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DYNAMICS OF TOURISM SUPPLY AND DEMAND IN THE “BANATUL MONTAN” REGION OF ROMANIA

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Abstract: *The study analyses tourism supply and demand in 19 of the 64 administrative-territorial units (ATUs) of Banatul Montan, using INS data for 2010, 2015 and 2019–2025. The descriptive comparisons examine the evolution of the indicators, length of stay and concentration of overnight stays, with and without Băile Herculane. Between 2010 and 2025, arrivals increase by 166.64%, and overnight stays by 47.77%; the length of stay decreases from 5.12 to 2.84 nights/arrival. Without Băile Herculane, the decrease in length of stay is 17.80%. The results depend on the ATUs included and cannot be generalised to the entire area.*

• Introduction

The analysis of tourism supply and demand allows the evolution of accommodation capacity and recorded flows, as well as territorial differences, to be tracked. The objective of the paper is to assess the dynamics of establishments, existing bed places, arrivals and overnight stays in the 19 ATUs analysed in Banatul Montan and to examine the contribution of Băile Herculane to the aggregate results.

• Material and method

The study uses INS TEMPO-Online data for 2010, 2015 and each year from 2019 to 2025. The analysis covers the same 19 administrative-territorial units (ATUs) with complete data for all selected years. A separate comparison excludes Băile Herculane and covers the remaining 18 ATUs. Data for 2011–2014 and 2016–2018 are not included. Descriptive analysis in R examines absolute and percentage changes, indices relative to 2010 (= 100), average length of stay and the territorial concentration of overnight stays. Missing values are not imputed. Findings apply only to the ATUs analysed and are not generalised to all 64 ATUs in the study area. The exclusion of the other 45 ATUs reflects incomplete data availability, rather than an absence of tourism activity.

• Results and discussions

Between 2010 and 2025, establishments increase from 124 to 331 (+166.94%), and existing bed places from 6,708 to 9,863 (+47.03%). Arrivals increase from 87,976 to 234,577 (+166.64%), and overnight stays from 450,678 to 665,978 (+47.77%). In 2025, arrivals and overnight stays remain below the 2019 level by 6.95% and 14.34%, respectively.

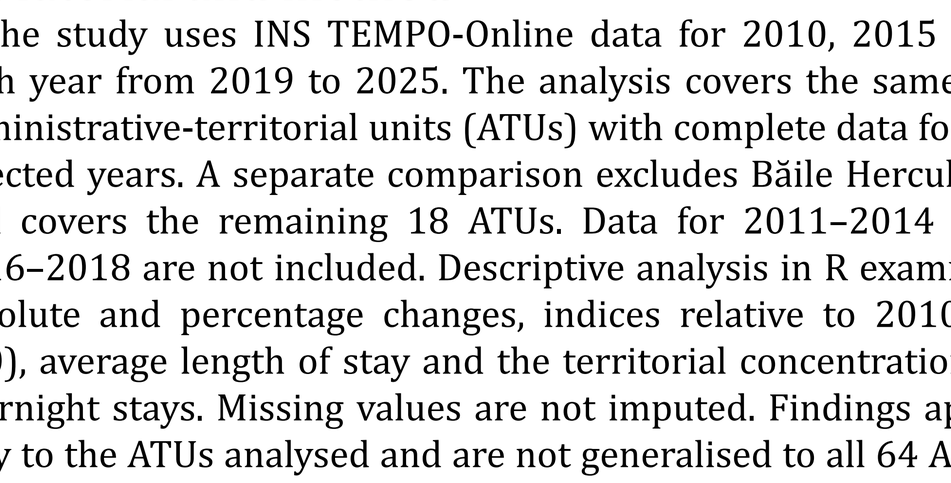


Figure 1. Comparative evolution of tourism supply and demand in the 19 ATUs analysed (2010 = 100)

The average length of stay decreases from 5.12 to 2.84 nights/arrival (−44.58%). Without Băile Herculane, it decreases from 2.37 to 1.94 nights/arrival (−17.80%). The difference shows the dependence of aggregate results on the ATUs included. Arrivals increase more rapidly than overnight stays; the analysis does not identify the individual reasons for shorter stays.

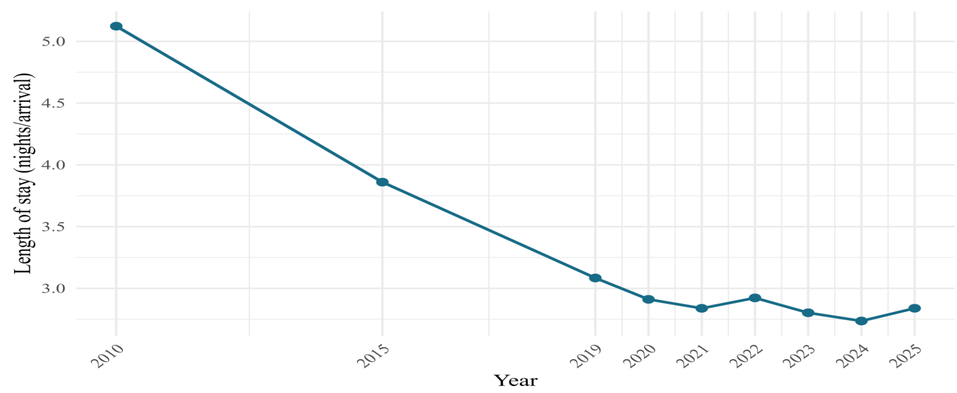


Figure 2. Average length of stay in the 19 ATUs analysed (nights/arrival)

In 2025, Băile Herculane accounts for 77.62% of overnight stays in the 19 ATUs, and the top three ATUs together account for 87.15%. The HHI decreases from 0.634 in 2010 to 0.552 in 2019, then increases to 0.609 in 2025. Concentration does not follow a continuous trend in the same direction and in 2025 remains below the 2010 level.

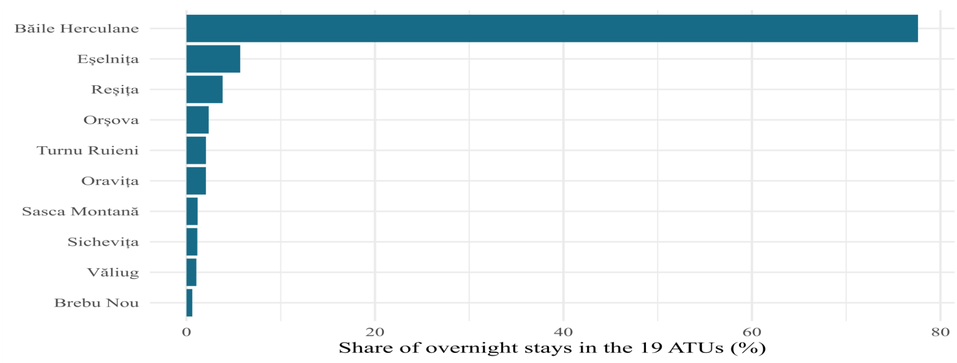


Figure 3. Distribution of overnight stays in the top ten ATUs in 2025 (% of the total for the 19 ATUs analysed)

Tourist arrivals increased faster than overnight stays, while the average length of stay declined. Despite growth since 2010, both arrivals and overnight stays remained below their 2019 levels in 2025. These findings apply to the 19 ATUs analysed.

• Conclusions

The analysis shows that tourism supply expanded between 2010 and 2025, while arrivals increased faster than overnight stays, resulting in shorter average stays. Recovery from the decline recorded in 2020 remained incomplete, as arrivals and overnight stays were still below their 2019 levels in 2025.

Băile Herculane retained its dominant position in the territorial distribution of overnight stays and shaped the aggregate trends. Excluding this destination changed the magnitude of growth and revealed a less pronounced reduction in average length of stay. Territorial concentration declined between 2010 and 2019, then increased, remaining below its initial level in 2025.These findings support monitoring accommodation capacity, tourism flows, length of stay and territorial concentration together, using the same administrative-territorial units over time. They do not establish excess capacity, insufficient profitability or causal relationships. Conclusions apply only to units with complete data and cannot be generalised to the entire study area..