

CHALLENGES AND DEVELOPMENT PROSPECTS FOR TOURISM IN ROMANIA

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Abstract

Tourism in Romania has witnessed in recent years a sinuous evolution marked to a great extent by a multitude of private initiatives and to a lesser extent by strategic coordination at governmental and regional level, respectively. The development of tourism is somewhat chaotic and unplanned, devoid of any inclusive, holistic vision concerning the correlation between transport infrastructure investments and investments in accommodation and tourist destinations. This led to a paradoxical situation in which areas with great tourism potential (e.g. the Danube Delta) are hardly accessible to foreign tourists/tourists from faraway regions. The attraction of such tourists is accomplished by primitive means, without any strategic thinking or appropriate planning.

The authorities' great disinterest and disengagement notwithstanding, Romania as a tourist destination possesses some major advantages stemming from its high potential for development in various directions. Entire tourism sectors (spa-based, mountain, cultural tourism etc.) are not yet exploited at maximum capacity while tourism initiatives undertaken by various entities are not sufficiently developed.

In this paper, the authors attempt to highlight the main strategic development directions of tourism in Romania, pointing to Romania's major advantages as a tourist destination and drawing attention to the primary courses of action that must carefully be considered by decision makers in developing a viable tourism strategy.

Key words: *comparative advantage; international tourism; international business; tourism; tourism practices integration.*

JEL Classification: *F2, F29, L8, M2*

I. THE ADVANTAGES OF ROMANIA AS A TOURIST DESTINATION

The period of time stretching from the outset of the 21st century up to the year 2014 recorded a positive trend in what the international tourist flow is concerned. Despite the many economic and political global shifts, international tourism continued to expand even beyond any foreseen expectations and predictions. While the statistics for the year 2012 recorded over a billion international tourists (a real cornerstone in the history of global tourism), the year 2013 witnessed a growth of 5% (around 52 million tourists) which brought the number of tourists to 1.087 billion international travellers per year (WTO, 2013, p.2). We can honestly say that we "are living in the Age of Travel" since, due to its dynamic features, tourism has come to represent a great opportunity in the economic development and extreme poverty eradication processes. Tourism has brought about major changes in the tourism market: it has emphasized the need to rethink the service industry and the great variety of customer needs and preferences. One of the many evolutions of international tourism envisions the creation of tailor-made, individualized and specialized tour packages that differ in quality, resources, advantages and presentation.

As opposed to the recent past, current tourist destinations have changed significantly, mainly with the rise of new destinations on the tourist map (China, India, the Middle East etc.) and with the unprecedented development of the travel and transport industry (the modern and efficient low-cost companies which facilitated the growing popularity of weekend breaks). Hence, the once remote tourist destinations have become accessible to the Romanian tourist, as well (Postelnicu, 1998, pp.15-24). The very nature of the tourism industry places it at the junction between various economic branches directly contributing to its proper progress. Likewise, domestic and international tourism have produced a multiplier effect in the economy of a certain country (Cristureanu, 1992, pp.227-231; Cocean et al., 2014). In the following years, the multiplier effect will be further boosted with the help of economic globalization (Rotaru, 2004; Postelnicu, 2007, pp.8-10). Nevertheless, tourism is no longer

understood only in leisure and recreational terms, but as a fundamental element in the process of civilization, culture and education, an ambassador of peace and international cooperation.

Statistics confirm that tourism in general, and international tourism in particular represent means of recovery and development for all the countries which possess important tourist resources (WTO, 2013, pp.34-40). Nowadays, there are various states situated on different continents (islands of Central America, the Caribbean Sea etc.) which live solely on tourism-generated profits. As a service provider, tourism has always been on demand; this happened every year, every season, daily even. That is why most of the countries seek to capitalize this competitive advantage so as to become, in time, a magnet for international tourist flows, following the example of France, Italy, Spain, Portugal, Greece, Great Britain, China etc. The World Tourist Organization has concluded that this field of activity generates around 9% of the global gross product, representing 6% of the total amount of direct and indirect export, which is the equivalent of 1.4 trillion dollars. One in 15 employees working in a productive field is currently employed in the tourism sector (WTO 2013, p.1).

II. MAIN ADVANTAGES OF ROMANIA AS A TOURISM DESTINATION

Romania possesses a very rich tourist potential, which entitles us to explore the potential as an inherent element of the general strategy of domestic economic development. Romania features a great variety of natural resources, such as the Black Sea stretching on a 245 km coast, the Danube River with its 1,075 km course (out of 2,860 km) crossing our domestic territory (DEX 1996, p.158) and with its extremely rich and attractive stream (27% of which covering Romanian territory). We need to mention the Iron Gates Natural Park (dating back to the Roman times), the Danube Delta reserve (included in the UNESCO natural world heritage list for its unique variety of protected fauna and flora), the Great Island of Brăila with its biggest agricultural farm in the European Union etc.

There are 13 National Parks and 13 National Reserves in Romania, which cover around 7% of the country's surface (MPDTN – Master Plan for the Development of National Tourism - 2007, p.4) and host wooden areas, natural lakes and pollution-free rivers. A third of Europe's natural mineral springs (about 3,000) are located in Romania (MPDTN, 2007, p.5). Comparatively, Hungary has 450, Italy has 264, while Switzerland has 250, Germany – 165, France – 116, the Czech Republic – 57 etc. More than 117 resorts offer treatments (water, salt, mineral mud, mofette therapies) for various diseases and illnesses. 29 resorts have a global reputation and manage to attract international tourists every year. Such examples include oligo-mineral resorts (Călimănești, Slănic-Moldova, Olănești etc.), sparkling water resorts (Bodoc, Biborțeni, Sângeorz-Băi, Buziaș, Lipova etc.), sulphurous water resorts (Mangalia, Pucioasa etc.), chalybeate water resorts (Vatra Dornei, Băile Tușnad, Malnaș, Buziaș etc.), thermal water resorts and spas (Felix, 1 Mai, Moneasa, Vața de Jos, Herculane etc.), therapeutic mineral mud resorts (Amara, Fundata, Lacul Sărat, Techirghiol, Sovata, Ocna Sibiului etc.) (Păcurar, 2004, pp.54-55).

Romania's natural resources are accompanied by its rich cultural heritage. At present, there are 30 architectural, historic monuments and archaeological sites that have been included on the UNESCO built heritage list (UNESCO 2015), such as the wooden churches in Maramureș, the painted churches in Northern Moldavia and the Dacian fortresses of the Orăștie Mountains. 6,600 additional monuments are considered to be part of the patrimony. There are 670 museums in Romania, all varying in size and theme. Traditional folk art is strongly represented in Romania and partially acknowledged abroad (MPDTN, 2007, p.5). Rural areas host a wide range of traditions and folk events. The tourism and travel industry relies on a number of airports (17 of which are international). According to the annual number of arrivals for 2013, the most important airports are: Henri Coandă (Bucharest Otopeni, 7.62 million travellers), Avram Iancu (Cluj-Napoca, 1.03 million), Traian Vuia (Timișoara, 0.76 million), Transilvania (Târgu-Mureș, 0.36 million) (Tiron, 2014). Romania boasts an extensive railway infrastructure, with many border checkpoint stations (Carei, Câmpulung la Tisa, Curtici, Episcopia Bihor, Fălcu etc.) (Politia, 2015). Unfortunately, the highway infrastructure is still in progress; by the end of 2014, Romania had been able to use under 1,000 km of highway, while aware that the incoming years need to see a greater development of this transport industry (Neferu, 2015).

According to the strategy elaborated by the statutory and governmental authorities, the highway network in Romania will be able to link the historical regions of the country and to facilitate the exit to the neighbouring states by the year 2018 (MPDTN 2007, pp.6-10).

The tourist accommodation capacity for the year 2012 (the most recent year for relevant official data) is represented by 5,821 lodgings covering a total of 301,109 places (189,780 in hotels and motels – 67.2%). 218 of these lodgings have a 4-5 star rating (NIS, 2013, pp.601-602). Hence, international arrivals for the year 2012 recorded more than 7.93 million inbound tourists, most of them coming from Europe (7.47 million). As expected, only a relatively small percentage of these chose tourist accommodation (1.65 million). We can partially understand the phenomenon in light of the fact that most of these travellers who visited Romania in 2012 came from the Republic of Moldova or Hungary (neighbouring states), which means they stayed with their friends and relatives (NIS, 2013, pp.604-613).

III. MAIN PRIORITIES OF ROMANIA IN THE DEVELOPMENT OF THE TOURISM INDUSTRY

A proper capitalization of Romania's resources could help increase the number of international tourist arrivals substantially, up to an estimated number of 15.4 million, most of them still coming from the European Union (MPDTN 2007, p.12). That is why the incoming years should be decisive in determining authorities (ministry, central and local public administration institutions etc.) to consider reinforcing and reorganizing different types of tourism for Romania. **Balneary tourism** stands out as one of these priorities, due to Romania's potential in this direction.

This tourism branch boasts an abundance of types of accommodation which have a relatively low occupancy rate. This may happen for various reasons: the need to update equipment and adapt them to the clients' needs; to extend internal and external market research with a view to properly identify the demand for treatments and adequately put together spa packages; to support intensive promotional campaigns and advertisements of resorts and to issue updated information to interested market sectors; to rehabilitate lodgings and ensure a certain quality standard for accommodation; to create and promote all-inclusive tour packages (which recently witnessed a VAT reduction to 9%, according to Hotnews, 2014); to employ qualified medical staff; to attract foreign investments from European funding, from the national budget, as well as from the local budgets dedicated to the development of the material infrastructure of local and regional balneary tourism.

A second priority envisions the large-scale promotion of **rural tourism**, with its two sub-components: ecotourism and agritourism (Glăvan, 2003). Rural tourism has become more and more popular as more and more people wish to temporarily escape from the urban jostle over the weekend. In recent years, the number of lodgings offering rural accommodation (guest houses) has risen due to private investment and the capacity to attract European funding for the development of local business. Currently, Romania hosts 1,247 agritourism certified guest houses, with over 27,000 places (NIS, 2013, p.601). Rural entrepreneurs have managed to properly understand the role of tourism and to appreciate its advantages. Certain regions of the country have gradually increased the number of rural accommodation, which attracted more inbound tourists. When it comes to promoting rural tourism, several tendencies in developing products can be observed: tour packages include accommodation as well as a wide range of local attractions and activities, such as daily agricultural chores (haymaking and hay stacking, berry picking, raising animals etc.), including tourists in traditional local events and practices (pig slaughter, celebrating the return of the sheep from the mountains etc.), initiating tourists in local arts and crafts (pottery), in local gastronomy etc. (Nistoreanu, 2010, p. 123).

Seaside tourism has been a constant concern for most tour operators. Even though Romania features optimal conditions for seaside tourism over the summertime (the Black Sea) and plenty of lodgings (almost half of the tourist lodgings are at the seaside), there has been a recent drop in the tourist flow – mainly incoming – for this part of the country. One possible explanation results from the offer (which does not always manage to rise to customers' expectations and idea of quality of services) and from the fact that both the domestic and foreign tourism market have advanced to the point of demanding more sophisticated services than ever before.

In addition, the very short high season (basically running over June, July and August), the limited extra-season (May and September) and the established prices (which are not always brought to international standards or to the clients' horizon of expectations) have all contributed to the situation. Moreover, seaside tourism is facing difficulties in attracting and keeping trained staff on site and tourists for more than a weekend break (e.g. people living in Bucharest, who, starting with 2014, have the possibility to travel those 200 km in less than 2 hours by train). Heavy traffic, cutting the number of charter flights on Constanța international airport and setting up permanent connections between the country's main cities and the seaside resorts like Mamaia, Eforie, Jupiter, Venus, Saturn, Mangalia, or Vama Veche all add to the picture. In 2014, the demand for seaside accommodation rose due to the introduction of all-inclusive packages, which helped many hotels score high on the occupancy rate. For the year 2015, the expectations are equally optimistic (Cosma, 2015).

Seaside tourists have many leisure activities to choose from, such as snorkelling, scuba diving, windsurfing, paragliding, boating, yachting, hydro-biking etc. (Cap Aurora, 2015). With the opening of the cruise ship terminal in 2008, the number of tourists visiting Romania and Dobrogea by ship-owners like MSC Cruises gradually increased. While there were 69 recorded cruise stopovers in 2013 or 92 stopovers and over 70,000 tourists in 2014, the predictions for 2015 indicate an evolution of the phenomenon, if we are to think of the military and political situation in Ukraine (Tita-Calin, 2015). TUI, GTA-Sky-Ways or ASTOR's hundreds of river cruise liners helped double the number of tourists to the point where 2015 is expected to further add to the increase. The only disadvantage in organizing river cruises is given by the low levels of the Danube over the summertime (River Tourism, 2015).

The development of **mountain tourism** is considered to be both an opportunity and a priority for action-taking. The Romanian Carpathians are the largest massif on the continent inside the same border perimeter, occupying around 80,000 square km (DEX, 1996). The potential of these mountains is supported by the large

variety of their natural features, by the tourist heritage of the many archaeological traces and by the ethnographic, cultural and historical patrimony. The Dacian fortresses of the Orăștie Mountains - already included in the UNESCO built heritage list (Costești-Blidaru, Sarmisegetuza Regia etc.) – stand out as examples of well-preserved civilization remains (Puchiu, 2015). The demand for mountain tourism products has always been oscillating, but rising. Despite the progress of the last few decades, the visibility of this tourism branch is still a work in progress. Even though the Carpathians host an extensive area of hundreds of kilometres of ski slopes brought up to European standards, the technical and material foundation is undergoing a process of modernization, together with the still underdeveloped transport infrastructure. These two components are expected to attain the comparatively average standard of the European Union by the years 2020-2025. Currently, the largest internationally adapted area (around 50%) can be found on Prahova Valley and in the Bucegi Mountains (MPDTN, 2007). For the rest of the areas, the development of Romanian mountain tourism to the level of the countries boasting a tradition in winter sports remains somehow incomplete, but open to future possibilities.

One of the most driving motivations for Romania's inbound visitors is given by **cultural tourism**. Romania possesses an impressive number of architectural monuments, historical traces, medieval monasteries, churches, museums, art galleries, memorial houses, palaces, castles etc. – all part of the attractions industry for the country. There are many cultural, artistic and folk events that take place all year round. Entertainment shows – usually organized in the cities – have gained international reputation. In 2007, the city of Sibiu became European Capital of Culture; in 2015, the Transylvanian city of Cluj-Napoca was nominated as European Capital of Youth. Other similar events are considered unique in the nature of their offer (cruises on the Danube, tours of the monasteries in Northern Moldavia and Bucovina, tours of Maramureș region etc.). There are still many things that await improvement when it comes to disseminating, in real time, the information on the many cultural events. The medieval fortresses are numerous and, generally, quite reputable and they welcome a great number of tourists (Alba Iulia, Bran, Hunedoara). Others have managed to preserve their initial features (Suceava, Neamț Fortress, Deva, Rupea, Sibiu etc.). The residence of the Romanian kings, located in Sinaia Prahova, stands out as a remarkable example of castles (Peleş, Pelișor).

Business tourism has become gradually important for Romanian tourism recently; while it admits to the existence of many resources, it is still incompletely explored. In view of developing business tourism as one of the main priorities and of transforming Romania into an internationally competitive destination, one must decisively engage in hosting as many international conferences, symposia and meetings as possible. As Romania has become a member of the European Union, it must be aware that more and more conference and meeting centres need to be built in all the major cities and with all the facilities needed, mainly since business tourism is not a seasonal business. Organizing European and international trade fairs or exhibitions could lead to a maximum occupancy rate for the 4-5 star rated hotels, both over the winter and the summer seasons, by businessmen from the country and from abroad. Many multinational companies (Bombardier, Bosch, Sykes, Genpact, Emerson, Oracle, Lidl etc.) have opened regional centres, production or assembly units, service centres etc., while a series of international hotel chains have opened their doors in almost all the major cities (Hilton, Holiday Inn, Accord, Marriott, Best Western etc.) (Cosma et al., 2014, pp.1352-1365).

One final tendency in the development of Romanian tourism is the **holistic approach to a viable and effective marketing**, suited to the demands of the 21st century. This should primarily target: restructuring the views on a tourist product, creating a flexible strategy of prices and tariffs for accommodation, diversifying distribution channels, using local myths (Dracula), elaborating a new marketing approach for the tourist destinations. Without a clear strategy regarding the deeper understanding of national and international market tendencies, no country can become competitive in this demanding field of activity. Romania has, therefore, taken a series of measures meant to improve the effectiveness of tourism marketing: an intensive participation in international trade fairs and exhibitions, advertising through classic and modern media, elaborating promotional materials, creating a national tourism brand and a high impact slogan (*Romania – The Land of Choice, Discover Romania – Explore the Carpathian Garden*) (Slogan 2010), issuing special stamp collections, boosting visibility on the Internet, opening tourism centres abroad, disseminating tourism information in the countries with the highest number of outbound tourists, introducing new programmes in the tourism circuit etc.

Consequently, Romania makes it a priority to achieve greater visibility on the international tourism market, especially when compared to the bordering states. One tourism niche is senior tourism, whereby various decision factors have started admitting the importance of creating age-specific tailor-made tour packages, regardless of the origin. These packages are designed to attract seniors to resorts outside the high season, when prices are considerably lower (Cosman, 2015).

A rather recent phenomenon is medical tourism, which grew extensively in the last years. Many dental and surgical clinics have been purposely opened to the needs of incoming tourists (EU member states, the USA etc.), who choose Romania in order to follow a certain treatment. According to statistics, this market sector targets 0.5 billion dollars annually, while the prices for similar treatments abroad are 40-50% higher (Spiridon, 2015). Aware of the opportunities brought by this market sector, a series of clinics have recently founded the

Romanian Association for Medical Tourism, which is dedicated to promoting, alongside the national tourism brand, this new type of tourism among domestic and foreign target groups (ARTM, 2015). Despite the exodus of many Romanian doctors, this type of tourism seems to be a good substitute for the lack of medical staff in the public health system. Whether medical tourism will significantly contribute to the economic development of Romania is still to be seen.

Another rising type of tourism is **tour guiding** – organized exclusively for inbound tourists. Some tour agencies (Karpaten-Tourismus, City Tours etc.) have put up exclusive offers for speakers of a certain language, whereby the guided tour of the country is conducted in the speakers' language (Turism nemțesc, 2015). These companies have chosen national circuits which include the Danube Delta and the seaside, UNESCO monuments, the major cities, various castles and vestiges, natural features etc.

For the inhabitants of Romania, the country is still a strong orthodox religious destination, which organizes pilgrimages for various religions, especially those conducted by the Orthodox Church. The orthodox calendar (the religion of the majority) celebrates many martyrs, which is why mitropolies and bishoprics are competing in setting up pilgrimages to relics worship. There are critical voices which rose against the transformation of these religious events in highly profitable business opportunities (Pelerinaje, 2015). Pilgrimages lead tourists to the UNESCO sites and monasteries of Bucovina – which are unique in Europe for their murals and for their age; some of these were erected some hundreds of years ago by the Moldavian lords. The other official religions of Romania (Greek and Roman Catholic, Protestant etc.) give **religious tourism** a moderate importance, while still hosting annual conferences, symposia, meetings and specific assemblies (Drule, 2015).

IV. CONCLUSIONS

Provided that the general and specific infrastructure is properly ensured, Romanian tourism will have a good and even very good future evolution. Almost no form of tourism can be developed or practiced in the absence of adequate access routes. That is why one of the main priorities for developing Romanian tourism in the next years concerns speeding up the process of highway construction, of airport and harbour modernization, of updating the national and regional road infrastructure to European standards, of rehabilitating the railway system etc. Certain technical projects are underway (Transylvania highway, Sibiu highway, Brașov-Curtici railway etc.), but the time allotted to their completion exceeds the deadlines for priority investments.

Modern tourism has been marked by an increased focus on sustainable development, environmental practices in tourism, the preservation of resources and the support from tourists in the implementation of such strategies (Dabija, Băbuț, 2013, pp.617-633; Epuran et al., 2015, pp.927-937; Crișan, Borza, 2015 pp.869-878). It remains to be seen to what extent tourist units and destinations will be able to cope with behavior and vision changes made by target groups as increasingly stronger focus, especially on the part of younger generations of consumers, is placed on the issues of environmental protection (Barber et al., 2010, pp. 64-75).

In addition to the aspects highlighted in the paper, which, in our opinion, might contribute to the better development of tourism, we believe there are also other aspects that take into account local or regional factors and conditions and add value and realism so that the best solutions for tourism development may be reached. One of the shortcomings of the Romanian tourism could be the lack of a common vision about how to promote it abroad in an appropriate manner. In order to attract tourists, the line ministry has over time appealed to mythical characters or locations which are somewhat unique in Europe: Dracula, Saxon Castles and Fortresses in Transylvania, The Fortified Churches, the Monasteries in Northern Bukovina etc.

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