

THE ROMANIAN TOURISM INDUSTRY IN THE ENLARGED COMMUNITY

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Abstract. Tourism is an economic field for Romania, with a valuable development potential, unexploited yet enough and which can become a source of attraction both for foreign tourists, but this is made difficult by the strong competition from neighbor countries and the extent of issues connected to competitiveness. Despite this current difficult problem, the Romanian tourism has had an ascending trend in the last few years. For increasing the role of tourism in industry, achieving the goal of European integration for the touristic field and complying with the requirements of sustainable development, the government has to keep playing an important part and initiate active policies that would lead to the increase of the tourists' number, tourism incomes and the average duration of the stay. The Romanian government perceives the important role the tourism and travels field can play within the future development of the country, but during the considerable economic efforts made for the European Union integration in 2007, the touristic field has been sort of left in the shadow.

The touristic field development strategies have proven to be less notable. This is justified by the large list of weak points of the touristic field, both at national level: low standards of the tourism infrastructure, weak quality of accommodation and related services, underdeveloped main infrastructure, the list of the sports tourism capacities, insufficient promotion of touristic products on national and international plan, as well as at regional level, the low number of tour operators, the low number of touristic and cultural events, high weight of the social subsidized by the state budget tourism. The frequent reorganization of Romanian structures and institutions is another weak point of the field and the lack of continuity affects the capacity to promote and implement a unitary strategy for tourism development and promotion.

The studies drawn-up within OMT, based on information and market analyses made in big countries generating touristic flows in Europe, as well as researches made among foreign tourists visiting Romania, characterize the Romanian touristic offer, through the following aspects:

- all the types of programs offered by Romania face a tight competition on the West-European markets. Authorities show that Romania is not directly competing with its neighbors, nor with Bulgaria or Hungary, nor with any other country in the zone, because we have a very diversified offer for tourists. Bulgaria has only seaside, Hungary counts only on spas, while Romania has both of them, but we do not know how to promote them. For now, the number of Romanians attracted by the offer of “non-competing” countries is very high.
- competing destinations have a diversified range of facilities for all the categories

of tourists;

- the Romanian offer is somehow limited, restricted to a few resorts, and there only to a few hotels. The touristic services offer are less diversified, and the lack of corroboration of the tariff levels with the quality of touristic services damages consumption.

- services are inferior to those of competing destinations such as Bulgaria, Turkey, Greece or Cyprus. Romania is more competitive towards some of its competitors in the field of prices, environment, its opening towards trade and tourism and social field, and less in the field of technology, human resources and infrastructure.

- pleasure does not equal the offer level of other destinations. When off-peak season, tourists are not offered optimum conditions for accommodation and meal, while the pleasure activities almost do not exist.

- the technical-road infrastructure is inappropriate. The technical status of roads, streets and railways is poor, the image of town entries, itineraries, access ways is often inadequate and so it is their signaling;

- the lack of superior comfort hotels in big cities and international interest resorts;

The strategy project for 2007-2013 issued by the National Tourism Authority draws the attention upon the fact that Romania has stopped being an attractive touristic market from the point of view of the quality-price report. Any country that wants to develop long-term tourism has to ground its activity on a long-term tourism development plan. The Romanian government has established that it is extremely necessary to draw-up a Tourism development plan for laying the bases for implementing a sustainable approach of tourism development in Romania, by concluding a contract with The World Tourism Organization for this action. The Master Plan includes a 6-year action plan (2007-2013) and financial support through the structural funds to which Romania has access due to its integrating in the European Union in January 2007, but refers to tourism development for a period of 20 years, until 2026.

The tourism strategy represents the action plan meant to provide positive economic results and strengthen the management process. In drawing-up a competitive tourism strategy, authorities and experts must take into consideration many elements: defining objectives, choosing services and facilities, quality provision, drawing-up the marketing strategy, drawing-up a reliable tourism brand, financing it, establishing the organizational structure, the field support and achieving a continuous strategy monitoring.

Romania's perception as a touristic destination is not very good due, mainly, to the deficiencies of marketing and destination promotion, the weak governmental support for tourism, the often unprofessional practices in the field, low standards of visitors' services, touristic infrastructure, facilities and ways to spend time, which are not in compliance with the current requirements. Citing the WTTC President, Jean – Claude Baumgarten (May 2006), the Romanian tourism has the potential to develop, by 2016, over the European and world average "the first emergency" being the improvement of the country's image abroad (*WTO, Master Plan for developing national tourism 2007-2026*).

The strategic tourism development objective is, within this context, the establishment of a competitive touristic destination, on an international level, at the level of Romania's touristic resources that can establish this field as a main economic activity within the national economic system. The achievement of this objective aims some action directions related to: modernizing the touristic product, marketing and

promotion, human resources, correlating with other national economic development policies, monitoring and assessment.

Tourism and travels must be included within the general policies for workforce, trade, investments, education, culture and environment protection. Romania has to undertake an image campaign in order to increase the information of public and private factors relating the tourism industry contribution and the development potential.

In most of the world countries, the jobs included in the touristic fields are divided into national professional associations, without a lucrative purpose and with no political purposes, seeking to defend the job interests and favour the development of their professional specialized actions. In this quality, they take part in the policies substantiation process, especially in the field of personnel competences. Professional associations are those proposing training courses and programs to the economic agents and education units in the public and private field for the tourism jobs. They also take part in preparing and enforcing the decisions related to touristic development through their proposals.

Tourism is an industry with an intensive labor market, based on people. When tourists visit Romania, they “buy” not only the charm and attractions, but the skills and services of the tourism employees also. That is why, the development of human resources should be the main concern of tourism experts. Lately, Romania has answered the increase in the tourism industry, focusing on product development and marketing. With limited resources used in tourism, Romania has generally given priority to hotels buildings, airports, roads and other facilities and on developing marketing campaigns, not very well achieved.

In general, the tourism labor market is characterized by a low level of education. Tourism is a traditional, fragmentary, industry, dominated by small businesses and run by managers who do not actually have education or formal training in tourism. In Romania there is the view that a proper skilled generalist can be trained within the specific problems of touristic operations and is preferred to a highly skilled tourism expert. This approach from bottom to top cancels both innovation and leadership. Due to the fast change of tourism nature, there is a danger coming from the overtraining in detailed knowledge and skills. Human resources development and training programs are often implemented ad-hoc, with specific programs for different activities to prevent the most pressing needs in field industry. There is a tendency to develop the trainings remediation initiatives complying with what usually happen, rather than proactive training initiatives, which anticipate the future needs of industry. The important work resources are not seen as an integrating part of tourism development. Our opinions are supported by the structures of skills levels tourism employees; due some studies made in the main European touristic countries the following have been established: approximately 40% of the entire tourism personnel is unskilled, almost 42% have general average training, 8% - specialty studies and only 10% - superior studies.

Industry and education have to work together to promote tourism accessibility as an activity. Educational levels in schools – and in general – related to tourism, was low in the past and contributed to the bad image of tourism and its acceptance as an activity in general. If tourism education and training support a profitable tourism industry, where the key position of human resources development is well known, stronger partnerships will be achieved, as well as a better communication and a commune direction for education, training and quality products in tourism.

Providing a stimulating and stable financial – fiscal environment is vital for

drawing investors and private capitals to provide the development of touristic projects. Direct transactions taxes are still high enough in Romania, with a negative effect upon performance; an impediment in drawing foreign investors in the touristic field is represented by inadequate facilities in the banking and financial field, taking into consideration the international feature of tourism and travels, by correlating the banking system with that of the origin countries of investors and visitors; although there are investments facilities for foreign persons, the bureaucracy within governmental departments is an important obstacle for the investments in the field. The quick relaunching of the Romanian tourism has to be supported through fiscal facilities: profit reinvesting, stimulating new investments, especially in “special” touristic areas, in season touristic resorts, as well as for certain forms of tourism and categories of tourists. It is necessary to give preferential interest credits for the projects aiming touristic investments and a bigger involvement from the local and national authorities in obtaining nonrefundable funds by the investors. It would also be beneficial to establish an unique desk for investing in tourism, where interested parties may receive information and advice regarding the bureaucratic process.

Another key component of any tourism strategy has to be the marketing and promoting both touristic projects and destination as a whole. Even the most impressive attraction can fail without a proper promotion. Because marketing is such a complex subject, it is necessary to develop a personal strategy for helping to plan, coordinate, and invest in different necessary actions. Only then, it will be able to work both at the level of individual touristic facilities and at the level of destination.

Tourism is already drawn into particular market segments, which means the marketing strategy should also be focused on certain types of tourists (*William Revill Kerr, 2003*). Market studies draw a profile of visitors interested in visiting that area and are useful for identifying the best communication channels with tourists and guiding towards the adequate image on their destination. Because the biggest part of the tourism is short-lived, such as expectations, experiences, feelings, emotions, it is important to focus on developing the area’s positive image, which will help us gather few of these feelings and therefore, increase the general attraction of the destination.

The promotion activity of the Romanian tourism, including the participation at international tourism fairs and exhibitions is accomplished through the 16 subsidiaries that the National Tourism Authority has abroad: Budapest, Vienna, Chisinau, Moscow, Roma, Madrid, Paris, Brussels, London, Stockholm, Berlin, Munich, New York, Beijing, Tokyo, Tel Aviv. Through its entire activity, touristic information offices abroad want to promote Romanian tourism in the countries where it is working, for increasing the touristic circulation towards Romania, increasing the currency incomes coming from tourism and drawing foreign investments in the field of the Romanian tourism as a whole (*ANT Strategy*).

Certain advertising materials can increase Romania’s general image, by suing well-known techniques. That is why it is very important to make sure that the materials is precise, well composed (without too many superlatives and established at the proper level for the public. This will ascertain that people will not arrive with expectations we are not able to meet, which will most likely disappoint them. The best reputation is that built on oral transmission, recommended by marketing managers.

Finally, we have to also mention that reputation cannot be created over night, five years may even pass until the marketing strategy may begin to have results. Therefore, strategy has to be seen as a long-term activity, in order to be revised and updated

constantly, in accordance with the changing needs of the market and visitor. This also means that an important role is played by a tourism strategy that will continue to inform and focus on tourists after they have left the destination. This helps gathering faithful clients and encourages repeated visits.

There are different distribution channels for promoting the touristic destination. Websites are more and more known nowadays and are an ideal way to reach the international audience, especially for the new, small and farthest destinations, which do not have the necessary budget (or even a market) for big advertising campaigns. They can be used both at the individual level of business, and at the level of destination, where it requires a certain expertise to make sure that it is regularly updated.

Romania as a destination is not very well represented on tourism websites. The style, presentation and design of www.turism.ro are old from the aspect point of view and the site has wrong information, www.romaniatravel.com is not updated, and contains many past events and elements, www.romaniatourism.com is created by the America office and is available only in English, www.traveltoromania.com has an adequate aspect but it does not offer almost any practical information, destination or hotels cannot be viewed contact addresses cannot be given, bookings are not available, www.romtravel.ro is only in Romanian, addresses only to the hunting and fishing field and has been under construction for a while. We notice that the sites that would normally facilitate the contact of touristic services providers serve more for general information than for making it easy to acquire a touristic product. Worse than that, Romania is not present on internationally known sites with an impressive visitors' number, like www.europe-travelers.eu and Lonely Planet, where registration is either free, either on low costs. The destination management systems have to value first the huge opportunities offered by Internet. The World Tourism Organization has suggested that destinations marketing organizations have every reason to be present on the web and have no excuse to be missing.

Specialty newspapers and magazines are also perfect for reaching different markets – their leaders are already aiming at those types of tourists that the country wants to draw and they are therefore more responsive to the adds about a destinations that offer activities of interest for them. Encouraging publication in independent guides is also useful. Finally, if the touristic product is specialized, the investment of inviting journalists to these newspapers for writing articles about their experience is worth made.

Commercial fairs are the most classical forms of advertising. Anyway, for many destinations, their usefulness may be limited in comparison with the necessary time and investment. Commercial fairs are useful only in drawing intermediaries, as well as tourism operators. Only a small percentage of final consumers (tourists) base their decision on the information got from a commercial fair. Romania's national program to take part in tourism fairs is not monitored or assessed through criteria related to incomes increase or contracts conclusion with tour operators, making it difficult to appreciate the impact and efficiency of Romania's participation to tourism fairs. Also, Romania does not have a clear or strong image, a strong touristic brand and the personnel cannot sell a destination on which they know so little. Romania's touristic brand has to be an activity made in collaboration with many responsibility factors, both from tourism and other exterior trade field, whose functioning may be affected by the international image of Romania.

Most destinations are successful in drawing tourists from neighbor countries and

closed regions. In addition, in time, if products keep their dynamics and quality may increase their area of attraction. In some cases, this could be enough, but it is usually useful to try to develop a broader area of touristic resources, so that there would be safety upon more than one area. Exterior tourism is more reliable from the economic point of view, because visitors tend to stay longer and spend more once they reach the destination.

There is very important that they try to form alliances and networks with destinations and touristic attractions in other areas or countries, or in Europe. There are not many examples of this kind of networks, but where formed, they are very profitable. The tourists, who have experienced a touristic product and have been pleased with it, will most probably try another product related to it, especially in these more specialized market segments. An established network may capitalize its potential interest by providing free access to the information on attractions and a services quality standard guarantee. Moreover, because the internet is so easy to use by tourists interested to find a touristic destination, the advertisement of such networks proves to be easier than before.

Touristic networks can operate at any level. One of the most successful, up to now, which have involved different accommodation forms are Gites de France and Europe de Traditions, which group together similar types of accommodation around a commune theme. Other focus more on a certain touristic segment, for example the PanParks initiative promoted by World Wide Fund for Nature and The Dutch Molecantan group, which have proposed to bring together different parks in Europe through a homogenous vision and tourism high quality and strong ecologic principles.

Alternatively, different routes and itineraries could be explored, as for example the ones promoted by the Europe's Council. We remind you that they regroup specific types of cultural interests with a commune theme. This does not necessarily mean that the tourist will go through the entire route at once, but rather it encourages him to discover other areas in Europe, while learning more different routes.

A touristic product does not follow the standard, linear route of developing one product, from the concept, development when exit the market. There is a continuous need for stocks, regulating and adapting different products and providing a dynamic tourism in accordance with the other tourism segments (*Gruescu R., 2005*).

Tourism is a dynamic economy in continuous change, very dependant of a great number of external factors. Imminently, tourism will evaluate in time. A normal cycle of a touristic destination passes, normally, through several stages. To be able to respond to these changes and to avoid last stagnation stages and decline is vital that tourism strategy have a monitoring program. Only being aware of the monitoring and impressions about this, it is possible to react in time, before appearing problems, and to create a dynamic destination, which might be capable to adapt to market needs and exchange of preferences. This thing is adequate to relatively small and specialized markets. Unfortunately, this element is often forgotten and has not sufficient resources.

There are four important elements around which the monitoring and management program must be developed. These represent support basis:

- impact on economy;
- impact on environment;
- impact on society;
- needs and expectations of tourists.

The development of a monitoring program around these factors will help at;

- Identification of positive effects of strategy on these elements;
- Identification of negative effects;
- Establishing time tendencies;
- Obtaining some useful information to initiate a correspondent management;

Program itself must determine what information needs to respond to these questions, how these can be obtained, who is involved, how often will be gathered and what costs. The last plays an important role in accuracy of monitoring. It is useless to develop a very complex monitoring system if there are not sufficient resources so that these can function correctly.

Tourism studies are the most adequate method to obtain progress, but are expensive and it is necessary that these be intersected with other monitoring techniques like performance tests or maintenance indicators. These are more significant means of fixing parameters that can be measured which help at determination of the impact of tourism in that area. They can indicate if positive effects can be foreseen or not (performance indicators) or if there are unexpected indicators of the negative impact (stress indicators).

It is difficult to establish indicators. Universal indicators still does not exist even if World Organization of Tourism, together with other participating persons working on this. Each destination will need the development of own set of indicators, depending on particular circumstance and necessary information. The following indicators give some ideas on what is necessary to take into consideration.

- **Performance indicators**

First of all there are necessary primary statistics on tourists and on using facilities by them, to create an exact image of tourism in the area and impact and performance.

Among elements that can be determined by these statistics we can remember the following:

- *Total number of visitors per year* which will help at monitoring progress in time and will determine if the number of visitors is increasing, if they have occupied or exceeded the capacity from the tourism strategy or if begins to stagnate or decrease.
- *Monthly fluctuations* will determine the optimal tourism season, if there are significant differences between high season and the other or what happens in different periods
- *Holiday profiles* show what kind of persons reach destination, if they come for short or long periods of time, for activities specific to the area, for relax or to search certain particularities of nature and environment
- *Visitors profile* will describe an image of the type of tourists who visit that area, where they come from, how they travel, in group or individually, from what age group and what social class they are a part.
- *Success of diverse attraction points*, information obtained for each attraction points, which will help to identify which of them is more successful and from what reasons

- **Stress Indicators**

Stress indicators represent another element of the monitoring programs and serves for completion of tourism primary statistics and complex evaluation, through introduction of an early mechanism of warning in this process. Essentially, these require selection after factors that can be easily monitored. If they are activated, they will send a signal that it is time to pass to more detailed information. European Commission published recently a rapport regarding systems of early warning for tourism

destinations, which is often consulted by participants in this field.

*** Environment indicators**

For durable tourism, stress indicators of the environment are essential. Even if we are attentive with environment, it is not always possible to foresee the impact of tourism on this. It is very important to be capable to observe negative tendencies in time, to prevent them before becoming problems.

The type of the impact depends on the type of activities but, generally, includes a large area of factors, from water and pollution to modification of animal life. Signification of effects depends on vulnerability of environment and the intensity of using it. Eventual stress indicators will be calculated depending on these factors. For example, in case of water and pollution, regulated monitoring of water quality will help at discovery of any modification at pollution level. Also, erosions and visible signs of degradation will be a stress indicator.

In all cases it is essentially to establish a connection between impact on environment and density of visitors (volume of visitors during one year), intensity (maximum number of visitors in a certain period of time) and activity type (consumer/not consumer, passive/active). This will help determine the level of visitors and some patterns which might be tolerated by environment without significant damages. An evaluation of these capacities was already evaluated in the development phase of tourism strategy. Now it is time to verify if these estimations have been correct and if it is necessary to be revised.

*** Satisfaction indicators of visitors**

Stress psychological indicators produce a system of early warning for reduced level of satisfaction of the visitors. If tourists are less satisfied during their visits, it is less probable that they come and recommend the place to others. Stress indicators must be structured to observe these problems, in time, and to determine why level of satisfaction is so low. Common causes can be traffic congestions in the area, agglomeration, losing authenticity of events and places and over commercialization of destinations and resources.

The simplest manner to find out these stress indicators is to put at disposal of visitors, boxes for suggestions which give the tourists the opportunity to register comments and spontaneous reactions. If the number of negative commentaries increases, then it is time to realize a more complex study.

*** Social indicators**

Finally, stress indicators are applied at local population but, of course, key factors can be hardly identified for this group. Two possible signals might be increasing negative reports from local press and modification of the rapport between number of tourists and number of local population. In conformity with World Organization of Tourism, if this rapport is higher than 1 (one) year, then it is possible the apparition of problems and conflicts.

The management of the touristic destination Romania is an iterative process that requires all the stages of the development process for the destination to be visited again and for touristic products to remain reliable and attractive. Within the strategic future directions we have to include the understanding and pleasing of the new tourist, strengthening current markets and winning new markets, strengthening the touristic industry financing and continuously promoting sustainable development.

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