

TOURISM DEVELOPMENT BETWEEN POTENTIAL AND STRATEGIES. THE CASE OF BALNEARY TOURISM

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Abstract

Tourism is one of the important sectors of national and international economy, with a significant growth rate and also constitutes a priority objective of European policy. The European and international level is characterized by an accelerated development of health tourism sector, which emphasizes the role of health tourism as a tourist destination. Development of balneary tourism in Romania occurs in the context of the need for investment in impaired accommodation structures and objectives on sustainable tourism development, which require an integrative and innovative approach of the sector. An aging population and increasing incidence of diseases related to sedentary lifestyle are factors that will support the development of balneary tourism strategies. The study took into account an analysis of the evolution of Romanian balneary tourism sector between 2013-2015 compared to the development of the tourism industry at national and regional level. The analysis was completed identifying actions undertaken to develop balneary tourism in Romania aimed highlighting the current state of implementation of formulated strategic action plans and the existing possibilities of development. Development of balneary tourism cluster at national and regional level represents innovative approaches towards achieving competitive advantages for the tourism industry and related sectors with a positive impact on the environment.

Key words: tourism development, balneary tourism, tourism strategies, cluster

INTRODUCTION

Tourism is an economic sector recognized as having an important role in a country's economy because, through his development and potential interference with other sectors (Ursache, 2015), stimulates economic growth at regional, national and international level. The annual report of the World Tourism Organization (WTO) for 2015 shows a growth sector worldwide (+4.4%), the number of tourists in Europe reached 609 million, an increase of 5%, which puts it in first place internationally.

Tourism is a means of development for all countries with important tourism resources (Postelnicu & Dabija, 2016), which are the main prerequisites for development of tourist destinations. Tourism potential in many regions in Romania is considered a strategic factor ensuring regional development, even if there are different levels of development (Nicula et al., 2013), determined by economic, social and environmental aspects.

Ensure sustainable development of destinations, for various reasons, they are no longer the attention of tourists (Nicula et al., 2013 Ursache, 2015), recognition and development opportunities while ensuring the conservation of natural resources and cultural ties. Neacsu (2012) states that

sustainable development of tourism is conditional on the optimal use of natural resources and the efforts of preservation, respect of socio-cultural needs of the local community by preserving cultural values and traditional (Ursache, 2015) and ensuring processes which will benefit economic entire community, including stable jobs. However, sustainable tourism development faces several impediments (Bodoşca & Diaconescu, 2015), issues related to national legislation, the need for substantial funding or institutional cohesion between different entities and business in a community.

Enormous tourism potential is not exploited enough (Postelnicu & Dabija, 2016 Roangheş-Mureanu et al, 2016), whether it is cultural tourism, spa tourism, rural or any other form. The literature defines tourism potential (Cruceanu et al., 2015) in terms of attraction and resources, if they have different meanings: tourist attraction expresses motivation to travel and visit certain destinations, tourism resources comprising, besides the attraction, and resources necessary for tourism: natural, human, material and financial.

In today's high incidence of diseases that can be treated (Roangheş-Mureanu et al., 2016) using resources spas - cardiovascular, rheumatic, respiratory or nutritional, Romanian health tourism is an opportunity for the sustainable development of the whole sector tourism, involving the development of other types of tourism and other economic sectors. Postelnicu and Dabija (2016) identifies over 117 resorts with different therapeutic profiles - water, sand, silt, therapeutic gases. Spa development is done in broader framework of the health tourism (Vukovic et al., 2015), both through a preventive approach to health problems and quality of life, and by the curative one, traditional (NTA, 2009).

Regress of health tourism (Ungureanu Tesic, 2014) in the last decades, after expansion registered before 1989 and his survival by turning into a kind of social tourism (NTA, 2015), requires innovative strategies for repositioning and development in a pronounced competitive environment.

Formulating effective strategies for the development of of health tourism is done along the following lines: on the one hand, a potential natural rich and varied material resources are in poor condition, the need for financial resources for rehabilitation, investment and marketing and providing resources human, and on the other, the pursuit of sustainable development objectives, aiming at granting environmental requirements (Neacsu, 2012) with economic and social progress. The success of the strategies adopted in the development of sustainable tourism is subject to financing and to a very large extent on the cooperation between actors of the tourism sector. Cooperation at local or regional level have certain features (Pechlaner & Volgger, 2012), development of tourist destinations requiring support from operators and all stakeholders. Is recognized efficiency and

competitiveness of innovative models of development in tourism cluster type (Omerzel, 2015 Soteriades, 2012). Being a local network or regional entities involved in local tourism, the cluster requires their cooperation and knowledge transfer in an innovative manner. Romanian clusters role in tourism development has been highlighted in studies (Ursache, 2015 Fundeanu, 2015 Nicula et al., 2013), but the implementation of this model of development is difficult because calls for the harmonization of contributions and interests of the various stakeholders.

MATERIAL AND METHOD

The main objective aimed at analyzing the evolution of spa tourism during 2013-2015, compared with the national trend registered by the tourism sector. In addition, strategists sought to highlight the optimal development of spa tourism, which would strengthen its position in the national tourism sector.

Quantitative analysis conducted based on data from the National Statistics Institute reveals regional disparities recorded in tourism and spa tourism position in the tourism sector. Master Plan for development spa tourism in updated version (NTA, 2015) anticipates the development of spa tourism in the context of a preventive approach to issues of health and looks forward strategic directions.

Consideration of coordinates of sustainable development strategies oriented towards innovation and more to mainstream tourism sectors or sub-sectors, but data show inertia in implementing them. The research took into account, in addition to studies in tourism, steps towards the formation of cluster type networks at national and regional levels.

RESULTS AND DISCUSSION

Data processing show maintaining regional disparities in development of the tourism sector, justified by factors of physical-geographical, economic or socio-cultural. South East holds 30.47% of the total accommodation capacity of the existing nationwide, followed by the Central Region (20.99%) and North West (9.81%).

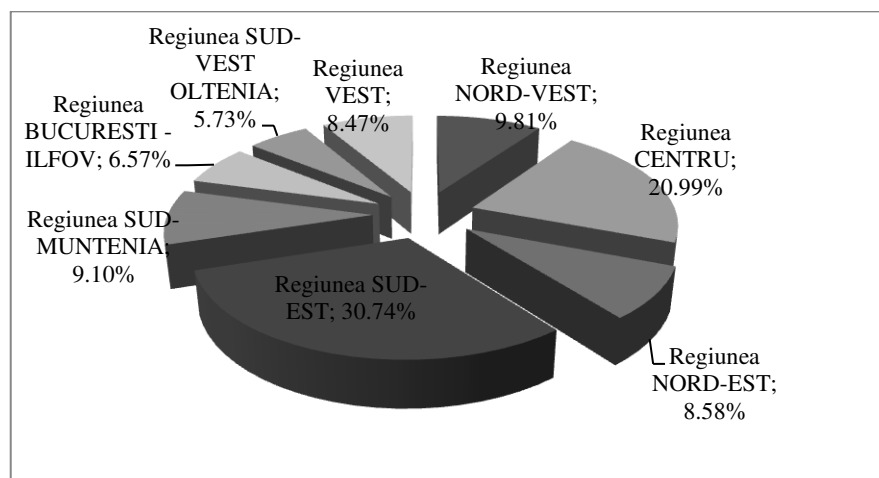


Fig. 1. Accommodation capacity existing at national development regions

Source: NIS data processing

Reviving spa tourism is a stated goal for the authorities involved in organizing and promoting this type of tourism (NTA, 2009, 2015), although statistics show while maintaining a narrower sub-sector shares in total spa tourism sector. The evolution of tourist accommodation structures in the range 2013-2015 is upward nationally (+ 11.3%) in 2015 than in 2014. At the spa destinations has been a reduction in the number of accommodation (-9.4%) in 2014 over the previous year, but in 2015 the indicator increased by 6.21%, reaching a level of 479 accommodation units (Fig. 2) fully recover without loss in 2014.

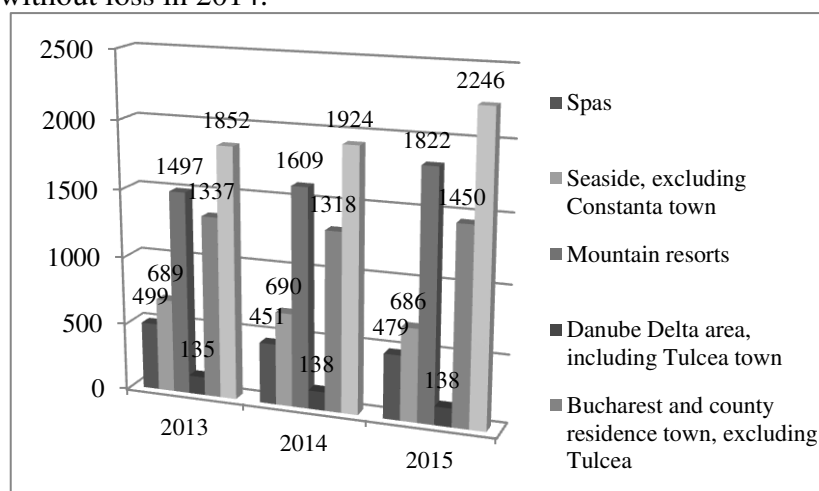


Fig. 2. Number of accommodation structures by tourist destinations

Capacitatea de cazare din stațiunile balneare a înregistrat cea mai amplă scădere în 2014, comparativ cu celelalte destinații turistice, revenirea din 2015 fiind modestă (Table 1).

Table 1

Existing touristic accommodation capacity by touristic destinations

Touristic destinations	2013		2014		2015	
	Bed places	% spa in total touristic accom.	Bed places	% spa in total touristic accom.	Bed places	% spa in total touristic accom.
Spas	39953	13,07%	33576	10,79%	35342	10,76%
Seaside, excluding Constanta town	82563	27,01%	83625	26,86%	83353	25,39%
Mountain resorts	48034	15,71%	50996	16,38%	55775	16,99%
Danube Delta area, including Tulcea town	4297	1,41%	4283	1,38%	3907	1,19%
Bucharest and county residence town, excluding Tulcea	80081	26,20%	83160	26,71%	86565	26,37%
Other localities and touristic routes	50779	16,61%	55648	17,88%	63371	19,30%
Touristic accommodation capacity-total	305707	100,00%	311288	100,00%	328313	100,00%

Source : NIS data procession

The number of beds has fallen from 39 953 beds in 2013-35342 seats in 2015, which modifies unfavorable development of spa tourism position compared to other tourist destinations, depending on the capacity of existing accommodation. Calculations also show a reduction in the average number of beds per accommodation structure, from 80 in 2013 to 74 in 2014 and 2015, which means a change of accommodation for structures with less capacity. Tourist accommodation capacity in houses has increased three times in 2015, an upward trend was observed for lodges and tourism pensions and agritourist pensions (Table 2). Rehabilitation or private new investments in accommodation structures with larger capacity resulted in their case an upward trend, but this is reduced to increase by up to 7 percentage points for registered hostels. This dynamic would require an analysis of arrivals on age groups and can be a significant element in the adoption of regional strategies or on certain spa destinations.

Table 2

Trend of existing touristic accommodation capacity by type of establishment in spas

Type of establishment	2013	2014		2015	
	Bed places	Bed places	I (%)	Bed places	I (%)
Hotels	29085	24118	82,9%	25238	104,6%
Hostels	301	431	143,2%	460	106,7%
Motels	441	525	119,0%	555	105,7%
Touristic villas	2267	1770	78,1%	1720	97,2%
Touristic chalets	106	132	124,5%	177	134,1%
Bungalows	214	169	79,0%	125	74,0%
Campings	1307	976	74,7%	686	70,3%
Touristic halting places	604	550	91,1%	440	80,0%
Houselet type unit	257	199	77,4%	632	317,6%
School and pre-school camps	1007	758	75,3%	743	98,0%
Touristic boarding houses	3398	3322	97,8%	3894	117,2%
Agrotouristic boarding houses	966	626	64,8%	672	107,3%
Total bed places in spas	39953	33576	84,0%	35342	105,3%

Source : NIS data procession

Spa tourism has an occupancy rate of 42.88% against the general occupancy rate of 28.73% of the tourism sector, but the level is mainly supported by state settled tickets treatment (Fig. 3). Foreign tourists visiting spa resorts as no destination, but because natural attractions around them (NTA, 2015), the employment rate by them in spa resorts is below 2%, which hampers the competitive development of spa tourism.

Several studies (Ungureanu Tesic, 2014 Nicula et al., 2013 Ursache, 2015) showed the need to implement sustainable strategies for tourism development. Developing the competitiveness of the sector is possible by modernization of the existing accommodation, extending the offer to products for prevention (Roangheş-Mureanu et al., 2016), promoting destinations spas worldwide (Soteriades, 2012) or integrating several forms of tourism destination such as the spa and rural (Vuković et al., 2015). Financial resources available from European funds through various funding programs (NTA, 2015), show interest towards developing tourism potential.

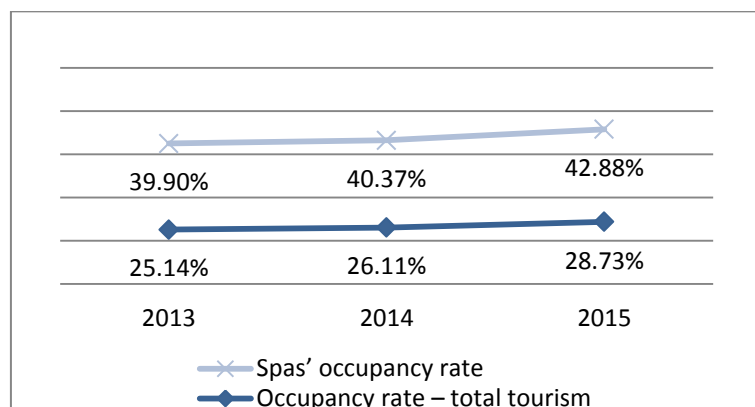


Fig. 3. Occupancy rate – total and spas'
Source own processing

Sustainable tourism development must be supported by innovation (Omerzel, 2015 Nicula et al., 2013 Fundeanu, 2015), and this approach requires collaboration. In Romania, one cluster aims spa tourism, spa touring Regional Cluster "Transylvania" in Central Region, operating a total of four clusters in the tourism sector (clustero.eu), which shows a low level of implementation of the principles sustainable development. But their location in regions which hold 5% - 8% of the accommodation offer national (Fig. 1), in conjunction with tracking effectively the goals you have set, can alleviate the disparities between regions and motivate the establishment of a national network in tourism.

CONCLUSIONS

Modern tourism acts as sustainable development principles and environmental protection is a requirement that will provide Romanian tourism and spa tourism in particular, a long-term development. Spa tourism potential, as his positioning segment both curative and preventive health tourism market (NTA, 2009), motivates more than the depreciated state of existing infrastructure, fundraising and implementation of innovative development strategies. Formation of clusters, premised on the cooperation of various stakeholders, access to information and opportunities, leverages existing resources and ensure optimal promoting destinations (Soteriades, 2012) and the necessary consultation.

Redevelopment Master Plan for the Development of Spa Tourism in 2015 outlined the strategy followed by the sector, but their application depends more financial resources, partly available through European funds, as human resources as a factor decider, for natural resources as long as they are used responsibly (Neacsu, 2012), is "an inheritance infinitely exploiters and exploited" (Cruceanu et al., 2015).

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