of data presented on the site of World Travel Market regarding the travel offers for Romania of travel agencies promoted at this travel fair (www.london.wtm.com). The forms of tourism presented were: business, luxury, spa and wellness, leisure, FIT - free independent travelers, off-road, cultural, ecotourism, active, adventure, cycling, hiking, trekking, and skiing, most of which are presented in the Master Plan. Also, the types of packages regarding group preferences were: private with or without guide, group travels, for small groups, and family trips; and about duration was: half-day, one-day cruises, tours in Romania lasting several days, and multi-country tours lasting several days. There were promoted thematic tours: wine, gastronomy, with workshops, for Halloween, and music (the George Enescu Festival).

Also the promoted travel destinations continued to be the ones promoted in the Master Plan: Transylvania, Bucovina, Bucharest, the Black Sea Coast, the Danube Delta, while the Carpathians and also the Banat region were highlighted.

In Transylvania tours were offered related to citadels, churches, medieval cities, villages, hills, Multicultural Transylvania, bicycle tours, off-road tours, 2-8 day tours, Bucharest-Transylvania-Bucharest tours, and Christmas Markets, including also Cluj-Napoca. For the Carpathians travel packages were promoted providing nature, adventure, culture, and ecotourism forms of tourism, off-road, hiking, 4-8 day circuits seeing natural areas, castles and villages. Bucovina was promoted as a cultural destination, highlighting the painted monasteries, and Bucharest continues to be promoted as a city-break destination (4 days) or a starting and finishing destination for multi-days tours: Bucharest-Black Sea-Bucharest or Bucharest-Transylvania-Bucharest.

Restricting the area, we decided to further analyze the Northwest Region. According to the region's actual development plan, for the 2014-2020 period the challenges were regarding the fields of sustainable development of spa, cultural and mountain tourism and in promoting North Transylvania as a travel destination on international markets, building on the already existing international reputation of the Transylvania brand (Planul de Dezvoltare al Regiunii Nord-Vest 2014-2020). Reaching the level of Cluj County, the Cluj County Development Strategy 2014-2020 was consulted. The main strategical directions for the county are: becoming a modern and competitive economic center, a scientific and educational pole, a medical center, a touristic and cultural pole, the center of Transylvania, easily accessible, possessing a modern infrastructure, a place with best quality public services, a green county. Also, another direction is Cluj-Napoca – European metropolis (Strategia de Dezvoltare a Judetului Cluj 2014-2020).

The direction regarding tourism is that Cluj County's tourism should be integrated into the touristic system at various levels (regional, national, international), the offers should be suitable for the many and various categories of potential tourists and able to encourage growth in visitor' numbers. Also, the goals are: increasing the area's attractiveness, the quality of infrastructure, and quantity of its components (improving the quality of accommodation units, increasing the number of restaurants with local specialities, developing the cultural, leisure and ski facilities), expanding the length of tourists' stays, organizing cultural events, a county-level functional system of both touristic information and coordination, and defining and promoting the county's brand. Last but not least, the priority forms of tourism are: ecotourism, skiing, hiking, mountain, cycling, and caving-tourism; niche tourism (active, extreme, gastronomical, wine, photography/video); wellness; and cultural (related with art, multiculturalism, religion, and folklore) (Strategia de Dezvoltare a Judetului Cluj 2014-2020),

Also, now in process is the elaboration of Cluj County's territorial planning plan (PATJ), which is both necessary and welcome because the existing one was created in 1998, with no update available. This new plan will be able to express the actual situation, priorities and development directions. The county is the first one from Romania which will receive technical

assistance from the World Bank for its elaboration (www.cjcluj.ro). The Cluj county territorial strategy will be elaborated and act as source of inspiration, giving directions for creating the strategies of smaller territorial units such as cities (Referatul de Aprobare al Consiliului Judetean Cluj, nr. 12378/2019).

Regarding Romania's promotion as a travel destination, one weak point is that the country's tourism promoting campaigns change periodically. Since 1996 Romania had the following tourism promoting campaigns: "Eternal and Fascinating Romania", "Come as a Tourist, Leave as a Friend", "Made in Romania", "Romania Simply Surprising", "Romania – Fabulospirit", "Romania - Land of Choice" and "Explore the Carpathian Garden" (Popescu and Corboş). The "Explore the Carpathian Garden" brand cannot be changed until 2020 (www.profit.ro), but it has caused discontent which leads us to believe that it will be changed. Also, there is no touristic brand for the Northwest Development Region (North Transylvania) or for Cluj County.

After many changes regarding Romania's brand, the president of Incoming Romania Association, Ovidiu Tudor, mentions that a further necessary step would be the realization of a national-level program for developing incoming tourism in Romania, called Destination Romania. (www.wall-street.ro).

In 2006, when Romania's Master Plan for tourism was prepared, Romania had 15 tourist promotion offices, located in Hungary, Moldova, Germany, Spain, Italy, Israel, Austria, the United Kingdom, France, the USA, Belgium, Japan, China, Sweden, and Russia (Master Planul pentru Dezvoltarea Turismului National 2007-2026). These were closed and recently the opening of new offices for better contact with the target foreign markets was taken into consideration; the idea of the creation and development of destination management organizations has been proposed, a public-private collaboration which would also promote tourist destinations.

The Destination Management Organizations (DMOs) are important for both the public and private sector. The government mentioned that establishing these organizations is one of the priorities regarding tourism (Programul de Guvernare 2019). Also, the Incoming Romania Association mentions that it is important to create and start operating the DMOs (Asociatia Incoming Romania – press release 27.12.2019).

Conclusion

Thus, in this paper the proposed objectives were fulfilled. Trends in international tourism were discussed and there was discussion on the extent to which Romania is following them and this county's level of competitiveness in the T&T industry. Further, the features of foreign tourist demand in Romania were identified, along with the country's directions regarding tourism and the situation about promoting the tourism offer.

Related with the trends, in general Romania is following most of the tendencies and recorded record growth in competitiveness in the T&T field in recent years, with improvement in various categories. Nevertheless, more improvement is needed, especially in aspects such as better coordination of the public and private sector, improving the infrastructure (mainly ground transportation and touristic infrastructure), the business environment (eg. the level of qualifications of persons working in tourism), and promoting Romania as a travel destination.

The main travel markets are the neighboring countries (especially Hungary, Moldova and Bulgaria), other countries in Europe, either in the European Union (Germany, Spain, Italy, Austria, France, Belgium, Netherlands, Poland, Greece) or not (the United Kingdom, Albania) as well as countries from outside Europe – the USA, Israel, Turkey, Japan and China. Also, regarding markets for travel agencies, very high grow in demand for Romania was noted by Germany, Spain, Italy, Austria, the UK, and the USA, moderate growth by France, Belgium, the Netherlands, Albania, Japan, and China and the interest remained constant for Hungary and Israel.

Most tourists travel either for professional purposes (business and MICE) or for leisure. Since the moment when Romania's Tourism Master Plan was created, the priority forms of tourism has been in the following categories: nature and adventure (especially ecotourism, nature and adventure), cultural (highlighting multiculturalism, history, traditions, gastronomy), health and wellness (especially wellness and spas), MICE, city-breaks, winter sports (skiing), and the sea (cruises, beach).

The main travel destinations have been: Bucharest (for city-breaks and as a starting and finishing point for circuits in Transylvania that sometimes include also Maramures and Bucovina), Transylvania, Maramures, Bucovina, the Black Sea, the Danube Delta and the Carpathians. The priority forms of tourism and travel packages at national level are also partially present in the priority directions of developing tourism also at the level of the Northwest Development Region of Romania and at the level of Cluj County. Regarding promotion, the public and private sectors need to make efforts in this area and collaborate, and Destination Management Organizations are proposed in order to improve and promote Romania's image as a travel destination.

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