THE COMPETITIVENESS OF ROMANIAN TOURISM IN EU CENTRAL AND EASTERN EUROPE: A COMPARATIVE PERSPECTIVE

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SUMMARY

Tourism is one of the economic sectors with significant growth potential for Romania, but its performance remains moderate relative to the country's available natural and cultural resources. The paper analyses the competitiveness of Romanian tourism in a regional context, drawing on the economies of Central and Eastern Europe within the European Union, aiming to highlight Romania's position and the typologies of tourism development in the region. The originality of the paper lies in the integrated use of the Travel & Tourism Development Index (TTDI) 2024 and economic indicators to assess both tourism competitiveness and the sector's economic contribution. The analysis is based on the Travel & Tourism Development Index (TTDI) 2024 indicators and a set of relevant economic variables, including tourism's contribution to gross domestic product, the sector's share of employment, and the structure of tourism demand. To identify tourism development models, the study employs hierarchical cluster analysis to group economies by structural similarities in the tourism sector. The results highlight three distinct clusters of tourism development: economies oriented towards domestic tourism, economies strongly dependent on tourism, and high-performing, diversified tourism economies. Romania is included in the cluster of economies predominantly oriented towards domestic tourism, characterised by a relatively modest sector contribution to the economy, limited integration into international tourism flows, but a high degree of internal demand. In this context, strengthening the sector's competitiveness depends on investments in infrastructure, the development of human capital, and the implementation of coherent strategies for destination management and international promotion. The study is limited by its static nature and by the fact that the cluster analysis provides a classification of countries rather than causal explanations.

Keywords: *tourism competitiveness, Travel & Tourism Development Index, cluster analysis, Central and Eastern Europe, tourism performance, domestic tourism*

INTRODUCTION

Romanian tourism occupies an ambivalent position within the regional tourism economy. The country benefits from diverse natural and cultural resources, a rich tourism heritage, competitive costs, and a relatively robust domestic market. Yet these assets are only partly reflected in the sector's economic contribution or in Romania's share of international tourist flows. According to TTDI 2024, Romania scores 4.19, with tourism accounting for 1.6% of GDP and 1.7% of total employment. The core challenge, then, is linking tourism assets more effectively with infrastructure, destination management, and international promotion. However, the dynamics of recent years show clear signs of maturation: the consolidation of domestic tourism, the diversification of products, and the emergence of regional destinations capable of competing at the European level.

The objective of the paper is to analyse the competitiveness of Romanian tourism within the economies of the European Union's Central and Eastern Europe, to evaluate its regional positioning, and to identify the main directions for consolidating the performance of the tourism sector.

In order to achieve this general objective, the paper pursues the following specific objectives:

(1) Assessing Romania's position within the TTDI 2024 and comparing it with the performance of other EU economies in Central and Eastern Europe;

(2) A comparative analysis of economic and market indicators relevant to tourism competitiveness - the contribution of tourism to GDP, the sector's share in employment, and the structure of tourism demand;

(3) Identifying regional typologies of tourism development by applying hierarchical cluster analysis to the economies analysed and highlighting Romania's position within the resulting clusters.

The paper addresses a gap in the literature: tourism competitiveness and the economic contribution of tourism are frequently examined in isolation, yet their relationship is rarely tested comparatively. This study brings them together by pairing TTDI 2024 scores with GDP, employment, and demand-structure indicators across Central and Eastern European economies in the EU. The analytical contribution lies in constructing a comparative regional database and applying cluster analysis to situate Romania within a broader typology of tourism development.

The paper is structured into several sections. After the introduction, the second section presents the specialised literature on tourism competitiveness, the main conceptual approaches, and the methods used to assess it. The third section describes the research methodology, including the selected indicators and the clustering procedure used. The fourth section presents the results of the analysis, including the assessment of Romania's position within TTDI 2024 and the cluster analysis of EU economies in Central and Eastern Europe. The last section is dedicated to the conclusions, methodological limitations, and implications for strengthening Romanian tourism's competitiveness.

LITERATURE REVIEW

Tourism competitiveness is a central concept in the analysis of tourism sector development, as it reflects a destination's capacity to attract visitors and generate sustainable economic benefits. The specialised literature highlights the multidimensional nature of this concept, which integrates economic, social, cultural, and institutional factors, and there is no universally accepted definition, as a destination's performance is determined by a complex combination of interdependent factors (Allahverdi et al., 2025). From this perspective, competitiveness is often associated with a destination's ability to create value and maintain its position in the tourism market by efficiently using available resources (Băbăt et al., 2023).

Classical frameworks for destination competitiveness (Ritchie and Crouch, 2003; Dwyer and Kim, 2003) converge on a key insight: resources alone do not produce competitiveness. Their economic value depends on how well they are supported by infrastructure, destination management, and public policy, and on a country's capacity to convert comparative advantages into sustainable competitive ones.

Theoretical approaches distinguish among perspectives on tourism competitiveness, highlighting both the internal dimensions of the sector (such as performance, resource management, and innovation) and external factors, including the economic, social, and institutional environment that influences tourism development (Allahverdi et al., 2025). This distinction highlights the complexity of the competitiveness assessment process and the need to use integrated analytical frameworks.

Regarding the measurement of competitiveness, a widely used tool in the literature is the Travel and Tourism Development Index (TTDI), developed by the World Economic Forum, which enables comparisons of countries across dimensions and pillars relevant to tourism development (Özdemir, 2025; Marti & Puertas, 2025; Maráková & Očkaik, 2026).). This index is frequently used in comparative analyses between countries, facilitating comparisons between destinations and highlighting differences between them (Feridun et al., 2025).

However, the literature highlights the limits of using TTDI as a single indicator of competitiveness. Empirical studies show that variations in index scores are not always correlated with tourism performance indicators, suggesting the need to use additional indicators for a more comprehensive assessment (Kunst & Ivandić, 2021). In this sense, indicators such as tourism's contribution to gross domestic product (GDP) and tourism revenues are considered relevant for analysing the sector's performance (Vašaničová et al., 2023).

Comparative analyses at the European level highlight significant differences between countries in tourism competitiveness, both in overall performance and in the structure of its determinants. Some countries register consistent competitive advantages, while others face limitations related to infrastructure, public policies, or resource utilization (Ozkaya & Demirhan, 2022). These differences are highlighted in studies using TTDI indicators, which enable analysis of the relative positioning of destinations and the identification of competitive advantages and disadvantages (Feridun et al., 2025).

In the South-Eastern, Central, and Eastern European regions, the literature highlights the heterogeneity of tourism development. The use of multivariate statistical methods, such as cluster analysis, enables the classification of countries into homogeneous groups based on competitiveness levels and structural characteristics of the tourism sector (Jovanović et al., 2014). Such approaches facilitate the identification of development typologies and provide support for the formulation of differentiated tourism strategies.

Cluster methods are used in empirical analyses of tourism competitiveness to classify countries into homogeneous groups, based on relevant economic and tourism indicators (Bulin, 2014). Research also highlights that tourism infrastructure is an essential determinant of competitiveness, sometimes having a greater influence than tourism resources themselves (Popescu et al., 2018).

The assessment of tourism competitiveness is closely linked to the analysis of the sector's performance and efficiency and is often conducted using specific quantitative methods. In this context, efficiency analysis methods, such as Data Envelopment Analysis (DEA), highlight significant differences between countries in resource use and outcomes (Ciocoiu et al., 2025). These approaches offer a complementary perspective on competitiveness, focusing on the ratio between inputs and outputs. At the same time, the literature highlights the link between tourism competitiveness and the socio-economic development of destinations. Factors such as infrastructure, the business environment, and sustainability influence both tourism performance and the level of development. At the same time, research shows that the availability of tourism resources does not automatically guarantee competitiveness; competitiveness largely depends on how those resources are exploited and integrated.

METHODOLOGY

The study follows a quantitative, cross-sectional, and exploratory design, drawing exclusively on secondary data. To identify typologies of tourism development among EU economies in Central and Eastern Europe, the research employed hierarchical cluster analysis. The aim of this analysis was to highlight structural models of tourism development and to determine Romania's position relative to other economies in the region.

Rather than testing causal relationships, it is guided by three research questions: RQ1. Where does Romania rank within TTDI 2024 relative to other EU Central and Eastern European economies? RQ2. To what extent does Romania's TTDI 2024 score align with its economic contribution indicators? RQ3. What tourism development typologies emerge at the regional level, and where does Romania fit within them?

The analysis was carried out on the basis of four economic and market indicators, considered relevant for characterising the competitiveness and structure of the tourism sector:

(1) Travel & Tourism Development Index (TTDI) 2024, a composite index that reflects the overall conditions for tourism development and competitiveness;

(2) Share of tourism in GDP, as an indicator of the economic contribution of the tourism sector to the national economy (% of GDP);

(3) Share of tourism in employment, which highlights the sector's capacity to generate jobs (% of the total employed population);

(4) Share of domestic tourism in total tourism demand, an indicator that captures the structure of the tourism market and the degree of dependence on domestic demand (% of total tourism consumption).

TTDI 2024 was chosen as the primary competitiveness benchmark given its recency and its systematic coverage of structural tourism conditions across countries. Since the index does not directly capture economic outcomes, it was supplemented with indicators for GDP contribution, employment, and tourism demand structure.

The selected indicators capture both the potential competitiveness (TTDI) and the actual economic performance of the tourism sector, facilitating analysis of the gap between structural capacity and the economic results generated.

The analysed sample included 11 economies from the European Union belonging to Central and Eastern Europe: Bulgaria, Croatia, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, and Slovenia.

For clustering, the Ward hierarchical method was used based on Euclidean distance. The optimal number of clusters was determined by analysing the dendrogram produced by the hierarchical procedure. The three-cluster solution was retained based on both the dendrogram structure and the interpretability of the resulting groups. A two-cluster partition would have essentially isolated Croatia without revealing meaningful regional patterns; the three-cluster solution draws a clearer distinction between domestically oriented economies and those with a more diversified, internationally integrated tourism base. Cluster analysis is exploratory and highlights similar tourism development profiles without implying causal relationships among the variables included. Therefore, the results obtained should be interpreted as a basis for the structural comparison of the analysed economies and for the positioning of Romania in the regional context.

RESULTS AND DISCUSSION

ROMANIA'S TOURISM COMPETITIVENESS

The publication of the Travel & Tourism Development Index (TTDI) 2024 (the successor to the Travel & Tourism Competitiveness Index - TTCI - launched in 2007) provides a comprehensive picture of the capacity of states to build sustainable, resilient, and competitive tourism (World Economic Forum, 2024). In the post-crisis context, which has heightened the importance of sustainability and resilience, TTDI evaluates 119 economies using a revised methodology based on 17 pillars grouped into five dimensions, totalling 102 standardised indicators on a scale from 1 to 7. In this evaluation, Romania ranks 43rd worldwide, with an overall score of 4.19 out of 7. The country is thus in the upper half of the global ranking, but remains in the second half of the European hierarchy. In the Europe and Eurasia region - the best-performing global area in terms of tourism competitiveness - Romania is placed in the median segment, in 43rd place, alongside Slovenia (42) and Bulgaria (40). Potentially competing countries, such as Poland (27) or the Czech Republic (33), are better positioned, benefiting from more coherent public policies, sustained infrastructure investments, and tourism branding campaigns better calibrated to the international market. The differences do not necessarily derive from existing resources, but from the capacity to convert them into competitive advantages: predictable infrastructure, balanced distribution of flows, specialised workforce, and functional public-private partnerships.

To better understand Romania's positioning and the nature of its competitive challenges, we considered it appropriate to conduct a comparative analysis with countries in Central and Eastern Europe (CEE), a region marked by similar economic profiles, regional competition, and varying tourism performance. This approach allows for the development of an integrated picture of the performance and structure of the tourism market across the region's economies.

Table 1.
Regional comparative analysis (EU CEE) - economic tourism indicators

Country	TTDI	Share of tourism in GDP (% of total)	Share of tourism in the employed population (% of total)	Share of domestic tourism in total tourism demand (%)
Poland	4.4	1.7	2.1	31.2
Czechia	4.31	1.7	4.6	71
Estonia	4.28	3.6	3.1	38.2
Hungary	4.27	2.3	4.2	25.1
Bulgaria	4.25	1.8	2.7	17.2
Slovenia	4.22	4	5.3	39.5
Romania	4.19	1.6	1.7	53.2
Lithuania	4.17	1.9	1.6	58.6
Croatia	4.13	12.2	12.5	13.1
Slovakia	4	1.8	2.5	73.6
Latvia	3.88	3.1	4.2	53.5

Source: World Economic Forum - Interactive Data and Economy Profiles (World Economic Forum, 2024b)

The comparative analysis of the 11 Central and Eastern European economies confirms Romania's position in the middle of the regional competitiveness range, with a TTDI score of 4.19, just below Slovenia (4.22) and Bulgaria (4.25), but above Lithuania, Croatia, Slovakia, and Latvia.

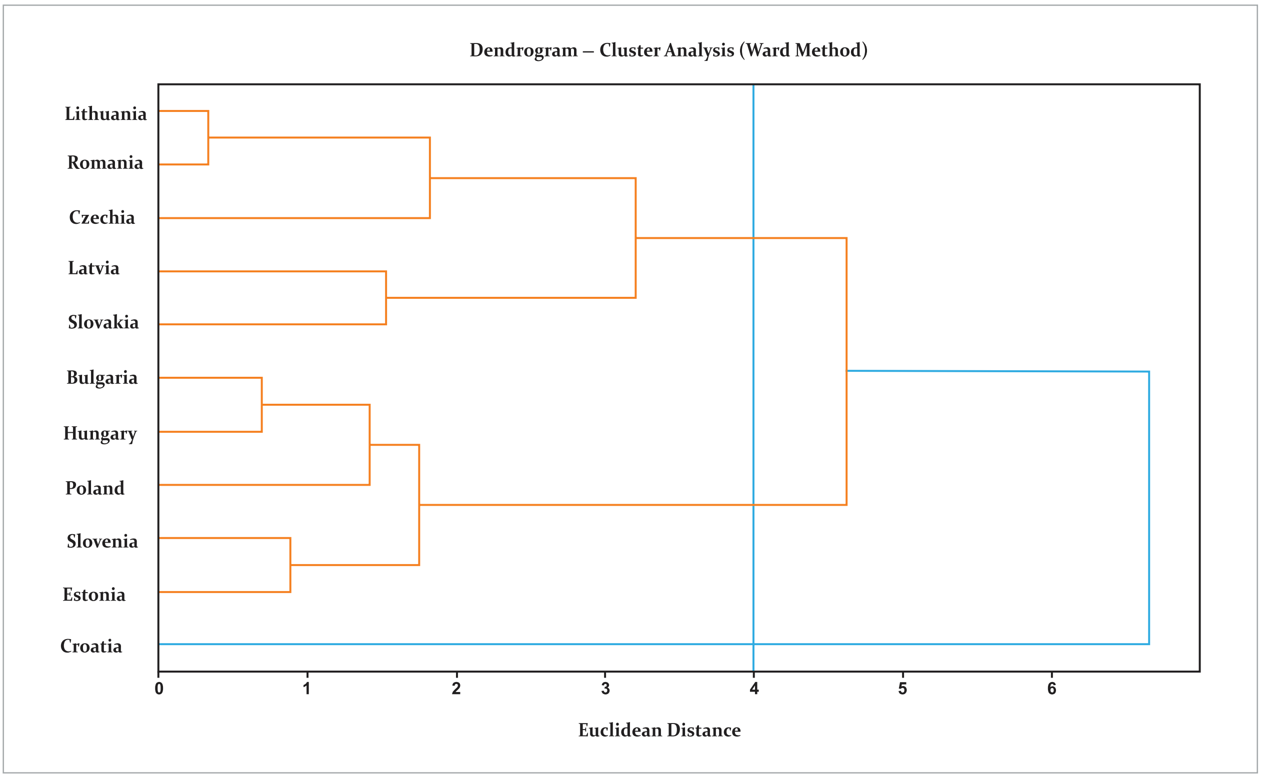
From an economic contribution perspective, the share of tourism in GDP (1.6%) confirms the sector's still modest role in the national economy, far from the levels recorded in Slovenia (4%) or, especially, in Croatia (12.2%). This under-sizing is coupled with a low contribution to employment (1.7%), which indicates a tourism industry with low added value and limited integration into local economic chains.

On the other hand, the high share of domestic tourism (53.2%) constitutes an element of resilience and stability, so that domestic demand remains the main pillar of support for the market, mitigating the impact of external volatility and providing a solid basis for sustainable development. However, the low share of international tourism poses challenges for Romania's positioning within global tourist flows. Overall, Romania's profile indicates a weak economic conversion of competitiveness in tourism potential. Strengthening the country's position in the region depends on the ability to transform comparative advantages into competitive advantages. In the absence of these elements, Romania risks remaining with the image of having poorly exploited potential and of being a modest performer in economic terms.

CLUSTER ANALYSIS

The dendrogram resulting from the application of the Ward method highlights the degree of similarity among the analysed economies, with distances between branches reflecting the level of structural differentiation of the region's tourist profiles. At the lower levels of the dendrogram, groupings of countries with similar characteristics emerge, such as the Czech Republic–Slovakia and Lithuania–Latvia, suggesting comparable economic and tourism structures. As the level of aggregation increases, these initial groupings consolidate into three distinct clusters, corresponding to different models of tourism development.

Figure 1.
Dendrogram of clustering of tourism economies in Central and Eastern Europe



Source: made by the author, based on processing in Python.
Note: The vertical line indicates the retained three-cluster solution.

The separation threshold used indicates the existence of three regional typologies of tourism development in Central and Eastern Europe, associated with different levels of maturity and economic integration of the sector: Cluster 1 - balanced economies, oriented towards domestic tourism; Cluster 2 - economies dependent on tourism; Cluster 3 - performing and diversified economies.

Despite some intra-cluster differences, especially in the share of tourism in employment, the clusters' composition and general features highlight distinct models of tourism development at the regional level.

Table 2.
Composition and characteristics of clusters

Cluster	Countries	Characteristics
Cluster 1: Balanced, domestically oriented economies	Czechia, Latvia, Lithuania, Romania, Slovakia	High share of domestic tourism, modest contribution of tourism to GDP, and medium to low competitiveness;
Cluster 2: Tourism-dependent economies	Croatia	Very high contribution of tourism to GDP and employment; high dependence on international tourist flows; vulnerability to external shocks;
Cluster 3: High-performing, diversified economies	Bulgaria, Estonia, Poland, Slovenia, Hungary	Relatively high tourism competitiveness, moderate economic contribution of tourism, and a more diversified structure of tourism demand;

Source: by the author, based on research results

To better understand the structural differences between the identified groups, the average values of the indicators used in the clustering were analysed.

Table 3.
Average values of indicators by clusters (centroids)

Cluster	TTDI	Tourism in GDP (%)	Tourism in employment	Domestic tourism (%)
Cluster 1: Balanced, domestically oriented economies	4.11	2.02	2.92	61.98
Cluster 2: Tourism-dependent economies	4.13	12.2	12.5	13.1
Cluster 3: High-performing, diversified economies	4.284	2.68	3.48	30.24

Source: by the author, based on research results

CLUSTER CHARACTERISTICS

CLUSTER 1: BALANCED, DOMESTICALLY ORIENTED ECONOMIES

This cluster includes the Czech Republic, Latvia, Lithuania, Romania, and Slovakia and is characterised by a relatively modest contribution of tourism to the national economy. In most of these countries, the share of tourism in GDP is relatively low, and the sector's participation in employment is also limited.

The distinctive feature of this group is the relatively high importance of domestic tourism, which functions as the main driver of tourism demand. Such a structure provides the market with a degree of stability, reducing its vulnerability to fluctuations in international demand. At the same time, this predominantly domestic orientation can limit the economic growth potential associated with attracting foreign tourist flows.

Romania clearly fits into this pattern. With tourism contributing only 1.6% to GDP and 1.7% to employment, the sector remains relatively modest compared to other economies in the region. At the same time, the high share of domestic tourism (53.2%) indicates a relatively stable domestic market, but also limited integration into international tourist flows. Overall, this cluster can be interpreted as bringing together economies with relevant tourism potential but limited capacity to translate it into consistent economic results.

CLUSTER 2: TOURISM-DEPENDENT ECONOMIES

Cluster 2 is represented exclusively by Croatia, highlighting the distinctive profile of this economy within the analysed region.

Croatia stands out for its very high dependence on the tourism sector, reflected both in tourism's contribution to GDP (12.2%) and in its share in employment (12.5%), values significantly higher than those recorded in the other economies included in the analysis. This profile indicates a pronounced economic specialisation in tourism, supported mainly by international tourist flows.

Although this specialisation generates substantial economic benefits, it also implies a high level of vulnerability to external shocks, such as economic crises, pandemics, or geopolitical tensions. From this perspective, Cluster 2 illustrates a model of intensive tourism development, characterised simultaneously by high economic performance and increased structural risk.

CLUSTER 3: HIGH-PERFORMING, DIVERSIFIED ECONOMIES

Cluster 3 brings together Bulgaria, Estonia, Poland, Slovenia, and Hungary, economies characterised by relatively higher levels of tourism competitiveness and a more efficient integration of the tourism sector into the national economy.

These countries present a more balanced profile, combining a relatively high level of competitiveness, as measured by TTDI, a moderate economic contribution from tourism, and a more diversified structure of tourism demand, in which international tourism has a higher share than in the cluster predominantly oriented towards the domestic market.

In many of these economies, the development of the tourism sector has been supported by more coherent public policies, infrastructure investments, and more consolidated tourism promotion and branding strategies. These elements have favoured the transformation of available tourism resources into more consistent competitive advantages and a more efficient economic valorisation of the sector.

ROMANIA'S POSITIONING WITHIN CLUSTERS

The composition of the clusters confirms that Romania occupies an intermediate position in the tourism landscape of Central and Eastern Europe. Although the level of overall competitiveness, as reflected by the TTDI score of 4.19, is relatively close to that of some of the more performing economies in the region, the tourism sector's effective economic contribution remains low.

This discrepancy suggests a gap between the competitive potential of Romanian tourism and its actual economic results. From a structural point of view, Romania can be characterised as a tourism economy predominantly oriented towards domestic demand, still some distance from the model of more integrated and diversified tourism economies.

In this context, strengthening the competitiveness of Romanian tourism depends on the capacity to transform existing comparative advantages - natural resources, cultural heritage and competitive costs - into sustainable competitive advantages. This process involves investments in infrastructure, the development of human capital, and the professionalisation of tourism destination management, so that the existing potential can be exploited more efficiently economically.

CONCLUSIONS

The analysis of the competitiveness of Romanian tourism in a regional context highlights a significant gap between the country's tourism potential and the sector's actual economic performance. Although Romania has valuable natural and cultural resources, these are only partially exploited, limiting tourism's contribution to the national economy and its integration into international tourist flows.

The research objectives were addressed by mapping Romania's TTDI 2024 position, benchmarking its tourism and economic indicators against regional peers, and identifying development typologies through hierarchical cluster analysis.

The results of the comparative analysis indicate that Romania is in the middle of the range for tourism competitiveness in Central and Eastern Europe. At the same time, the low share of tourism in GDP and employment confirms the sector's underdeveloped nature relative to its potential. In contrast, the high share of domestic tourism highlights a stable domestic demand base, which contributes to the sector's resilience and can serve as a point of support for future development.

The cluster analysis highlighted three distinct models of tourism development in the region: economies oriented towards domestic tourism, economies dependent on tourism, and high-performing, diversified tourism economies. Romania's inclusion in the cluster of economies oriented towards domestic tourism indicates a model characterised by stability, but also by limited integration into international tourist flows.

From a strategic perspective, strengthening the competitiveness of Romanian tourism depends on the capacity to transform existing comparative advantages into sustainable competitive advantages. This process involves the modernisation of transport infrastructure and tourist services, the development of human capital in the hospitality sector, the consolidation of destination management, and the implementation of coherent promotional strategies in international markets. In this context, emerging segments such as sustainable tourism, slow travel, creative tourism, and digital nomadism offer realistic avenues for diversifying Romania's tourism offer, provided they are embedded in coherent destination management and promotion strategies. These directions follow directly from Romania's placement in the domestically oriented cluster: rather than emulating highly tourism-dependent economies, the country's more realistic path is a gradual shift toward greater diversification and international integration.

Comparing the average profiles of the clusters highlights that the differences between the tourism development models in the region are determined not exclusively by the level of tourism competitiveness, but especially by the degree of economic integration of the sector and the structure of tourism demand. In this sense, Romania's positioning suggests the potential for convergence towards the model of diversified tourism economies, conditional on the implementation of public policies aimed at increasing competitiveness and more efficient use of tourism resources.

Research limitations. Although cluster analysis provides a relevant perspective on the typologies of tourism development in the Central and Eastern European region, the results must be interpreted in light of certain methodological limitations. First, the analysis is based on a relatively limited set of economic and market indicators, given that tourism competitiveness is a multidimensional phenomenon influenced by many variables. Second, the exploratory nature of the clustering method implies a certain dependence of the results on the selection of indicators, the aggregation method used (Ward method), and the criterion for establishing the number of clusters. In addition, the analysis is static, based on data from a specific period, and does not capture the dynamics of developments over time.

Future research could extend this analysis using panel data and a broader set of indicators, such as international arrivals, overnight stays, tourism receipts, and accommodation capacity, and test the robustness of the cluster solution with alternative methods. Dedicated work on slow travel, ecotourism, creative tourism, and digital nomadism, examined through both destination-level and demand-side lenses, would further enrich the picture.

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