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TOURISM ATTRACTIVENESS STUDY OF ROMANIA – MARKETING RESEARCH WITH SPECIAL APPLICATION TO MOUNTAIN TOURISM

ABSTRACT

In order to establish which types of tourism are particularly attractive for future development in Romania, we briefly present Romania's current tourism offer. First of all, Romania has over 80% of the surface area of the Carpathian Mountains, meaning that there are a lot of regions that could be developed into ski areas, especially slopes for beginners and intermediates. Currently, winter sports tourism is seriously underdeveloped in Romania, having only a small number of areas where they can be practiced. The area of the country covered by forests measures about 30% of the entire country. Some of them are the oldest preserved virgin forests in Europe (the case of Izvoarelor Nerei – Caraș-Severin in Banat), protected by environmental laws, with very high attractiveness for the development of mountain tourism.

The Danube, flowing along 1075 km of Romania's territory, is a possible tourist attraction of utmost importance, yet with extremely poor promotion, even though it ends with the most beautiful delta in Europe, a wonder of nature and biodiversity. One third of Europe's natural mineral and thermal springs are located in Romania, meaning high potential for wellness tourism. Romania's coastline is 245 kilometres long and has over 80 km of developed beaches. The country's cultural heritage is quite remarkable and highlighted by UNESCO.

Key words: tourist attractiveness, marketing research, mountain tourism, rural tourism, Banatul Montan.

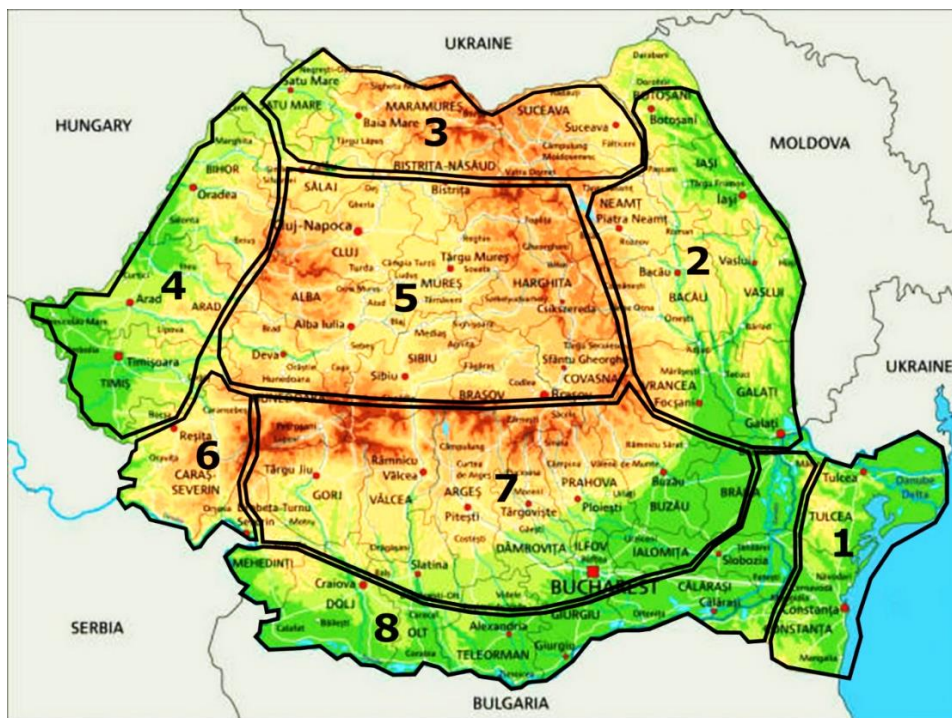
JEL Classification: Q01, R10, L83.

1. INTRODUCTION

Given the natural and anthropic offer, Romania can develop the following main types of tourism:

- Mountain tourism;
- Danube and delta tourism;
- Coastal tourism;
- Nature tourism, including sports and water tourism;
- Wellness tourism for health;
- Cultural tourism;

- Business tourism;
 - Rural tourism and agritourism.
- Analysing the Romanian territory, in terms of the possible tourist offer, we have outlined eight macro-touristic areas (regions), according to the map in Figure 1:
1. Black Sea shore – Danube Delta;
 2. Moldova;
 3. Bucovina – Maramureş Oaş.
 4. Western Plain;
 5. Transylvania;
 6. Danube Belt – Banatul Montan;
 7. Subcarpathian area;
 8. Danube area.



Source: Authors' representation

Figure 1. Romania's tourism macro-regions

2. MATERIAL AND METHOD

In order to find out about Romania's attractiveness as a tourist destination for foreigners, particularly Germans, we conducted a three-day opinion poll in the

Botanical Garden in Munich, randomly interviewing a number of people, most of them aged between 18 and 35. The survey was designed to last 5 minutes, but as a surprise, most of the interviewees wanted to know more about Romania, asking lots of questions about the country. This increased the average duration to 12–15 minutes per person. Another unexpected aspect was the great interest of interviewees in Romania and the desire to discover it, especially in the younger participants.

The opinion poll comprised 13 questions, from general surveys to specific surveys on Romania and its competitors. For the presentation of Romania, we used 11 photos including the most important tourist attractions such as the coast, mountains and gastronomy. The form used to conduct the survey had the following structure:

Ladies and gentlemen,

I am a student from Romania at the Faculty of Management in Public Food and Agritourism in Timisoara. I would like to find out your knowledge of Romania, based on the following questions.

1. Please choose your age group

<input type="radio"/> 18-27	<input type="radio"/> 28 – 35	<input type="radio"/> 35 – 50	<input type="radio"/> 50+
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2. How many trips have you made in the last year?

<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5+
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3. How many of these took place outside the country?

<input type="radio"/> 25%	<input type="radio"/> 50%	<input type="radio"/> 75%	<input type="radio"/> 100%
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4. What is the average duration of your trips? (Number of days)

<input type="radio"/> 1 – 4	<input type="radio"/> 5 – 10	<input type="radio"/> 10+
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5. What are the average costs per person for a trip? (€)

<input type="radio"/> < 1000	<input type="radio"/> 1000 – 2000	<input type="radio"/> 2000+
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6. Please rank the following types of tourism according to your preferences. From 1 = favourite and 4 = least favourite:

Seaside (Beach and sun)	Natural tourism	Cultural tourism	Wellness and SPA

7. Please circle three of the fifteen activities listed below that you enjoy doing on holiday.

Beach	Water sports	Aqua Park	Navigation	Trekking
Ski	Mountaineering	Festival	Museums	Gastronomy
UNESCO sites	Roadtrip	SPA	Treatments	Party

8. Please order the following countries according to your desire to visit them. (1 = favourite and 4 = least favourite)

Romania	Slovenia	Croatia	Montenegro

9. Have you already visited Romania?

YES

NO

10. What kind of attractions and activities do you think of when it comes to a trip to Romania?

11. How would you rate Romania as a tourist destination according to the following criteria?

	Does not meet				Fully complies	I can't classify
SAFE	①	②	③	④	⑤	0
NATURAL ENVIRONMENT	①	②	③	④	⑤	0
CULTURAL SETTING	①	②	③	④	⑤	0
INFRASTRUCTURE	①	②	③	④	⑤	0
SERVICES	①	②	③	④	⑤	0
GASTRONOMY	①	②	③	④	⑤	0
RANGE OF ACTIVITIES	①	②	③	④	⑤	0

12. How much do you want to visit Romania now?

I don't want to				I want to very much
①	②	③	④	⑤

13. After seeing the 11 photos of Romania, my country, how much do you want to visit Romania?

I don't want to				I want to very much
①	②	③	④	⑤

Explanation of the choice of age groups and questions. *The age groups we have chosen are according to the Y, X, Z generations and Baby Boomers. These generations have different spending possibilities, different values and habits about holidays, different levels of acceptance and desire for discovery. The chosen age categories are: the 18–27 age group, Generation Z; the 28–35 age group, Generation Y; the 35–50 age group, Generation X and the 50+ age group, Baby Boomers. The generations have different aspirations depending on marital status, income, etc. and have had different influencing factors during their age evolution. Based on the results of the survey, the holiday requirements and wishes of the different age groups are analysed.*

Questions 2 - 5 were asked to determine how many holidays are taken in a year, their average duration, how many tourists want to holiday abroad and the average cost of these holidays. We aimed to see how many German tourists are willing to spend and pay for their holidays in Romania, in order to create a basis for the prices that can be charged. Secondly, the proportion of holidays that can be spent outside Germany was asked to find out the level of willingness of Germans to travel outside German-speaking areas.

The length of holidays is important in determining the number of activities and offers made to tourists. Finally, the number of holidays is important, as the more holidays there are, the greater the opportunity to visit different countries and destinations.

Questions 6 and 7 had other purposes: firstly, to determine the type of tourism closest to the requirements of customers and the holiday activities requested by tourists, in order to determine the tourist areas of Romania that can offer the requested tourist activities. A second area of these questions was to determine the difference in demand between generations and to establish some breakdown of supply per generation. For example, all generations like the beach, but under different conditions. While the younger generation wants loud music and night bars, the older generation prefers quietness and rest.

Question 8 is self-explanatory as it sets out the level of Romania's attractiveness compared to competitor countries in the Balkan area.

Question 9 was asked to see if there are different opinions between people who have visited Romania and those who have not.

Questions 10 and 11 were used to determine what people already know about Romania and how they see the country from different perspectives. This data can be used to find out Romania's image as a tourist destination, to determine what opinions

need to be changed, what needs to be emphasised and what can be used to improve the country's image. In addition, the information gathered from question 10 can be used to develop a unique product for the country or the country's core tourism product.

Finally, *questions 12 and 13* were used to determine the desire to visit Romania and how this desire changes after a simple information campaign that was based only on a few photos and a few explanations.

3. RESULTS AND DISCUSSIONS

The results of questions 2-5 are presented in Table 1 both independently for each group and comparatively across generations.

Table 1

Results of questions 2-5

Age group	Average trips per year (nr)	Average outbound trips (%)	Average number of leave days	Average holiday spending €
18-27	3.30	68.30	6.41	1116
28-35	3.30	66.60	7.50	1200
35-50	4.42	78.57	7.14	1428
50+	3.00	75.00	10.00	1900

Source: Author's calculations

For question 6, the rankings and scores in Table 2 are the result.

Given the number of spa resorts in Germany and the spa offer of this type of tourism (the country where the study was conducted and the high demand for them in German domestic tourism), the fact that spa tourism is by far the least preferred type of tourism in Romania came as a surprise. What was to be expected was the gap between the natural and cultural environment for the 18–27 age group and the almost non-existent difference between the two for the older generations. As one of Romania's tourism offers is the abundance of natural springs, spa tourism would have been the main type of tourism chosen for development.

Table 2

Results for question 6

Types of tourism	Age group			
	18–27	28–35	35–50	50+
Sun and beach tourism	2 (59)	1 (25)	1 (8)	2
Natural tourism	1 (58)	2 (44)	2 (16)	1
Cultural tourism	3 (77)	3 (45)	3 (19)	3
Spa tourism	4 (102)	4 (61)	4 (24)	4

Source: Authors' calculations

For question 8, the following ranking and scores are presented in Table 3. In terms of country rankings, Slovenia and Croatia were expected to have very close scores, while Montenegro and Romania were well below the other two countries. Croatia is by far the most desired destination, followed by Montenegro, while the difference between Romania and Slovenia is insignificant. On the basis of these data, Romania should take into account the fact that Slovenia is the main competitor and try to create a tourism product that is totally opposite to it.

Table 3
Results for question 8

Country	Age group				Top
	18–27	28–35	35–50	50+	
Romania	4 (87)	3 (57)	4 (22)	3	4
Slovenia	3 (86)	4 (58)	3 (19)	2	3
Croatia	1 (40)	1 (32)	1 (11)	1	1
Montenegro	2 (77)	2 (53)	2 (18)	4	2

Source: Authors' calculations

In the case of question 11 (Table 4), the expected results coincide with the actual results, with infrastructure and service levels below 3.0, indicating that these two aspects need to be improved through urgent development measures. What came as a surprise in the survey is the recurring idea that Romania is an unsafe country. The score for this criterion was expected to be at least 4.0 out of 5.0, also given that more than 30% refrained from giving a real answer, showing obvious cause for concern. In conclusion, work is also needed to change Romania's image from that of a poor and insecure country to a positive image of a welcoming country.

Table 4
Results for question 11

Criteria	Average grade (out of 5)	% replies "I don't know"
Safety	3.44	33.3
Natural environment	4.05	20.0
Cultural heritage	3.58	24.0
Infrastructure	2.41	26.0
Service level	2.81	48.0
Gastronomy	3.66	33.3
Variety of activities	3.79	58.0

Source: Authors' calculations

The results of questions 12 and 13 on the increase in the desire to visit Romania are shown in Table 5.

Table 5
Results of questions 12 and 13

	Age group			
	18–27	28–35	35–50	50+
Willingness to visit, %	59.26	51	42.8	-

Source: Authors' calculations

The results of questions 12 and 13 highlight the need to change Romania's image. Just through a small information campaign using different images of the country (a few photos), the change in the perception of the people who participated in the survey was amazing. Of course, these results cannot indicate the emotional difference of the interviewees, who showed a real "astonishment" when they found out that the photos were taken in Romania and depicted the culture, heritage and wonderful sights of our country, demonstrating, once again, the lack of true information on Romania.

Even though the expectation for question 7 was to have very different results between generations, the actual results were similar. This may be based on the cultural and social influence of older generations on younger ones. Based on the results of the survey, the top favourite activities during holidays are the following: seaside (beach), hiking, visiting UNESCO sites, gastronomy and water sports activities.

The results of question 10 of the survey were as expected. Many tourists said they were not aware of the attractions or activities in Romania and chose to leave the question unanswered. Those who answered only wrote Dracula, the Carpathian Mountains and gastronomy.

Out of the total number of people who completed the survey, only 17% had visited Romania previously. These tourists had only positive things to say about the country and always expressed a desire to return. Gastronomy and the natural environment were always mentioned and praised.

The results of the survey are generally useful to understand what most foreign tourists, especially Germans, actually expect from a holiday in Romania. This information, together with the comparative analysis of the four countries, can help to shape tourism products, understand and develop what is currently lacking in terms of tourism and provide insight into what can be done to start developing Romania as an important and attractive tourist destination for foreign tourists.

4. CONCLUSIONS AND PROPOSALS

The comparative study of the tourist attractiveness level of competitor countries, the SWOT analysis of Romanian tourism, with a special focus on

mountain tourism and the results of the survey represent a basis for proposals, implementations and recommendations that could contribute to making Romania a preferred destination for foreign tourists, especially German tourists.

It results, both from the analysis of Romania's tourism offer and from the survey, that the biggest impediment to Romanian tourism at the moment is the highly underdeveloped road infrastructure. The only niche in the Romanian infrastructure that is sufficiently well developed is air transport. As can be seen from the competitors' analysis, Romania has the best air transport infrastructure compared to other countries and is quite well positioned in terms of the European average. The other three types of infrastructure that affect tourism are a big problem that needs immediate attention. Firstly, road infrastructure needs to be addressed. The most important step to be taken in the coming years is the creation of motorways between all the major cities of the country: Timisoara, Oradea, Cluj-Napoca, Sibiu, Brasov, Bucharest and Iasi. In addition, the ring roads for all these cities must be completed as soon as possible. By implementing these two measures, traffic in the cities will be eased, business and commercial tourism will be strengthened and road safety will be increased. Another important aspect is that if the motorways are built, pollution in the countryside will decrease, as the national roads crossing most villages will be used much less. Thus, more villages can be used and developed for rural tourism, a type of tourism that is increasingly sought after.

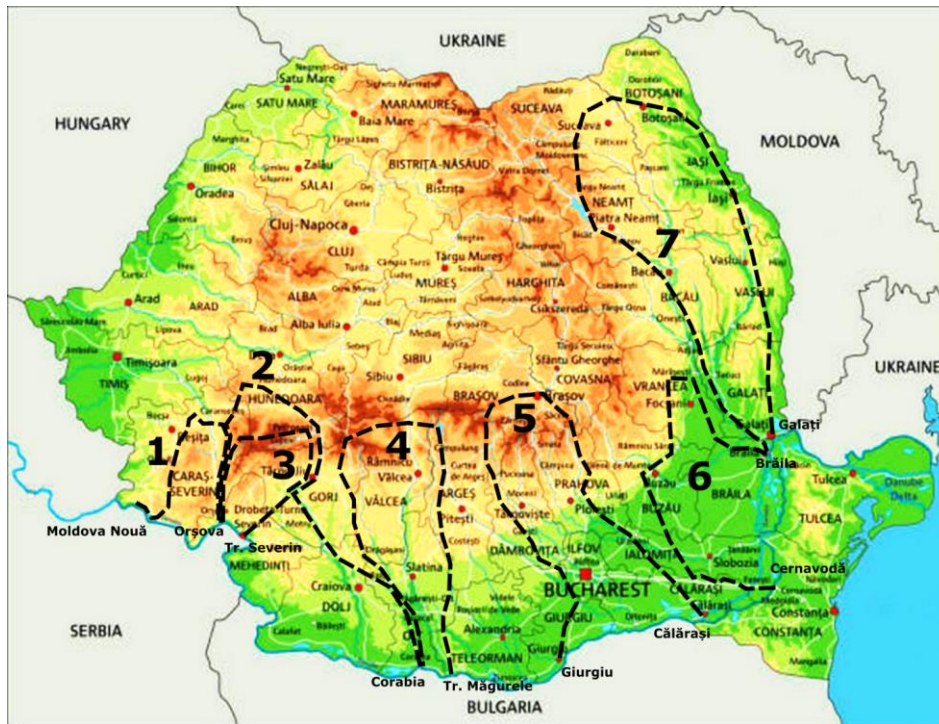
Turning to the rail infrastructure, it is imperative to upgrade both tracks and stations, as well as equipping them with new trains. This type of infrastructure is by far the most depreciated at the moment. It is much more sustainable to travel by train as it offers the opportunity to visit more, especially for a country the size of Romania. Bringing the railways and trains in Romania up to European standards will further relieve general traffic within the country, and it will also create the possibility of special tours that cannot be offered at present because the infrastructure does not allow it; finally it will position Romania as a country investing in sustainable tourism (requirements of the *European Green Deal*, 2019 and the *Romanian National Recovery and Resilience Plan*, 2021). The rehabilitation of the railway infrastructure will boost rural mountain tourism through the rehabilitation of old mountain railways, the famous narrow gauge steam trains *Mocănița* and forest railways could be transformed into mountain tourist routes.

Rebuilding port infrastructure would be another major boost to tourism. At least seven to eight ports should be developed along the Danube River in places such as the Danube Gap or the Danube Delta, where cruise ships could dock so that tourists can visit the tourist regions on field trips (Figure 2).

In order to attract Danube cruise lines to stop over in Romania, a promotion and sales campaign should be developed for all cruise lines offering trips along the Danube. The main strategy that Romania can adopt in this case is the strategy of

cost reduction: lower prices for the cruise liners and all the tourist products offered – gastronomy, sightseeing, etc. By adopting this measure, larger groups of tourists can be brought into the country.

A Danube-Carpathian tourism project, taking tourists from cruise ships docking in the various Danube ports of Moldova-Nouă, Orșova, Turnu-Severin, Corabia, Turnu Măgurele, Giurgiu, Călărași, Cernavodă, Brăila, Galați, etc. by coach for one, two or more days on the most interesting mountain tourist routes (Cheile Nerei, Valea Cernei, Podgoria Recașului, Țara Hațegului-Retezat, Defileul Jiului, the Brâncuși sculptures in Târgu-Jiu, the monasteries of Vâlcea, Valea Oltului, Valea Prahovei, Bran-Moeciu, Peleș, Podgoria Buzăului and Vrancei, Bucovina, Nordul Moldovei, Podgoria Cotnari, etc.) would be a real “godsend” in terms of currency for tourism in Romania (Otiman, 2019).



Source: Authors' representation

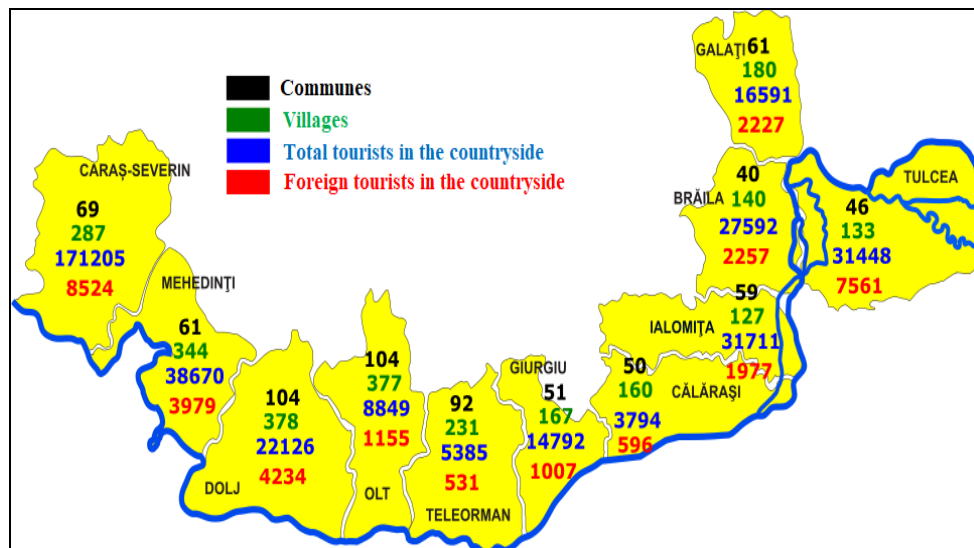
Figure 2. Danube-Carpathian tourism routes

The number of tourists staying in the Danube countryside in 2018 did not exceed 25,000 (out of which almost one third, more than 7,500 tourists stayed in the Delta) (Figure 3).

The explanation is simple. All the Danube ports, starting with Moldova Nouă, Orșova and ending with Sulina, do not have adequate port infrastructure for

landing and receiving tourists coming on the Danube by river cruisers. Of the hundreds of ships that transit the Danube from Baziaş to Sulina, from April to October, not even one docks in Romanian ports. They dock in Serbian and Bulgarian ports. Therefore, foreign tourists who come to our Danube, spend their money in Serbia and Bulgaria.

An important change that needs to be adopted soon is the privatisation of the Romanian National Tourism Promotion Authority (ANPTR) and its separation from the Ministry of Tourism. The Ministry should only have regulatory powers and only people genuinely qualified in tourism promotion should be employed in the newly created institution. At present, none of the people in charge of the ANPTR have any education or training in tourism. Doing so would give the institution access to both government and private, national and international funds, increasing the real budget by far.



Source: Otiman, 2019

Figure 3. Number of Romanian and foreign tourists in the Danube countryside, 2018

The first activity the ANPTR should undertake is to set a limited number of SMART objectives for the tourism strategy. In doing so, the focus should be on those objectives that generate real development and results. ANPTR should start with the digitization of the Romanian tourism offer by presenting accommodation facilities, access to restaurants and businesses offering tourism related products on their website. Offering direct booking on their website or even some tips for accommodation facilities would simplify a part of the booking process. In addition, in order to ensure a uniform level of service, the Authority should organise, on an annual basis, specialised trainings with different focus points depending on the

tourism product. Through these trainings, staff should learn basic tourism marketing techniques, sales and learn foreign languages.

After the implementation of the above-mentioned activities, following the first signs of success, the ANPTR could create several schools, inspired by German practices such as “Ausbildung”, specialised in tourism. These should be extended over a period of three years, combining both theoretical and practical lessons, with three days a week devoted to school and two days to practice in the field.

On another note, some big cities in Romania lack a well-known hotel chain, not necessarily five-stars, but one with which international tourists are familiar. For example, ANPTR could negotiate with well-known hotel chains such as Motel One to open a few tourist establishments in major cities other than Bucharest. This would achieve two things: foreign tourists will have a known offer in Romania, increasing their sense of security: Motel One chain will create competitiveness for other hotel chains, influencing other operators to develop activities, leading to an increased level of service in the hotel sector. It may also develop specialised tours that travel agencies and tour operators could sell as packages.

Another example for such a tour could be focused on the Danube Delta, with fishing and cruising trips, as well as excursions where tourists are taught about methods of preserving the Delta's natural environment, etc. Tours of UNESCO World Heritage sites and gastronomic and wine products could become another attractive solution for Romania.

Cooperation with the largest tour operators – TUI, Thomas Cook, DER Touristik and FTI is necessary. DER Touristik has a hiking tour in Romania as part of its offer, which is almost nothing, given that the other big tour operators have no offers for Romania whatsoever. Trips can be sold as “package tours” or “Last Minute”.

To attract younger generations, it is necessary to present tourism offers on Social Media. ANPTR is active on Facebook, but not in an attractive way, it only addresses Romanians in their mother tongue, no English or other well-known languages are used. Currently, there is no active Instagram account. An Instagram account linked to the Facebook page should be opened, so that they have a wider coverage and variety by age groups, with daily, informative, promotional posts, in the main languages (English, German, French, Italian, etc.).

One method, although costly but effective to reach foreign tourists, is to hire a marketing and PR agency with easy access to all the resources in the country that would help build a correct image of Romania as a tourist destination. The contract with such an agency should primarily be concluded for a period of one year and include services such as:

- familiarising journalists with the trips on offer, so that they can write articles in magazines or blogs, post pictures and videos, which reach an increased number of potential tourists;

- co-branding with a low-cost airline introducing charters to Romania from major airports in Germany, Austria, Switzerland, etc.: planes operating these routes should have the “*Explore the Carpathian Garden*” logo on them.

The marketing strategy should be developed based on the “*hidden gem*” effect, as Romania is not known and this can be used to its advantage. The words “discovery” and “exploration” should always appear. The whole campaign should also have a sense of mystery. The main marketing tools should be visual and use lots of images and videos, as these have a much stronger effect than written or verbal presentations.

The promotional video launched in 2019 should be used a lot more on social media, at travel fairs, but also as a TV spot. Given that Romania wants to attract as many foreign tourists as possible at the moment, it is advisable to use tools to reach customers: guerrilla marketing, e-mail marketing, SEO, event sponsorship and sales activities.

Another important option for Romania as a destination is to define the target groups it wants to attract, and from there it should define the main types and products of tourism best suited for the chosen target groups. From the analysis of Romania's possible tourism offer it could be concluded that the country should focus on attracting foreign tourists by promoting itself as a seaside, natural and cultural tourist destination.

Once Romania's positioning as a tourist destination on the European market is established and the number of foreign tourists has increased, it is recommended to invest in the wellness infrastructure in order to position Romania on the wellness tourism market. According to the SWOT analysis, rural mountain tourism could become very popular. The main focus for rural tourism should be the promotion of traditional homemade and farm products, quality mountain food, a disconnection from the daily routine and a 'back to the roots' atmosphere, similar to the French rural tourism product '*retour à la terre*'.

Romania has great natural and man-made mountain tourism potential to become a European tourist destination. Privatisation of tourism institutions, total rehabilitation of infrastructure and intensive promotion of tourism offers are the first steps Romania needs to take to become an attraction. All the measures, listed above, represent a sum of possibilities that can develop tourist Romania, representing the most important ones to be developed in the PhD thesis on “The contribution of rural tourism to the sustainable development of the Banat Mountain region”.

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