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New Challenges for Tourism Destination Management in Romania

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1. Introduction

With its content and role, tourism is a well established industry, a highly important component of the economical and social environment of more and more countries. Worldwide a growing interest is taken in a deeper understanding of its multiple economic, social, cultural and political implications, its active role within the society, respectively its dynamics and mechanisms.

Tourism is one of the world's largest industries with an estimated 940 million international arrivals in 2010 and more than US\$ 919 billion revenues, or 30% of the world's export services. In the last years, the industry is expanding at an average rate of 4% annually (except 2009). Moreover, in the first half of 2011, international tourist arrivals are estimated to have grown by 4.5%, after a 6.6% increase in 2010 (UNWTO, 2010).

Tourism can bring a number of benefits, including the enhancement of economic opportunities by creating more jobs for local residents, increasing incomes and by the stimulation or creation of local and regional markets. Tourism can also help to protect natural and cultural heritage, preserve the values through education and interpretation, and help to support research and development of good environmental practices. Tourism can also help to enhance quality of life through improved infrastructures, enhanced intercultural understanding and the valuation by local people of their culture, their heritage and traditions.

The tourism destination is a link between all parts of the tourism industry, maintains and propels these parts, is a complex and specific element of the tourism industry and is a topic of numerous researchers (Stancioiu, 2002). The management of the tourism destination is a concept widely utilized in the theory and practice, while the image of the destination is an important point of interest for the researchers, as well as for the people managing the tourism industry.

Destinations are regarded as well-defined geographical areas, such as a country, an island or a town, with an amalgam of tourism products, offering an integrated experience to tourists. Destinations are not a single product, but composite products consisting of a bundle of different components including: accommodation and food establishments, tourist attractions, arts establishments and cultural venues, and the natural environment (Pop et al., 2007). It is a combination of tangible physical attributes (such as product, facilities, location and accessibility) and less tangible attributes (such as service, experience and community

attitude). Destinations are places towards which people travel and where they choose to stay for a while, are places with personality and with consistent tourist product (Suarez, 2007), so the perceived attractiveness and the competitiveness of destination are the most important issues to study.

The approach of tourist destination management is done through strategic management and marketing, taking into consideration specific theories, models, techniques, principles and strategies. Planning and implementing strategies means to involve all internal and external stakeholders, in order to assure brand equity and a good tourist experience (Kozak & Baloglu, 2011). Marketing of destinations should balance the strategic objectives of all stakeholders as well the sustainability of local resources, for the optimisation of tourism impacts (Buhalis, 1999).

Most literature of destination management introduces both theory and practice, related to specific areas of interest or even local tourist destinations, providing comprehensive textbook coverage for students on higher education and professional courses (e.g. Howie 2003; Ovsenik & Kiereta, 2006; Gunn, 2002). But also the destination management in communities of developing countries is a common and present issue (e.g. Jamieson, 2006; Velasquez, 2005); the complexity of destination management is discussed through illustrative case studies and effective practical approaches for various facets of destination management, providing a comprehensive view to planners, policymakers, and destination managers who attempt to ensure a sustainable future for those communities, in an innovative way.

Competition among tourism destinations continues to intensify on the international market; in these conditions, competitiveness of a destination is analyzed in terms of variable factors of influence. A destination is competitive if it can attract and satisfy potential tourists and this competitiveness is determined both by tourism-specific factors and by a much wider range of factors that influence the tourism service providers (Enright & Newton, 2004).

Competitive advantage requires the ability to effectively manage all components of the tourism system to ensure success is achieved. To assist in achieving this objective, many destinations have created a destination management organization (DMO) to provide leadership for the management of tourism in the destination (Bornhorst, Ritchie & Sheehan, 2010). The roles of the DMO have been explored in many scientific publications, but it still remains to research how the DMO can be more effectively structured and operated, in order to make the destination more competitive and successful.

Destination's image is the perception by the tourists of what could be experienced at the destination; is a composite of various products (attractions) and attributes woven into a total impression. Image plays a fundamental role in the success of tourist destinations, since tourist image, seen as a mental picture formed by a set of attributes that define the destination, exercises a strong influence on consumer behaviour in the tourism sector. Findings from many studies in this field suggest that both personal variables, such as demographics, culture, and familiarity, as well as attributes of the visual, such as physical features, are relevant to image assessment (MacKay & Fesenmaier, 1997). More than that, the destination's image is influenced by tourist motivations, the experience of travel has a significant relationship with cognitive and affective images, and the socio-demographic characteristics influence the cognitive and affective assessment of image (Beerli & Martin, 2004).

For tourist destinations, the differentiation on international market become critical, given the strong present competition, when tourists can choose from a wide variety of destination often substitutable. So the destination must be identified and differentiated from alternatives in the minds of the target market (Qu, Kim & Im, 2011). In this way, branding is considered beneficial from both the supply and demand perspectives. It can generate advantages for products and services, such as increased purchase intent, lower costs, increased sales, price premiums, and customer loyalty. In the same time, branding could give advantages for destination marketing organisations, including increased potential to differentiate against similar destinations, increased destination loyalty and increased yield for local tourism businesses and tour operators. Benefits for the traveller include ease of decision making through reduced search costs, reduced risk, and possibly enhanced brag value (Pike, 2009).

Under the brand umbrella, destinations have to design the appropriate market strategies. Umbrella branding refers to the linkages and synergies in the development of strategies at the national authority level but also at the DMO and stakeholders levels and that means a strong involvement of the local community.

2. Romania as a tourist destination

Romania is an important destination for local and foreign tourists. The respective legal frame was created before World War II. Early 1960s Romania boosted its accommodation capacity, primarily on the Black Sea coast. Early 1970 Romania was already a well known destination on the most important importing markets in Europe, especially Germany, UK, the Scandinavian countries, France, Italy, Austria and Belgium.

After 1980 the arrivals of foreign tourists decreased sharply and this tendency continued in the 1990s. The reason was the lack of investments for development, modernization and maintenance of the specific infrastructure, as a result of the very slow and complicated privatization process, wrong fiscal legislation, lack of supporting policies from the banking sector. The last decade did not bring much improvement, but after Romania's accession to the European Union, we witnessed increased investments in the tourism industry, especially due to financing from the European Union, but also as a result of increased efforts for a coherent strategy to develop and promote the Romania tourism destinations.

2.1 Qualitative and quantitative aspects of the Romanian tourism

Situated in the South-eastern region of Europe, in the Northern part of the Balkan Peninsula, Romania holds an attractive, rich and various environment, with a diversity of landscape forms – mountains, hills and plateaus, plains, coastal zones -, flora and fauna, thanks to its geographical position. Romania also owns a rich culture, developed over more than 2000 years of history by the Romanian people in this area.

The landscape is varied and harmoniously distributed. Romania is the country of the Carpathians, the Danube and the Black Sea. The Carpathians are one of the most important mountain chains in Europe; the backbone of the Romanian territory is formed by the South-eastern Carpathians, which make an almost compact ring, with the Transylvania Plateau on the inside. They are in the centre of the country, bordered on both sides by hills and plateaus

and finally the Great Plains of the outer rim. Forests cover over a quarter of the country and the fauna is one of the richest in Europe including wolves, bears, deer, lynx and chamois.

Romania is also situated on the inferior basin of the Danube, an important European river. The Danube and its tributaries water 97.8% of the country's territory. Romania has the greatest surface of the hydrographical basin of the Danube, controlling 38% of the navigable course. Finally, the country is located on the Western coast of the Black Sea with a marine shore spanning over 245 kilometres, which confers it a special status.

The main components of Romania's tourism offer may be summarized as follows:

- a. The highly complex natural potential, of tremendous tourism value, known all over the world:
 - The mountain potential, of varied landscaping beauty, a complexity of tourism resources (landscaping, skiing areas, spa, cultural, etc.) and various possibilities for tourism exploitation (there are available 14 forms of tourism and entertainment modules). The most famous mountain resorts offer important facilities for winter sports, mountain hiking trips, cave exploration and mountain climbing, spa, cultural tourism, religious tourism, eco tourism and others;
 - The wellness spa tourism, world renown for the natural curing factors, such as: mineral waters (1/3 of European mineral resources are found in Romania), therapeutic clay pits and gas, saline bio climate, ionized air bio climate, phytotherapy, etc., partly exploited through national wellness spa resorts (approximately 24) and the regional and local non-certified wellness resorts (36). In addition to these favourable elements, one might also consider the professionalism of the medical and curing staff, as well as the wide range of typical Romanian medication and treatment with plants, characteristic to this sector;
 - The tourism potential of the Black Sea with its renown resorts connected also to wellness tourism, such as the mineral waters of Mangalia, Venus, Neptun, Eforie, the sapropelic mud pits of Techirghiol and charcoal in Mangalia; the chlorium-nitrite waters of Techirghiol Lake; the marine bio climate as well as other tourist objectives of cultural, historical and natural significance, spread over a range of 70 kilometres between Cape Midia and Vama Veche;
 - The tourism potential of the Danube Delta with its unique ecologic landscape and fauna attractions (various birds and fish species), ship cruises and expeditions in a one-of-the-kind landscape and its cultural particularities (the cultural and economic traditions of the local Russian, Ukrainian and Romanian communities, etc.);
 - The tourism potential of the Danube River and its shores, with interesting attractions for tourists: the Danube Gorge and the Iron Gates, Delta ponds, etc.
 - The protected areas (13 national parks, 13 natural parks and 3 Bio-sphere reserves) as key destinations, representative for the international geo-fund and the leisure recreational educational and scientific research activities;
 - The cave potential (over 10.000 caves) and the potential for mountain climbing and escalade, as well as for extreme sports which may be conducted especially in the mountain area;
 - The Romanian climate is favourable for tourist activities throughout the year due to its comfortable climate; the layer of snow allows, through thickness and duration of life, practicing all sorts of winter sports, the therapeutic value of the bio-climate

- (negative ionized air, tonic bio climate – mountain stimulant, hill relative, excessive – exciting in the plains and sea shore, etc.).
- b. The cultural and historical heritage, completely representative of our country, given the multi-millennial history of the Romanian people, represented by:
- The existence of over 680 heritage values of national interest, among which 197 churches and monastery complexes, 36 monuments and architecture ensembles, 11 castles, mansions and palaces, 70 urban architectural ensembles (civil constructions), 20 historical centres and archaeological sites, etc. A considerable proportion of all the historical and artistic monuments are values of the UNESCO World Heritage (villages with fortified churches in Transylvania, churches with exterior murals in Bukovina, the Dacian fortresses of the Orastie Mountains, the historic centre of Sighişoara, wooden churches of Maramures etc.);
 - The Romanian ethnic and folk treasures of considerable originality, represented by the particular rural architecture in the villages of Maramures, Bucovina, Oltenia, Dobrogea, Transylvania, etc.; wooden churches in Maramures and Salaj; craftsmanship, wood cutting and processing, the decorative art cultural and religious traditional festivals, fairs and ethnographic open-air museum exhibitions or pavilions, etc.
- c. The technical and economic potential, through works of engineering art, bridges, dams, salt and coal mines, old factories and railway buildings, vineyards and stud farms, etc.

So, Romania holds a huge treasury of archaeological traces, historical, architecture and art monuments, as well as a valuable patrimony certifying continuous and life evolution on these lands, Romanian culture and art development.

All of these constitute very attractive elements of Romanian tourism offer, presenting a wide variety of tourism types: large or short holidays at the seaside, mountain resorts or spa, hunting and sportive fishing, cultural tourism, rural and agrotourism, ecotourism, professional tourism etc.

From qualitative and quantitative point of view, we witnessed a continuous improvement of the infrastructure, particularly in terms of the network of hotels, hostels and tourist villas, in cities, resorts, as well as in rural areas. In the last several years, the investments¹ focused also on the restoration of some elements of the cultural heritage, on developing or modernizing the connecting roads to some of the resorts (in the mountains, in the coastal regions or to medical resorts), on developing leisure equipment like sports centres, swimming pools, hiking trails, beaches, slopes (54 new slopes were built in the last 3 years), cable transport and water sports equipment in the Danube Delta, respectively on developing the tourism potential of some salt mines, spa centres, tourism information centres etc.

A total of 5003 accommodation units were operational in 2011, out of which 1308 hotels, the rest representing tourist villas, tourist boarding houses, agrotourist boarding houses, camping sites, school camps and others; most accommodation units are operating in the segment of medium comfort (2-3 stars; see figure 1).

¹ From a quite low level of 20 million Euros invested in tourism in 2006-2008, the government increased the invested amounts to 812 million Euros in 2009-2011, out of which 612 million from the European Union. Additionally there were quite important private investments in hotel and restaurant activities.

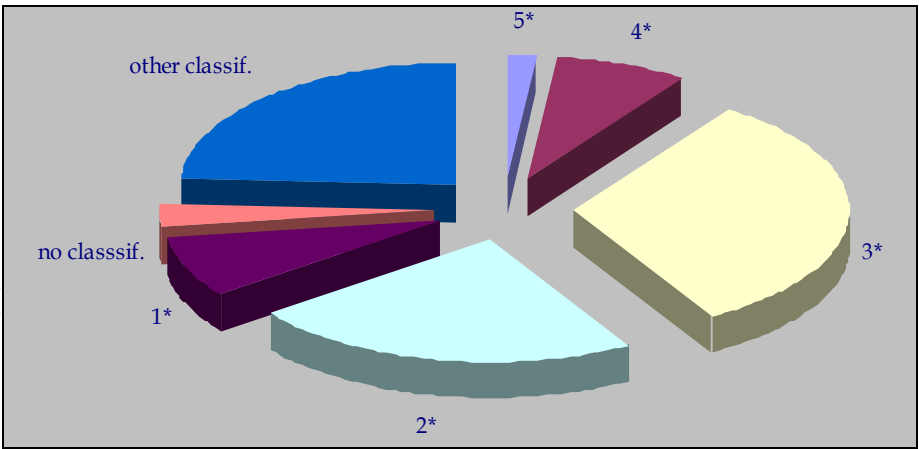


Fig. 1. Accommodation units’ structure by comfort class in Romania, 2011

A total of 278,503 bed places were available in 2011 in Romania, out of which 174,748 in hotels (62.7%). Unfortunately the occupying rate is low (25% in 2010, down from 35% in 2000-2008, as a result of the economical crisis and not only), showing an unsatisfying usage level of the tourist accommodation units.

19,000 bed places were available in Bucharest, which is 7% of the total on national level; however the occupying rate is higher than the national average (over 45%).

Details about the dynamics of the tourism indexes in 2000-2010 are shown in table 1.

Indicator	2000	2005	2010	2010/2000
Total establishments	3121	4226	5222	+67.3%
- hotels and similar establishments	2533	3608	4724	+86.5%
- other collective accommodation establishments	588	618	498	-15.3%
Total bed places (1000)	280	283	311	+11.1%
- in hotels and similar establishments (1000)	199	216	258	+29.6%
- in other collective accommodation establishments (1000)	81	67	53	-34.8%
Total arrivals in accommodation units	4920	5805	6072	+23.4%
- non-residents	867	1430	1346	+55.2%
Total nights spent	17647	18373	16051	-9.0%
- non-residents	2149	3464	2767	+28.8%
Average stay	3.6	3.2	2.6	-27.8%
- non-residents	2.5	2.4	2.1	-16%
Number of tourists who stay at least 4 nights (1000)	-	3583	4289	
Number of trips with at least 4 overnight stays (1000)	-	3857	4403	

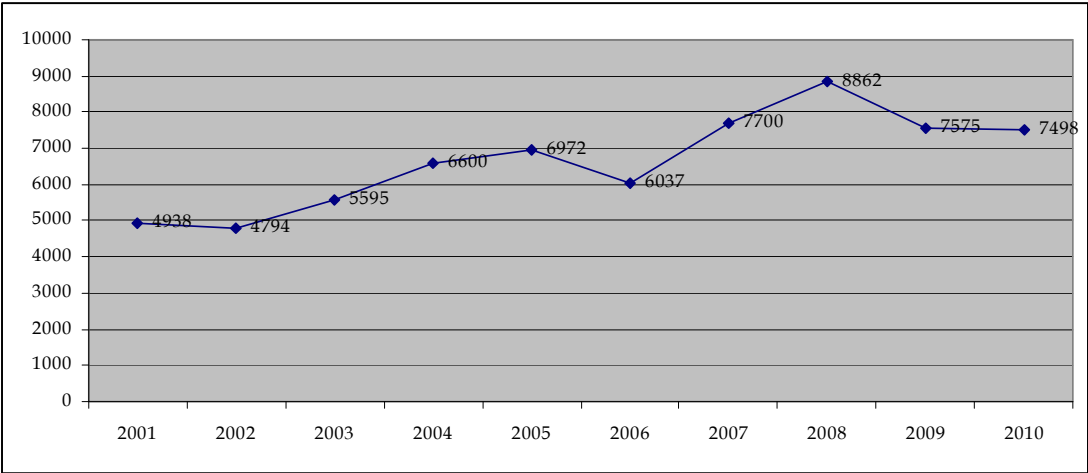
Source: Eurostat, data compiled by the author based on http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/data/main_tables and Romanian Institute of Statistics, at <https://statistici.insse.ro/shop/index.jsp?page=tempo2&lang=ro&context=63>

Table 1. Evolution of main tourism indicators in Romania

At present, Romanian tourism industry is characterized by the following indicators:

- 7.5 million foreign visitors in 2010 (down from 8.9 million in 2008...); out of which, 7.1 million visitors are coming from Europe (the most important markets being Moldavia, Bulgaria, Germany, Italy, Turkey, France, Russia and Spain);
- 10.9 million outbound Romanian tourists (same year); the main destinations are Italy, Greece, Hungary, Bulgaria, Spain, Austria and Turkey;
- more than 1,000 million US Dollars revenue from international tourism, but this amount is quite low in comparison with other European countries;
- 3,405 millions US\$ in GDP (or 2.04%) and
- 270,000 jobs (3.2% of the total number of employees in Romania), showing a quite low participation of the tourism in the total Romanian economy (WEF, 2011).

As a short conclusion, we can see that Romania has a fairly modest economic performance in the tourism industry, compared with the existent potential and with the other Central and East-European countries.



Source: National Institute of Statistics, 2008. *Romania's Statistical Yearbook*. Bucharest and National Institute of Statistics, 2010, *INSSE – Statistical DB – TEMPO-Online time series* [online], Bucharest. Available at: <https://statistici.insse.ro/shop/index.jsp?page=tempo3&lang=en&ind=TUR107C> [Accessed 02.12.2011].

Fig. 2. International tourist arrivals in Romania (thousands of tourists)

As a matter of fact, after the year 2000, Romania scored a high rate of increase in the number of international tourists' arrivals, i.e. 7.1%/year (European Commission, 2008). In 2011, in the first half of the year, according to the National Institute of Statistics and Ministry of Tourism and Regional Development, the number of foreign tourists accommodated in Romania increased by 11.6% (Ministry of Regional Development and Tourism, 2011).

This dynamics of international tourist arrivals in Romania, and in parallel of a higher increase of outbound Romanian tourists, led to a relatively modest volume of revenues from tourism and – for a significantly long period of time – to a negative balance of payments in tourism. As a matter of fact, the European Union's statistics include Romania in the group of countries which are the main generators of tourists over the last 5 years (European Commission, 2008).

In terms of the promoting activities, several campaigns were launched after 1996, each of them trying to bring some novelties or to create a new image of the destination Romania. First it was *"The Eternal and Fascinating Romania"* (trying to change the country's image after the communism), after that *"Come as a tourist, leave as a friend"*, then it was *"Romania – Simply Surprising"* (an aggressive campaign trying to re-conquer some traditional markets like the Baltic Republics, Central and Eastern Europe, Middle East and the Scandinavian countries), the 2007 long term Master Plan for the development of the Romanian tourism and finally the current campaign under the slogan *"Explore the Carpathian Garden"*. Despite the consistent financial efforts all over this period, the expected results in terms of revenues or number of tourists were never reached.

2.2 The Image and competitiveness of the Romanian tourism

Romania has a huge tourism potential, but the promoting campaigns never produced the desired effects and they lacked coherence and continuity. Another problem is that the foreign tourist finds in Romania something different than the expectations and promises – for example the inesthetic urban landscapes and the bad infrastructure are disappointing.

In contrast with all the advantages of the tourism potential, some surveys conducted by the World Tourism Organization, based upon the information and market research done in the European countries - generating tourism flows – or by the national tourism administration in Romania show the Romanian tourism offer in the following way:

- all types of tourism programs offered by Romania meet a strong competition from the West-European markets;
- other countries have a large variety of offers for categories of tourists, but the Romanian offer is, in a way, limited, concentrated only in a few resorts, and there, only in a few hotels;
- by comparison with competitors from Bulgaria, Turkey, Greece or Cyprus, the quality of the service in Romania is lower;
- the entertainment is less diversified;
- technical and transportation infrastructure is inadequate;
- it is imperative to improve the comfort level in hotels in large urban areas and in the resorts for foreign tourists;
- concerning the quality/ price ratio or the value for money, Romania is not anymore an attractive tourism market.

Also, the author's own research in the period 2007-2010 shows some more elements in the way the foreign tourists perceive Romania as a tourist destination:

- the main destinations are Transylvania (Dracula' tours, fortresses, landscapes), Bukovina (UNESCO monasteries with mural paintings, rural tourism, gastronomy and traditions), Maramures (UNESCO wood churches, landscapes, old villages with tradition and handicrafts), Bucharest (museums, Palace of Parliament, night life and casinos), the Delta of Danube (cruises, birdwatching, fishing and heritage), Carpathian Mountains (active holidays) and seaside;
- highly appreciated are the patience, hospitality, benevolence, and sociability of the people, great satisfaction with accommodation, information and business services;

- main negative aspects are related to infrastructure and the lack of professionalism of the employees around the tourism, the meals and leisure facilities, the non-competitive prices compared to neighbour destinations (Bulgaria, Turkey, Greece);
- the persistence of some problems about the image of Romania as a tourism destination (pocket lifters, taxi drivers which cheat the customers, stray dogs, lack of cleanliness, lack of parks and public toilets etc.);
- the marketing efforts abroad were inconsequent and/or insufficient.

The World Economic Forum ranks the competitiveness of the Romanian tourism on the 63rd position worldwide (out of 139 countries), respectively 34th in Europe (out of 42 countries), with a Travel and Tourism Index of 4.17 (up from 4.00 in 2009). Such low value of the index is the result of numerous weak points in the development of the tourism.

Compared to its main competitors, Romania seems to be not competitive:

Country	The Travel & Tourism Competitiveness Index 2011
Greece	4.78
Croatia	4.61
Montenegro	4.56
Hungary	4.54
Bulgaria	4.39
Turkey	4.37
Romania	4.17

Source: The Travel & Tourism Competitiveness Report 2011, Word Economic Forum, at http://www3.weforum.org/docs/WEF_TravelTourismCompetitiveness_Report_2011.pdf [accessed 02.12.2011]

Table 2. Romania versus his competitors from East-Europe

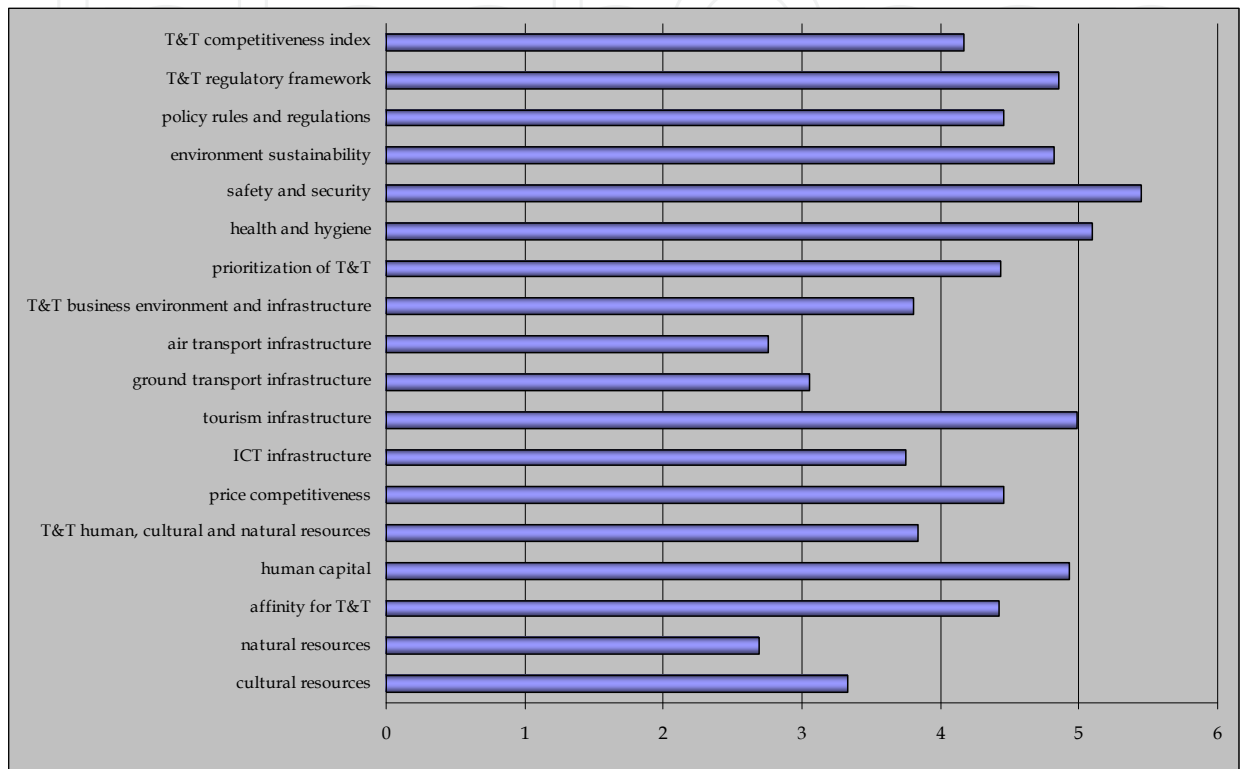
A detailed analysis of the elements of this index, on subindexes and principal pillars, shows the critical aspects of the Romanian tourism competitiveness, but also his strengths, as is reflected in figure 3. So, Romania is more competitive in safety and security, health and hygiene, tourism infrastructure, but less in business environment and general infrastructure.

A more detailed analysis of the elements of each pillar shows that Romania has notable competitive advantages in terms of presence of major car rental companies (rank 1!), ease of hiring foreign labour (rank 23), hospital beds, number of World Heritage cultural sites (rank 29), creative industries exports, road density, number of international fairs and exhibitions, number of operating airlines, mobile telephone and broadband internet subscribers, ATMs accepting Visa cards and others. But many other aspects substantially reduce the competitiveness of the destination: transparency of government policymaking (rank 137!), sustainability of T&T industry development, extent and effect of taxation, tourism openness, government prioritization of the T&T industry, effectiveness of marketing and branding, quality of the natural environment, quality of transport infrastructure (air, road, railway, port infrastructure), local availability of research and training services etc.

Taking into consideration all those problems, the investments in modernization and promotion are vital actions needed for the transformation of Romania into an internationally successful tourism destination. As for the distribution of the tourism product, it's a very

good sign that the large European tour-operators like TUI and Neckermann returned to Romania, but there is a lot more to do for the local service providers in order to improve the perception of the large tour-operators about the quality of the services.

Additionally, Romania needs to encourage and support more the initiatives of the local authorities, the public-private partnerships, and the co-operation between the National Tourism Authority with professional associations.



Source: The Travel & Tourism Competitiveness Report 2011, Word Economic Forum, at http://www3.weforum.org/docs/WEF_TravelTourismCompetitiveness_Report_2011.pdf [accessed 02.12.2011]

Fig. 3. Romanian Tourism & Travel Competitiveness Index and subindexes

3. The need for a strategic approach of Romanian tourism

If the concept of destination management is today often discussed in the literature and also in practice, his consideration of national level is a challenge. Yet, national marketing plan is absolutely necessary today, and international experience gives us many examples of success.

The development of Romania destination must consider a macroeconomic marketing approach, but also at the micro-destinations’ level. Destination marketing planning seeks to find direct response to a series of questions about the market, competition, environment, and to establish goals for a certain period, to identify target markets, products and strategies for each market.

A Marketing Plan sets the framework and direction for all marketing activities for a destination including market research, brand development and management, advertising and promotion, sales, distribution and cooperative marketing opportunities.

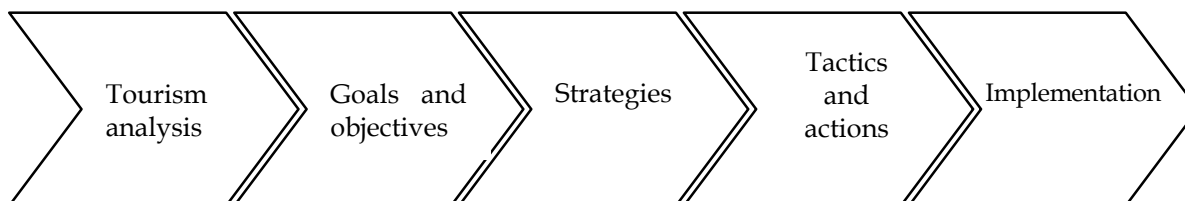


Fig. 4. The marketing plan contents

Tourism sector analysis, as was mentioned above, can be synthesized using the SWOT tool necessary to define the development and promotion strategies.

Strenghts of Romania destination:

- good geostrategic position;
- diversity of landscapes - mountains, sea, delta, various tourist attractions;
- 35% of mineral water springs in Europe and pits, which offers a wide range of spa treatments;
- good natural conditions for tourism activities - skiing, trekking, riding, cycling, water sports etc.;
- unspoiled nature and landscape, great biodiversity in protected areas, cultural heritage including UNESCO sites, Dracula's legend, authenticity, hospitality etc.;
- 17 commercial airports (biggest Henri Coanda, former Otopeni) and a large number of international airlines, extensive railroad network (4th largest in Europe in 2004);
- 11th largest economy in the EU;
- some brands already present in hospitality industry (Hilton, Hyatt, Marriott, Novotel, Pullman, Ibis etc.) and other planned penetration in next years (Sol Melia, Sheraton, Kempinski, Hampton, Courtyard);
- a large tourism infrastructure and good distribution of tourist products.

Weaknesses:

- the natural environment pollution, degradation of some natural attractions, the lack of environmental awareness from a part of the population;
- infrastructure still underdeveloped, main road corridors to be upgraded;
- overcrowding of tourist areas and poor valorisation of others;
- the state of degradation of many buildings and monuments;
- weak promotion of cultural objectives and events;
- many accommodation units and recreation facilities in resorts require upgrading;
- weak quality and diversity of tourist services in general, quality / price ratio non competitive;
- insufficient tourist information (signaling, information centers, information, etc.);
- short tourist season in the seaside resorts or winter sports resorts;
- weak awareness of the importance of tourism in the economy;
- training in the hospitality sector does not correspond exactly to the needs of employers;
- lack of institutional structures for regional development of tourism;
- lack of integrated tourism development of cities / resorts;
- incentives and support mechanisms for investors are insufficient;

- lack of powerful images, positive Romania abroad as a tourist destination;
- low collaboration public / private sector on marketing issues.

Opportunities:

- the European funds can be used to upgrade the general and tourism infrastructure;
- the adoption of new national tourism strategy, starting with 2010;
- reincrease of international tourism demand after the crisis year 2009;
- changes in the tourist motivations and permanent decline of traditional destinations;
- designation of Romania as vice-president of the World Tourism Organization, which contributes to improving the image of the country;
- the development of major sport events in Romania – UEFA Europa League Final 2012, edition of the Olympic Winter Festival of European Youth 2013, professional boxing galas, etc.

Threats:

- the current economic crisis will affect global tourism demand in 2012;
- strong competition from Central and Eastern European countries;
- damage country's image from some of immigrants;
- too frequent changes of development strategies, the lack of continuity in the fiscality legislation, public administration and environmental regulations.

Thus, the main general objectives which underline the basic development strategies for the Romanian tourism sector are (Ministry of Regional Development and Tourism, 2009):

- Creating a diverse and competitive tourism offer by supporting national and foreign investment development, which would in turn lead to an increase in the size of tourist activities and tourist circulation, respectively;
- Stimulating the development of quality tourist services, which will translate into an increase in income level (in national and foreign currency), of the contribution of tourism to the internal revenue and to the net income of the population, as well as a better absorption of the labour;
- Creating the conditions for integrating the Romanian tourism in the mainstream trend, present at a global and European level.

Among the specific objectives, some could be (Tigu, Andreeva & Nica, 2010):

- A yearly increase in the number of foreign tourists of 5-10%;
- Increasing the contribution of tourism in Gross Domestic Product (GDP), until 2015, to 6%;
- The yearly increase in the number of Romanian tourists by 5%, and the average stay to 3.5 days;
- Creating some 350.000 jobs in the tourism and related industries, until 2015.

The analysis of the current stage of Romanian tourism and the study of its weak points clearly indicates the main necessary actions for invigorating the industry and supporting it in reaching its objectives and clarifying its vision. These actions may be summarized as follows:

- the institutional structures of the public sector which benefit of trained staff and sufficient resources, must work in partnership with entities in the private sector;

- market research, segments, clients and communication channels;
- an integrated tourism planning will lead to modernizing, developing and better presenting the tourist products to meet the market's expectations and demands;
- education and training for the industry personnel at all career levels aimed at customer satisfaction, improving professionalism and enhancing skill level;
- oriented marketing to establish Romania as a preferential tourist destination (Tigu, Andreeva & Nica, 2010).

To a greater or lesser extent, these actions must be applied in all fields of Romanian tourism – products, destinations, services, etc. These include: seaside tourism, city breaks, tours and geo tourism, wellness tourism, active tourism and youth tourism, cultural tourism, business tourism, rural and eco tourism, education and training, entertainment, transportation, tourist information, destination marketing, quality control, planning, environment, legal framework, investment promotion and consulting services.

Moreover, in the last two years new strategies were developed by the national tourism authority, to meet these requirements established by the 2007 Master Plan, developed with the support of WTO consultants. First, was developed in 2010 the strategy of creation and promotion national tourism brand, realising the fact that country branding is a complex, complicated, abstract process and arises from social, political and economic mutations; he is not just a name, a slogan, a logo or a specific design, but a broad national approach. Simon Anholt identifies six elements involved in building the image of the country; these elements are: tourism, immigration and investment, exports, political activities, people, culture and tradition. This means that tourism is one of the elements shaping a brand, but it should be remembered that, in fact, this sector is a result of all other elements (Anholt, 2005). In other words, refers to the holistic brand reputation of the tourism destination has achieved (Jamroz & Walsh, 2008).

Romania's new brand was launched at the Shanghai World Expo 2010, under the slogan "Romania - Explore the Carpathian Garden" with a logo represented by a green leaf and a blue river, to highlight elements of differentiation of the Romanian tourism:

- unspoiled nature and landscapes: nature and national parks well protected, beautiful isolated landscapes, rare flora and fauna areas, valuable ecosystems (Carpathian Mountains, Transylvania, Delta of Danube);



Fig. 5. Romania's logo

- authenticity: ancient traditions, simple rural life, organic food produced locally, typical local architecture (Transylvania, Maramures, Bucovina, Dobrogea, villages);
- unique cultural heritage: castles, monasteries, Latin and Byzantine cultural heritage, German cultural heritage, the painted monasteries of Bucovina, the old town of Sibiu, wooden churches of Maramures.

Another important decision to be taken is to create a national, independent and apolitical authority, that works as a DMO (Destination Marketing Organization) intended to provide expertise to all projects about country branding and to have representation in every country where want to implement a promotion campaign. The establishment of this authority is important because currently there is no leadership in terms of country branding; there is no coherent communication and collaboration between ministries and public and private organizations involved in promoting the country's image. The existence of such an authority can ensure collaboration between these insitutions and can assure a promotion plan for a minimum of 20 years.

It is also developed a strategic and operational tourism marketing plan for 2011-2015, with an special marketing plan for Bucharest destination. Other strategies are ready to be implemented: for health tourism, ecotourism, for the south region of the Romanian seaside, and a strategy for rural tourism.

4. Tactics and integrated actions

In the context of the national economy as a whole, tourism acts as a catalyst of the global system. In Romania, tourism sector has to bring a qualitative leap in destinations, ensuring a sustainable growth and an increasing competitiveness on the international tourism market.

Before talking about the country brand and to promote the Romania's destination image, new product strategies have to be implemented, taking into account:

- **New tourism products and packages (quick wins).** Taking into consideration the potential and the stage of development, those products could be: touring, city breaks, wildlife and nature parks, active tourism and adventure, countryside and rural tourism, health and wellness. The main key success factors for those products are:
 - Build attractive thematic tour routes and packages, but also events and animation services;
 - Keep nature and culture as major values for the markets;
 - Strongly promote ecotourism in the Danube Delta, national parks and reserves and rural areas;
 - Restructure Black Sea tourism, mountain and spa resorts.
- **Development of infrastructure and access to major cultural and natural destinations:**
 - Upgrade national transport system (roads, in particular, but also rail and maritime system) and improve a country wide buss, shuttle, rent a car and taxi system;
 - Increase air traffic capacity via regular and low cost carriers;
 - Expand national tourism signage system in relation with key themed tourism routes;
 - Develop the Danube Cycling route.

- **Improving quality in destinations:** establish the leadership of tourism in environment protection; update existing tourism infrastructure and facilities; improve visitor facilities in national museums and monuments focusing on welcoming, interpretation and marketing services; sustain and promote local festivals and events; better programs for employees' training and development.
- **Searching the points of differentiation:**
 - "True" authenticity, unspoiled nature and landscapes and a unique cultural heritage (most unique attractions being: Delta of Danube, abundant endangered flora and fauna, painted monasteries, Dracula's legend, many living traditions);
 - Possibility to offer a complete and combined tourist package and tours, with a wide variety of attractions (mountain, spa, culture, nature parks, beach), situated near to each other;
 - Unspoiled mountain region, with potential for niche products like hunting, fishing, bird watching, hiking, mountain biking, and other forms of adventure tourism;
 - Several national and international personalities: culture values (Constantin Brancusi, George Enescu), sport icons (Nadia Comaneci, Gheorghe Hagi, Ilie Nastase) or historical figure (like prince Vlad Tepes or the Count Dracula, as mix between history and myth).
- **A new business tourism environment:** invest focusing on market needs, encourage DMO development, investment and tax incentive system, competitive tourism statistics, research and training system, developing a network of tourism visitor/info centers, coordinating the policies, strategies and plans at all levels (national, regional, local community).

Obviously, all product strategies must be developed under the already chosen brand umbrella, brand that must be strengthened.

Target consumer is the discerning explorer, looking for unique destinations with great nature & landscapes and authentic cultural life and sites. Target audience is characterised by 25-34 and 50-64 ages (empty nesters), highly educated, middle-high income but with high spending potential, frequent travellers, living in medium-big cities. The main motivations and behaviour can be described as: living experience and emotions, satisfying a special interest, learning, getting involved and interacting with local people in a nice environment, with a high level of security, in small groups or in couples (Horwath, 2010).

Target markets are strategic; looking at the foreign tourist arrivals in Romania, the most important markets at the moment are:

- *Strategic markets:* Germany, Austria, Italy, France, United Kingdom, Turkey, Israel, United States, which count more than 200,000 tourists in Romania every year;
- *Emerging markets:* China, Ukraine, Spain, Russian Federation, Bulgaria, Poland, Czech Republic, Slovakia, with an important tourism flow in Romania and with real increasing potential;
- *Diverse markets:* Holland, Denmark, Sweden, Norway, Canada, Japan etc.

All markets need to be approached through strong and personalised communication strategies, which have to include powerful public relations and web strategy (including

also on-line direct booking channels), under the same brand umbrella – “Explore the Carpathian Garden”.

5. Conclusion

As tourist resources are practically inexhaustible, tourism represents one of the industry sectors with real long-term development perspectives. The complex capitalizing and exploitation of tourist resources, accompanied by an efficient promotion strategy on the international market may constitute a valuable source for foreign currency income for the Romania, thus contributing to the balancing of the external debt.

Tourism represents a safe market for the workforce and for re-distributing the unemployed resulting from other economic sectors undergoing a restructuring process. Tourism, through its multiplying effect, acts as a catalyst for the global economic system, generating specific demand for goods and services which further generate supplementary increase in their respective productivity and contributing, in turn, to diversifying the national economy sectors. A harmonious development of tourism throughout the national territory contributes to economic and social growth and a lessening of inequalities between various areas, constituting an important source for increasing the level of income of the local population.

Despite the big tourist potential, Romania faces many problems related to the tourism contribution in national economy, quality of services and products, the image as a tourism destination, competitiveness, and strategies' continuity. Although marketing and planning efforts were significant in recent years, adopting different strategies on various market segments, the expected results in terms of revenues or number of tourists were never reached. Furthermore, it noted the lack of synergies in the national economy, that supposed to help tourism sector. Lack of application of the destination management concept is also visible in the field of tourist activities management both at central and local level.

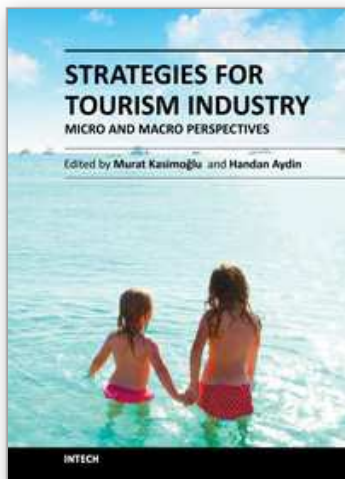
Adopt a new brand strategy must be supported by an improvement in the quality of general and tourist infrastructure, by the attraction of new segments / markets, development of competitive products, services, and destinations, pragmatic and effective regional and local tourism planning and management, all for creating travel experiences related to promised brand and generating further economic benefits.

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Today, it is considered good business practice for tourism industries to support their micro and macro environment by means of strategic perspectives. This is necessary because we cannot contemplate companies existing without their environment. If companies do not involve themselves in such undertakings, they are in danger of isolating themselves from the shareholder. That, in turn, creates a problem for mobilizing new ideas and receiving feedback from their environment. In this respect, the contributions of academics from international level together with the private sector and business managers are eagerly awaited on topics and sub-topics within Strategies for Tourism Industry - Micro and Macro Perspectives.

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