

## INNOVATIVE PRACTICES IN TOURISM. A POSSIBLE MODEL BY FOSTERING SHADOW FACTORS

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### Abstract

*The paper is the result of an empirical research, a study that includes a theoretical framework. The data used to test our hypotheses come from 60 small tourism firms from Bihor County, Romania.*

*The research conducted has revealed that actions focusing on innovation must be based on a solid analysis, supported by the knowledge and the understanding of the contextual factors (environment, culture as a mental programming, values) also based on the organizational factors (the management commitment, systemic perspective, learning and practice of experimentation, rapid transfer of knowledge within the organization). For the purpose of this work, the contextual factors that are exogenous represent the shadow factors. The studies performed in three European projects implemented in tourism SMEs of Bihor County have allowed us to advance the idea that contextual and organizational factors, that are identified as the source of innovation are based on rationality, which is enlarged by affectivity and imagination. The identified correlations may be considered, in our opinion an element of novelty and originality. Finally, the purpose of this paper is to provide a possible model, based on the idea of building an innovative firm, the one that has learned how to determine their own employees to be innovative.*

**Key words:** *innovation, empowerment, performance, transformational management, shadow factors.*

**JEL Classification:** *O03, L2, L26*

### I. INTRODUCTION

The content of a competitive travel-package offer is customized, more and more, through differentiation, and the main resource for this is, in the most cases, innovation. Therefore, performance will be reached by those who learn quickly how to deliver better services to the market and / or deliver differentiated services against the competition. Tourism consumers assert and claim solutions to their problems, rather than the goods and services themselves. As a result, the goals of the tourism business are no longer expressed as: lower cost, highly skilled labor force and better management, but through customers satisfaction! In the current crisis, tourism entrepreneurs strive to design value added, sifting by sieving any small variable, any weak signal, any strategy, budget and control plan in order to be able to grasp variations and changes of consumer needs for travel, to choose the most appropriate market segments to be able to develop an appropriate offer. An appropriate response to all these challenges seems to be innovation.

In this sense, the aim of this paper is to present the innovation performance of 60 small touristic firms in Bihor County, situated in the western part of Romania, in order to identify the determinant factors and to provide a possible model. These factors are essential for small touristic firms who want to improve performance and here we present a research included in three European projects financed by UE.

We structure the paper as follows: first we focus on the innovation concept, analyzing the importance in tourism and its value for the small touristic firms across a bibliographic review. In the next section we present the methodology used for the empirical analysis, the group of firms and the selected variables. Then we include in our present paper the empirical results and we show how innovation results are related with factors used imaginatively by small touristic firms from the western part of Romania (Bihor County). The results are presented as description of the empirical analysis. Finally, discussion and conclusions are presented and implications are discussed.

## II. THEORETICAL BACKGROUND

To innovate, according to Romanian language explanatory dictionary (DEX), means "to make a change, to introduce a novelty in a field in a system." Innovation means "novelty, change, transformation." Oslo Manual (OECD and Eurostat, 2005) defines innovation as "a significantly improved product (a good or a service), or a process, a new marketing method or a new organizational method, a business method or an organizational method or establishing and managing of external relations". In this approach, innovation differs from invention by necessity of placing it on the market, and by the need to provide value.

Generally, in business and especially in tourism, the innovation is "the creation of substantial new value for customers and the firm by creatively changing one or more dimensions of the business system" (Sawhney *et al.*, 2011, p.28). To innovate, companies must have innovative capability, defined as the use of knowledge in order to successfully implement new ideas into practice (Zhao *et al.*, 2005).

Business performance has had and will have its source in the innovation act. Business performance - on its own market, in customer relationship etc. is outcome of the technical innovation and of the social one.

Specialized literature deals with innovation from several angles: *innovation as a product*, *innovation as a process*, as well as *innovation management*. *Product innovation* deals with new or significantly improved products, in which it is addressed to specific targeted markets. New techniques, methods or improved ones of the various departments/ structures (production, commercial) give birth to the *process innovations*. Through innovation management we understand creation of the kind of the organizational culture (as a sum of collective values, beliefs, traditions principles and practices, settled in time, accepted and adopted by members of organization) in which the innovative behavior is encouraged and rewarded. Innovation management refers to the creation of a kind of organizational culture (etc) in which the innovative behavior is encouraged and rewarded.

For small businesses, all these elements of organizational culture (values, traditions, principles, practices) are prevalently transmitted orally, through direct involvement of those who created the company, the founders-entrepreneurs. It is known that the work climate (immediate experience, on a personal level) significantly determines the creative thinking (Ekvall, 1996; Amabile *et al.*, 1996 Sternberg, 2005). Each entrepreneur's challenge is to be, at the same time, creative and efficient. Studies show how difficult it is achieve this condition (Amabile, 2002; Mehri, 2006). The solutions seem to be related to the creation of a climate of trust, encouragement, and empowerment. After Zwilling (quoted by Tanțău, 2011), elements that contribute to an innovative culture are: fostering passion, recognizing the contribution, awarding good new ideas, awarding prizes for courage, flicking on failures, small group discussions, promoting diversity.

Both *product innovation* and *process innovation* are known under three distinct forms.

***Innovation by accumulation or by enhancement*** –it is about designing a product with enhanced performance, meant to cope better and meet consumer needs. They do not have to learn new consumption behavior, but only to adapt to the new state.

***Synthetic innovation*** is about combining the creative ideas or already existing technologies. This type of continuous and dynamic innovation has as outcomes products that alter normal consumption behavior; it interrupts consumer routine, but does not require a total learning.

***Discontinuous innovation*** - it is about how to accomplish a completely new product, a product that represents a leap from those actual available on the market. Establishes new consumption habits among consumers, and this requires attending a completely new learning process.

Peter Drucker in his book on innovation (Drucker, 1993), recommends the adoption of five principles of action, which may give the company a *competitive advantage*. Firstly, it starts with identifying opportunities. Then it analyzes the opportunities in order to see if people are interested in using information. Innovation must be simple and clearly focused on a certain specific need. Efficient innovations start slowly because they address a limited market, and then, as the market grows, it makes fine adjustments for keeping out competition. Innovation must target the supremacy, otherwise it fails to impose and it will create only an opportunity for competitors.

Rightly, it is said that "if you know what you truly want, it is amazing how you will be able to take opportunities and capitalize on them." It is about understanding the situation, before having a plan; also it is about, in terms of becoming, as a physical person and a legal person (organization). Innovation management tells us what we become, not just about what we do.

For a company, it is more convenient to produce new products with existing technology, than to introduce a new technology which is more expensive; however, this latter approach demonstrates its feasibility in the long term. The progress of human society is due both to the scientific findings and technology, as well as to increasing managerial expertise. In this article, we adopted a situational vision, because it seems to be the most compatible with reality and most able to support tourism company in Western Romania.

The management process is understood as a series of decisions and actions meant to make the company able to define and achieve its goals.

In a tourism company we believe that real management that is focused on innovation as a result of understanding the imperatives of the day, is asking the managers to achieve an efficient use of resources, to make the organization responsive to its environment, and to make people able to perceive the positive relationship which can be built between business goals and individual ones. Our goal is to rises of the manager interest, to make him more effective regardless of the position he (will) hold.

### III. HYPOTHESIS DEVELOPMENT

#### The relationship between innovation and contextual factors

Obtaining the performance in business is closely related to the promotion and support of a culture of innovation, which includes, in our opinion the following: environment, the culture, as mental programming and the values. These are factors, which we have grouped together and we refer to them as : *contextual factors*.

*The environment* supports and promotes innovation through a cultural component, respectively "whole intellectual aspects of a civilization" (Oprea, 2006). Explicitly, we're talking about: "*the nation of which the individuals belong; openness and diversity; the cultural environment; technology; institutional environment*" (KEA European Affairs, 2009).

*The nation to which the individuals belong*, that variable is taking into account the knowledge, skills, competencies and attributes of individuals that facilitate the creation of personal prosperity and social, as well as economic wealth. The individuals composing a nation are molded by the economic level, but especially by values and cultural norms; namely " a collective mental programming that makes us accept something together as members of the group / nation to which we belong" (Hofstede: 2006). The modern concept of economic development argues that *diversity* and the exchange of ideas, as basic components of an open society, are sources of innovation, playing an important role in the creation of powerful and dynamic cities. *The cultural environment* is essential to the development of a creative society, being an ideal facilitator to the birth of new ideas. The mere existence of art is not enough. For boosting the creativity is important the exposure of the individuals to art and culture. It is recognized the crucial role of *information and communications technology (ICT)* in the economic and social development in XXI century, and in triggering Europe's creative potential. People have accustomed with "virtual habits", and they changed the traditional business model with one that is strongly electronically-impregnated. Digital technology has generated two opposing tendencies manifested simultaneously – known as "round-trip" (Castells: 2001).

Thus, on the one hand, culture becomes global as media companies manage to cover the entire planet and deliver a creative and diverse content, for a variety of audiences and, on the other hand, culture becomes personalized gaining an increasingly local character, focusing on commitment, rather than on experience. New technologies give rise to new forms of creative activities, such as computer animation, digital graphics, etc..., elements that become increasingly, more important in gaining performance by tourism firms, for instance. The welfare of the societies and of the states is related to the transparency and accountability of *regulatory agencies/institutions*. The American professor Michael Porter has identified a link between a country's competitiveness and various institutional factors, including the primacy in state law and public policy compatibility (Porter, 1985).

If we are referring to *the culture* as a factor of support and promotion for innovation, within the worldwide management literature the Dutchman Geert Hofstede imposed himself as an analyst that treats culture as an element which it is " the foundation for the thoughts, feelings and actions of the individuals, organizations and nations " (Hofstede, 1996). Hofstede uses the analogy with computer programming, but we ascertain that *people are not computers*. Out of the terms used by Hofstede to *describe the manifestations of culture*, the concept is covered by the following four, almost completely: *symbols, heroes, rituals and values*.

*The Values* are comprehensive tendencies, and that refers to preference of some elements rather than other. The values can be inferred from the manner in which people act in different circumstances. In this respect, it is helpful if the observation is done systematically, according to a plan consisting of systematic and rigorous recordings, thorough and clear of all reactions and forms of conduct, contained in a program of research of tourism activity, as our case is. It is the most appropriate method, because one knows that people think in a way, and they say something else; and finally, they make quite differently, what they thought and said. The administering of questionnaires remains a useful stage, but the answers are not to be taken "*ad litteram*". In the abstract way, each is in favor of the virtue (knows how it should well to be),but actual in practice, each acts in his own interest.

*H1: Innovation capacity is influenced by contextual factors (environment, culture as mental programming, values)*

### **The relationship between innovation and organizational variables**

A second group of factors that determine performance in business, are called *organizational factors*, these are: *management commitment, systemic perspective, learning and practice of experimentation, rapid transfer of knowledge within the organization*. After Kreitner (who identified managerial success formula), *formula entrepreneurial success*, the locus of knowledge, experience, motivation, thought, is  $S = A \times M \times O$ , where success (S) is the product of entrepreneurial ability (A), motivation (M) and opportunity management (O).

Managerial ability is defined as the demonstrated ability to perform and to achieve organizational goals, effectively and efficiently. In this framework, the examples of important skills are the following: to plan, to organize, to lead, to make decisions, to communicate verbally and in writing. For an individual the motivation to lead is a strong and persistent desire to make progress, to push forward the organization he leads. Some essential elements are: a willingness to take responsibility, the desire to exercise power and authority over others, the desire to have tangible and real outcomes, always accomplished effectively and efficiently. The management opportunity is defined as getting an occasion to lead, or looking for such occasions. The formula is designed so that if one of the terms is zero, managerial success becomes void.

The task of the innovation management, respectively of the one that places as its central concern, the innovation and adaptation to change, as well as exploitation of knowledge as a separate resource, is creating a climate in which employees feel encouraged and rewarded to learn systematically. A learning organization is an organization that achieves good results in the act of creation, in the acquisition and transfer of knowledge and in modifying behaviors to reflect the new knowledge. The learning organization represents a new paradigm in management. A deep analysis of organizations is presented by Senge; the author opens a perspective and suggests courses of action that converge towards building a learning organization (Senge: 1990). There are no proposed models, but a discussion; moreover "there are no models to imitate / copy management" (Toffler, 1999). Learning organizations focus on: addressing and solving systemic problems, experimenting with some new ideas, learning from others, the rapid transfer of knowledge within the organization. These organizations:

- a. are team-based structure;
- b. have free flow of information;
- c. have authoritative employees (empowerment and enthusiasm).

*H2: The capacity to innovate is influenced by organizational factors (managerial commitment, systemic perspective, learning and practice of experimentation, rapid transfer of knowledge within the organization)*

### **The relationship between innovation and the firm performance**

Although in the past 20 years there have been many studies on the subject of the relationship between innovation and performance, until now the innovation of the product and the innovation of the process, but also their influence, have not been highlighted enough yet. Besides, it is worth mentioning that there is a lack of case study on this field. Company's ability to satisfy customers is organically related to the capacity for innovation. (Usahawanitchakit: 2008).

In tourism, we need entrepreneurs, whose business is not dedicated exclusively to the arising problems, but, these entrepreneurs have to be able to answer also to existing issues with social, economic or even artistic imagination. The role of innovation is to increase the value of the supplied product / service. In tourism, what is sold are mostly "experiences" (biotic, of life, of exploration, of knowledge). The customers assess the tourism product relying on an image that was created by them with respect to that product. Also, certainly, we have to consider the complexity of the tourist product, which most often covers more markets, alongside various operators.

When someone is innovating the extent to which the innovation concerns only an aspect of the matter or more of its components must be determined, in which case we must ensure the availability all those involved to implement the novelty. Developing innovative products and their inclusion in the various kind of tourism supply, as: rural tourism, of the spa, of the products as city-breaks, as well as adventure, and active tourism, in our opinion, would be an innovative feature, designed to increase of tourism performance in Bihor County. The tourism firms that have adopted innovation have clients, and their economic performance is superior, i.e. above an average of the profits. This allows the differentiation from other companies, positively influencing the performance (Garcia-Morales *et al.* 2011). In the current crisis, innovation allows for the survival of the firm, something that it is highlighted by studies performed a long time ago (Calantone *et al.*, 2002). According to Hjaeleger, for tourism, the most appropriate type of innovation seems to be "the niche innovation". (OECD, Innovation and Growth in Tourism: 2006). This is based on: a. supporting and promoting employers who take an opportunity; b. developing ways of combining the existing products in new ways; c. to encourage companies in tourism and related industries to form alliances. We appreciate the model of Stage & Gate as the most appropriate, since it requires an evaluation

phase after each stage of the innovative process comprising: identifying the ideas; selection of ideas; concept development and testing the concept of product; business analysis; product development and their testing; testing on market; launch the new product (Edgett, 2014).

*H3: The Innovation capacity positively affects firm performance.*

#### IV. FINDINGS

The main method proposed for the present research is the case study, considered by the team that implemented the projects to be the most suitable method which can cover the studied problems. The main objective of the investigation of the case study is critical analysis and impact assessment. The research of the case study approach is complex and includes a variety of quantitative and qualitative methods. During field research we used the following methods: secondary analysis of statistical data and relevant literature (reports, strategies, studies, monographs etc.) about Bihor region, semi-structured interviews with key-informants used to collect information about successful initiatives in order to innovate in tourism.

Bihor County is situated in North West of Romania, (population over 575000 inhabitants, in 4 municipalities, 6 towns and 91 communes); the total area of 7,544 sq km, being one of wealthiest counties in Romania; a GDP per capita above the national average and one of the lowest unemployment rate in Romania. (Stefanescu & Bekesi:2013, 564)

The data used to test the three hypotheses exposed above are originated from 60 small touristic firms from Bihor County. All of these firms were included in the integrated research projects financed by the EU: (1) "Supporting integration of SME export-import activity from Bihor county within the single European market through the development of cross-border services" ongoing period 2007-2008; (2) "Development and promotion of common thematic packages Hajdu-Bihar-Bihor Euroregion" carried period - August 2008-November 2009; (3) "Entrepreneurship and Equal Opportunities. An inter-regional entrepreneurial model school for women", ongoing period 2009 to 2010".

Initial sample consisted of 20 firms, that accounted tourism group in the project "Supporting integration of SME export-import activity from Bihor County within the single European market through the development of cross-border services" ongoing period 2007-2008. The activities undertaken in the project had outlined in a first form, the hypotheses H1, H2, H3. Basically, the pilot research was conducted to validate the hypothesis, using the method of documents analysis, field research, observation and semi-directed interviews.

The effective research, and the validation of the assumptions held during the project "Development and promotion of common thematic packages Hajdu-Bihar-Bihor Euroregion" carried period - August 2008-November 2009.

The preliminary Report was verified later during the project "Entrepreneurship and Equal Opportunities. A inter-regional entrepreneurial model school for women" carried period 2009-2010.

After processing and interpretation of data, we can make the following statements.

##### Contextual factors

Contextual factors - environment, culture and values - are very important factors for small touristic firms in Bihor County, and hypothesis *H1: Innovation capacity is influenced by contextual factors (environment, culture as mental programming, values)* is confirmed.

Consistently, without exception, participants in the study claim that Romanian business environment will not offer, probably never, the opportunities as in the decade 1990 - 2000. Basically, we are witnessing a narrowing of perspectives. Resources are more expensive, demand is stagnant, if not declining, and unfair competition is strengthening. Economic activity, methods of organization, and management of the work and personal values are strongly influenced by the economic downturn of the crisis we are facing now. In addition, there is a large fluctuation in demand, hard manageable in terms of efficiency.

*As an element of reference to the culture is the mental programming.* We found three categories of suppliers in Bihor County tourism. A first group are "the creators" , entrepreneurs who work for themselves. These maintain their work into an equilibrium area of the inseparable opposites "endeavor - benefit". They have a great inclination towards innovation, and claim that the tourists will return if what they will find each time is something new, something better, or a completely new solution to their problems. These are dedicated to the idea: "there is a better way to do it, so go for it." A second group are "the heirs". They are the individuals belonging of the second generation of entrepreneurs who work for themselves and they are advocates to limit the time of work and of and preoccupation concerning the own business. They have an average inclination towards innovation and argue that tourists seek for "the report as good value for money". They also claim the idea that "it is good to innovate, but first we have to make sure it is worthwhile." The third group of tourism suppliers are "the managers" who work for themselves, but they copied models. These extrapolate the scale economies, they

had accumulated capital, they buy the companies and sometimes they are handling values. They work, if they are well paid, and claim idea: "we must bring in only those innovations for which customers are willing to pay". To these, the propensity for innovation is low to medium.

**Organizational factors**

*Hypothesis H2: the organizational factors, managerial commitment, systemic perspective, learning and practice of experimentation, rapid transfer of knowledge within the organization influences the innovative capacity of tourism firms in Bihor County; this was confirmed when it was investigated.*

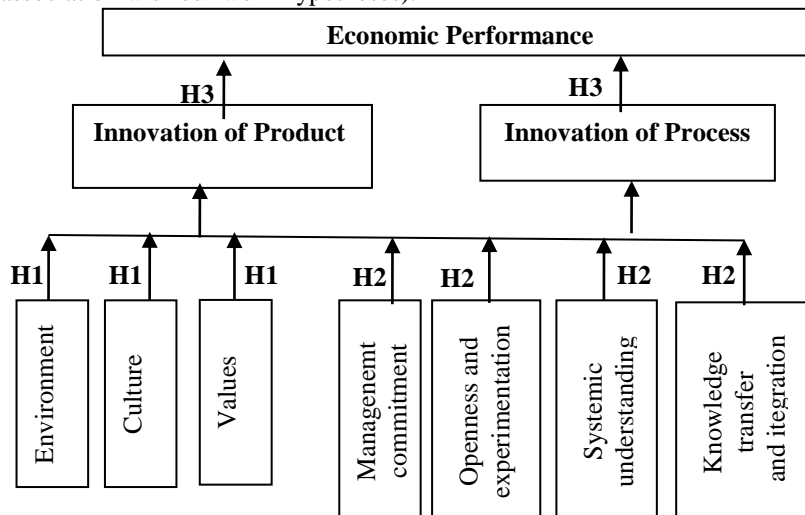
The Bihor County people, like many other Romanians, have developed a sense of ownership. As a result, the opportunities for innovation are also seen from this point of view.

Tourism demand is strongly determined by the "the novelty of attraction." These are found (together or separately) the case of the deals of the following units: the SPA centres, restaurants, cafes, teahouses, treatment structures for care and beauty, entertainment; animation, all deals integrated into the accommodation suppliers. The organizational factors influencing innovation in tourism businesses of Bihor County can be summarized as follows:

The supplier prone to innovation (the creators' type and the heirs' type):

1. They have a vision, " for them, the future is built rather than given";
2. They are not easily influenced (namely - are opaque, not open to suggestions), they choose rather to change the constraining data of a program which to them it is supplied or imposed, saying that "they prefer their own version";
3. They have an autonomous moral judgment based on principles; they balance between aims and means. Those who toil more" they do it rather to be more fitting, than to have more ";
4. They are willing to try and choose the following versions: "Why not?", or "Always something can be done";
5. They make decisions in real time for them: "if you delay too much to do something, it might be that it doesn't need doing anymore";
6. They move to the action, as soon as they decided, in the style: "what it is said, it is done";
7. They make their own way by all means, namely, they are characterized by determination, tenacity, perseverance; and they choose the variant: "you can still do more, even after you said you cannot anymore";
8. They love the work. They submit, in a given direction, a significant effort and they are entrusted, that: " vinegar is produced little by little";
9. They are attentive to the details, "small things can lead to big results";
10. They consider that, if what it is done is done with passion, it will get done well, and then, naturally, money comes as a reward. They choose the variant: "money is a means, not an end".

These fostering shadow factors, in synthesis, act as in the following model: (Figure 1 /fostering the shadow factors, in association with our work hypotheses):



**Figure -1 The model of relationship between innovative performance and economic performance of a SME through fostering the shadow factors**

## V. DISCUSSION AND CONCLUSION

The conducted research has emphasized that tourism firms investigated in Bihor County are a system open to the environment, but the adaptation to the constraints and / or opportunities of this is an essential condition for their performance in business.

The actions that are focused on innovation must be grounded on a thorough analysis based on knowledge and understanding of the *organizational and contextual factors*.

In the approach of this paper, *the contextual factors* are a group of exogenous factors comprising of culture and values. We take into consideration that a new consumer trend is manifested again: namely those to contract for group-sejours, to spend more time to a destination / location by using multiple facilities to raise the quality of the tourist experience. Apparently, paradoxically enough, in times of crisis, 'the demands for pampering are increasing'.

As a result of innovation, we have identified the followings: creatingspaces for relaxation, reflection, and meditation; use of technological novelties, for instance, treatments that combine virtual technology's bioback with advice from experts in wellness and light therapy to help those who suffer from depression or insomnia; designing innovative products: anti-stress cures, thermic contrast, body detox programs, rejuvenation programs, programs for acquiring new skills (cooking, pottery, swimming, tailoring etc.); sessions in a salt grotto with a high concentration of aerosols; creating events: the arrival, departure, themed evenings.

The new kind of competition is not only between what touristic firms offer through their products, but also among what they add to their products when using public relations, advertising and publicity, client counselling, and many other things that help them be appreciated by the consumer. We noticed the extension of the paradigm: "*customer centricity*". The traditional concept of: "*exchange*" between buyer and seller, has been replaced by the concept "*relationship*". Now, the client has become complex, more informed, demanding and pretentious, and yet very easily influenced by the reviews online.

Endogenous factors, namely those related to the answer of the firm, we called them organizational factors. This group includes: management commitment; systemic perspective; learning and practice of experimentation; the rapid transfer of the knowledge within the organization. As elements that show the presence of innovation, we have identified in the first instance, the presence on the first page of the search engine "Google". The latest research in the field of "e-tourism", has showed that 62% of "users" check only the first page of results in Internet search. Of course, it is necessary to address the concept of "pay per click" or "paid ads by proficiency." Another concern element of innovation is the inclusion of information and technology communication (ITC) in the touristic product for customers willing to spend time in the hotel room or in its surrounding facilities: TV programs, movies, Wi-Fi Internet, hot-spot etc. Noteworthy is the existence of virtual messages: greetings, announcements and various information on entertainment and leisure activities on unite site (hotel, pension, club). Another innovative element is the *arrangement of accommodation for pets* (sometimes in specially manner) with the introduction on publicity and on-line of the information: "dogs & cats friendly".

Innovative thinking operates in time, as a result of harmonization of the smart thinking with the creative thinking, being by its nature a process of rationalization which can generate new solutions and at the same time builds implementation mechanisms. Romanians tend to spend less on accommodation, but they are willing to try unusual things, the more so as, the audience, of TV-shows of this kind, is increasing. On the other hand, the more common becomes the organization of various events. It might be tournament of story tellers, or unusual sports, a sports shows, music shows, events, festivals all able to attract tourists and people who live in the area (residents). Another example that is also an innovative element is the collaboration with a professional photographer. He can capture unique moments of the vacation, or of the event, it can represent memories that are brought home, and also it is "proof of the deed" of what happened on vacation, a life experience, a proof of deed of knowledge, of exploration.

The purpose of this paper was to explore the factors that determine innovation as source of performance in tourism and to provide a possible model, based on the idea of building an innovative small touristic firm, one that has learned how determining employees to be innovative: to correct, to transform, and to improve processes every day. The study was performed in three European funded projects, and this allows us to advance the idea that contextual and organizational factors, that was identified as the source of innovation and hence the performance of Bihor County in tourism businesses are based on rationality that is enlarged by imagination and affective. A good manager in tourism is that who has himself developed enough to sense skilful people and engage them to do what he wants, on the one hand, and enough self-control not to meddle in their affairs, and to confuse them and hamper in their work, on the other. Innovation processes depend largely on the availability of staff to do things that are not connected to the job description, or take the initiative and make things better. In tourism the innovation should be recognized by consumer, the most obvious by extending the time spent in a location / destination and by the money amount she expended.

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