CHARTING SUSTAINABLE TOURISM IN ROMANIA.
AN OPPORTUNITY RELEVANT AUTHORITIES MIGHT BE MISSING

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Abstract: The unprecedented crisis humanity has been facing for almost two years now has had tremendous impact on the entire tourism ecosystem. The dramatic decline in the international tourism economy must be addressed both at an international and national level, with recovery strategies that can provide solutions for structural transformation. Particularly convenient for the Romanian landscape is the development of sustainable domestic tourism, which could quickly prove profitable for the entire HoReCa sector. The current paper focuses on The Ministry of Economy, Entrepreneurship and Tourism, the measures taken to encourage domestic tourism and its communication efforts, as seen online by the stay-at-home Romanians.

Keywords: Sustainable tourism; domestic tourism; marketing strategy; Covid-19 crisis; public communication.

1. Introduction

The tourism industry has been growing steadily over the past decades, proving very dynamic and adaptive (UNWTO, 2021; ICAO, 2018; Akpan and Obang, 2012). Tourism has become the largest industry worldwide in terms of employment and share of global gross domestic products. The sector has demonstrated strong and continued growth in the number of people traveling internationally each year, as well as its economic impact over the last six decades. In 2018, future predictions suggested that the sector would continue to grow in size and significance, amplifying its opportunity and responsibility to act as a force for good in the world (ICAO, 2018).

During the 2011 General Assembly, The World Tourism Organization, through its specialized departments, made projections about the future development of international tourism for the upcoming years (up to 2030) by considering the joint action of various economic, social, political, geostrategic and environmental factors that influence and impact the tourism sector. It was estimated that international tourism would achieve a huge increase between 2015 and 2030, at an annual average pace of 3.3%. (2011, p. 6) Moreover, according to UNWTO World Tourism Barometer (2015), international tourist arrivals reached 1.138 million in 2014, by 51 million more tourists as compared to 2013. Therefore, the 2015 barometer underlines that tourism had proven to be highly resilient to the shocks of international market, being an important contributor to the reconstruction process and economic revival in the aftermath of the international economic and financial crisis (UNWTO, 2015, p.9). However, nowadays, the situation

and prognosis of tourism development is substantially different than anticipated, as the Covid-19 pandemic has severely damaged the tourism industry worldwide.

2. Sustainable tourism and the impact of the Covid-19 crisis

The unprecedented global health crisis we have been facing since the beginning of 2020, has generated a 72% fall in international tourist arrivals (overnight visitors) between January and October 2020, curbed by slow virus containment, low traveler confidence and important restrictions on travel still in place. The UNWTO (WTB, December 2020, p.1) shows that „the decline in the first ten months of the year represents 900 million fewer international tourist arrivals compared to the same period in 2019 and translates into a loss of US$ 935 billion in export revenues from international tourism, more than 10 times the loss in 2009 under the impact of the global economic crisis".
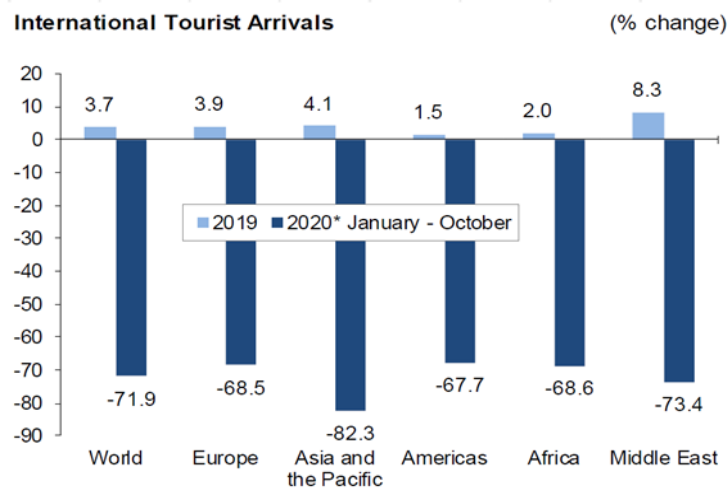
International Tourist Arrivals   (% change)

Figure 1. International Tourist Arrivals in January -October 2020 (Source: World Tourism Organization 2020)

Even with such a dire landscape, people working for or in the tourism industry should consider that crisis is a once in a lifetime opportunity to move towards fairer, more sustainable and resilient models of tourism development. There is an urgent need to diversify and strengthen the resilience of the tourism economy, to better prepare for future shocks, to address long standing structural weaknesses, and encourage the digital, low carbon transformations that will be essential to shift to stronger, fairer and more sustainable models of tourism development (OECD, 2020). The Organisation for Economic Cooperation and Development (OECD) is also arguing that rebuilding tourism should be a priority if the sector is to become more sustainable and resilient in the future. OECD (2020: 6) suggests that key policy priorities include:
  ➢ Restoring traveler confidence,
  ➢ Supporting tourism businesses to adapt and survive,
  ➢ Promoting domestic tourism and supporting safe return of international tourism,
  ➢ Providing clear information to travelers and businesses, and limiting uncertainty (to the extent possible),

➢ Evolving response measures to maintain capacity in the sector and address gaps in support,
➢ Strengthening co-operation within and between countries,
➢ Building more resilient, sustainable tourism.

The World Tourism Organization (WTO) defines sustainable tourism as "tourism which leads to management of all resources in such a way that economic, social and aesthetic needs can be filled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems" (McKercher, 2003: 3). The sustainable development of tourism entails not only the protection of the environment, but also equal opportunities for the development of the communities in which the tourist activities take place (Mitrică et alii, 2021: 2).

Nistoreanu et alii (2011: 118) also argue that tourism is one of the industries that must be involved in sustainable development as an industry of resources, dependent on the natural and human potential and cultural heritage of a society. It is essential for tourism to be active in sustainable development issues and to cooperate with other industries in providing qualitative resources for all tourism and tourism related activities. So, in this meaning, the sustainable development of tourism has the role of balancing preservation of natural and socio-cultural heritage with meeting the demands of tourists and local population in host communities.

A comprehensive image of sustainable tourism has been put together by Janusza and Bajdora in 2013. It highlights the economic, environmental and social dimensions as well as the balancing of resources it should consider.
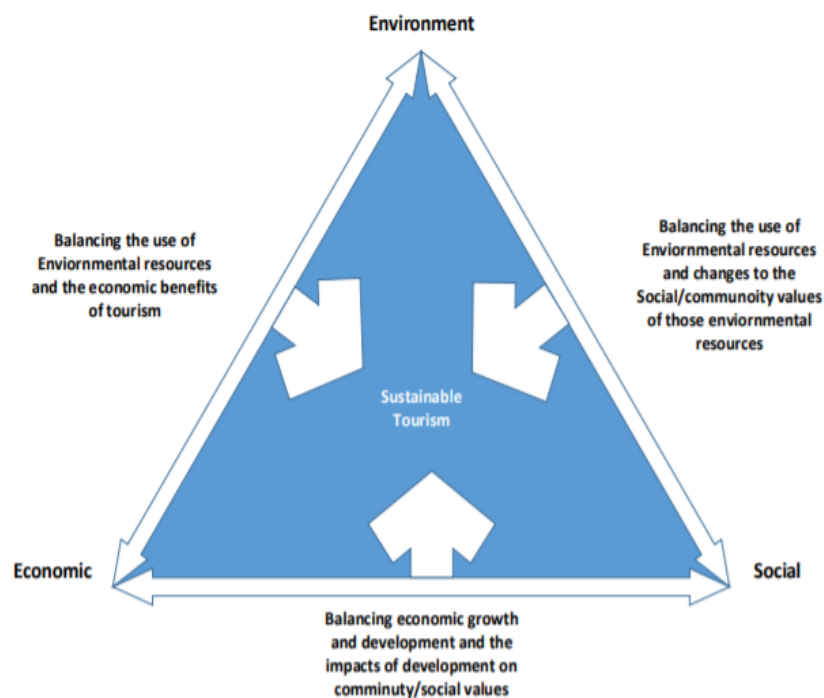

Figure 2. Dimensions of sustainable tourism (Source: Janusza and Bajdora, 2013: 3)

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At the moment, each country is trying to revive tourism and find solutions to the structural shortcomings and vulnerabilities exposed by the pandemic. Domestic tourism has restarted and is helping to mitigate the impact on jobs and businesses in some destinations. However, real recovery will only be possible when international tourism returns. This requires global co-operation and evidence-based solutions so travel restrictions can be safely lifted (OECD, 2020: 6).

3. Marketing strategies as means of aiding the recovery of the tourism industry

Strong marketing strategies that focus on all stakeholders should be a main supporter in the development of sustainable tourism, and as Philip Kotler (2011: 132) stressed "companies must address the issue of sustainability". Martin and Schouten (2012: 238) define sustainable marketing as "the process of creating, communicating, and delivering value to customers in such a way that both natural and human capital are preserved or enhanced throughout […] so that all the marketing processes are environmentally and socially benign while helping to bring about a society in which striving for sustainability is the norm". These authors (p. 21) outline the system conditions for sustainability, i.e., the management of each element:

- ➢ causes no systematic increases in environmental concentrations of substances from the Earth's crust,
- ➢ causes no systematic increase in environmental concentrations of synthetic substances,
- ➢ causes no systematic increases in ecosystem degradation, and
- ➢ creates no systematic barriers to people meeting their own needs.

Of crucial importance in the development and implementation of marketing strategies are the big consulting companies active in the field of tourism. In 2015, Horvath HTL presented ten megatrends that would shape the future of the industry. HTL - standing for hotel, tourism and leisure – is one of the biggest consulting companies in the field of tourism and the megatrends presented by them impact both the demand and supply chains in tourism.
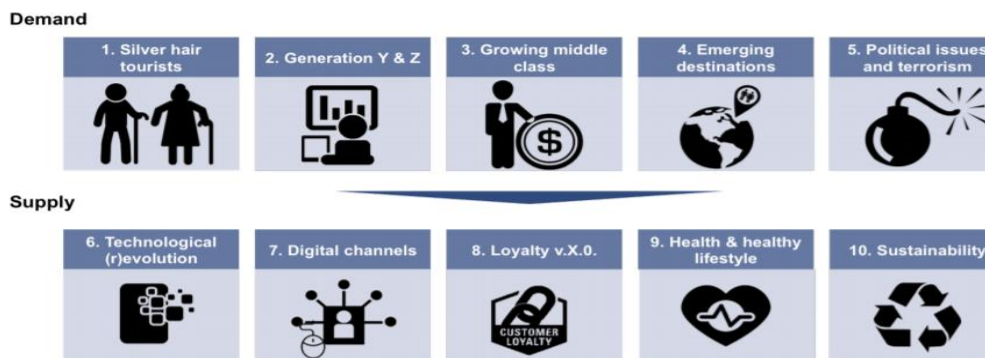

Figure 3. Tourism Mega Trends (Source: Horvath HTL, 2015: 2)

In short, the figure above can be understood as follows. The first megatrend relates to the so-called Silver-haired tourists, meaning the travelers over 60 years old, their main

characteristics being free time and their readiness to spend money. Aside from these, they are also known for wanting comfort, but at the same time looking for soft adventures under the form of highly personalized tourism packages. On the opposite pole we find the second megatrend on demand side, the other age groups defined as Gen Y (Millennials) and Z. These young generations are highly digitalized, have active lifestyles and focus on exploration and understanding the local cultures when traveling. Due to their high adaptability, they are open to all types of travels and destinations, moving further away from the classic tourism types. The third mega trend refers to the growing middle class, especially in Asia Pacific (China, India and Thailand). The current estimation is that by 2030 the middle class will represent more than half of the global population. They are willing travelers who search for value for money, therefore their traveling habits will have major impact on how the tourism sector will develop. Due to the aforementioned groups the fourth mega trend was shaped: emerging destinations. More and more new traveling destinations appear on the world tourism map due to the changes in traveler's profile, due to political stability and globalization. Examples for emerging destinations are Georgia, Taipei, countries in Africa, etc. All megatrends on the demand side are linked to one another, therefore it is no surprise that due to the fact that new destinations appear on the market, social problems like political instability, religious and ethnic differences emerge, all leading to the possibility of terrorist attacks or riots.

Considering that there are so many changes regarding the overall profile of travelers, the supply side needs to adapt rapidly in order to maintain their market share and profitability. The first mega trend on the demand side, mentioned by Horvath HTL (2015), is the technological revolution, characterized by the fact that the entire search for information has been shifted online. The ever-growing market of online travel agencies and the need of digital communication between customers and providers from the tourism sector are only some of the factors that show that technology will play a vital role in the future of the industry. Big Data together with technology will help the stakeholders from the tourism sector adapt their product to each individual customer. For example, adapting the temperature, lighting and TV channels in a room to the client's needs, before he checks in. The next mega trend brings forward the digital changes. Social Media plays a major role in this case, as it has become the main source of inspiration for traveling. Almost all travels and travel related information are planned and sought after on social media or the internet, where a strong and active presence of tourist stakeholders on both sides are necessary for survival in today's market. An example is the use of influencers to promote destinations, hotels, and restaurants etc., more and more marketing strategies using this tool as a main promotion tool of the products. Loyalty as the third mega trend is more and more difficult to achieve, especially due to the fact that travelers seek personalized products. Tourist stakeholders need to adapt their services and make use of technology and digitalization in order to achieve loyalty. A good example here are the Austrian family hotels that have managed to maintain their clients in the last 30 years when everything changed. They have created a familiar environment and adapted to the client's needs in such a way, that almost 90% of the bookings for the coming season are made upon check out during the previous season.

Health and healthy lifestyle are worldwide trends that apply in the tourism sector as well. This influences mostly the wellness and spa sector, which is ever growing due to high demand. In Western Europe there is an increase in the wellness and spa

destinations, shifting from seasonal to all year destinations. For Romania this represents a major possibility in becoming a stable destination, as the country has one third of all balneal resources from the European continent. Lastly, the HTL article (2015) refers to an essential mega trend, i.e., sustainability. Destinations have to take sustainability into account as soon as possible. This will require proper waste management, ensuring that historical heritage is properly preserved by allowing only a specific number of travelers to visit at once, preserving natural resources and habitats, for example by completely banning entrance using any other vehicles other than bicycles. But the most important factor for the success of sustainable tourism is the collaboration of all tourism stakeholders from within a destination.

4. Romanian case

The present paper aims to identify the efforts made by the Ministry of Economy, Entrepreneurship and Tourism, in 2020, to support the development of domestic tourism, in the context of Covid-19 restrictions and the crisis of the HoReCa sector, as seen online by the stay-at-home Romanians.

The pandemic has influenced Romania in a similar pattern to the one described globally by OECD, i.e., international travel has plummeted, with around 95% of all trips booked by Romanians having Romania as destination in the first trimester of 2020 (p.7). Moreover, people tend to self-book, opting for shorter stays and searching for destinations closer to home, with remote accommodation.

The natural resources of Romania generate potential for both classical (mountain, seaside, leisure, sports, cultural tourism etc.) and new types of tourism (developing the niche tourism intended to reduce its seasonality, hosting international conferences and conventions, symposiums, fairs and expositions, sports competitions, concerts, excursions, winter sports, gastronomic and shopping tourism etc.) (Postelnicu and Dabija, 2018).

In order to efficiently develop sustainable domestic tourism important data about the specific landscape has to be considered (Otiman, 2019: 235-237): 93,7% of Romania's surface is rural; 45% of Romania's population lives in the rural area; tourism represents one of the few economic opportunities available to remote communities; the majority of the population within rural areas engages in agricultural activities; the minority engages in administration, social and service area, however, in their spare time they also get involved in agriculture (own farmhouse, helping out family members). Therefore, the latter represents a target group to be involved in the revival of domestic tourism.

The question that arises, concerns the means to contact and motivate people living in rural areas with high touristic potential, to engage in tourism activities as hosts.

The objectives of the present research paper were to identify if there is any centralized effort to encourage domestic tourism, if the Ministry of Tourism is actively involved in the revival of HoReCa sector and to present best practice cases, if such were identified.

An online research revealed "The Strategy for Tourism Development in Romania, 2019-2030", which presented the organism responsible for the promotion of Romanian tourism and its attributes. "The General Directorate of Marketing and Development

ensures the strategic framework for the development and promotion of Romanian tourism, both nationally and internationally, and includes the following branches:

1. Investments, Forms and Tourist Destinations Service,
2. Marketing and Internal Representation Service, through the "Territorial Representatives" subdivision,
3. Marketing and External Representation Service through the tourist attach subdivision / administration subdivision,
4. International Relations and European Affairs Service." (The Strategy for Tourism Development in Romania, 2019-2030)

However, this information was not available on the Ministry of Tourism's website, and we could only retrieve it from specialized forums or from the websites of the European Commission and the OECD. A similar situation was discovered in the case of the organizational chart of the Ministry.
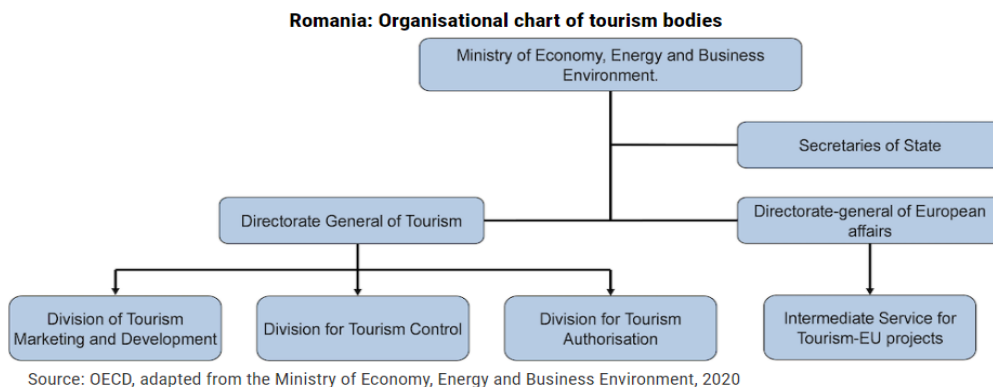
Romania: Organisational chart of tourism bodies

Ministry of Economy, Energy and Business Environment.

Secretaries of State

Directorate General of Tourism

Directorate-general of European affairs

Division of Tourism Marketing and Development

Division for Tourism Control

Division for Tourism Authorisation

Intermediate Service for Tourism-EU projects

Source: OECD, adapted from the Ministry of Economy, Energy and Business Environment, 2020

Figure 4. Organizational chart of tourism bodies in Romania (source: OECD, 2020)

The research revealed numerous inaccuracies which may be misleading for the common online visitor. One of them is the name of the Ministry, which has suffered many changes along the years as can be seen in the image below.
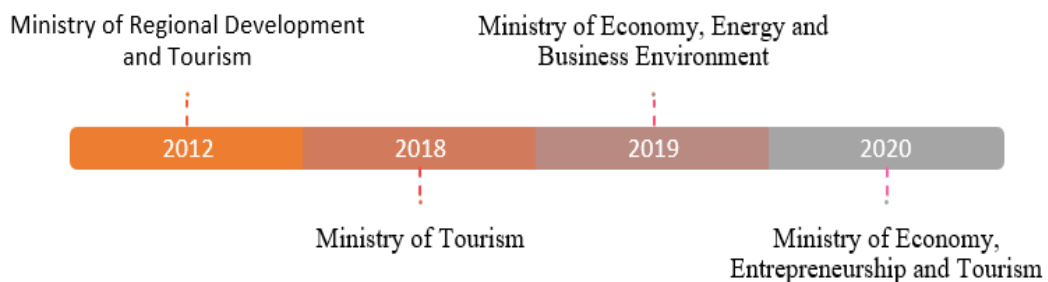
Ministry of Regional Development and Tourism

Ministry of Economy, Energy and Business Environment

2012 | 2018 | 2019 | 2020

Ministry of Tourism

Ministry of Economy, Entrepreneurship and Tourism

Figure 5. Evolution of denomination of the Ministry of Tourism

Even now, on the official websites we can find, in parallel, the last two denominations: Ministry of Economy, Energy and Business Environment (http://turism.gov.ro/web/) and Ministry of Economy, Entrepreneurship and Tourism (http://economie.gov.ro/). This shows lack of coordination and leads to mistrust on the side of the online visitor.

As part of its marketing strategy, the Ministry of Economy, Entrepreneurship and Tourism has supported the development of 110 Tourist Information and Promotion National Center (TIPNC) an intermediate organism that can provide relevant information to tourists - online and offline, i.e., face-to-face in the dedicated centers. The Tourist Information and Promotion National Center is considered to be a key factor in the creation and promotion of the image of a tourist destination from a certain area (Herman et alii, 2019: 445) and the results obtained using the questionnaire method, though limited quantitatively (to just the 35 out of 110 Centers that responded positively to the research team's request), are suggestive in qualitative terms, providing valuable information that successfully reflects the role and importance of Centers of this kind in outlining and developing the image of Romania as a destination for tourists (Herman et alii, 2019: 443).
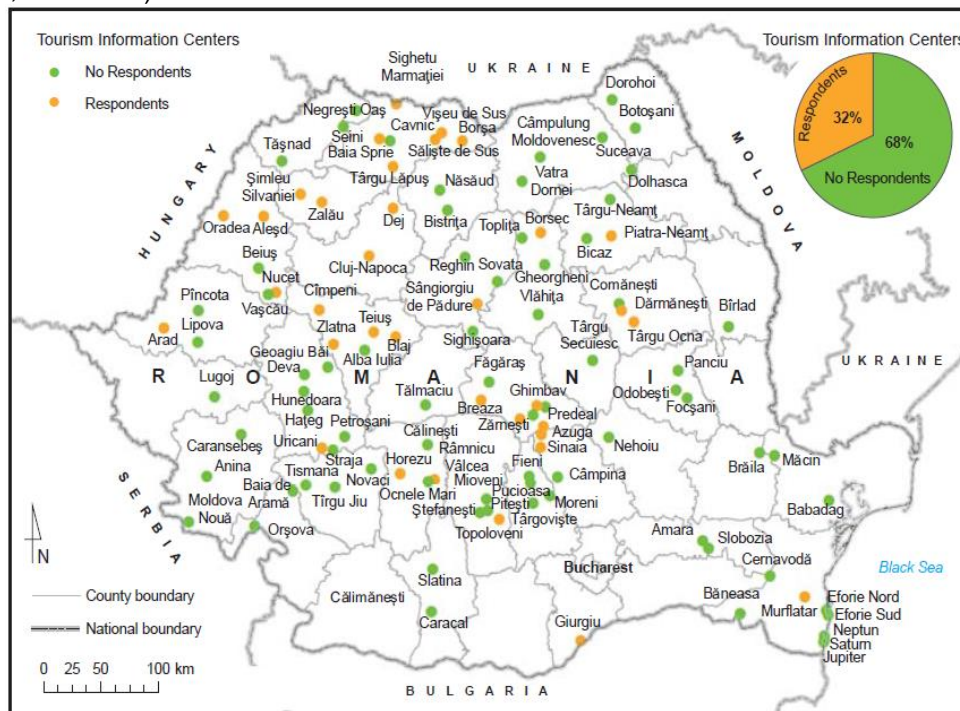

Figure 6. The consulted Tourism Promotion and Information Centers responding or failing to respond (Source: Herman et alii, 2019: 446)

The conclusions put forward by Herman et alii (2019: 451) paint a pessimistic image, as the one third of centers that provided answers – which may mean it covers the more active TPICs – provided crucial services in rather small percentages (research, analysis, planning and tourism marketing (at 55% of the Centers), offering the possibility of

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reservations for means of public transportation (at 49%); recommended local tourist products (at 46%); possessed information on local tourist traffic (at 43%) and the possibility of tour guides being contracted (40%).

We decided to extend our colleagues' research and contacted the 17 Territorial Representatives of the Ministry's Marketing Service. We sent 13 emails, as the contact data were identical in the case of some representatives and received 8 replies. The purpose of our qualitative research was to identify the information flow provided by the Territorial Representatives, when interrogated by a family looking to spend a long weekend in the area. We gave them all the same basic information: family of 4, looking to spend 3 days/2 nights in the area, wanting to know more about accommodation and possible activities. Figure 7 displays the type and amount of information received.
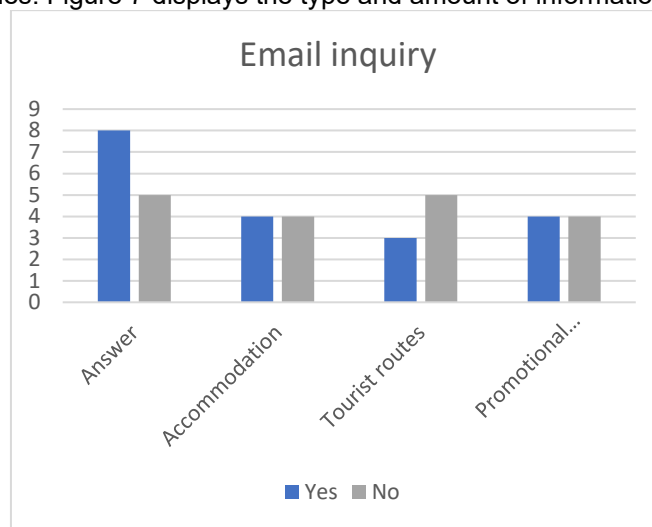

Figure 7. Information provided by territorial representatives in their response emails

Unfortunately, 2 of the replies said their purpose was not to provide us with such information and in one case we were redirected to a single guest house, instead of the local information center. Very polite and helpful were the answers given by the representatives in Arad and Baia Mare, while the center in Bucharest was quite impolite and unwilling to communicate.

Our effort to identify the marketing and communication efforts undertaken by the Ministry of Economy, Entrepreneurship and Tourism to support the development of domestic tourism, as seen online, led us to thoroughly analyze the 85 press releases issued in 2020. We discovered that ~28% of them tackled the subject of support for the industry, more exactly 24 out of 85 dealt with the subject. The press releases referred to measures such as vouchers, grants and the app for the provision of emergency certificates (CSU) https://csu.prevenire.gov.ro/, meant to help economic operators in distress.

One interesting campaign conducted by the Ministry was the project "Be the ambassador of Romanian tourism!" (#FiiAmbasadorulTurismuluiRomanesc), a good idea adapted to the expectations of millennials and, in general, of people coerced by the

pandemic to stay at home and browse the Internet. However, the project had limited impact as it should have had more posts and should have brought more influencers on board. For example, the first post featuring the Minister of Tourism, Emil-Razvan Pirjol, reached 79 likes and 16 shares, while the post featuring Charlie Ottley reached 1.300 likes and more than 1000 shares.

5. Conclusions and recommendations

Romania represents one of the emerging destinations defined in the mega trends, with incredible potential for providing unique experiences in wild, original destinations. Moreover, the development could be done by following good practice examples from other countries and, thus, accelerating the process of sustainable development. As Winston Churchill specified: "never waste a good crisis", the Romanian government should use the situation created by the Covid-19 pandemic as an opportunity to restart tourism in Romania, with focus on sustainability.

On the other hand, our research revealed vulnerabilities and inaccuracies which directly affect the trust people have in the Ministry and its efforts to counteract. We encountered official website that lacked accessible information and transparency, provided outdated information and were user-unfriendly. Another important aspect revealed was that the governmental websites provide no virtual tours of important touristic destinations and, most importantly, lack coordination in their communication efforts. We found out interesting information about the Ministry's activity only after reading the 85 press-releases issued in 2020, which is obviously not the typical means of information for the every-day user.

The inquiry regarding the Territorial Representatives of the Marketing Service has shown great disparities in the tone and the content of replies provided to potential tourists, therefore raising the question of professionalism of the people involved in providing the marketing and information services. A future research might investigate if know-how is gained through centralized training, with the support of the Ministry, as the case of polite and professional answers might be an indicator for proper know-how of employees.

Recommendations refer to the opportunity to capitalize on the momentum of tourism revival and to support the sustainable development in Romania, the Ministry of Tourism should create a Tourism Promotion Authority that could be in charge of the following:
- ➢ Creating a contract with a tourism Marketing and PR company such as Aviareps. This contract would provide marketing coverage in markets such as Germany, Austria, France etc. The company would be in charge of representing Romania as a tourism destination in other European markets with the end scope of increasing the number of international tourist arrivals,
- ➢ Creating promotion materials applicable on national level with clear branding that should be made available in every Tourism Promotion and Information Center and be given freely to tourists,
- ➢ Closing contracts with travel agencies, hotels, restaurants etc. in order to create giveaways, discounts, organize promotional events or participate in tourism fairs and have synergies in the regions.

This would also make the entire process of sustainable tourism development centralized and coordinated at national level, while initiated and controlled by providers of specialized marketing services.

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