



Government policies for tourism in Romania during the COVID-19 pandemic: a stakeholders' perspective

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Abstract

This paper explores the tourism-related official actions undertaken by the government in Romania during the COVID-19 pandemic from a stakeholders' perspective. The approach is based on answering three research questions: (1) Which are the policies that tourism stakeholders benefitted from during the pandemic? (2) How do tourism stakeholders appreciate the utility and efficiency of the measures implemented by the government? and (3) To what extent do the stakeholders perceive these measures as providing long-term benefits? Methodologically, the study relies on the statistical analysis of data collected through a questionnaire applied to tourism stakeholders from Romania. The results indicate mixed perceptions regarding the implemented policies, with most stakeholders considering the received support as less than optimal. A positive perspective is given by the fact that although most stakeholders regarded the positive impact of the policies only in relation to the pandemic period, there are also stakeholders indicating long-term benefits of these policies. These results are useful for providing lessons from the recent pandemic and for suggesting ways for improving governments' response to future crises.

Keywords: tourism stakeholders, government policies, COVID-19 pandemic, Romania

Introduction

Governments have an essential role in tourism development at the level of local destinations, regions and countries, a role consisting in formulating policies, introducing necessary legislation and regulations or providing diverse incentives that support independent stakeholders (Bramwell, 2011; Jenkins, 2020; Shone et al., 2016). Generally, governments' involvement in matters related to the tourism sector is motivated by the economic and social benefits that the sector brings to the territories where it develops (Ruhanen, 2013). Naturally, both national and local governments will also be expected to intervene and support the tourism sector during various crises, as they (should) have the means and power to help the industry and,

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implicitly, individual businesses to resist during a crisis and to recover once the crisis is over (Hoang et al., 2023; Sigala, 2020).

The COVID-19 pandemic represented an unprecedented global crisis (Estiri et al., 2022; Gretzel et al., 2020), which posed a real challenge to all European Union members, and not only, by testing their capacity to provide effective responses and to avoid a severe socio-economic crisis (Entin & Galushko, 2021). The pandemic led to extreme measures and restrictions imposed by national governments, which had a devastating impact on tourism activities, reflected not only in a decline of both international and domestic tourism but, in many cases, in an almost complete cessation of tourism activity (Gössling et al., 2021; OECD, 2020). Consequently, right from the early stages of the pandemic, there has also been a rapid response from governments in the direction of mitigating the economic impact of the crisis and, later, in facilitating the restart of the sector (Gössling & Schweiggart, 2022; World Tourism Organization, 2020a). While the main focus of governments was on supporting stakeholders for surviving and recovering from the severe negative impact of COVID-19 pandemic (Allaberganov et al., 2021), this crisis situation was also considered a lesson from which all those involved in the sector should learn, as well as an opportunity for bringing the necessary changes towards a more sustainable approach on tourism for the future (OECD, 2020). Therefore, even from the start of the pandemic, it was expected that, because of the diverse impacts it had, COVID-19 would determine long-term changes to the tourism sector from all perspectives, representing a chance to reset how governments, businesses, communities and tourists think and act in matters related to tourism development (Ioannides & Gyimóthy, 2020; Sigala, 2020).

Although the COVID-19 pandemic impact on the tourism sector has been studied from multiple perspectives (Sigala, 2020; Yang et al., 2021), matters related to how governments manage the effects of health crises on the tourism sector and, more precisely, to how stakeholders perceive governments' support in such contexts appear to still represent a rather underexplored research stream (Allaberganov et al., 2021). Consequently, in the attempt to fill this gap in the literature, the main purpose of this paper is to explore the tourism-related official actions undertaken during the COVID-19 pandemic by governments at different geographical scales for the particular case of Romania. This investigation is conducted from a stakeholders' perspective, aiming to answer three main research questions: (1) Which are the policies that tourism stakeholders benefitted from during the pandemic? (2) How do tourism stakeholders appreciate the utility and efficiency of the measures implemented by the local, regional and national governments? and (3) To what extent do the stakeholders perceive these measures as providing long-term benefits? The answers to these research questions are provided through the analysis of data collected from over 500 tourism stakeholders through a semi-structured questionnaire.

Following the Introduction, in order to set the context for the analysis, a review of the literature on the topic of policies adopted during the pandemic and on how stakeholders related to governments' measures was provided in the first section. The second section detailed the materials and methods used, from designing and applying the questionnaire to statistical analysis of the obtained data. The results were presented and discussed in the third section, structured in three sub-sections focused on the precise measures and policies that stakeholders benefitted from, on the stakeholders' perception on the utility of these measures and on the effects they have on stakeholders' activity. Finally, conclusions of the analysis were provided, oriented, mainly, towards the contributions of the study and also towards the lessons that can be learned from this crisis context, both by governments and by individual tourism stakeholders.

1. Literature review

The government, at any geographical level, has been considered to have a central role in supporting the tourism recovery following the pandemic (Allaberganov et al., 2021; Fong et al., 2021; Yeh, 2020). Governments in all or in most countries have prioritised the development of strategies and policies targeted at helping stakeholders and destinations to tackle the COVID-19 crisis (Aldao et al., 2021; Kuščer et al., 2022; Payne et al., 2021). According to the UNWTO COVID-19 dashboard on country measures to support travel and tourism, the support packages adopted by governments and institutions worldwide belong to six main categories: fiscal and monetary, jobs and training, market intelligence, public-private partnerships, restarting tourism and domestic tourism (World Tourism Organization, 2020a, 2021). Previous studies on the subject of governments' responses to the pandemic have concluded on the disparities among countries regarding the strategies that were adopted (Collins-Kreiner & Ram, 2021), with an unsurprising tendency of countries more dependent on the tourism industry to develop and implement larger and more aggressive measures and policies in order to mitigate the negative impact of the pandemic (Khalid et al., 2021). However, there have also been similarities between most countries, with the main one consisting in the fact that, by far, the fiscal and monetary policies have been the most frequent ones across all regions of the world, adopted in the first phase of the pandemic by more than 80% of the 167 countries which reported specific measures to mitigate the negative impact of the crisis and to ensure the recovery of the sector (World Tourism Organization, 2020a). This priority for developing and implementing fiscal and monetary policies is in accordance with companies' needs and expectations, as the pandemic had a severe impact on their revenues, leaving such stakeholders, in many cases, dependent on the governmental financial assistance (Do et al., 2022).

During the last years, the tourism literature has been enriched with numerous studies on the impact of the COVID-19 pandemic on the tourism sector and a

particular stream of research on this topic has been focused on analysing the support governments have provided for tourism stakeholders from various countries. While some papers focus on identifying and discussing the implemented policies, regardless of their category (Allaberganov et al., 2021; Collins-Kreiner & Ram, 2021; Li et al., 2021; Mensah & Boakye, 2023; Rogerson & Rogerson, 2020; Salari & Murphy, 2023; Wu et al., 2021), other studies are centred on the analysis of particular types of measures and policies implemented by the governments and/or by their subordinated organizations and institutions, such as economic policies (Foo et al., 2020; Khalid et al., 2021; Okafor et al., 2022), marketing strategies (Ketter & Avraham, 2021) or holiday vouchers for domestic tourism (Cvelbar et al., 2021). These studies are diverse in their approaches, employing analyses of news articles or of official documents (Allaberganov et al., 2021), interviews or surveys with various stakeholders involved in the tourism activity (Salari & Murphy, 2023; Wu et al., 2021), or econometric models to test particularities of the economic stimulus packages developed by certain governments (Khalid et al., 2021).

Going further into detail, there have been researchers who were also interested in how the stakeholders perceived the implemented policies and, implicitly, to what extent those policies truly responded to their needs. Unsurprisingly, tourism stakeholders related differently to the interventions and policies implemented by the governments. Their perceptions and attitudes varied from positive appreciations of the role that the governments' support had in their recovery (Dayour et al., 2020) to mixed perceptions, with both satisfied stakeholders and those indicating deficiencies in governments' interventions (Jafari et al., 2021; Kristiana et al., 2021; Salari & Murphy, 2023). Unsurprisingly, there were also cases when stakeholders expressed complete dissatisfaction regarding the manner in which the authorities managed the crisis (Booyens et al., 2022). Based on interviews with tourism stakeholders from Ghana, the work of Dayour et al. (2020) concludes, among other important results, on the idea that part of the stakeholders expressed gratitude towards some of the government's measures, measures which had a positive effect on their activity. On the other hand, policies adopted in other countries are perceived from different perspectives by the tourism stakeholders, as it is emphasised in the study of Kristiana et al. (2021) or in the study of Salari and Murphy (2023). Kristiana et al. (2021) investigated government' strategies of support for the tourism sector in an Indonesian destination and, while the government is indicated as being proactive in finding solutions and strategies for tourism recovery, overall, the support measures are still considered less than optimal. For the case of a particular category of tourism stakeholders in Iran, respectively owners of eco-tourism lodges (Salari & Murphy, 2023), the research conducted on the topic indicated that these stakeholders had both appreciation for early assistance from the government and, on the opposite side, disappointment due to a feeling that ecotourism, in particular, has been abandoned by the authorities in the crisis context. More precisely, some of the stakeholders complained about issues of communication or delays in receiving necessary

approvals for certain activities. As previously mentioned, there are also cases when stakeholders manifested a profound discontent regarding the government's interventions. In their study on South Africa, Booyens et al. (2022) identified a widespread perception among tourism businesses that the government has failed in providing them with real support, stakeholders' complaints being related to problems of bureaucracy in applying for the funds, to the long waiting period for receiving those funds or to eligibility issues. Moreover, even some of those businesses which have received financial support appreciate that the funds were far from being sufficient when compared to their needs during the pandemic.

For the case of the Romanian context, tourism during the COVID-19 pandemic has been studied from various perspectives. Some studies explored the impact of the pandemic on tourism demand in Romania (Popescu et al., 2022) or the sector's resilience in front of this crisis (Mazilu et al., 2023). A particular interest of Romanian researchers was for sustainable practices adopted by hospitality stakeholders during the pandemic (Băltescu et al., 2022; Dragomir et al., 2021) or in the post-pandemic period, with focus on discussing sustainable strategies for the recovery of the sector (Dobrescu & Mazilu, 2020; Orîndaru et al., 2021). Little attention has been given, to our knowledge, to Romanian governments' involvement in managing the COVID-19 crisis and to stakeholders' perceptions of this involvement. An attempt in this direction is provided by the study of Matei et al. (2021), which explored the role of public administration in supporting the tourism sector during the pandemic for the particular context of Bukovina region, concluding that the governance models applied by county and local administration are essential in helping the sector recover.

As it is easily noticeable, measures and policies have varied across countries and, naturally, stakeholders' perceptions on the policies that have been implemented are diverse. While the COVID-19 pandemic has been studied from multiple perspectives by tourism researchers during the last years, due to the important impact the pandemic had on the sector (Yang et al., 2021), studies investigating the perception of tourism stakeholders on the support they received through the policies implemented by governments are still rather scarce (Allaberganov et al., 2021) despite this being a rather important topic of research. Consequently, the current study addresses this gap in the literature by investigating the stakeholders' perceptions on the governments' support during the pandemic for the case of Romanian tourism, as it has been emphasised above that it is a particularly understudied area from the perspective of governments' policies for supporting tourism during COVID-19.

2. Materials and methods

The analyses in this paper, respectively the attempt to answer the previously indicated research questions, rely on data collected between June 2022 and

November 2022, through a semi-structured questionnaire designed by the authors so as to answer the research questions. The questionnaire was applied exclusively by email to stakeholders from Romania, belonging to diverse sub-categories of the tourism sector: accommodation units, travel agencies, museums, tourist information centres, restaurants, other types of tourist attractions (castles, natural protected areas etc.). The lists of stakeholders for the travel agencies and for accommodation units were collected from the official website of The Ministry of Entrepreneurship and Tourism, consisting of over 2000 travel agencies and over 6000 accommodation structures. However, the lists turned out to contain numerous invalid email addresses, which considerably reduced the number of potential responses. It has also been considered important to add to the study the perspective of other categories of tourism stakeholders, respectively of those belonging to the tourist attractions category, tourist information centres or restaurants, since they are also an essential part of the tourism system. As such, the questionnaire was also sent to stakeholders from these categories, the lists including these categories of stakeholders having been built based on different travel and tourism websites (TripAdvisor, romaniatravel.guide).

In total, 550 responses were obtained, which are considered to provide relevant and illustrative information for the perception of tourism stakeholders regarding the measures and policies implemented by governments during the COVID-19 pandemic. The main categories of respondents consist of a number of 174 travel agencies and 283 accommodation units. A number of 93 stakeholders belong to various categories, i.e. 38 museums, 16 restaurants, 16 tourist information centres and 23 respondents to other categories (natural protected areas, leisure structures, event organisers, public administration).

From a geographical point of view, the respondents are dispersed across the country, most answers being provided from counties with the most important destinations according to their attractiveness for tourists. As such, 14.7% of respondents are from Bucharest, 8.4% from Constanta county, 7.3% from Brasov county and 5.5% from Cluj county. Therefore, the results can be considered representative regarding their geographic distribution, since they were mainly provided by stakeholders from all of the most developed tourist destinations across the country.

The obtained data was analysed mainly through descriptive statistics and through a qualitative approach on some of the stakeholders' responses. The analysis was structured on three main directions, related to the research questions of this study:

1. Identifying the measures and policies the tourism stakeholders benefitted from
2. Investigating the perceptions of stakeholders regarding governments crisis responses related to tourism
3. Analysing the degree to which stakeholders get from these policies benefits that are beyond resisting the crisis and recovering from it.

3. Results and discussion

Governments are responsible with developing appropriate policies and strategies for ensuring the recovery of the tourism sector following a crisis, implicitly following the COVID-19 pandemic (Wong & Lai, 2022), and governments across the world have done this right from the first stages of the pandemic by implementing various measures, from financial support to the businesses to initiatives for promoting traveling inside national borders and restarting the tourism (World Tourism Organization, 2020a). In Romania, national, regional and local governments have developed measures of support for the tourism sector and, as the following sections illustrate, these measures were received with diverse attitudes by the tourism stakeholders.

3.1. Measures and policies to support tourism – stakeholders' experience

Financial support as a priority

In line with the global level tendency (World Tourism Organization, 2020a), the policy responses most often indicated by the stakeholders are mainly economic ones, respectively fiscal and monetary measures. For all the main categories of stakeholders which responded to the questionnaire, the financial support for their business/activity is the predominant type of help received from the government. More precisely, in different stages of the pandemic, tourism stakeholders were provided with the opportunity to apply for various programmes meant to provide them with emergency economic funds, economic assistance, reduction of taxes and special credit options.

The response of most stakeholders has been a general one, indicating the received financial support through general terms such as 'financial assistance', 'grants', 'European grants' or 'support funds'. However, there are also numerous references to particular programmes/measures, the most frequently mentioned ones, by all stakeholders, being the 'State aid scheme for HORECA sector' and 'Measure no. 2. Grants for working capital for SMEs'. The 'State aid scheme for HORECA sector' is, first of all, a reflection of the severe negative impact that the hospitality sector faced, being generally considered one of the most affected sectors during the COVID-19 pandemic (Abbas et al., 2021; Aronica et al., 2022; Gössling et al., 2021). Furthermore, this support program also reflects the concern of the government for the recovery of the hospitality sector, setting special measures for the stakeholders in this sector. As such, these grants covered for its beneficiaries 20% of the loss in turnover disbursed in 2019, as a result of the COVID-19 pandemic, the allocated funds being ensured by the national government (Eurofund, 2021b). Accommodation and food activities, as well as Administrative and support service activities were the ones targeted through this aid scheme. As it results from the

analysis of the data generated through the applied questionnaire (Table 1), this measure has been mentioned by stakeholders from all three main categories of activities: travel agencies, accommodation units and restaurants.

On the other hand, the ‘Grants for working capital for SMEs’, most of the times referred to as ‘Measure no. 2’, was an important measure meant for enterprises from all economic areas, and tourism businesses appear to have taken advantage of it to a considerable extent. These grants were destined to help enterprises affected by the pandemic, the precise purpose being to cover a certain percentage of the companies’ expenses from the year before the pandemic. The budget consisted mainly of non-reimbursable European funds, completed through the state budget (Eurofund, 2021a). These grants have been indicated by a significant number of stakeholders from the hospitality sector, respectively by 21.8% of the interviewed travel agencies and by 7.42% of the accommodation units. Many of these stakeholders have applied for these grants simultaneously with applying for support through the ‘State aid scheme for HORECA sector’, which should theoretically have implied better results towards the recovery from the crisis and also a higher satisfaction of these businesses’ owners with the governments support.

Concern for the protection of tourism workers

The research conducted by the World Committee on Tourism Ethics showed that, right from the first stages of the pandemic, tourism companies across the world demonstrated a major support for their workers, their well-being representing a priority during the COVID-19 pandemic (World Tourism Organization, 2020b). This support was of an economic, psychological and medical nature, covering all or most of the types of difficulties that tourism employees faced during the crisis. At the level of the national governments, there has also been an evident concern for providing special measures targeted at the protection of tourism workers, measures oriented towards employment retention, offering training and skills development opportunities or reskilling the workers (World Tourism Organization, 2020a). Such measures are definitely encouraged by a growing awareness of the employers that qualitative human resources in tourism are hard to replace once they are lost, their intention being to avoid in this way even more severe negative effects generated by the pandemic. Naturally, the degree to which this matter was a priority for the governments varied from one country to another. While the official policy tracker launched by UNWTO does not indicate Romania among the countries which have implemented measures in the ‘Jobs and Skills’ category (World Tourism Organization, 2020a, 2021), the results of the questionnaire applied to the Romanian tourism stakeholders emphasise that certain percentages of each category of stakeholders have benefitted from policies designed with tourism workers in mind (Table 1).

The main measure indicated is the one related to the technical unemployment, respondents from the categories of travel agencies, accommodation units and restaurant being the ones to have mentioned this measure. The funding for this measure was provided from national funds, the measure itself consisting in an indemnity for technical unemployment which was applied to those employees who were affected as a result of the suspension or reduction of activity in the first stages of the pandemic (Eurofund, 2020a). It is notable that not many stakeholders indicated this measure as one of support for them during the crisis, which might be determined either by the fact that these respondents indeed were not the subject of this measure or by the fact that they did not consider it as important for them and they neglected to mention it.

Other mentioned measures which reflected a concern for employees and for helping them retain their workplace appear to be the ones regarding the possibility of working in teleworking arrangements (Eurofund, 2020c), indicated in particular by travel agencies, museums and tourist information centres or the ‘Kurzarbeit measure’, which implies the reduction of working time for employees from companies whose economic performance was affected considerably during the pandemic (Eurofund, 2020b).

Table 1. Measures and policies Romanian tourism stakeholders benefitted from

Stakeholder category	Number of respondents	Measures/Policies they benefitted from	Frequency of answers	
			Number	% of total*
Travel agency	174	Financial support (fiscal and monetary) <ul style="list-style-type: none"> ▪ <i>State aid scheme for HORECA sector</i> ▪ <i>Grants for working capital for SMEs</i> ▪ <i>Financial support for small and medium size companies - IMM invest</i> 	133	76.4
		Measures related to jobs and employees <ul style="list-style-type: none"> ▪ <i>Technical unemployment</i> ▪ <i>Kurzarbeit</i> ▪ <i>Teleworking</i> 	16	9.2
		Encouraging domestic tourism <ul style="list-style-type: none"> ▪ <i>Extending the validity of holiday vouchers</i> 	4	2.3
		No measures/policies	68	39.1
		Accommodation structure	283	Financial support (fiscal and monetary) <ul style="list-style-type: none"> ▪ <i>Grants for working capital for SMEs</i> ▪ <i>State aid scheme for HORECA sector</i>
Measures related to jobs and employees <ul style="list-style-type: none"> ▪ <i>Technical unemployment</i> 	19	6.7		
Encouraging domestic tourism <ul style="list-style-type: none"> ▪ <i>Extending the validity of holiday vouchers</i> 	17	6		

		Marketing measures	4	1.41
		▪ <i>Promoting certain attraction/ a certain tourism business</i>		
		No measures/policies	176	62.2
Tourist Information Centre	16	Financial support (fiscal and monetary)	6	37.5
		Measures related to jobs and employees	6	37.5
		▪ <i>Teleworking</i>		
		▪ <i>Protection through sanitary measures</i>		
		No measures/policies	6	37.5
Museum	38	Financial support (fiscal and monetary)	6	15.8
		Measures aimed at protecting the visitors	6	15.8
		Measures related to jobs and employees	3	7.9
		▪ <i>Teleworking</i>		
		No measures/policies	27	71.1
Restaurant	16	Financial support (fiscal and monetary)	10	62.5
		▪ <i>State aid scheme for HORECA sector</i>		
		▪ <i>Grants for working capital for SMEs</i>		
		Measures related to jobs and employees	1	6.25
		▪ <i>Technical unemployment</i>		
		No measures/policies	5	31.3

Note: * The percentage is calculated by considering the number of stakeholders from a certain category that indicated each type of measure/policy. One stakeholder might have indicated one or several measures/policies they benefitted from.

Source: Authors' representation

Particular measures for different categories of stakeholders

While some of the measures and policies are widespread and are addressed to all or to several categories of hospitality stakeholders, there are also official actions taken by the governments that are specific only to certain participants to the tourism activity or that are perceived as important only by some of them.

The extension of the validity of holiday vouchers is clearly a strategy which brought significant benefits to the hospitality sector in Romania during the pandemic. Such a measure is also well-known in other European countries, where governments saw the introduction of such vouchers, or the extension of their validity, as an opportunity to fight the collapse of tourism demand in their countries by encouraging domestic tourism (Cvelbar et al., 2021). Although for the case of the Romanian tourism stakeholders, this measure is not mentioned by a large number of respondents (6% of the accommodation units and 2.3% of the travel agencies), the decision to extend the validity of holiday vouchers emitted the year before the pandemic has clearly induced widespread positive economic effects for the domestic tourism. The small percentage of respondents indicating this measure might come as a surprise since the vouchers are known to target all public sector employees (Williams & Horodnic, 2020) and therefore, a larger number of accommodation units and travel agencies might have

been expected to be positively influenced by the population's access to these vouchers. However, there might be multiple reasons for this, from the fact that not all businesses are open or capable to accept the payment of their services through these vouchers or, some accommodation units, because of their smaller accommodation capacity, might not feel the positive effects of such a measure to a large extent. The utility of such a decision for Romanian businesses' activity is synthesized through the following affirmation of one of the guesthouse's owners: *'extending the validity of the holiday vouchers was a good decision because it ensured a significant flow of tourists for us'*. More precisely, in a time when mobility outside one's country was restricted worldwide, thus leading to a severe decline of international tourism (Fotiadis et al., 2021), focusing on encouraging people to visit their own country was a logical strategy to be adopted by the national governments, and many countries developed their marketing strategies in this direction right after the first wave of the pandemic (World Tourism Organization, 2020a).

The measures related to the protection of visitors were also mentioned, although by a reduced number of respondents. Unsurprisingly, this type of measure is especially indicated by representatives of museums (15.8% of the museums), who appreciate the official actions meant to ensure health and safety protocols and to provide the material means for this as quite important in order to maintain a certain number of visitors.

No measures and policies

More than 50% of the respondents for the case of accommodation units (62.2%) and for museums (71.1%) indicate that they did not benefit from any of the governments' policies, which raises question marks regarding the level of accessibility of these policies. It is also the case of travel agencies, restaurants and tourist information centres, although to a lower degree. More precisely, while the majority of stakeholders indicated that they did not benefit from such measures, some stakeholders indicated issues related to the applicability of the implemented policies for their particular type of activity or related to their eligibility for certain types of support. As such, some stakeholders were not eligible for any of the measures, while others expressed dissatisfaction for not being even informed about such opportunities: *'the authorities did not inform us that we could apply for the grant'*. Also, a problem to be taken into consideration is the lack of trust in the government of some business owners, which prevented them from even considering to apply for any of the support schemes, as one guesthouse' owner indicates: *'we did not apply out of distrust, because such a financial support is always destined for <house companies> (<firmele de casă> in Romanian)'*, referring to those companies which are usually in close relationships with the local public administration and are believed to receive substantial economic benefits from such relationships.

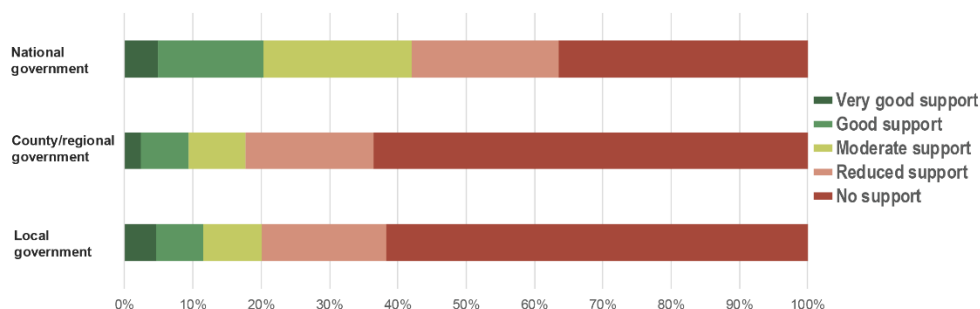
Museums stand out through the reduced number of cases to have benefitted from the implemented policies. In this regard, the statement of one of the respondents, who appreciates that *'the support measures implemented by the authorities were not oriented towards the cultural sector, respectively towards museums'*, is quite representative. While such a statement should be regarded with caution, as it could only be a result of the respondent's lack of knowledge concerning potential policies destined for the cultural sector, if considered together with the fact that the majority of museums appear to not have benefitted from any support, it should encourage further investigation on this matter.

It is important to consider the fact that part of the stakeholders, although not many of them, indicated that not benefitting from governments' help was a result of their own choice, mainly motivated by either not being in need of such a support or by the fact that their business was a new one, which entered the tourism market precisely at the beginning of the pandemic, and therefore, they were not eligible for the implemented policies.

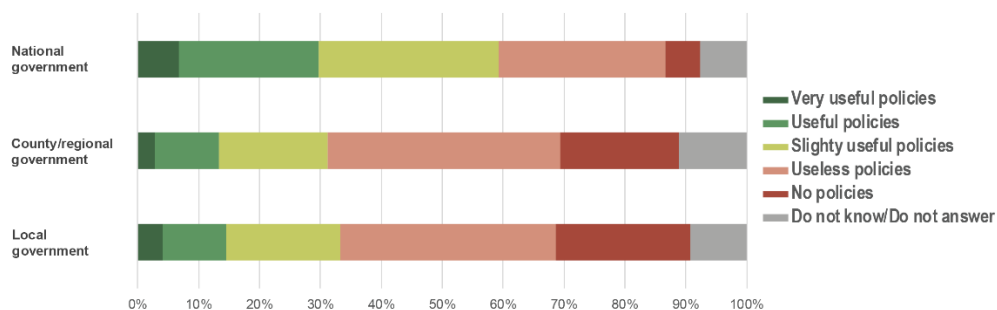
3.2. Perceptions on governments' involvement

It has already been established that tourism stakeholders in Romania related in very different manners to the policies that have been developed and implemented by the public authorities during the COVID-19 pandemic. Figure 1 provides further information regarding the stakeholders' perception on the matter, illustrating a precise evaluation of the governments involvement in crisis management as perceived by the stakeholders. It is easily noticeable that there is a spread discontent in regard to governments' responses to the crisis, for all geographical scales the predominant perception being that there was no support offered by the government or that it was a very insignificant one. However, things are quite different between how national government involvement is perceived and how the involvement of regional and local ones is perceived.

The national government appears to have a rather positive image in the eyes of approximately 40% of the respondents, based on the support it provided for the tourism sector during the pandemic. Furthermore, 5% of the tourism stakeholders appreciated the support of the national government through the policies they implemented as being a very good one. Travel agencies represent 65.4% of the respondents with this perception about the national government's involvement ('very good support'), reinforcing the previously discussed result that this category of stakeholders is the one that has assimilated the benefits of the implemented policies to the greatest extent, when compared to the other categories of tourism stakeholders. A weak communication between the government and other categories of stakeholders, or a potentially dysfunctional management in the implementation of the policies for tourism support might be causes that justify these diverse and even opposing perceptions regarding governments' responses to the crisis.

Figure 1. Stakeholders' perceptions on governments' involvement during the pandemic

Source: Authors' representation

Figure 2. Evaluation of the utility of implemented policies for tourism sector

Source: Authors' representation

While perceptions related to the regional and local governments are very similar, there is a slight difference between them in favour of the local governments. Slightly more stakeholders appreciate local authorities involvement as being a very good one or a good one as compared to the regional authorities, indicating that there might have been more initiatives on behalf of the local government, in certain areas, than from the regional one. Overall, the percentage of negative perceptions is overwhelming in regard to both the local and the regional government, indicating potential deficiencies at these geographical levels which could be the subject of further investigation. However, for the case of the regional authorities, a reduced involvement might be the natural effect of limited decision-making powers attributed to them through law no. 315/2004¹, a law that establishes all matters related to regional development in Romania.

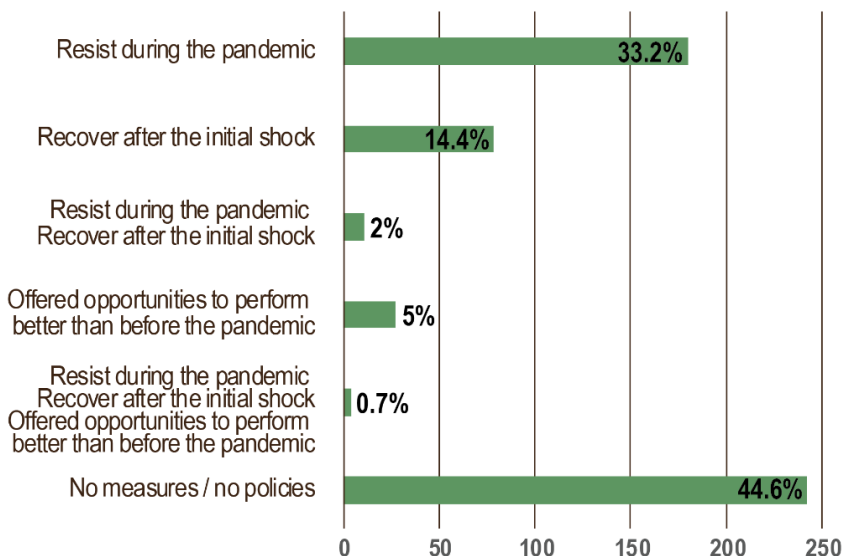
¹ Law no. 315/2004 on regional development, published in Romania's Official Gazette, no 577 of June 29 iunie 2004, amended by EGO. no.111/2004 (published in Romania's Official Gazette, no. 1115 of November 27, 2004, approved by Law no.58/2005, published in Romania's Official Gazette, no.257 of March 28, 2005)

A similar situation was encountered when tourism stakeholders were asked to appreciate the utility of the implemented policies. Unsurprisingly, since national government was perceived as the most involved, their actions were also considered by a larger number of stakeholders as useful. More precisely, 30% of stakeholders considered their policies useful or even very useful, while for the case of regional and local governments, this perception came from approximately 15% of the stakeholders for each case.

3.3. From support for resisting during the crisis to long-term benefits

Unsurprisingly, the majority of the stakeholders perceive the policies which have been implemented by the government as useful only as a support to resist during the pandemic. However, quite a large number of the tourism stakeholders declared that the help provided through these policies were rather oriented towards enabling them to recover after the initial shock (17.16% of the stakeholders), which contains even more positive implications (Figure 3). As such, these measures designed and implemented by the government have managed, for particular stakeholders (especially for travel agencies), to help them reach the state from before the pandemic and not only to barely survive during this crisis.

Figure 3. Effects of the policies adopted by the government on stakeholders' activity



Source: Authors' representation

An even more positive perception comes from those cases when the policies generated long-term positive effects on the activity of the stakeholders, enabling them to perform even better than before the pandemic. Therefore, the support from the government, especially the financial one, under the form of various grants, represented for certain stakeholders a means of investing in their business, of reinventing themselves or/and of outgrowing other businesses which did not manage to overcome the crisis as easily. This appears to be the case of 5.7% of the stakeholders, who indicated that the previously discussed official actions offered them development opportunities beyond the necessity of simply resisting and recovering from the pandemic.

The stakeholders who found opportunities for performing better than before the pandemic in the support provided by the authorities belong to various categories, most of them being naturally found among the categories with the most numerous respondents: travel agencies and accommodation units (Table 2).

Table 2. Stakeholders who perceive the implemented policies as bringing long-term benefits

Category of stakeholder	Number of respondents who performed better than before the pandemic	Total number of respondents in the category	% of respondents who performed better than before the pandemic out of the total
Public administration	1	1	100 %
Travel agency	13	174	7.5 %
Accommodation unit	8	283	2.8 %
Museum	1	38	2.6 %
Restaurant	1	16	6.25 %
Tourism Information and Promotion Centre	3	16	18.8 %

Source: Authors' representation

These stakeholders demonstrate, without a doubt, a better resilience capacity in front of crises, as they appear to have been able to cope with the negative effects of the pandemic and, even more than this, they managed to grow following this crisis. While the public authorities' support is indicated as a factor of this growth, respectively of their better performance as compared to the context prior to the crisis, the fact that not all stakeholders benefitting from this support have the same perception most probably points out that supplementary factors of this success have to be identified and investigated. It is natural that the impact of the implemented policies will vary among individuals inside the sector, and the question that has to

be raised, and further investigated, is whether the higher degree of satisfaction is related to other advantages which allowed those stakeholders to assimilate the support in a more efficient manner or if it is only a matter of an inherently more positive perception and attitude towards the governments' support for those particular stakeholders.

Conclusions

The current paper has aimed to explore the tourism-related official actions undertaken during the COVID-19 pandemic for the particular case of Romania. Through the analysis of the responses gathered from 550 tourism stakeholders, this study contributes to the knowledge on the measures and policies implemented in Romania during this crisis context from a stakeholders' perspective, the focus being more on how tourism stakeholders perceive and relate to the measures developed and implemented by the government and less on a comprehensive analysis of all the policies.

The main contribution of the paper is in shedding light on the Romanian tourism stakeholders' perception on the government's support and the utility of this support. As it has been shown, perceptions are diverse, i.e. from stakeholders completely satisfied with governments interventions to stakeholders who point out a complete lack of involvement on behalf of the public authorities. This last category is especially present with reference to the local and regional governments, indicating that, at this level, business owners clearly had higher expectations. These results are in line with the situation in other countries, where governments involvement proved to be less than optimal (Kristiana et al., 2021) and many stakeholders were dissatisfied with governments' decisions and behaviour in terms of communication and transparency (Salari & Murphy, 2023) or with the bureaucracy and eligibility issues (Booyens et al., 2022). On the other hand, a diversity in terms of perceptions and level of contentment with the government is only natural, as not all stakeholders were capable to the same degree to absorb the provided support and, at the same time, already existent distrust issues towards the public authorities might have prevented their openness in relation to the offered support. Moreover, although governments should target all categories of stakeholders in such contexts, the COVID-19 crisis has been an unprecedented situation and the necessity for fast decision-making might have posed difficulties in covering all necessities and particularities of the tourism sector.

Another important contribution of the paper is in emphasising the nature of the implemented policies and, more precisely, the impact these policies had on the stakeholders. While most stakeholders perceived the support they received as helpful only with focus on the pandemic context, respectively for resisting during the crisis and/or for recovering from it, it is notable that some of the stakeholders, although not numerous, took advantage of these policies for the long-term. These results

reflect the stakeholders' perceptions at a late stage of the pandemic, when they were in the position to better appreciate the policies' effects and how these policies could bring long-term benefits. As compared, some of the results from the early stages of the pandemic revealed a reduced concern of stakeholders for long-term strategies, mainly focusing on government's support only for survival and getting back to normal during the pandemic (Dayour et al., 2020). For the case of the Romanian tourism, it appears that some of the implemented policies addressed the situation from a sustainability perspective resulting, at least in some cases, in improving the performance of tourism businesses during and after the pandemic, not only in helping them stay afloat. This result brings an optimistic perspective on the manner in which the pandemic has been approached, despite the fact that such cases are not widespread across the country.

This study is of an exploratory nature, aiming, at least at this stage, to investigate the measures that tourism stakeholders benefitted from and their perceptions on these measures. Further studies could and should go further and look into the factors that determined certain perceptions of the stakeholders, be them of contentment or of dissatisfaction. Moreover, this direction of research could be further developed by simultaneously addressing governments' policies and stakeholders' own measures for survival during the pandemic and for getting back to normal following its end.

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