

## ANALYSIS OF THE TOURISM LABOR FORCE STRUCTURE IN BUCHAREST

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### Abstract

*As the capital of Romania and the country's most important urban and economic center, Bucharest represents a significant hub for the tourism industry. The labor market is dynamic, and in 2024, the number of job opportunities increased from one month to the next. October recorded a 15% increase in new job openings compared to September. Tourism, services, the food industry, and transportation were the most dynamic sectors. The structure of the labor force in tourism in Bucharest is influenced by economic, demographic, and social factors, as well as global trends in the industry. This analysis will examine the main characteristics of the labor force in tourism in Bucharest, focusing on essential aspects: the typology of the workforce, educational level and qualifications, working conditions, and the challenges and opportunities present today*

*Keywords: tourism; labor market; labor force.*

### 1. Introduction

Based on the definition of tourism provided by UNWTO, "Tourism is a social, cultural, and economic phenomenon that involves the movement of people to countries or places outside their usual environment for personal or business/professional purposes," and the definition of a tourist destination, "The main destination of a tourist journey is defined as the place visited that is essential for the decision to undertake the trip," Bucharest, first documented in 1459 and ranked among the top 10 largest capitals in Europe by population size, stands out as one of Romania's most important tourist destinations due to its favorable geographic positioning and accessibility. As one of Romania's most significant labor markets, it is also one of the largest in the HORECA sector.

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According to the National Institute of Statistics, the resident population of the Bucharest-Ilfov region in 2024 was 2.133 million people [INSEE, January 2025]. Bucharest remains Romania's largest urban agglomeration and, consequently, the largest labor market, offering the greatest diversity of job opportunities. If in 2022, over 700,000 people from neighboring counties (Ilfov, Călărași, Giurgiu, Ialomița, and Teleorman) commuted daily to work in Bucharest (Ziarul Financiar, online, June 2022), by 2023, this number had exceeded 1 million employees, suggesting that Bucharest's de facto population surpassed 3 million inhabitants. Against this backdrop, Bucharest also absorbs the highest volume of both domestic and international tourists, ranking first in Romania in terms of the number of tourist arrivals. This contributes to a large, dynamic labor market in the tourism sector, making it a compelling subject for study and analysis.

This study aims to analyze the structure of the tourism labor market in Bucharest, focusing on its segmentation, trends, and challenges during a period of social, economic, and geopolitical uncertainty.

## 2. Workforce – The recruitment pool of employees in the HORECA sector in Bucharest

As of January 1, 2024, according to the National Institute of Statistics, Romania's population was 21.833 million inhabitants, with 12.187 million residing in urban areas. The national workforce was estimated at over 12 million people, while in Bucharest, it reached 1.3 million. Thus, out of the approximately 2.133 million people living in Bucharest, excluding those commuting daily from neighboring counties, 61.46% constitute the city's available workforce.

Table 1. Workforce in Bucharest as a Share of the Total Population, 2019-2023 (thousands of people)

|                       | 2019    | 2020    | 2021    | 2022    | 2023    |
|-----------------------|---------|---------|---------|---------|---------|
| Romania               | 12198,3 | 12216,8 | 12201,4 | 11986,4 | 12091,8 |
| Bucharest             | 1546,4  | 1241,7  | 1247,3  | 1313,8  | 1311,2  |
| Bucharest/Romania (%) | 12,67   | 10,16   | 10,22   | 10,96   | 10,84   |

Source: <http://statistici.insse.ro:8077/tempo-online/#/pages/tables/insse-table>

The workforce at the national level remains around 12 million people, with Bucharest accounting for 14.10% of the total in 2023, experiencing an annual growth rate of approximately 1% from 2019 to the present. Although the workforce in Romania represents 55.38% of the total population, the average number of employees in 2023 accounted for 44.368% of the total workforce and only 24.57% of the total population.

Table 2. Average Number of Employees in Bucharest as a Share of the Total, 2019-2023 (thousands of people)

|                                   | 2019   | 2020    | 2021   | 2022   | 2023   |
|-----------------------------------|--------|---------|--------|--------|--------|
| Romania                           | 5164,4 | 5031, 7 | 5094,2 | 5209,4 | 5364,9 |
| (Y <sub>n</sub> /Y <sub>0</sub> ) | 100,0  | 97,43   | 98,64  | 100,87 | 103,88 |
| Bucharest                         | 984,04 | 965,4   | 967,9  | 988,0  | 1030,6 |
| (Y <sub>n</sub> /Y <sub>0</sub> ) | 100,0  | 98,10   | 98,35  | 100,4  | 104,73 |

|                   |       |       |       |       |       |
|-------------------|-------|-------|-------|-------|-------|
| Bucharest/Romania | 19,05 | 19,18 | 19,00 | 18,96 | 19,21 |
| (%)               |       |       |       |       |       |

Source: <http://statistici.insse.ro:8077/tempo-online/#/pages/tables/insse-table>

At the capital city level, the average number of employees in 2023 was 1,030,600. This figure accounted for 19.21% of the total average number of employees in Romania and 78.59% of Bucharest's workforce.

Within this context, tourism holds a significant share of the total number of employees, particularly in sectors providing transportation services, accommodation, food services, entertainment, and event organization, as well as in the tourism production sector, including travel agencies.

The tourism workforce in Bucharest includes a wide range of professionals working in various sectors, such as:

- Accommodation and Hospitality: Employees in hotels, motels, guesthouses, hostels, and short-term rental apartments, including unit managers, front desk managers, receptionists, housekeepers, cashiers, security personnel, bellboys, marketing and sales specialists, etc.
- Restaurants, Bars, and Cafés: Staff in public food service establishments, including unit managers, floor managers, waiters, busboys, bartenders, sommeliers, chefs, buffet attendants, bakers, pastry chefs, confectioners, unskilled workers, dishwashers, etc.
- Transport and Travel Agencies: Tourist guides, travel agents, drivers, translators, etc.
- Additional Services and Activities: Event organizers, entertainment and wellness specialists, merchants, local manufacturers, etc.

Regarding education and qualifications, employees in the HORECA sector have varying levels of education and training.

The first category includes employees with higher education degrees—these professionals work in top management sectors such as hotel management, travel agency and tour operator management, tourism marketing, and specialized tour guiding. Bucharest benefits from a large number of academic institutions offering programs in tourism, including the Academy of Economic Studies, the Romanian-American University and Dimitrie Cantemir University, which prepare specialists in tourism management and marketing.

The second category includes employees with vocational or technical training—many tourism-related positions, particularly in the food service, reception, and housekeeping sectors, are occupied by individuals with vocational or technical education. Additionally, there is a continuous need for ongoing training in hospitality and lodging management. Bucharest also benefits from technical colleges that train this category of employees, including Mihai Bravu Technical College, Dinicu Golescu Technical College, Viilor

Economic High School, Virgil Madgearu Economic College, Constantin Kiritescu Economic College, and UCECOM Spiru Haret College, among others.

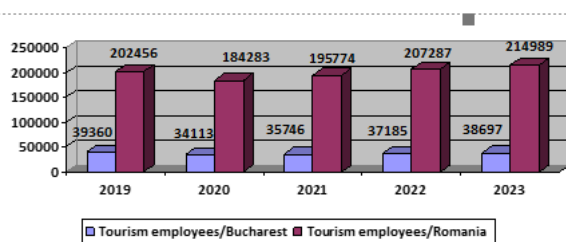
The last category, and also the largest, consists of unskilled workers—these employees are frequently found in support positions, such as cleaning staff, service personnel in restaurants and bars, or various auxiliary tourism activities. These jobs do not require formal education but demand teamwork skills and the ability to interact with customers.

Table 3. Average Number of Employees in Hotels and Restaurants, 2019-2023

|                          | 2019   | 2020   | 2021   | 2022   | 2023   |
|--------------------------|--------|--------|--------|--------|--------|
| Romania                  | 202456 | 184283 | 195774 | 207287 | 214989 |
| Bucharest                | 39360  | 34113  | 35746  | 37185  | 38697  |
| Bucharest/Romania<br>(%) | 19,44  | 18,51  | 18,25  | 17,93  | 17,99  |

Source: <http://statistici.insse.ro:8077/tempo-online/#/pages/tables/insse-table>

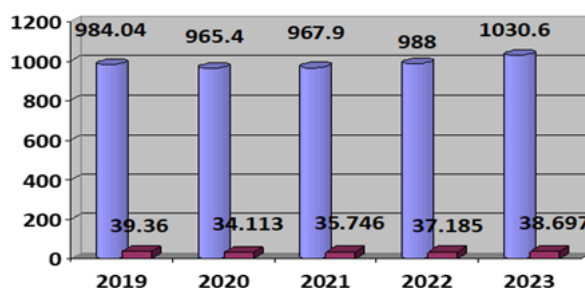
Figure 1 The number of tourism employees from Bucharest and Romania, 2019-2023



Source: <http://statistici.insse.ro:8077/tempo-online/#/pages/tables/insse-table>

Following the analysis of the labor market in the HORECA sector, it was found that in 2023, employees in this field accounted for 1.77% of the total labor resource at the national level and 4.007% of the total number of employees in Romania. However, at the Bucharest level, HORECA employees represented almost double, accounting for 2.95% of the city's total labor resource and four times more (17.99%) when comparing HoReCa employees in Bucharest to the same indicator at the national level (see Table 3).

Figure 2 Tourism employees from total employees in Bucharest (000' pax)



Source: <http://statistici.insse.ro:8077/tempo-online/#/pages/tables/insse-table>

Starting from a total of 34,113 individuals employed in the HORECA sector in Bucharest in 2020, an extrapolation using the Average Growth Method forecasts that by 2026, the number of employees in this sector will reach 43,281 in the capital of Romania. This represents an increase of 26.87% in the number of employees.

Table 4. Number of employees from hotels and restaurants

| Years | Number of employees from<br>hotels and restaurants( $y_i$ ) | $t_i$ | $\tilde{Y}=y_1+ \Delta x t_i$ |
|-------|-------------------------------------------------------------|-------|-------------------------------|
| 2020  | 34113                                                       | 0     | $34113+1528 \times 0=34113$   |
| 2021  | 35746                                                       | 1     | $34113+1528 \times 1=35641$   |
| 2022  | 37185                                                       | 2     | $34113+1528 \times 2=37169$   |
| 2023  | 38697                                                       | 3     | $34113+1528 \times 3=38697$   |
| 2024  | unpublished                                                 | 4     | $34113+1528 \times 4=40225$   |
| 2025  | ...                                                         | 5     | $34113+1528 \times 5=41753$   |
| 2026  | ...                                                         | 6     | $34113+1528 \times 6=43281$   |

Source: <http://statistici.insse.ro:8077/tempo-online/#/pages/tables/insse-table>

$$\Delta = \frac{y_n - y_1}{n - 1} = \frac{38697 - 34113}{4 - 1} = \frac{4584}{3} = 1528$$

In this context of increasing employment in the tourism sector, certain characteristics of the Bucharest tourism labor market can be highlighted, indicating a fairly sensitive market, with high employee turnover and relatively low wage levels, as follows:

- Flexible work schedules – Employees in the tourism sector are often subject to more flexible working arrangements, with extended shifts.
- Wage levels – As in any other sector, salaries are determined by the level of education and job profile. Although the tourism industry generates significant revenue, many employees, especially those in basic service sectors such as accommodation and food services, face relatively low wages. In some cases, their income is supplemented by tips (gratuities).
- Employee turnover – The tourism industry is known for its relatively high staff turnover rate due to physically demanding work, irregular schedules, low wages, and seasonality. For example, Bucharest remains a year-round tourist destination, but most tourism-related activities peak in autumn and spring, while there is a decline during winter holidays and summer months.

- Continuous training – Especially in accommodation establishments, high staff turnover poses a significant challenge, leading to additional costs for recruitment and ongoing training.

### **3. Challenges and opportunities in the Bucharest tourism labor market**

In 2024, sectors such as logistics and HORECA recorded salary increases of 13% and 9%, respectively (Cezar Cârligeanu, February 12, 2025).

Like any labor market, the tourism labor market generates substantial revenues while also playing a multiplier role, contributing to income growth in many related industries.

Being a dynamic market, both entrepreneurs and employees in the tourism sector acknowledge that the challenges of the labor market have intensified after the COVID-19 pandemic, the outbreak of the wars in Ukraine and Gaza, and additional difficulties caused by resource depletion, global warming, economic crises, the U.S. presidential elections, the emergence of new power poles, and the geopolitical reconfiguration of the modern world.

The specific nature of jobs in the tourism sector, combined with a labor shortage, brings several additional challenges to the forefront, such as:

- Intensive physical labor – Many employees in the tourism industry, especially those working directly with customers, face physically demanding and standing-intensive tasks. Work shifts are often very long, ranging from 14 to 15 hours per day (e.g., chefs, waiters, bartenders, etc.). Additionally, those employed in hospitality and event organization frequently handle heavy loads, such as merchandise, crates, boxes, equipment, and furniture.
- Lack of qualified personnel – Although Bucharest has educational institutions that train tourism specialists, there is still a gap between market demands and employee skills. This is particularly evident in fields such as tour guiding, ticketing, hotel management, and digital tourism marketing.
- Global economic, social, and political fluctuations – Various financial and political crises have a direct impact on tourism demand. Employees in this sector are often among the first to be affected by economic recessions or declines in tourist numbers.

In an era of digitalization and social responsibility, the tourism sector also presents various opportunities for professional development and for attracting human resources to this field.

Increased use of technology in tourism – The growing adoption of mobile applications, online bookings, and virtual tours can create new opportunities for attracting tourists and streamlining reservations. Additionally, it offers new training and professional

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development methods for the tourism workforce, particularly in fields such as digital marketing and tourism technology management.

Growing trend toward sustainable tourism – There is a global shift toward sustainable tourism, and Bucharest has the potential to attract this customer segment, particularly through hospitality structures affiliated with hotel chains that visibly implement sustainable practices and show concern for reducing their environmental footprint.

Since sustainability practices cannot be effectively implemented without the involvement and commitment of human resources, these establishments require a better-educated workforce that is interested in sustainability, in order to develop green, eco-friendly, and responsible tourism offerings.

Infrastructure development for improved tourist accessibility – enhancing Bucharest's accessibility as a tourist destination can significantly boost tourism demand. Key projects include the expansion of Henri Coandă Airport, the reopening of Aurel Vlaicu Airport in 2025 for medium and large commercial aircraft, the construction of a new ring road around the city, and the modernization of public transport, including new tram systems. Additionally, the growth of hospitality infrastructure, with the entry of international hotel brands such as Moxy Hotels, Marmarosh Hotels, and Courtyard, along with the development of new anthropic tourist attractions like Mina Museum (Romania's first immersive museum) and the Therme Spa Center, will likely increase tourism demand. With enhanced accessibility and improved working conditions in new and modern establishments, Bucharest has the potential to attract a workforce from neighboring regions and counties.

Increasing Bucharest's visibility as an urban and city-break destination – The rising popularity of Bucharest as an urban tourism and city-break destination is driving faster growth in tourism compared to other sectors. This expansion will lead to the creation of new jobs in the industry. Although HORECA wages have traditionally been relatively low, the increasing demand for employees in a labor-shortage context will likely result in more attractive salary offers to retain and attract workers.

Continuous training as a key factor in skill development – Ongoing training is essential for developing new competencies that align with the increasingly complex demands of the labor market. It has a significant impact on both productivity and work quality, as employees with higher skill levels are twice as likely to achieve higher productivity compared to those with lower skill levels. The expansion of online courses has intensified professional development activities, offering employees continuous training opportunities, including online courses and mentorship programs. In a rapidly evolving labor market, 73% of employers consider continuous employee development essential, while over 60% of employees will require training or retraining by 2027 (Andreea Tobias, 2025).

#### **4. Trends in the tourism labor market**

New employees prioritize transparency and flexible work schedules, showing a greater interest in professional development rather than salary alone (Bogdan Cană, 2025).

One of the most significant phenomena affecting Romania's labor market is workforce migration. In recent decades, the country has recorded one of the highest emigration rates in the EU, with reputable recruitment firms facilitating access for professionals to jobs abroad. This phenomenon has multiple causes, ranging from significant wage disparities compared to other European countries to working conditions and living standards. The effects are diverse and complex, including labor shortages in certain sectors and increased pressure on the retirement system.

Technological advancements and digitalization have profoundly transformed work processes across many industries. New occupations have emerged, and skill requirements have evolved accordingly. In this context, rapid adaptation to new technologies has become a key factor for employees. It is estimated that by 2035, 35% of jobs will be automated, while Romania continues to lag behind other countries in adopting new technologies at the organizational level.

Romania's labor legislation has evolved over time, adapting to new socio-economic realities. Its primary objectives are to protect employee rights while also providing flexibility in labor relations. However, the implementation of these regulations has sometimes posed challenges for both employers and employees.

The use of "staff leasing in tourism" (Intra Interim, 2025). This is defined as a process in which tourism companies lease their personnel to other firms during peak periods. It is an efficient mechanism that allows companies to cope with increased demand without incurring the costs associated with hiring and training new staff. Regarding the types of staff leasing, this can be carried out on a long-term or seasonal basis. Long-term leasing involves renting personnel for extended periods, while seasonal leasing refers to hiring personnel during peak periods, such as winter for ski resorts or summer for beach destinations. Staff leasing plays a crucial role in the tourism industry, especially during peak seasons, when demand for personnel is high. The demand for tourism staff can increase by up to 30% during peak seasons, in which case staff leasing helps efficiently manage human resources and ensure high-quality services for tourists.

#### **5. Conclusions**

In conclusion, the tourism labor market in Bucharest is a continuously growing sector. Despite its numerous challenges, as Bucharest develops into a top European destination, it will attract an increasing number of tourists, compelling entrepreneurs to invest in human resources, focusing on training and employee retention to overcome future socio-political challenges. Wage levels are also rising, and employers are striving to offer additional benefits to employees, beyond basic salaries, recognizing the importance of workforce satisfaction in delivering high-quality tourism services. On the other hand, 2025 will be a year of adaptability, and employers who invest in human resource

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development and the adoption of new technologies will gain a competitive advantage. The structure of the tourism workforce in Bucharest is characterized by a diverse range of professions and educational levels, with a balance between qualified personnel and those working in less specialized sectors.

Although there are challenges, such as lower wages and seasonal fluctuations, Bucharest has significant opportunities for tourism development, especially in the context of digitalization and the growing demand for sustainable tourism. Investments in education and continuous professional training, along with improvements in working conditions, will be crucial for enhancing the competitiveness of the tourism workforce in Bucharest.

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