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The Management of Tourist Destination with Special Focus on the Romanian Balneary Tourism

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***Abstract**: In 2009, a "Master Plan for the development of balneary tourism in Romania" was developed, which contained strategic changes for the development of balneary tourism in Romania: localities with thermal baths - leisure possibilities, anti-aging treatment stations, traditional social tourism, renovation and modernizing the balneary facilities. This strategy was updated in 2015 and focuses on the implementation of an innovative public-private partnership, aimed at developing a health tourism tourism cluster, supporting the development of medical tourism by setting up a thematic destination management organization, on the development complex tourism products that combine ecotourism offers with health tourism and capitalize on the Romanian know-how in the field of anti-aging treatments.*

In 2018, the Ministry of Tourism elaborated a project to set up the Destination Management Organization (MDG) to promote Romania's tourist destinations. The basic argument of this concept is the development of tourism through an integrated destination management system that ensures sustainability and vision regarding the development of a territorial administrative unit, a region or the whole country. The newly established body must have an integrative role but also as a coordinator and support in the development of competitive tourist destinations.

The tourist products that are based on the natural and wild environment, even if less attractive at the moment due to the lack of specific infrastructure are competitive. Romania benefits from a well-preserved natural environment that is among the most impressive in Europe. As the balneary and wellness sector is structurally linked to the natural environment (climate) and the natural elements of cleanliness, the association with nature tourism can be easily achieved and has a major potential to generate positive synergies.

Health and maintenance products have a major advantage not so much related to their authenticity - Romania cannot necessarily offer wellness and balneary products exotic or different from its neighbours - as much as to the natural environment and the attractions that can be associated with the product.

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To reach the potential development, health and maintenance products are among the ones that require the least marketing effort due to the fact that they benefit from the pure character of R*omania's nature, as well as the very attractive level of prices.*

***Keywords**: tourism destination management, competitive tourist destinations, integrated destination management system.*

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I. The competitiveness of the Romanian tourism

According to the Tourism Competitiveness Index of 2017 compiled by the World Economic Forum (FEM), Romania ranks 68th out of 136 countries, the Czech Republic ranks 39th, Bulgaria ranks 45th, Hungary ranks 49th, and Ukraine ranks 88th. Although Romania has the average score on most indicators, our country was in the lowest position both in terms of the government's prioritization of tourism and travel, as well as the efficiency of marketing and branding for attracting tourists. For both indicators, Romania ranked 131 out of 136. Regarding the quality of the tourism infrastructure, Romania is also at the bottom of the ranking, on the 129th place out of 136.

The competitiveness of tourism in Romania was compared with the level of competitiveness registered in several countries selected as the main source markets and competitors of Romania, based on indicators relevant to the tourism industry. The analysis revealed that, from the point of view of the demand on the tourist services market, the strengths of Romania (which has a good growth potential) are the following: the number of UNESCO natural sites (46th place), the attractiveness of the natural objectives (62nd place), protected areas (38th place), number of UNESCO cultural sites (36th place), number of oral and intangible cultural heritage objectives (25th place) and price index for hotel services (10th place). In the case of all these indicators, Romania's score is above the EU, South-Eastern Europe (EU and non-EU) countries as well as those of its neighbours (Bulgaria, Hungary, Moldova, Serbia and Ukraine). In terms of supply, the comparative advantage of Romania is quite limited and, although the scores are lower than those of the EU, they are still better than those registered in some countries of south-east Europe. Regarding the Global Terrorism Index (security), Romania was in the first place, that is, maximum level of security; regarding the number of airlines operating in Romania, our country ranks 51st, and in terms of business tourism (MICE), the score places it 44th.

Two important indicators leave much to be desired: the digital demand in natural tourism and the digital demand in the cultural and entertainment area, where Romania is below the EU average, but manages to be above the average of the neighbouring countries. Also, the tourist infrastructure needs immediate attention.

The graphic representation of the places occupied by Romania included: the prioritization of the tourism and travel sector - the 108th place; land and port infrastructure - 92nd place; price competitiveness - 85th place; air transport infrastructure

- 82nd place; human resources and labour market - 81st place; business environment - 76th place; natural resources - 68th place; cultural resources and business trips - 46th place; the infrastructure related to tourism services - 62nd place; ICT availability - 60th place; international opening - 45th place; environmental sustainability - 43rd place; safety and security - 39th place; health and hygiene - 31st place.

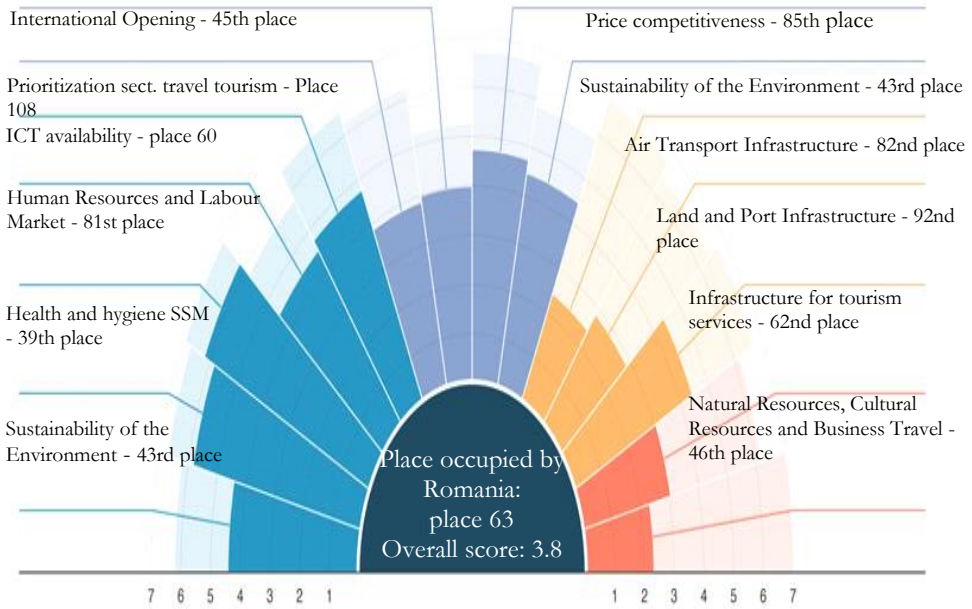

Fig. 1. Index of competitiveness for Romanian tourism Source: processed data: http://reports.weforum.org/travel-and-tourism-competitiveness-report-2017/country-profiles/#economy=ROU

Romania ranks 1st in the Terrorism Incidence Measurement Index, followed by leading positions in terms of hotel price index, where it ranks 10th globally. Access to drinking water, HIV cases and the presence of large car rental companies are also ranked first.

Improvements are possible to two important indicators, such as the online application for Natural Tourism and the online demand for cultural and leisure tourism, where Romania is below the EU average, but occupies better places than the neighbouring countries.

II. Balneary, health and medical tourism in Romania

In Romania, health, balneary, wellness or medical tourism are generally referred to as "balneary tourism" and have a long tradition, with attestations in this regard from the Roman Empire to Romania today (eg Băile). Herculane, Geoagiu Băi - Germisara). More than 160 localities in Romania benefit from mineral waters with

therapeutic properties, some of them being declared tourist resorts of national or local interest or "balneary" resorts, according to the Romanian legislation.

It is estimated that about one third of the natural mineral springs in Europe are in Romania. Well-known seaside resorts are scattered throughout the country, the most important being Felix Bath, Herculane Bath, Sovata, Tusnad, Vatra Dornei, Techirghiol and Mangalia, Călimănești-Căciulata, Olănești and Govora.

According to scientific studies, thanks to the valuable therapeutic factors (mineral springs, sludge and gas) that exist throughout the country and which offer a wide variety of treatments (for cardiovascular, rheumatic, digestive, gynaecological and recovery problems), and besides the prophylactic function, namely, disease prevention, health tourism in Romania has great development potential.

The certification of the tourist resorts is carried out by the Ministry of Tourism, at the request of the authorities of the local public administration and must be approved by Government Decision. There are two levels of classification: resorts of national and local importance.

The incentives to obtain the certification of a tourist resort are the following:

- For resorts of national interest:
  a. the organization, by the MT, of tourism promotion events, such as fairs or exhibitions in the resorts of national interest;
  b. organization, by MT, of professional training courses for local employees in the hotel sector;
  c. financing allocated by MT for financing the quality management accreditation program, for the local public administration;
  d. financing allocated by MT for financing strategies and urban planning studies for tourism development;
  e. the classification as priority beneficiaries of the special investment programs, financed from the state budget or from European funds.
- For the stations of local interest, access to the same benefits as the stations of national interest, except those of letters (a) and (e).

Stakeholders in the public and private spheres of tourism, such as MT, are not involved in this certification process. Therefore, the resorts in Romania can receive two different certifications, one of a tourist resort of local or national interest and one of a balneary, climatic or balneo-climatic resort.

The tourist product offered by the seaside resorts focuses mainly on the treatment, namely, medical care, convalescent care especially for the sick or the elderly, but some of the resorts also offer wellness packages. The wellness component continues to benefit from a significant growth potential, being able to meet the needs of domestic and foreign visitors.

In 2017, there were 577 accommodation units registered in balneary resorts, 7.3% of the total number of accommodation units in the country. The tourist units offer 36,631 beds in beds - 10.6% of the total number of beds in registered beds.

The number of tourists staying in the spa in 2017 was 945,527 persons, representing about 7.7% of the total number of tourists staying in Romania in the same year. The balneary resorts total 4,204,898 of the stays with accommodation in

a period of one year, representing 15.5% of the total stays with accommodation registered in a year in Romania. Domestic tourists represent over 95% of the total number of tourists arriving and over 96% of the total number of stays with balneary resorts. These figures provide an indication of the importance of balneary tourism in relation to Romanian tourism, in general: even though they do not attract many tourists (7.7%), they represent over 15.5% of the total stays with accommodation registered in accommodation units in Romania in a year. Also, from these statistics it is obvious that balneary tourism, the main form of social tourism, is fed almost exclusively by local demand in Romania, given that only 1.7% of the total number of foreign tourists staying in 2017 in Romania was they stayed in a balneary resort.

As for the Romanian clients of the balneary resorts, they are mainly elderly people. The senior tourists in Romania are generally retirees, who travel for medical reasons and sometimes benefit from state-subsidized balneary treatment tickets, which include accommodation and meals. In view of the communist past, in Romania pensions are paid almost exclusively from the state system and, considering other factors (currently, there are 9 pensioners per 10 active employees, aging of the population, reduced ratio of active persons to the total population, the low level of income in Romania), pensions represent a small income: the average pension in the first quarter of 2018 was about RON 1,122 (around 240 euros). This represents a very low level, compared not only with the average pension at European level, but also with the net average salary of the active persons in Romania: approximately 590 euros in April 2018.

In conclusion, the beneficiaries of the balneary tourism are, in Romania, almost exclusively persons with low incomes.

Therefore, the tourists who benefit from the tickets offered through the state social insurance system represent a significant percentage of the clients of the balneary resorts. Between 1993 and 2003, the total number of tickets granted by the National Pension Funds and by the National House of Pensions and Other Social Insurance Rights (CNPP) almost doubled, from 148,143 tickets to 334,817 tickets. In the last 15 years, there has been a significant fluctuation of the total number of tickets offered to the population; however, the general trend has been decreasing, although it has increased again in recent years, as the duration of the subsidized stay has shortened.

In 2017, the 203,299 treatment tickets subsidized from the public system were reflected in 3,049,485 stays with balneary resorts. Thus, the system of tickets with public financing represents almost 3/4 of the total number of stays with accommodation and only 21.5% of the total number of tourists staying in the balneary resorts. This fact demonstrates a high level of dependence of medical tourism in Romania on the public treatment ticket program, as well as the correct definition of wellness and medical tourism today as social tourism. Therefore, wellness tourism has the highest values of employment rates: 42.7% compared to the national average, which is about 31% of the total number of places available in a year. On the other hand, the average length of stay in tourist units is significantly higher than the national average, being 4.5 days / tourist, while the national average is about 2.2 days / tourist. Thus, most private operators have agreed to rely on the mechanism

of subsidizing pensioners through treatment tickets at balneary resorts. The revenues were considerable, but the profitability reduced, and most of the state or private companies did not make any new investments in order to renovate the equipment. At present, most of these hotels do not meet or reach the quality standards required to attract foreign or unsubsidized tourists from Romania.

This system has ensured and continues to provide constant but small annual incomes, which does not favour investment. With the decrease in the volume of tickets or the duration of the treatment, in the last years, this whole economic model has been faced with additional pressures and a diversification of the offers is needed to attract the customers from abroad.

Table 1. Trips organized by tour operators and retailers in the balneary resorts Romania (2016-2017). Source: processed data: http://reports.weforum.org/travel-and-tourism-competitiveness-report-2017/country-profiles/#economy=ROU

Packages sold	2016		2017		Change
In balneary resorts	no.	%	no.	%	
	38051	5.05	41952	5.49	10%

The variations registered in the flow of tourists in the balneary resorts are the consequence of the subsidized treatment tickets offered to the residents, as well as of the auctions. Therefore, the seasonal character of the occupancy of these resorts was less pronounced than of other segments of the tourism industry, in previous years, the tender procedure being organized at the beginning of the year. Subsequently, the auction was organized in the spring, and in 2018, the auction procedure was completed in June.

The peak season remains in the summer months, but the absence of subsidized tourists during the first six months of the year poses major problems for hotel owners and other treatment facilities, as they have higher expenses with employees, especially with medical staff, but also with maintenance facilities.

III. The infrastructure and facilities of tourism for health

The balneary resorts in Romania represent the main tourist assets, due to the quality of the thermal springs, the location of these resorts, the historical heritage, the national tradition of holidaying in the balneary resorts and the new international tendency to promote the balneary tourism and wellness.

The facilities and infrastructure of the Romanian balneary resorts have not been modernized since the fall of the communist regime and have suffered due to the inefficient privatization strategy since the late 1990s and early 2000s.

Table 2. The evolution of the number of accommodation units in the balneary destinations (2007 and 2017). Source: processed data http://reports.weforum.org/travel-and-tourism-competitiveness-report-2017/country

Destination type	Classification	2007		2015		2016		2017		+/-, 2007-2017
		no.	%	no.	%	no.	%	no.	%	
Balneary & wellness resorts	5 stars	24	0.01	387	0.12	613	0.19	321	0.09	1337.50
	4 stars	590	0.21	2093	0.64	2547	0.77	3428	1.00	581.02
	3 stars	4295	1.51	12584	3.83	12504	3.80	12631	3.67	294.09
	2 stars	24522	8.64	17236	5.25	17259	5.25	16987	4.94	69.27
	1 stars	6428	2.27	1121	0.34	932	0.28	1123	0.33	17.47

Most of these balneary resorts and their associated accommodation units are no longer competitive and even the tourists from Romania prefer to go to the seaside resorts in Hungary. This lack of competitiveness of the seaside resorts Romania is mainly due to the following factors:

- difficult access, in some situations, to the thermal natural water resources (exploitation rights being to ANRM);
- lack of financing among private investors for the renovation of the old accommodation units that require urgent rehabilitation work;
- lack of public / private facilities for spending free time in resorts;
- legal uncertainties regarding the ownership of land, arising from the process of retrocession of the nationalized properties during the communist period, as happened in the case of the historical resort of Băile Herculane, and the failure of the privatizations carried out by the public authorities;
- lack of funding from the local public authorities to renovate the centres of the historical balneary towns;
- the absence of accredited facilities (to be granted by internationally recognized bodies, based on international standards) prevents any attempts to consider Romania a medical destination. Accreditation is essential in the medical tourism sector, both for medical tourists traveling on their own, who mainly seek medical treatments and services through the Internet, and for insurance companies for which patient safety is a priority. In such situations, it is important to obtain the confirmation of the quality and safety of the services from a third party and / or from internationally recognized independent bodies. However, a number of particularly important steps have been successfully completed lately;
- The National Health Quality Management Authority (ANMCS) has the competence to issue the internationally recognized accreditations, starting from March 27, 2018, following the audit by ISQua. This accreditation is an important step for the Romanian operators to be able to benefit from the provisions of Directive 2011/24 / EU of the European Parliament and of the Council of 9 March 2011 on the application of patients' rights in cross-border healthcare. This accreditation can increase the credibility of medical services in our country

on international markets, especially in relation with insurers;
- ANMCS has concluded a certification protocol with the Patronal Organization of Balneary Tourism in Romania (OPTBR);

Most of the problems are manifested at national level and an integrated investment strategy is needed, which includes modern approaches to balneary tourism and which focuses on two priorities:

- Strategy for urban rehabilitation and modernization of balneary towns and resorts;
- Supporting private investors for developing new medical tourism products and for certifying / accrediting existing treatment facilities

These two priorities must be met at local, regional and national level, in order to change the image of the destination. Therefore, compulsory measures must be taken at local level, for the construction of an ecosystem of the balneary town and at national level, by adopting common urbanism laws and public financial support for the establishment of a network of balneary towns in Romania.

The ecosystem of the balneary resort implies the development of local products, based on small-scale *wellness* (food, handicraft, etc.) and on a larger scale, such as cosmetic and anti-aging products based on thermal water; international certification of therapeutic factors of thermal water for cosmetic products, treatment; construction of a training centre for Tourism and seaside resorts; supporting private investments; modernizing the balneary treatment centres; certification and accreditation of balneary treatment centres.

The balneary resorts in Romania benefit, in most cases, from unique locations and landscapes, often located in pure areas and unaffected by human activity or in protected natural areas. The Strategy of the Development of the Balneo-climate Tourism, as updated in 2015, defined the concept of "Ecological balneary tourism", underlines the need to capitalize on the well-preserved natural environment and its resources (flora, air, climate, thermal waters, landscapes, calm, etc.). This innovative position is currently being used, for example, in Scotland, where doctors have been authorized to prescribe patients in-kind stays. Thus, the development of the balneary sector should be "well thought out" along with that of ecotourism, through the elaboration of common products, in order to promote the use of the natural element for wellness and medical treatment, together with the local heritage, traditional dishes and the virgin natural environment.

IV. The Romanian balneary sector in the context of the Directive on cross-border healthcare

The EU Directive 2011/24 / EU on the application of the patients' rights in cross-border healthcare came into force on April 24, 2011. This directive lays the foundations for a general European framework for the provision of healthcare across the EU. Despite the difficulties, the Directive has been fully implemented in all EU countries. This normative act can be an opportunity for development and promotion for medical tourism products in Romania.

The main provisions of the Directive are the following:

- long-term medical treatments (including balneary and wellness medical facilities) in another EU state can be settled by the insurance company in the Member State of affiliation of the patient;
- countries can reimburse the patient for the expenses incurred by him / her (amounts representing the direct payment made by the patient to the foreign provider of medical services);
- a suspensive condition was introduced, which allows the affiliation states (the patient's state of origin) and the states where the treatment is being carried out (the patient's destination) to limit the reimbursement of cross-border medical services, for reasons of general / public interest (eg for reasons of general interest). planning and to allow permanent access to a balanced variety of high quality treatments or to keep costs under control and to avoid wasting resources;
- the system of prior authorization for planned medical interventions has been maintained from the previous regulations, but it is not mandatory: Member States can introduce a system of mandatory prior authorization only in the case of medical services that require planning, such as hospital healthcare (which, by definition, implies continuous hospitalization in a treatment center), medical services that require specialized infrastructure and extremely expensive medical equipment, medical services that involve a series of risks for the patient or the population or medical services to be provided by a provider that can pose major quality or safety issues in connection with the services offered.

Also, the Directive has adopted a series of administrative agreements aimed at ensuring close cooperation between national health systems in the EU, leading to better transparency for foreign patients. As a result, each Member State has established a national contact point which is obliged to provide patients with all the necessary information regarding the medical systems of the other Member State, the medical services that can be provided, their rights as patients, information about providers of health care, their quality and safety level, accessibility information for people with disabilities etc. .;

The latest Commission report was prepared in September 2018 and had the following conclusions:

- The Directive has improved legal certainty and clarity for cross-border and domestic patients regarding their rights.
- With regard to the structure of voluntary cooperation (e-health, ETM, RER), the directive provides the Commission and the Member States with a basis for strengthening cross-border cooperation and for how the wider technological and social challenges could be overcome.

Currently, five years after the implementation of the directive, it can be concluded that cross-border flows of patients have a stable pattern, determined in particular by geographical or cultural proximity.

Balneary treatments or even wellness therapies of lesser medical character may be covered by the Directive, in other words, they may be reimbursed through public

health insurance systems. This may occur, on the one hand, to the extent that the respective treatments are necessary to maintain a good health (preventive care, control of metabolic problems, chronic diabetes, obesity, sedentary lifestyle, etc.) or to improve the process of patient recovery (post-operative therapies, kineto-therapy, physiotherapy, etc.). On the other hand, these treatments can be settled if they are classified as medical services settled by the public health insurance systems of the home state (public, private, mutual aid, etc.)".

The Government of Romania declared tourism a priority through the Government Program for the period 2018-2020 and, therefore, implemented reforms to further promote the development of the tourism industry. The most recent evolution was to reduce the VAT rate to 5% for tourism activities (as opposed to the standard 19% VAT rate). In order to support the development of the balneary domain, zero royalties have been applied for the use of geothermal and mineral waters in certain circumstances. For the financial stimulation of the sector, the government issued over one million holiday tickets for civil servants, each amounting to RON 1,450 (310 euros). In addition, the state has launched the "Start-up Nation" and "The First Leisure Center" programs to support the development of the domain. The most recent measure is that the Ministry has announced the opening of regional promotional offices on high priority markets.

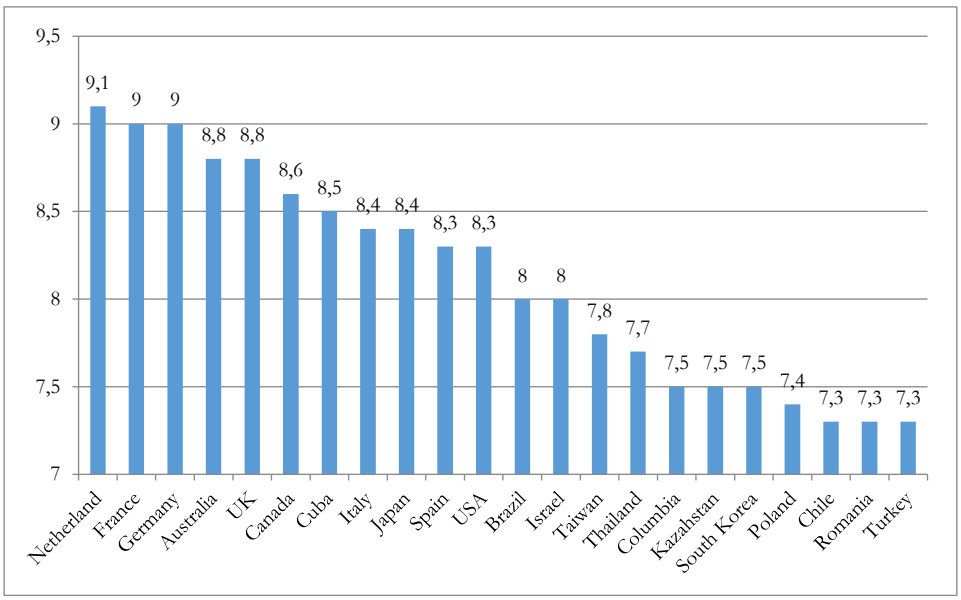

Fig. 2. Index of cross-border flows of patients
Source: data processed from KPMG publications; Economist Intelligence Unit

Romania's National Strategy for Tourism Development focuses on three levels, to serve as a guide for the sustainable development of tourism in Romania, so that:

- to further consolidate Romania as a well-known, world-class tourist destination throughout the year, as well as as a destination that meets EU standards in terms of product and service provision;
- to value the people, the tradition, the places, the natural and cultural heritage of Romania;
- to increase the visibility and reputation of Romania on the international tourism markets of the first rank.

Romania will be at the top of the competitiveness rankings in tourism, by virtue of strategic investments in infrastructure, education, marketing and promotion, which will lead to the development of unique experiences for visitors traveling to Romania and which will make it attractive to relevant markets in Europe and the world. Tourism will significantly increase its contribution to economic growth and development in Romania and Europe, by increasing visitor spending. The focus will be on the quality and diversity of the visitors, not the total number of visitors. Romania's National Strategy for Tourism Development aims to achieve the following strategic indicators and the following results:

- *Increase in tourism revenues* from the current level of 1.3 billion euros in 2017 to 6.3 billion euros in 2030;
- *The increase of the average expenditure per tourist* at the current level of 476 euros in 2017 to 633 euros in 2030;
- *Increasing the average stay of tourists from target markets* from the current level of 2 days in 2017 to 3 days in 2030;
- *The increase in the number of foreign tourists* to 2.7 million in 2017 to 10.3 million in 2030;
- *Increase the number of jobs in the tourism industry* to 210,000 in 2017 to 786,000 in 2030.

Table 3. Strategic indicators and expected results (2020-2030 forecast). Source: Romania's National Strategy for Tourism Development

Strategic indicators	2017	2020	2025	2030
Arrivals international tourism (thousands)	2.760	3.674	5.916	10.354
Receipts from international tourism (million euros)	1.314	1.796	3.360	6.554
Average cost per arrival (euro)	476	496	568	633
Number of employees in tourism	209.575	278.978	449.219	786.210

The vision of the strategy suggests that by 2030, Romania will become a well-known, high quality tourist destination throughout the year, focusing on the uniqueness of its cultural and natural heritage and offering services of international calibre.

V. Conclusions

It is a fact that in the EU countries, the elderly represent over 20% of the total demographic. Improving their health has increased their life expectancy. The vast majority of the elderly are retirees and can therefore travel outside the season. They are already a big market for tourism and this market is expected to grow massively, especially for the balneary market of "preventive" medicine. Prevention is a major concern for the new "generation" of older people, who seek therapies for better management of their own health, as well as, for protecting the body and optimizing the physical condition.

Romania has had a traditional holistic approach to balneary treatment and must be innovative again and develop preventative balneary products for off-season periods, addressed to the growing needs of people aged 55 to 70, especially from the European continent. , which represent the main promoters of the growth of the global balneary industry. In order to increase the flow of tourists to seaside resorts outside the season, the local private balneary tourism stakeholders have launched several tourism programs for the slightly crowded periods, at low rates (close to the price of subsidized programs of social insurance in the balneary tourism). However, the offers are not addressed to all foreign tourists, especially the elderly, and are not promoted abroad, and the elderly in Europe are the main target of the off-season EU tourism policies.

EU tourists who are interested in health tourism and who can benefit from the cross-border healthcare directive are facing difficulties in terms of paying for their treatment during their stay in Romania, because they are fully responsible for the administrative management of the balneary treatment they benefit from abroad including post-treatment recovery and / or spontaneous health tourism. In order to attract health tourists from the EU, the Romanian tourism stakeholders need to develop balneary tourism packages and transnational healthcare, which will ensure that the balneary treatment will be reimbursed and will support EU tourists in the reimbursement process. These innovative health tourism packages can be promoted and marketed in partnership with travel agents, on the model of special offers for off-season stays.

The Ministry of Tourism has already set up an inter-ministerial council for balneary tourism, which includes several ministries and public institutions, but does not have a national instrument, such as a destination tourism organization, a public-private tool to gathers together national public tourism authorities (ministries or public) and associations of private stakeholders (travel agencies, hotels, resorts, etc.).

The image of the seaside resorts in Romania is still associated with the famous anti-aging treatments of Ana Aslan (Gerovital), which were well known worldwide during the period 1970-1980. Unfortunately, during the last 30 years, the "Ana Aslan" units have not received sufficient funding for the renovation and modernization of its treatment facilities, nor for the research and development of new anti-aging treatments. Moreover, there are still copyright issues regarding the use of the "Ana Aslan" brand. However, the Ministry of Tourism can take advantage of this know-how and can stimulate the positioning of the balneary resorts in this segment, by

developing a national anti-aging pilot project, which will be supported by the management organization of health tourism destinations. This can be achieved by specializing municipal and balneary treatment facilities in the sense of prevention and anti-aging treatments. This offer will be supplemented with general medical examinations, light cosmetic surgery, smoking prevention program, anti-alcohol treatments, weight loss programs, etc.

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