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PhD Thesis – Summary

THE MANAGEMENT OF TOURIST DEMAND AND SUPPLY

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Tourist destination management; tourist demand; tourist supply; tourist market; tourism; tourist; tourist information center; tourist's profile; Transylvania; Romania; tourist resort; tourist objective; tourist attraction; competitiveness; empiric research; tourist receiving facilities; restoration services; leisure services; market services; cultural tourism; mountain tourism; spa tourism; ecotourism; SWOT; case study; SWOT; branding; projects financed by the means of European funds; promotional budgets; ministry of tourism; tourist destination management organization; perception studies; tourist behavior; particularities of tourist management.

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Why The Management of Tourist Demand and Supply? The present paper is based on a series of analyses I have done along the last eight years, regarding the way Romanian and international tourists perceive Transylvania as an international tourist destination. The aim of this research is an analysis upon the tourist profile and potential of Transylvania, in order to elaborate and design a number strategies to promote this tourist destination, nationally and internationally, namely to provide solutions in order to increase the number of Romanian and international tourists for this destination. The previous studies were developed and deepened, following several coordinates:

- the achievement of a critical analysis of the evolution of the Romanian and Transylvanian tourism, from the beginning of the 20th century up until now;
- the evaluation of the present state of the Romanian and Transylvanian tourism, including the tourist potential of the region;
- the deep investigation of the manner how three categories of actors (foreign tourists, Romanian tourists and the hospitality services suppliers who are closely linked to Transylvania's tourist activity see the tourist services provided in Transylvania), respectively of the manner how the host-population perceives Transylvania as a tourist destination;
- the identification of the main problems, on one side, and of the elements that can be turned to account, on the other side, in promoting the tourism of the region, both on a regional, and international level.

Tourism is a key element of any national or regional economy that has a number of tourist resources that can be rendered profitable. It is a well-known fact, and also a very sad one, that in Romania tourism is insufficiently exploited, although the tourist potential is extremely generous. Therefore, we aim at carrying out a solid study regarding the tourist offer and supply in Transylvania. We shall consider 16 counties, included into the three of the eight development regions of Romania: Centre, North-West and West. We shall discuss these in detail.

In order to gather information on the tourist activity, as well as for the proposal of a set of measures regarding the ensuring of a satisfactory level of the tourist activity in these regions, we aim to collect and process secondary data, as well as to realize a research on the level of the development of the recipient tourism in these two destinations.

Furthermore, we shall describe the present situation of the Romanian tourism and of the tourism in the counties taken into discussion (arrivals of the Romanian and international tourists), on one side, and we shall present the tourist particularities of these regions, on the other side.

Alongside a whole series of analyses of secondary data (originated in studies from specialized institutions), the gathering of information will be done directly, as well, by empirical research, based on questionnaires. We shall concentrate on four aspects we consider of major importance in our study:

- the attitude of the international tourists concerning Transylvania's tourist offer;
- the way Romanian tourists see these destinations;
- the manner in which hospitality services suppliers, mainly the lodging facilities, evaluate their own offers;
- the tourist behavior of foreign and Romanian visitors;
- moreover, the way the host population sees Transylvania as a tourist destination will be studied. Also certain data will be gathered with regard to spontaneous associations of non-tourists related to Transylvania.

We shall identify aspects related to regional tourist demand and offer, and we shall establish the rate at which the offer manages to meet the tourist demand by making use of the results of the analyses and of the results we shall obtain by implementing the

questionnaires. We shall also identify solutions for a better adaptation of the supply to demand, taking into account, at the same time, the tourist profile of the regions we analyzed. We shall also determine and analyze the main factors that influence the development of the tourism in the 16 counties that underwent the analysis, and try to identify the most appropriate means of communication for promoting their tourism. On the basis of our findings we shall propose and elaborate strategies to promote tourism in the destinations we analyzed, respectively, we shall sketch tourist destination management strategies as well.

We can demonstrate, as a justification for the topic we have chosen, that from the analysis of the specific literature and of the statistical data, one can come to only one conclusion: although Romania has a remarkable tourist potential, this potential is insufficiently exploited, a fact that is obvious for the Romanian tourism. Unfortunately, the development strategy of the national tourism is insufficiently correlated with the regional one. Therefore, we cannot expect them to be competitive on the international tourism market.

We can emphasize the fact that, at a regional level, it is necessary to carry out a more profound research regarding the tourist potential, in order to outline the regional identity of Transylvania. In the present thesis we propose to research the manner in which the promotion of the region could be achieved, starting with its potential and with the state of the tourism in the area.

The Main means of gathering information will be represented by the questionnaire. We shall opt for implementing of different questionnaires (both for the Romanian and international tourists, and for the local population, respectively, for the tourist and hospitality service suppliers. We shall concentrate on the study of the following major components:

- the analysis of the way international tourists see Transylvania as an international tourist destination, namely, the way these tourists appreciate the offers of the service suppliers;
- the evaluation of the Romanian tourists' outlook on Transylvania as a tourist destination and how they appreciate the offers of the local hotel owners;
- the identification of the manner in which Romanian tourists relate to Transylvania as a tourist destination;
- the achievement of a thorough analysis to investigate the main problems associated with the quality of services in tourism and the proposal of several solutions for their improvement, in order to increase tourist interest for the destinations in the 16 counties we have taken into discussion.

The contributions of our research to the scientific knowledge are:

- thorough knowledge of the tourist potential in the 3 regions;
- knowledge of the current tourist supply in the regions taken into discussion;
- identification of the tourist segments on the regional market;
- identification of the management issues in tourism and the proposal of viable solutions for these;
- knowledge of the perception of tourists on Transylvania as a tourist destination;
- knowledge of the degree of correlation of the demand and supply on the regional level;
- outline of the tourist identity of Transylvania.

In the present paper we propose to approach the following problems:

- In chapter I we shall revise the conceptual frame of tourism, underlining its characteristics and its components;
- In chapter II we shall delineate the conceptual delimitation of notions such as: tourist demand, tourist product and, respectively, tourist market, pointing out the characteristics of the tourist product as well. We shall also deal with the characteristics of the tourist demand, and the characterization of the tourist who visits Romania and Transylvania.

- In chapter III we shall characterize the tourist offer and its elements, we shall discuss Romania and Transylvania as a tourist destination from the perspective of the current offer, within the case studies we have elaborated. The last part is dedicated to the analysis of Romania's competitiveness, made by the World Economic Forum.
- Chapter IV is dealing with the tourist demand and offer for the Transylvanian tourist products;
- The last part of the thesis is dedicated to conclusions and proposals. The degree in which the offer meets the local demand is studied.

For a long while it has been noticed that tourism and the hospitality industry represent the economic sector that enjoys the highest rhythm of development at national level. Under these conditions, tourism must be treated as a key element of any economy that enjoys the presence of a tourist potential that can be exploited. The sad reality reveals that in Romania, despite its generous resources, tourism is still insufficiently developed, and consequently exploited much under its real potential. The same is valid for most of the country's regions.

The entire time span after the Revolution of December 1989 has been characterized by the existence at national level of an interest towards the sketching of the country's national identity (which has been more or less promoted abroad during the communist times). The governments that have been in power have raised tourism at the rank of national priority but they have unfortunately resumed at doing this only in theory rather than developing and promoting it appropriately based on some coherent strategies. Being included in this national strategy, the researches that we have aimed to undertake focus on the study of the tourist demand and supply at regional level with the purpose of determining the tourist potential of the three regions of development: Center, North-West and West *including Transylvania, Banat, Crişana and Maramureş) with the purpose of identity sketching, for the creation of Transylvania's (as we have delimited it) notoriety and image on the national market and at international level.

By the means of the undertaken researches with the purpose of elaborating the PhD thesis we have aimed at developing and deepening the knowledge acquired in the field of tourism and to mix them with the results obtained within the researches dedicated to the identification of the profile of Transylvania as an international tourist destination and to the determination of the manner how foreign and Romanian visitors perceive it. Another aim has been to investigate the foreigners' and the Romanians' tourist demand and to verify the measure in which this is satisfied by the offer of the local suppliers. Based on the realized researches we dare state that Transylvania enjoys the necessary potential for an appropriate development of tourism in this region. Moreover, this destination is capable of also contributing to the flourishing of tourism in other regions of the country.

A brief analysis of the average durations of stay at the level of the regions of development enables us to draw several conclusions. Thus, one may notice that, overall, Transylvania manages to retain its tourists at least as long as Romania; the average durations of stay registered within the regions of development Center, North-West and West are either at the level of the national average or a little above it. The obtained values indicate for Transylvania an average duration of stay that can be associated to business tourism and to citybreaks or weekend tourism; their association to cultural tourism is only possible in the context of the existing supply; at the same time, the most frequented accommodation facilities (classified at 2 and/or 3 stars, respectively flowers) also suggest cultural tourism. To these types of tourism there can be added the spa and mountain types. The findings are valid both the case of the Romanians and in that of the foreign tourists.

On the whole, we may show that Romania, as a national and an international destination, constantly loses ground in front of the external destinations and, especially, of

the European ones. Thus, once again, the trend of selecting nearby destinations is confirmed, and one must also note the constant decline of the demand for the local supply.

A series of aspects are worth to be mentioned regarding the tourist demand in Transylvania in relationship with that registered at national level between 1990 and 2012. Thus, in Transylvania there are registered: a) almost 40 % of the total national arrivals, respectively 35 % of the overnights registered in Romania; b) over 60 % of the total arrivals and around 60 % of the overnights in urban boarding houses; c) nearly 55 % of the arrivals and about 60 % of the overnights in rural boarding houses; d) over 40 % of all arrivals in tourist villas and nearly 40 % of the overnights registered by these lodgings; e) in the case of hotels, the arrivals and overnights in Transylvania have somewhat lower quotas, of a little over 35 %, similar to those at national level.

As the realized analyses and the data processing have revealed, the average durations of stay registered in Transylvania are very close to the national average; they even surpass it sometimes; these values mainly indicate the weekend and citybreak types of tourism as dominant manifestations for the rural tourism and for the cultural one, too; of course, the spa tourism is also fairly well represented in the cases of the renowned destinations, just like it happens in the case of the mountainous tourism; business tourism represents an important segment in Transylvania.

The rather low values of the average durations of stay registered both at national level and in Transylvania, as well as their descending trend indicate the fact that it becomes compulsory to adopt measures for the stimulation of demand both among Romanian and foreign tourists.

Despite the fact that **Region Center**, which, after the littoral, concentrates the richest supply of bed-places, registers for all types of destination categories lower average durations of stay compared to those calculated in Transylvania. In the case of this region the highest average durations of stay are registered by the resorts of local and national interest, demand orienting mainly towards mountain destinations. Urban destinations are also attractive; like Transylvania they retain tourists for 3-4 nights. The tourist villages and the rural destinations only attract tourists for 2.5 to 3 nights, lower values than those of Transylvania because of the lack of a varied supply of leisure services. Thus, from the perspective of the tourist demand, region Center can be characterized as a destination attractive for mountain and weekend tourism, mainly practiced in urban and then in rural areas.

Based on the data processing and keeping track of the tourists' demand, the counties belonging to region Center may be characterized as it follows. **Alba County** attracts and retains tourists especially for rural tourism and in the resorts of local and national interest, which, in this case, are mainly situated in rural areas; this county's urban tourism is rather a transit one and secondarily a business destination, too. **Braşov County** tends to be a weekend destination, registering in the case of most of its destinations average durations of stay from 2.5 to 3.5 nights; of course, its urban destination are renowned for their cultural offer, strongly marked by the Saxons' heritage; at the same time, mountain and business tourism represent two other types of tourism preferred by the county's tourists. **Covasna County** is first of all a spa destination, both in the case of local and national interest resorts, as well as in the case of its urban destinations; secondarily, there also occurs demand for rural tourism, dominated by the cultural component, influenced by the Hungarian specific of the area. **Harghita County** tends to have the profile of a cultural destination, this interest appearing both in the case of the urban and rural destinations. **Mureş County** can be remarked for its high, but on a descending trend, demand for spa tourism practiced in its resorts of local and national interest; urban cultural tourism is the second attractive element of the county, being strongly influenced by the Hungarian culture. **Sibiu County** has the reputation of a destination that is attractive especially for urban cultural tourism, Sibiu

representing the most appreciated city from this point of view; the rural cultural tourism supply is mainly concentrated in Mărginimea Sibiului, a renowned destination nowadays; despite the fact that from the perspective of the registered arrivals, the county has modest performances when it comes to mountainous tourism, the average durations of stay similar to those in Braşov indicate an increased interest of the tourists towards this type of tourism; the county's urban destinations also tend to be attractive for business tourism, too.

With an average somewhat higher than that of Transylvania, **region North-West** can be characterized as a destination marked by rural, spa (in resorts of local and national interest) and urban tourism. The interest of the tourists towards other mountain destinations has registered a continuous decrease throughout the entire analyzed time span. The values registered by the urban destinations mainly suggest business tourism.

More detailed, the development of tourist demand within the North-West region of development is presented as it follows at the level of each county: **Bihar County** is a spa destination, spa tourism being practiced in resorts of local and national interest; the county's urban tourism is mainly business oriented especially because of the fact that the county is situated on the border. **Bistriţa-Năsăud County** has the profile of a cultural destination, with a higher demand for the urban destinations: the county is also visited by the tourists interested in spa cures; rural tourism seems rather unattractive, registering a decrease from the point of view of the average durations of stay. **Cluj County** clearly has the profile of a business destination, with few exceptions, the average durations of stay being lower than two nights; a relatively modest interest is registered by the resorts of local and national interest, respectively by the tourist villages, both categories registering a diminishing trend throughout the analyzed time span; **Maramureş County** is obviously a truly attractive rural destination (as this type of tourism registers very high average durations of stay); still one must notice that despite of being attractive, the rural tourism has a reduced quota in the county's tourist activity; thus, the county's profile is that of a cultural destination with a somewhat intensive weekend tourist activity; the resorts of local and national interest enjoy a relatively high attractiveness especially for winter sports; urban destinations tend to be rather associated to business tourism. **Satu Mare County** seems to be a business and transit destination, given its position on the border; the average durations of stay registered by rural destinations suggest cultural tourism; the resorts of local and national interest retain their tourists for very short stays; urban destinations seem to be marked by business and transit tourism. **Sălaj County** has the profile of a cultural and short break tourist destination; somewhat higher values are registered by the average durations of stay in the case of rural tourism; despite the fact that the destinations from the category "other types of mountainous destinations" register very high values, they only attract very few tourists and, consequently, have a reduced effect in the county's tourist activity; urban destinations tend to be frequented by the tourists interested in cultural tourism.

The tourist activity of the **region West** can be described as one determined especially by business and transit tourism, respectively for cultural interests; although in the case of the resorts of local and national interest the average durations of stay are high, the quota of the demand for this type of tourism in the region's entire tourist activity is low; the profile of business and transit destination is mainly associated to Arad and Timiş counties, while that of cultural destination is mainly generated by both urban and rural destinations; the lowest average durations of stay are registered in the case of the category "other mountainous destinations".

The tourist demand of the four counties of the development region West is characterized in the following lines. **Arad County** is generally a business and transit destination, of course, because of its position on the border; rural destinations and the resorts of local and national interest retain tourists for longer durations but in a relatively low number, while the urban

destinations are sought especially for business and cultural purposes. **Caras-Severin County** is obviously a spa and leisure destination, with spa tourism as the type responsible for most of the arrivals and for the longest stays; to this one may also add nature related and mountainous tourism; rural destinations tend to attract tourists who are interested in cultural tourism, respectively those who prefer weekend breaks; in the case of the mountainous destinations, too, the calculated average durations of stay mainly indicate weekend and short break tourism. **Hunedoara County** is another rather cultural destination; urban and rural destinations tend to attract their visitors for cultural interests, while the spa destinations register decreasing and more modest average durations of stay; mountainous resorts have a poor contribution to the county's tourist activity. **Timiș County** is usually associated with business and transit tourism, determined especially by its position on the border but also due to its cities' economic activity; the resorts of local and national interest retain few tourists but for longer durations of stay, which are also affected by a continuous diminishment; the tourist villages also seem to be spa and relaxation destinations based on the relatively high values registered in the case of the average durations of stay but with a low number of arrivals; urban destinations are also attractive for cultural tourism.

To conclude based on the tourist demand registered in Transylvania we may characterize this destination as being mainly a cultural one; this type of tourism consisting in the specific case of this region of an interesting interweaving of urban and rural tourism with cultural valences. Cultural tourism mainly occurs within urban destinations. Significant quotas in the region's entire tourist activity are obtained by the spa and mountain resorts of local and national interest. Rural tourism and tourist villages also have significant contributions in the region's tourist activity. The only destinations that have an absolutely insignificant impact upon the region's tourist activity are those included in the category "other mountainous resorts".

As a result of the study on the strategic options of the tourist destinations a series of aspects can deduct a series of aspects regarding the management of the demand for the tourist products of Transylvania and Romania as well. Therefore a first recommendation would be to initially opt for an undifferentiated marketing. Furthermore, we appreciate that accent should fall on the common elements of the tourists, and not on those that differentiate them. Taking into account the fact that the Romanian tourism does not have unlimited financial resources but rather it is confronted with budgetary restrictions we think that the elaboration of a joint offer may attract more tourists.

Therewith, we recommend the renewal (meaning repeating) of the studies carried out on the target- and opportunity-markets with the aim of identifying new market segments, for which to design communication strategies centered upon them. From the perspective of the price-based demand stimulation strategies, DMOs may use several mechanisms. The most suitable of these mechanisms for Transylvania are the methods based on costs that target aspects such as: the application of marginal quotas, the analysis of the breakeven point and the estimation of the desired profit. As to the level of the prices, we appreciate that the strategy of moderate prices represents the most suitable solution for the tourist destinations in Transylvania. These destinations usually have a satisfactory service from a qualitative point of view, most probably attractive for tourists who have an average income.

Some price-related demand stimulation strategies specific to the microeconomic level are perfectly adaptable and applicable to the macroeconomic level (as a tourist destination). The most significant are the national programs of stimulation of the tourism – spa, rural, mountainous, seaside, etc – that are excellent variants for the encouragement of the tourist activities, mainly in off-season periods by diminishing prices. The adoption at governmental level of policies oriented towards the diminishing of the VAT also for the restoration services, respectively – in an ideal case – for the transportation means and/ or leisure, supplied for

tourist purposes represent another intervention that can support the development of the tourism. The influencing of demand by the means of the price during peak-seasons in Transylvania can also be realized through the application of different tariffs for leisure services, depending on the moment of the consumption or on the categories of tourists. The DMOs may indirectly intervene in the establishing of prices using key factors such as the increase or decrease of local/ resort taxes or the exemption of certain taxes, etc. We have pointed out that the role of the DMO is to ensure the coordination and synchronization of the price targets of the destination with the individual prices of the local actors. Thus, in the specific case of Transylvania, the maximization of the tourist accommodation capacity usage should be taken into account. Moderate prices provide an economic context that is favorably perceived by the tourists from the current year, and this is expected to determine more arrivals the following year. Another direction may be the retrieval of costs in the case of destinations confronted with periods when the accommodation capacity is not used, but which still has operation costs. Finally, the strategy of using price-based costs represents one of the most convenient means the tourist service suppliers have, in order to cover them.

From the perspective of establishing the prices at the destination level the DMOs have the role to coordinate the efforts of all the actors who cooperate at a local and regional level to develop tourist packages and can be involved in the establishment of the direct or indirect forfeit price by stimulating discounts in certain periods or for certain categories of tourists/ certain destinations or, the opposite, by encouraging the increase of prices when it comes to it.

The stimulation of the tourist demand off-season is another strategic lever the DMOs from the tourist destinations can use. This strategy, combined with the cultural tourism and with its promoting and stimulation, represents, perhaps, one of the most useful means to improve the tourist activity in Transylvania. It is also an excellent means to render valuable the tourist potential of the destination. The stimulation of the tourist demand off-season can be realized by developing tourist offers that are complementary with the tourism forms employed during full-season (summer/ winter mountainous tourism, spa tourism, cultural urban/ rural/ circuit tourism, event tourism, etc.). Moreover, the tourist demand may be also stimulated off-season by applying lower prices (by diminishing the fiscal burden of the suppliers during off-peak periods) or during bad weather seasons. Some of the initiatives may come from the suppliers themselves, who can offer, for example, during certain periods, free supplementary services, that would otherwise be paid services.

From the perspective of the autochthonous destinations, the development of services and complementary attractions represent an extremely valuable strategic option for their management, especially from the perspective of the development of the destinations and their evolution from embryonic stages to the stage of destinations for unique markets, and later, into diverse destinations. As a matter of fact, the DMOs and the local and central administrative institutions that are able to influence these activities have an essential role in the development of services and complementary attractions at the level of the destinations.

The DMO set up for the whole Transylvania, respectively the 3 DMOs set up for the three regions of development should be responsible for the development and implementing of centralized reservation systems at the level of each tourist destination. The creation and implementation of a unique system for the whole Transylvania, rather than the creation of several systems destined to each type of tourism practiced in the region (spa, mountainous, cultural, rural, religious, including adventure) is highly recommended. This is recommendable because both the tourist demand and the offer for Transylvania gravitate around cultural tourism, which justifies the attempt to promote Transylvania mainly as a cultural destination.

As we have already shown in the contents, the specialized literature includes a series of management strategies elaborated to realize the management of visitors of the tourist

destinations, taking into account that this deals especially with the management of the destinations such as protected site and natural reserves. Therefore, in the future (taking into account the fact that at present Transylvania is not a destination that is confronted with over-populating, except, perhaps the Medieval Festival in Sighișoara) several measures are recommendable, for the most frequented destinations: restriction on the number of visitors (establishing visitor rates, political regulations regarding visas or establishing the dimensions of the groups), applying visitation fees (discounts for certain socio-professional categories in order to stimulate consumption or, the opposite, no such facilities in order to discourage consumption during a certain period), the limitation of the development of the infrastructure and services (spatial and temporal redistribution of the tourists by dispersing them, concentrating, or hybrid measures, educating tourists, the segmentation and aiming at the segments concerned and de-marketing). These measures are meant to contribute to the durable development of destinations.

The study on the consecrated literature on tourist destination management reminds us of the eternal dispute regarding the direction the destination management should incline: towards demand or towards offer? We believe that both aspects are essential for the development of Transylvania as a tourist destination, and more important is to clarify the role of the DMOs with emphasis on their role, rather than to clarify the above mentioned dispute. The complexity of the local and/ or regional DMOs derives from the fact that these should coordinate all actors involved and to ensure the development of the tourist destinations. In order to attain their goal, they have at their disposal (more precisely, should have at their disposal!) political and legislative authority, as well as financial resources, respectively highly qualified personnel. Some of the most significant contributions of the DMOs are: to maximize the destination strategy on a long term; to represent the regional interests and the local and/ or regional tourist and hospitality industry on a national level; to maximize the profitability of the local firms; to maximize the multiplying effects; to elaborate and promote a homogenous and coherent image of the destination; to monitor the manner in which the destination is seen internally and internationally (mainly on the target and opportunity markets) and to optimize the tourist impact in the sense of a durable development.

The bibliography offers several variants to classify the destinations and their elements, most of which are centered on resources. The most suitable approach to the destination topic includes four elements: tourist attraction points, facilities offered and services supplied, access infrastructure and destination image.

In the actual case of Transylvania it was concluded that the creation of at least four DMOs would be opportune (three for each development region, and one organization for the whole Transylvania). These organizations will have to elaborate the marketing strategies for the regional destinations and for Transylvania as a whole, based both on the internal and external promotion, as well as to contribute to the development of the local resources, of the specific and support infrastructure, of the possibilities of valorizing and tourist promotion, and of the socio-cultural and fun activities.

The DMOs created in Transylvania have the complex task to develop tourist planning systems at a regional and local level, establishing the targets and detailing the actions that have to be taken in order to reach the targets, to implement the strategy and to fulfill the planned tasks (by: establishing the necessary program and actions to meet each pre-established target, the distribution of roles and the responsibilities for each partner, as well as the nominalization inside each sector that is involved of the people responsible for meeting targets, identification of the financing sources and the allocation of the necessary budgets for the carrying out of the planned activities and programs, the establishment of the action calendar and the establishment of the periodical monitoring methods, as well as the

implementation of an evaluation and control system destined to measure the results and of the degree of attaining the goals, in course and at the end (season, year, respectively, project, if it is the case).

The demand for a tourist destination offer, as shown above, is also determined by its attractiveness, which, on its turn, lies in the image and perception of the destination. These elements are determined by the tourist supply and on the actual tourist experiences, by the thinking of the tourist and by the existent tourist information or those offered on the destination.

The thorough analysis of the image of Romania allowed us to draw the following conclusions: before the pre-war and inter-war period Romania's image was very good. The country was highly appreciated on an international level due to its economic performances and due to its position as Europe's main wheat source. Unfortunately, the years following the Second World War were marked by communism, bearing terrible consequences on private propriety and on the economy as a whole, as well as on its spiritual and intellectual elite. Romania's being marked mostly by negative aspects after December 1989 is largely due to the lack of interest from the communist rulers to create and promote a positive image of Romania abroad, correlated with the incapacity or lack of interest of the new political class to elaborate and promote a positive image of Romania abroad. The communists did not do it because, from the economic point of view, they were not interested in the Western markets, and from the perspective of the tourism, the demand was quasi-spontaneous, mainly among the ex-communist countries and Northern European countries. The regime change in December 1989, appeared on the background of the lack of a coherent image of the Romanian tourist destinations, bringing forth all the problems inherent to the transition period and with all the corruption scandals, rapidly filled the image void, and created a negative image of Romania abroad, bearing serious consequences on the international tourist demand. Unfortunately, many of the government initiatives to correct this situation were meant to fail, because of strategic incoherence, scandals and corruption or simply because of unfortunate options for messages. Moreover, the increased delinquency some Romanian citizens are associated with has contributed to the confirmation of the negative image abroad. All these image and identity problems, correlated with the lack of a national brand for tourism is reflected in the weak performances of the Romanian tourism in the last 20 years. As for Transylvania as a tourist destination, some important issues are to be taken into consideration: some see Transylvania as an international brand; the region has a better defined identity than the rest of Romania, centered on multiculturalism; the destination has a better image abroad compared to the other Romanian regions; Dracula's myth adds to the notoriety of the region and its attractiveness; the conservation projects of the cultural heritage of the Transylvanian Saxons, carried out under His Royal Highness the Prince of Wales's aegis, raise the interest of the international tourists as well.

The identification of these values of Transylvania and the elaboration of a tourist brand for this region is one of the most important tasks of the DMOs that have to be set up at a regional level. A strong tourist brand of Transylvania will generate but favorable effects upon Romania's image as a tourist destination and will contribute to the intensification of the tourist activity from the rest of the other regions of the country, mainly the neighboring ones.

Studying the specialized literature we must to deduct that the country brand represents the umbrella under which all the other regional and sector brands lie, including the tourist brands. The aim of the destination branding is to attract visitors and to stimulate the tourist activity, while the country branding and the region branding aim at promoting economic, commercial and political interests, nationally and internationally.

The reason the local DMOs should consider the idea of elaborating a tourist destination brand for Transylvania include the following elements: the need to change an old, confuse or inadequate image (Dracula, for Transylvania, as for Romania there is a need to struggle against the negative image abroad and to create a more suitable image, meant to support the development of the tourism); the necessity to redefine the place following the development of the destination by investments in its infrastructure or by creating new events; launching new revitalization programs of the urban centers; the need to communicate certain messages in order to differentiate the destination and its actors from the competition; the inconsistency and lack of unity of the messages promoted in the past regarding the destination; diminishing the size and/ or the value of the offer recorded on the traditional destination markets; the inefficiency of the use of the marketing resources of the destination in the past. As a principle, almost all of the above reasons are valid for Transylvania. Four large categories of public must be aimed at by such an approach: the visitors, the inhabitants, the residents and the employees; the business and the industry, and the export markets. The DMOs have the role to ensure the balance between their interests.

The identity of the place being given by the people that inhabit the region, an important step is the defining of the identity of the Transylvanians. In this respect, historians, philosophers and anthropologists offer extremely valuable information resources.

The local OMD's have the task to identify all elements that will be used in the branding process in the region, as well as their harmonization; these are grouped under six aspects that make up the brand hexagon: the presence, the place, the potential, the pulse, the people and the infrastructure. Taking into consideration Transylvania's profile and the manner the tourist demands manifests itself for the offer of this destination, it is recommended that the elaboration and promotion efforts of the tourist brand of the region concentrate mainly on the target markets (Austria, France, Germany, Italy, Great Britain and Ireland, Russia, USA and Hungary); the opportunity markets will add to these.

In order that such an attempt be successful, it is necessary that the work groups in the DMOs include at least a few representatives of the following categories: representatives of the central public administration and of the regional and local public institutions, specialists from different fields, representative personalities, representatives of several ethnic and religious groups, of the Diaspora, of the NGO's that carry out activities in tourism and other related fields, representatives of associations and organizations of the owners and professional suppliers and intermediary providers of tourist and hospitality services, and representatives of the businesses, researchers and university staff, mass-media representatives, as well as financiers. Taking into consideration the multiple failures in creating a brand for Romania, it is believed that a condition for the success of such an attempt, in the case of Transylvania, is represented by the creation of a work group. At the same time, the newly found identity must be accepted and assumed by the host-population. This is the reason why the step of the debates and public discussions, regarding the tourist destination brand of the region, is essential. The element that defines the regional identity, as it results both from the bibliographic study, and from research, respectively, from the statistical data, is the multiculturalism; the spirit of the people is added to it (in our case, the local population).

From the perspective of the brand that has already been elaborated and is being promoted, the Romanian tourism is characterized by aspects such as: the differences in the perception between the international tourist that have visited Romania, and those who haven't visited it (the first category have distinctly favorable opinions regarding the country, hence, the strong recommendation for the intensification of the communication); the Romanians are not aware of the tourist potential of the autochthonous destinations (the

recommendations of the experts is to lay stress on the symbolic destinations: the untouched nature between the Carpathians and the Danube Delta, the cultural heritage, the painted monasteries, the regions with well-preserved traditions, etc.); for the international tourists the degree of notoriety of the Romanian tourist attractions is strongly linked to the actual visit to Romania (those who have not visited it are less informed); in the case of the foreign visitors who have visited Romania, the nature is identified as the main element of uniqueness (the Carpathians, the Danube Delta and the rural sights); the foreign visitors who have visited Romania would recommend it to other tourists as well; the attributes most often associated with Romania are: *authentic, rural, hospitality and green*. In fact, these are perfectly valid for Transylvania as well.

The problems linked to the tourist offer must be approached from the point of view of 3 categories of elements: tourist attractions, tourist services, and the tourist and support infrastructure. Goldner and Ritchie [2006: 334] have a significant recommendation regarding the tourist offer, namely: "If you cannot sustain [a tourist attraction / tourist attraction/ an accommodation establishment] it is better not to build it!"

We can characterize the Romanian tourist offer beginning with documents elaborated by several Romanian and foreign specialists. Thus, we could mention some aspects: during the communist regime, Romania was an important destination for the East-European market, where it promoted seaside and spa tourist products, cultural circuits and programs, the Northern Moldavian monasteries and those from Bucovina. Unfortunately, the tourist accommodation offer (developed mainly in the 1970's) stopped being attractive, not being modernized and un-evolving, not being able to meet the demands of the international and Romanian tourists, as well. It has also become uncompetitive compared to the similar tourist offers from the main competing tourist destinations. Notwithstanding the fact that all development regions of the country have very valuable tourist resources, the contribution to the national PIB was, and continues to be a modest one (about 1.5 % in 2013) [Agerpres, July 10, 2013]). The specialists appreciate the fact that the Romanian tourism is represented by: agritourism, spa tourism, mountainous tourism, circuit tourism, and event tourism, segments that are functioning extremely well, and are developed accordingly. The tourist potential of Romania is varied and evenly distributed at the level of the development regions of the country, where there is a significant tourist potential from the natural resources, cultural and historical point of view. As for its turning into value there are significant disparities at the level of the eight development regions, generated by their historic conditions of development and by the degree of endowment of the country with support and specific infrastructure, which led to the development of some infrastructure compared to others. Generally speaking, the Romanian tourist potential is divers and well-balanced from the point of view of the distribution at a regional level. However, there is a significant concentration in the Southern Carpathians (with a significant number of mountain spa watery tourist resorts of national and local interest, as well as on the Black Sea Coast, respectively in the regions which are rich in values and cultural-folk traditions such as: Transylvania (including Maramureş and Banat), Bucovina, Moldavia and Dobrudja. Analyses made by specialists revealed a sad reality: some of the most valuable attractions and Romanian resources are in the least developed regions from the point of view of the infrastructure. This is the reason why the tourism was identified as being the resource able to ensure the revitalization by turning into value their natural and cultural potential (according to analysts Romania includes regions with extremely valuable and complex tourist potential that represents approximately 24 % from the surface of the whole country and regions that represent 34 % from the territory; a series of natural and human-made tourist attractions add up; they are rich in opportunities for the development of the tourism, but with a lower density). Finally, Romania concentrates a third of the mineral and thermal waters of Europe,

being one of the countries that laid the foundation of spa tourism from the antiquity. Because of the absence of a support and specific infrastructure these very valuable resources are exploited below their true potential, the 160 spa resorts – very few matching an European value and many of which present only a local interest – offer numerous possibilities for the treatment of several illnesses (rheumatism, gastroenterological, gynecological, nervous, etc) as well as a lot of leisure and entertainment variants.

The analysis of the distribution of the natural and human-made human-made tourist resources, respectively of the support and specific infrastructure of the development regions of Romania and of Transylvania has lead us to the following conclusions: in both cases the percentage of the localities with (a lot of) tourist resources and facing infrastructure problems is overwhelming (79.2 % in Romania and 80.2 % in Transylvania; at a national level the most Administrative Territorial Units (ATUs) are those with a large concentration of tourist resources, equally dominated by both natural and human-made resources. The same distribution shows up in Transylvania (the ATU number in the two cases is sensibly equal). As for the infrastructure it can be noticed that both the national level and mostly the regional level are dominated by the ATUs with problems in the support and tourist infrastructure as well (48 % in Romania, and 46 % in Transylvania) followed by ATUs with tourist infrastructure problems (40 % in Romania and 44,3 % in Transylvania). The ATUs' number with a large concentration of tourist resources, but only with infrastructure problems is much diminished, favorably for Transylvania (9 %), compared to Romania (12 %).

Concerning the natural and cultural resources included in the national protected heritage we would like to point out a series of aspects: Transylvania concentrates about 49 % from the whole of the total of the natural and human-made natural resources, as follows: 54 % from the protected natural regions of national interest and Romania's natural monuments; 44,3 % from the total of the monuments and architectural ensembles and 33,1 % from the monuments and valuable archeological sites. These resources are found in localities with a high concentration of the human-made heritage of national cultural value (47,9 %) and in localities with a high and very high concentration of tourist resources (53,9 %). The resources are distributed in Transylvania as shown: in 43,4 % of the cities, 53,3 % in towns, and 47,7 % in villages.

One of the most valuable resources both in Romania and in Transylvania is represented by the cultural heritage, made up of: the immobile heritage – historic monuments; the mobile heritage - museums and archives; the immaterial heritage – aspects and the cultural sights – public spaces.

Simon Anholt proves that the competitive advantage of any country/ region is given by its culture, which can be associated with the rich and harmonious accompaniment of a simple melody. Moreover, in his opinion, this gives a country/ region dignity, an essential quality for any destination brand (country or region). The culture is in close connection with the tourism, the cultural tourism being the tourist sector that is the most profitable and which intermediates the creation of a connection between people's interests regarding a place in itself and their interests connected to the life of the actual place. Moreover, Anholt indicates that destinations with a varied and rich cultural life manage to attract rich and civilized tourists from upper classes, a category of tourists desired by any destination. Having considered the natural and cultural offer of the Romanian destinations, mainly those from Transylvania, we can conclude that the tourism of the region is dominated by two aspects of tourism: the nature tourism and the cultural tourism. Unfortunately, this extremely valuable potential is endangered by the negligence, incompetence and lack of interest, the Romanian legislation being much too permissive when it comes to the retraction of the historic monument statute or the cultural heritage element statute. UNESCO can intervene in such cases by the World Heritage Center it patronizes. Presently, 34 of the Romanian natural,

cultural and historic attractions are protected by the UNESCO; three natural attractions add to these, included in the Biosphere Reservations category.

To put it shortly, Romania is a destination that has harmonious and diverse sights, doubled by rich traditions and culture; it could be considered one of the most beautiful and resourceful place in Europe. Transylvania, as shown above, is one of the favorite cultural destinations of foreign visitors in Romania, famous due to its multiethnic heritage, which makes it a familiar destination easy to understand for the European tourists, and a true sample of the European cultural heritage [Negrușă; Cosma, 2008: 403-413, *apud* Dulău; Coroș, 2009.1: 74-79; Dulău; Coroș, 2009.2: 413-424].

The Romanian tourist accommodation supply with accommodation function has started to significantly develop after 1970. During the first years of the 8th decade the most important investments were made in the hotel business, when the large hotels on the Black Sea Coast were built, as well as those from the consecrated spa and mountain resorts, respectively, the large cities of the country. Therewith, during the same period the Romanian tourist villas started to flourish. They numerically dominated, for a long time, the autochthonous tourist accommodation offer. As expected, the hotels concentrate, by far, the largest number of accommodation possibilities, both as full accommodation capacity, and as full capacity of tourist accommodation, as well as from the point of view of the functioning capacity. From a qualitative point of view, the accommodation offer has known along the last 20 years a favorable evolution. However, the market is still dominated by inferior level structures or by unclassified ones (the distribution of the accommodation structures has decreased in this case from 90 % to 55 %), respectively the average segment, which registered a spectacular development (numerically, the accommodation structures have evolved from 8 % to 40 %, and the number of accommodation facilities from 6 % to 33 %). Luxury and superior accommodation structures have had an ascendant evolution as well (from 5 % to 10 %, and the accommodation facilities offered from 2 % to 12 %). A very important problem that has risen in the case of the accommodation offer quality is the suitable management of the accommodation structures which are functioning clandestinely or those which are not following the conditions dictated by their level of classification. As we have formerly demonstrated, there is a large number of lodging facilities that carry on their activity unabashed without a classification certificate, but which pretend to have a certain number of stars and which mislead the customers by promoting themselves as being hotels, villas or guesthouses, etc. without having the minimum conditions of being classified into that particular category. Following own analyses regarding the hotel business, and the data from the *National Foundation of Young Managers*, regarding tourist guesthouses, this phenomenon is quite widely spread.

The tourist guesthouses (urban, rural and agro-touristic) have appeared on the market only in the mid-90's and have had a spectacular evolution, both in number and from the point of view of the number of accommodation offered. They are also associated with authentic tourist experiences and are positively appreciated by the tourists that visit certain rural destinations (mostly regions such as: Maramureș, the Rucăr-Bran pass and Mărginimea Sibiului. The motels and hostels are present mainly in urban regions and urban tourist resorts. Neither of the two structure categories is well-represented at a local or regional level. Moreover, the motels can be recognized as such only in rare cases, lacking a clear identity as accommodation structures (un-individualized as such, or from the point of view of the architecture). Tourist villas failed in turning into advantage the potential offered by their long existence and by traditional architectural characteristics (unfortunately, clear examples in this sense are only in traditional tourist resorts: Bazna, Sovata, Herculane, Bușteni, Sinaia, Predeal etc.). Moreover, the lack of a strict legislative frame regarding the building of lodgings in the destinations lead to the apparition of a lot of constructions which do not blend

into the local sight and which distort with it (we refer to villas, hotels or guesthouses as well). Transylvania, due to its natural potential concentrates about 70 % of the tourist chalets of Romania and about 50 % from the camping sites and cabins in the country. The tourist halting places are underdeveloped, not being supported by the access infrastructure. Holiday villages have a large development potential, but this segment is weakly represented yet.

The legislation does not stipulate the inn as being a lodging facility anymore, but taking into consideration its architectural characteristics and the type of interaction it facilitates we recommend its reintroduction as an independent lodging facility.

As a whole, in Transylvania the accommodation offer is balanced by the distribution of hotels and guesthouses, but we have to remark that confronting the lists that include localities with a high and very high tourist potential, with the official lists that include accommodation establishments, respectively restoration establishments with the list of the localities (cities, towns and villages) according to the last *Population and Housing Census*, from 2011 one can easily conclude that a large part of the natural and cultural heritage of Transylvania is in the rural areas, and unfortunately, it is not doubled by any accommodation or restoration infrastructure able to support its development.

Actually, both in Romania and in Transylvania there is a large number of ATUs which have a high and very high tourist potential, but lack either lodging facilities, or restoration facilities. The absence of the accommodation structures and/or restoration facilities correlated with a very poor offer of leisure services explains the low interest of the foreign tourists in the autochthonous destinations. The presence on the Romanian market of the international hotel chains and groups is an excellent means to develop the Romanian tourism. It is a well-known fact that the international brands ensure the distribution of the tourist destinations, therefore they are a necessity. It is also well-known that the tourists who have vacation habits choose hotels which operate under international brands, seeking a guarantee of the service quality. Moreover, the extending of the chains and international groups on the average segment and not only the superior and luxury levels will have major contributions to the improvement of the quality of the autochthonous offer.

Some aspects are important regarding the presence of the large hotel operators on the market: in Romania there are 17 international groups and hotel chains. They own 55 affiliated hotels, totaling 15,435 rooms, representing below 9 % from the total of the accommodation capacity of the Romanian hotels (according to the National Authority for Tourism/ Ministry for Regional Development and Tourism – NAT/ MRDT – official database from December 2012). Unfortunately, the presence of the international brands on the Romanian market is weak in the traditional tourist resorts (there are but 3 hotels at the seaside, and there is the same situation in the mountain or spa resorts) and it is concentrated mostly in the capital (44 % from the total of the affiliated hotels and about 56 % from the number of affiliated places). For the time being the offer is unbalanced from the quality point of view (the 4 and 5 star brands showed interest in the extension of their presence in the average and even economic class. Taking into consideration the major importance of the presence on the market of international chains it is highly recommended that authorities revise and update their database in order to be able to cooperate with these structures to develop an attractive accommodation service offer, and to create competitive tourist packages. The authorities must also take into consideration that it is absolutely necessary that the database contain the structures that are in the process of being re-authorized, respectively, and those which can be identified among those unauthorized so that the actual image on the market be as truthful as possible.

The analysis on the Romanian companies (groups and chains) that are active on the Romanian market has led to the following observations: in Romania there are 11 hotel

companies that can be considered inland groups or chains. These operate 75 hotels which total 18,517 bed places (a little above 10 % from the total of the bed places offered by the hotel from the ANT/ MRDT official database. Seven of these companies are present in Transylvania (35 % from the total of the hotels and about 27 % from the number of places). In this case the offer is a balanced one quality-wise.

The lack of interest of the Romanian and international tourists in the Romanian accommodation offer is due to the lack of implication of the state in the development of the hotel industry in the post-privatization period (the 2000's), namely, the authorities did not stipulate actual measures in order to follow the manner in which the hotels that were privatized in the first half of the 2000's were reintroduced into the tourist circuit. Therefore, it has come to the situation that the great hotel owners (such as SIF Transylvania, TBRCM, SindRomânia, Frații Micula Brothers, and so) continue to operate these structures without making major investments that would impact on the quality of the supply. At present, the offer of these hotels is significantly dominated by the economic and average class segments, and the hotels are large, un-renovated, and they are located in the well-known resorts. Hence, the weak interest equally manifested both by the Romanian and the international tourists in the Romanian offer as well as the continuous decline of their demand.

A significant number of structures is concentrated in the portfolios of companies such as: SindRomânia, TBRCM and OPTBR, that target less pretentious customers, who prefer cheap, modest quality tourist packages (for example the spa tickets sold through the National Retirement Fund or the County Offices of the Labor Force).

Another aspect worth mentioning, coming from a cross reference from the MRDT database and the *Top 300 Capital* is connected to the investors' profile. Therefore, most of the hotel and lodging facilities owners, who are among the richest Romanians, have chosen to make such investments, in order to own such properties as vanity trophies (except for Radu Enache, the owner of the *Continental* hotel chain). Another important reason is associated with real estate investments (Micula Brothers). Such an attitude, correlated with the lack of specialized knowledge in the hotel management field and with the desire to get involved directly in this kind of management, manifests itself in the lack of investments in the development of the structures already owned and by the low quality of their offer.

The analysis of the occupancy rate shows a dramatic decline of this indicator in connection to the main lodging facilities, except the rural and urban guesthouses, respectively, the farms and agro-tourist guesthouses, where the values were constantly modest. This decline can be accounted for by two important factors: the decline of the number of overnight stays despite the increase of arrivals (for reasons connected to prices seen as too high compared to the quality of services, respectively due to the low quality of leisure offer of the destinations) and the significant increase of bed-places, especially the clandestine ones. The occupancy rate had a descending tendency in all tourist destinations; this tendency is somewhat lower in the case of the spa destinations. The competition from the international destinations, combined with an unattractive inland offer contributes to the decline of the occupancy rate.

Whether on the national level the seasonal character is more obvious (concerning the occupancy rate, similar to the indicators regarding the tourist demand), when it comes to the situation in Transylvania one can notice the same visible summer season – less pronounced than in the rest of Romania, and its maximum value is inferior to the national level.

As a whole, the effects of the economic crisis are visible in the case of the Romanian and Transylvanian tourism, generating a significant fall in the occupancy rate (from 50 % to 40 %, at national level, and from 45 % to 30 % in Transylvania). However, the main reason Transylvania – as international tourist destination – did not manage to turn the crisis into an

advantage is generated by the weak correlation of the offer with the demand and by all the problems identified at national level.

Restoration facilities are an important aspect of any tourist experience and also a substantial and essential component of tourism. Moreover, the gastronomic products expand, in symbiosis with the cultural tourism. At present, the Romanian tourist destinations attempt at developing such products or in association with programs such as *The Wine Route*. The analysis on the restoration facilities offer in Romania allows us a brief characterization: about half of the structures are classic restaurants or bars/ pubs, not necessarily associated with superior quality. Therefore, the conclusion is that the restoration offer is insufficiently developed and does not answer accordingly to the tourist demand, meaning that there are not enough restaurants which serve specific dishes (local, regional, national and international) or specialized restaurants (fish, venison, diet, vegetarian, respectively family or boarding houses). Wine cellars are also insufficiently developed, although the so-called wine routes have been promoted for the last 10 years.

From the point of view of the classification level, the market is dominated, both in Romania and in Transylvania by inferior and average class restaurants (as for the number of establishments, and also sitting places, 2 and 3 star restaurants represent 85 % from the national offer, in Transylvania 87 %, including one star structures, in Romania the percentage is 90, and in Transylvania it is over 92 %). The situation is the same in the case of bars: nationwide, 70 % are represented by the 2 and 3 star bars, one star bars, over 13 %. In Transylvania the 2 and 3 star bars represent 60 %, and the one star bars, over 22 %.

Following our analyses we can conclude that, as a whole, the Romanian gastronomic offer does not meet the tourist demand or the offer is limited. From the point of view of the services they are appreciated as being of low quality, although the food in itself is highly appreciated, therefore not yet prepared to contribute to tourist arrivals increase. The promoting of restaurants which serve specific dishes, considered the most suitable for the development of the tourism – the analyses and studies of the MRDT database and their websites led to the following conclusions: a considerably large number of counties lack restoration facilities suitable for the development of the tourism; one third of the structures we analyzed have web pages, but they are mostly poorly designed and do not bring any contribution to the development and promotion of the Romanian gastronomic tourism; most of the restaurants with specific dishes serve only Romanian food, targeting the international tourists, but fail in the proper promoting of their offers, because of having primitive web pages, inadequately realized, they are not translated into foreign languages and they are not optimized for mobile phones and other modern devices; moreover, most of these structures do not present their menu online, and the establishments that do, have a tendency to present undiversified offers, sometimes unpalatable; the interior and exterior design of these structures is unattractive, many of them using kitsch elements in decorations; the management of the majority of these establishments ignore the importance of teamwork or that of prestigious chefs, and do not lay stress on this kind of details, not offering such information; only one fifth of the investigated structures take into consideration the promotion of the destinations where they are placed, making it obvious that their management is not aware of the fact that their success lies in the popularity of the destination; only a small number of establishments gives importance to the customers' opinion, indicating that the vast majority do not see positive evaluations as an excellent means for promoting their facility; among the Romanian destinations only Transylvania and Bucovina tend to render profitable the connection between gastronomy and tourism. Finally, some gastronomical tourist products, with a large potential for success can be initiated,

beginning with Păstorel Teodoreanu's chronicles and writings, respectively, with Radu Anton Roman's TV shows and books.

The analysis regarding the hunting tourism lead us to the conclusion that the natural potential of Romania, largely concentrated mostly in Transylvania and Bucovina places these regions among the well-known European hunting tourist destination. The hunting tourism offer is well covered from the point of view of the hunting background and of the accommodation services, as well, and allows the successful development of the hunting tourism as a niche product.

As we have shown earlier, both Romania and Transylvania have a rich offer of cultural tourism, but the specific and support infrastructures are not an advantage. Generally speaking, the cultural tourism has the lowest economic efficiency but this type of tourism can be successfully associated with other more profitable types of tourism (for example, the business tourism). Most of the cultural tourism is based on museums, a rich offer in Romania, but only a small number of the Romanian museums manage to equal those abroad and to receive their visitors accordingly (for example, most of the museums do not have brochures with the description of the exhibits in foreign languages or electronic guidance devices).

The religious tourism is developed in close connection with the cultural tourism. Unfortunately, in the vision of the responsible authorities the offer is made up almost exclusively of the Orthodox cult edifices, ignoring the most valuable Gothic churches and monasteries, or the fortified churches, which belong to the Roman-catholic, Greek-catholic or protestant churches (Lutheran, Evangelic, Unitarian). According to our analyses, the main competitive advantages of the Romanian religious tourism derive from the large number of churches and from the great variety of religious events of great amplitude, but these are put to shadow by the competitive disadvantages of this form of tourism: the lack of accommodation and restoration capacities of the religious destinations; this type of tourism is not supported, there are but a small number of religious tourist guides, and the existing ones are strictly dedicated to the Orthodox cult; the signaling of these objectives is precarious, and the access infrastructure raises important problems; the cult edifices lack flexibility, and often have very strict visitation schedules; the press shows little interest in this type of tourism. In fact, Romania has a valuable religious tourist potential which goes to waste because of the unsuitable exploitation.

One of the most valuable components of the Transylvanian tourism is the rural tourism. This type of tourism may be included in the local cultural offer because the rural tourism ensures visitors a personalized contact, a sample of the physical and human rural environment and allows the participation in activities, traditions and authentic local life. In Transylvania the rural tourism has excellent conditions for development. The following forms have a remarkable potential: the agritourism, the rural week-end tourism, the rural tourism in secondary residences, the rural cultural tourism, the rural leisure tourism, the rural curative tourism, the religious and sports tourism, adventure tourism, proximity sporting activities or extreme sports. From the point of view of the accommodation offer, we have to notice that the agro-tourist guesthouses or tourist guesthouses have developed in the rural areas. Unfortunately, most of the guesthouses are illegal, not being authorized. The restoration offer is rather poor in the rural areas. Moreover, taking into consideration their architecture, most of the lodging facilities from rural areas are absolutely horrible.

Both Romania and Transylvania enjoy rich and varied natural resources, which are, among others, an excellent potential for the development of the mountain tourism, but, unfortunately, because of the absence of an adequate specific infrastructure, this potential cannot be properly exploited. For example, the Romanian ski destinations are far from being attractive for the Romanian or international tourists, because they almost entirely lack

international competitiveness. However, even under these circumstances the mountain areas manage to be attractive due to their karsts and hiking potential. Moreover, even with an underdeveloped infrastructure, the adventure tourism can be a relatively easy to develop and to exploit niche, both in summer, and in winter, in the mountain destinations, and not only there.

Romania is among the countries that set up the spa tourism, but, unfortunately it did not turn it to advantage. There are no 5 star hotels in any of the spa resorts. Although there is an enormous natural potential, doubled by highly qualified staff, it cannot be properly exploited because of the lack of the necessary developments, both for receiving tourists, for the spa treatments, and for the ensuring of the desired services. The authorities have chosen to internationally promote 34 spa resorts, from which one is not even certified (Sângeorgiu de Mureș), 9 are of local interest only, and taking into consideration that reality has proven that none of the spa resorts of national interest is truly competitive on the international tourist markets, we recommend that the financial efforts of the state be oriented towards the development of the infrastructure, and secondarily towards promoting offers. This way the efficiency of these actions would be enhanced. Travels to Romania for medical and surgical treatments (dental, dermatological, cosmetic, etc.) represent a segment of the medical tourism that has an excellent development potential.

The Romanian event tourism is considered to be the most attractive one, especially from the suppliers' perspective. However, it is not as profitable as it should be, suffering from the same causes that negatively affect the other aspects of the tourism, mentioning that the effects of the economic crisis were more striking in this case. A short survey on the business tourism points out its advantages and disadvantages: the general infrastructure is precarious, especially when it comes to small and medium urban localities; the apparition on the Romanian market of the international companies determined the increase of the demand for the business tourism, the favorite destinations of the businessmen being Bucharest and the big cities of Romania, Transylvania and Banat, and also Constanta and the key-cities of Moldavia (generally speaking, the cities where international companies have opened branches); the income made from the business tourism has shown an ascending tendency (the average expenditures of an international business tourist increased from 160-180 Euros/ day to 300 Euros/ day); the business tourism gave an impulse to the Romanian hotel market, raising the interest of the international companies and chains for the Romanian destinations and thus contributing to the raise of the investments in this sector aiming at raising the offer to the desired standards; the main countries where business tourists come from are: Hungary, Republic Moldavia, USA, Great Britain, Germany, Italy, Turkey, Poland, Austria, the Czech Republic, Russia, Holland and Israel.

As we have already shown, the event tourism includes a series of categories: political and diplomatic events, corporate and academic events, artistic and cultural events, as well as sporting events. From the point of view of the spaces destined for receiving tourists and for organizing the events we have just mentioned, we can consider that the Romanian offer is well represented and that it answers the specific needs of several categories of public, but in these cases the same problem remains unsolved: the insufficient development of the support infrastructure. Therewith, we recommend that investments be made in these fields.

As a result of our analyses we can conclude that one of the most important specific problems of the Romanian tourism is the fact that the supply of the tourist receiving facilities with functions of accommodation and of restoration is insufficiently supported by leisure and recreational services. This flaw is manifested by the low performances recorded in the occupancy rate, because, as a logical result, if there is no entertainment at the destination, the tourists will spend only short holidays there. The recommendations regarding this situation aims at opening new leisure centers and the diversification of the leisure offers, and

also at making investments in the development and promoting attractions from this perspective (botanical gardens, zoos, planetariums and dolphinariums). Taking into consideration that the tourist activity is often connected to the souvenir selling (encouraged by it) and that the handicraft products are often the most sought for products, we recommend the adoption of measures that stimulate the manufacturing and selling of genuine products and also fight the kitsch products, respectively the promotion of the villages well-known for their products (Căpușu Mare, Izvoru Crișului, Corund, etc.).

The analysis regarding the directions of the official promoting of the Romanian tourism lead us to the following conclusions, regarding the elements that make up the Romanian tourist offer, as seen by the respective ministry: regions and cities (historic regions – with stress laid on Transylvania, Banat and Crișana and Maramureș, followed by Bucovina and Moldavia, respectively Muntenia, and the key cities of Romania); main tourist attractions (seaside resorts on the Black Sea Coast, the Danube Delta, castles and citadels, fortified churches, medieval cities, The Carpathian Mountains, painted monasteries, spa resorts, traditional villages, sites from the UNESCO World Heritage) as well as special attractions (arts and crafts – craftsmanship and art – architecture and traditional architecture, the most valuable architectural monuments of Romania, classified by regions; authentic regions, active holidays, cruises on the Danube, Count Dracula's legend, festivals and events, gastronomy and wines, Judaic, medical tourism, MICE, Saxon, special sights, shopping, as well as traditions and folklore – customs and traditions, craftsmanship, wood culture, clothing). The fact that authorities lay stress on the genuine Transylvanian offer can easily be remarked, enough reason for considering the idea of creating the framework for the development of an DMO at the level of the region extremely suitable, in order to ensure a more efficient management of the destination.

Transportation plays a vital role in tourism. Unfortunately, as the analysis demonstrates, the Romanian destinations are at a disadvantage, roads are overcrowded, badly designed and badly maintained; the railroad infrastructure is unsatisfying, and it needs major investments in order to modernize it; the aquatic transportation (river and maritime) needs major investments in the harbor infrastructure; finally, the aerial transportation has a relatively well developed network of national and international airports, but the analysis on the low cost operated destinations revealed the fact that not all the countries considered target or opportunity markets are included on their list (admissible or opportunity exceptions are connected to the far off destinations). Generally speaking, the capital and some of the great cities in the country (including some from Transylvania) are on the list of destinations operated by the line companies, being well-connected with the international aerial traffic.

Another aspect we have analyzed is the manner the NTOs and TICs support the Romanian tourist offer, respectively the manner this offer is supported and turned into account by an adequate number of specialized guides. Unfortunately, half of Romania's counties have no tourist information centers, and six of these counties are from Transylvania (Bihar, Bistrița-Năsăud, Caraș-Severin, Hunedoara, Sălaj and Satu Mare), some of them being hosts for national interest resorts, and claiming international visibility.

From the point of view of their specialization, the guides are more likely not specialized, this being a great disadvantage. Therefore, only 69 people offer services in the mountain tourism, 31 for the religious tourism, 5 for the sporting tourism, 4 for eco-tourism, 2 for equestrian tourism, and only one guide for entertainment. It is clear that those forms of tourism that make attractive the Romanian tourist offer and those that are interesting for the Romanians, and for foreign tourists as well, are the least covered by tourist guidance services. Internationally level, Romania is promoted by NTOs which are present on the target and opportunity markets. According to minister Grapini, these have to be reorganized and

made efficient. The RCIs' network supports the NTOs promoting the Romanian cultural values, and, implicitly, the promoting of the Romanian cultural tourism.

The case study dedicated to the analysis of Romania led us to several conclusions. Although there is an exceptional tourist potential, in Romania the exploiting and turning to account of this potential is unsatisfactory (the average scores calculated for the internal and external factors are modest). Although the strengths of the Romanian tourism exceed its weaknesses, the tourist sector, with its favorable external environment, must be consolidated, in order to become a motor for the national economy. At the same time, there are still considerable threats, and their neutralization requires the use of adequate strategies which turn to account the opportunities offered by the natural environment. As a whole, the position of the Romanian tourism in the SWOT matrix is a favorable one, it lies in the strengths-opportunities quadrant, and very close to the strengths-threats and the threats-weaknesses quadrants. As a result, the generic strategy that must be adopted is the natural growth one, on the condition of adopting measures for avoiding and warding off risks and threats, respectively for surpassing weaknesses. The strategic aim of the development of the Romanian tourism must be changing Romania into an internationally competitive destination, quality-wise, which brings together international standards and which has a durable evolution. The image we promote has to be nuanced and centered on the advantages offered by Romania as a destination. The brand we create must be designed on a long-term basis and not changed according to the political majority. The development of the regional and local network of organizations (TICs) has to be supported. Moreover, the central authorities must consolidate their role in order to attain the quality standards for tourist and hospitality services and products. The improvement of the manner in which the statistical data regarding the tourist activity are collected is also recommended. The extension and improvement of the CIT networking are recommended, so that they may ensure the best possible dissemination of the information sought by tourists. Mechanisms must be created and subsidies must be allotted for the foreign and/ or local investors in order to facilitate investments in tourism; the improvement of the education system (especially the pre-vocational and vocational ones) in the tourism field will contribute to the improvement of the quality of human resources. An important aspect is the improvement of the salary-working conditions rate in order to increase the attractiveness of employment in tourism and hospitality fields and for stopping the migration of the qualified work force.

The second case study dedicated to Transylvania as a tourist destination allowed us to reach the several other conclusions. Transylvania enjoys a very attractive natural and human-made tourist offer which concentrates on of the most valuable tourist resources in Romania. The geographical position – in the centre of Europe – offers Transylvania a series of advantages, in connection both to its accessibility, and mostly to its multiethnic and multicultural character, which makes it a unique and attractive destination, both for the Romanian and for the international tourists. The relief forms and karsts formations constitute a rich and diverse , together with the flora, fauna, reservations and natural phenomena, therapeutic factors, salt lakes, medicinal plants, sports, eco-tourist resources, and hunting resources. The human-made resources are very important elements of the Transylvanian offer, represented by its natural beauty and by the much praised characteristics of its inhabitants, by the history of the region, famous for its characters, and completed by the contemporary and traditional shopping areas from the rural spaces, cultural attractions, philharmonic orchestras, theatres and operas, museums of all kinds, botanical gardens and zoos, leisure and entertainment areas and facilities (relatively few), events and special occasions/ customs and traditions, handicrafts, fixed date cultural and folk manifestations; buildings, monuments and statues, and many other elements, including the local gastronomy and viniculture. The technical-material background is not an advantage for the region but,

under the conditions of new investments in the accommodation infrastructure, it will be able to answer the needs and exigencies of the customers. At present, the Transylvanian lodging facilities are in no better condition than the rest of the country. Price-wise, Transylvania is seen as a cheap destination, with relatively satisfactory services. In order to render distribution and promoting efficient, it is recommended that the DMOs set up in this region – especially those which coordinate activities carried out throughout the region – identify attractive partners in order to promote and trade the local offer.

Finally, the profile of the international tourist who visits the region can be depicted from the general profile of the tourist who visits Romania, according to the interest manifested in the specific offer of the region. Therefore, we can identify three large categories: young people, between 20 and 40, active adults between 40 and 60, and seniors, over 60. Transylvania is seen by international tourists as a destination that can be visited all year long, although the demand is higher in the summer and during warmer periods. Obviously, according to the various target markets, the profile becomes more specific.

Analyzing Transylvania's offer from the point of view of its potential customers we may conclude that the destination enjoy a good current state, with a good improvement perspectives of the infrastructure, of the attractions and of the people, while the influence of these elements on the destination is moderate.

One of the most serious problems of the Romanian destinations comes from the bad management of its resources and from the fact that, in most cases, the offers are not integrated. As a result, we shall point out the most important elements regarding this problem, both from the point of view of the development policies and strategies of the tourist attractions and of the tourist receiving infrastructure, as well as also through the market strategies for a tourist destination's supply management.

Therefore, the incorporation in 1998 of the *Special Fund for Promoting and Developing the Romanian Tourism* by turning into account and protecting the tourist potential of Romania was an excellent initiative. Beginning with 1999, the tourist marketing and tourist development programs, that have become multiannual, are financed from this fund. It is regrettable, though, that the responsible authorities do not have a transparent demeanor on the manner of spending these funds, and that there is no question of the actual measurement of the efficiency of the promoting expenses or those of the investments in the development of tourist products. As a consequence, we recommend NAT to adopt a series of measures regarding the efficiency of these actions, especially that there are specific indicators and an evaluation grid, which are not used. As to the manner in which the authorities can support the development of the Romanian tourism, we would like to point out that government programs such as the *Holiday Tickets* program have the most chances for success by boosting the consumption, while those destined to certain social-professional categories have a limited impact and are not associated with quality tourist products.

The natural and human-made tourist potential must be turned to account. This is possible only by developing the tourist destinations. These efforts can be materialized only with the contribution of serious investments, therefore we appreciate the identifying of the projects financed from European funds as being one of the most valuable sources for financing specific activities, and the optimal solution for their organizing is given by the public-private partnership. On the basis of the data gathered on types of projects already financed, we can demonstrate that, compared to the total number of the projects we have identified, the number of those destined for the development of lodging facilities is superior to those destined for the development of destinations. The projects destined for the development of tourist destinations can be divided into three distinct categories: the modernization of attractions and tourist destinations, the establishing and/ or modernization of TICs and the development and/ or modernization of the access infrastructure.

Unfortunately, the authorities in charge do not process the information they have in order to monitor the efficiency of the spending of the attracted funds. Therefore, we recommend the gathering of data regarding this aspect and the evaluation of the positive impact on the destinations of certain types of projects, respectively, the impact of projects more suitable for the development of destinations.

In the years that follow it is recommended that authorities continue to see tourism as a priority of the national economy and to allocate tourism reimbursable and non-reimbursable European funds, centering on the support and access infrastructure, respectively, on the investments that aim at the development of destinations. In the case of the lodging facilities, the adjustment of the stipulations regarding the maximum number of rooms in a lodging facility, depending on the capacity of the most used transportation means that can reach the area is recommended (the lodging facility established through the SAPARD program are unable to realize a maximum occupancy rate for their bed-places because they are not multiples of the sitting places in coaches or minibuses; in fact, they depend on individual tourists that arrive by car, and they cannot accommodate groups, which are much more profitable). Another interesting future research direction is the investigation of the economic performances of the companies that have profited of European funds.

The development of the lodging infrastructure must be in accord with the priorities regarding the development of the tourist destination. All these aspects must be carefully coordinated and analyzed through DMOs from Transylvania and under the high quality conditions of the services. At the same time, a durable development of the destinations must be ensured, in the sense that the development of the lodging infrastructure must take into account, the protection of the natural and human-made attractions, respectively, the avoidance of the overcrowding of certain destinations, by overdevelopment. Moreover, when allotting financing, investments in less developed fields must also be encouraged. Actually, we consider that the government decision-makers can shift investors' interest from projects destined to the opening of new lodging facilities to those centered on restoration and leisure services, by allotting financial resources. The latter ones have attracted less financing from European funds than the former ones. This is the only way the Romanian destinations will change into diversified destinations.

A series of measures regarding the management of the offer were taken, beginning with firms, as in the case of the tourist management strategies. These measures are more or less applicable for destinations. In order to render the activity efficient, schedules can be set up for those institutions or organizations that come in contact with tourists, depending on the time intervals when their flux becomes more intense, making activity more flexible. Moreover, the schedules of certain service suppliers (e.g. local transporters) can influence the tourist demand, by encouraging it, or, on the contrary, discouraging it during certain time intervals or even on certain days. This strategy can be excellently combined with the programming of the work schedules and work shifts in accordance with the same tourist fluxes. Several activities can be made efficient with the direct participation of the customer to the service. Strategies for creating adjustable facilities in the case of certain services can be implemented, because lodging facilities do not have too much flexibility. In this sense, some measures such as the common use of the capacities that can be shared or the use of mobile installations represent solutions that come at hand to the interested parties. Cross-training of employees can be relatively easily combined with the above mentioned strategies and it ensures useful means for the diversifying of the supplied services. A less attractive measure for the older employees, but a very attractive one for young employees is the use of staff on partial work-schedule basis, respectively, seasonal/ temporary/ occasional employees.

One of the essential problems of the tourist destination offer management is the determination of the optimal accommodation capacity. Taking into consideration the

complexity of such an attempt, the determination of the carrying capacity of Transylvania as destination, as a whole, but also of several categories of destinations, respectively, of the most visited destinations, remains one of the major directions in research up until now.

The international literature brings into discussion several measures regarding the management of the offer. Using formal and informal delimitations of the spaces of the destination, a limitation of the intrusion of tourists into the life of the local population can be ensured (this intrusion can negatively affect it by too intense tourist fluxes; for instance, the case of the American natives' reservations or the case of very frequented destinations, where the quality of life of the local population can recede because of the large number of tourists; this fact can even generate adversity from the host population towards tourism and tourists). Other measures impose a limitation of the access of the tourists in the protected areas; the selection of fixed lodging facilities over flexible ones in order to limit the number of the tourists; the establishment and implementation of development standards so that they ensure a balanced development of the destinations. This last strategic measure must be taken into consideration by the responsible authorities in Romania in order to avoid and/ or limit the further chaotic development of certain destinations. Unfortunately, such situations are very difficult to correct later, sometimes the harm they have already done is irrecoverable. The DMOs have a very important role in the implementation of another strategic measure, namely, making exchanges regarding the development priorities in the vision of the interested parties which are also involved, at destination level. Finally, by granting governmental, financial or other types of incentives, the adopting of a certain desirable behavior of the tourist and hospitality service suppliers can be encouraged.

The study on the international competitiveness of the Romanian tourism allowed us to point out several aspects. Thus, the income made per tourist arrival in Romania is much below the one in Central and East Europe, and was negatively affected by the economic crisis, as were other destinations. Similarly, these registered a comeback in 2011. The small amounts cashed in situate Romania among the cheap tourist destinations, as in the case of many Central and East European countries. Romania's performances were analyzed compared to its main competitors, according to WTTC and in the context of Romania's target-markets. On the background of the departures of the Romanian tourists abroad, Romania has become a tourist exporting country. The income made by Romania per international tourist arrival is much below the level of the tourists' expenditures from Romania's target markets. The determination of the percentage of the tourists attracted by Romania from the total number of the tourists who departed abroad from the target-markets of the country is another aspect that has raised interest in connection with the measurement of the efficiency efforts in promoting the destination. Another continuation of the present research would be the in-depth study on the tourists' behavior on the target-markets and the calculation of several indicators specific to the measurement of the international tourism for each country taken into discussion.

Although most of the arrivals in Romania are from the EU countries, the destination remains negligible from the perspective of its market rate on European level and insignificant on global level. Hungary, Bulgaria and Ukraine are the countries where Romania attracts the largest percentage of tourist arrivals from. Unfortunately, the modest, and even very weak performances of the Romanian tourism are disquieting in the context of the evolution of the marketing budget and the budget destined to promote Romania as an international tourist destination, respectively, under the conditions in which there have been too many failed attempts to create and promote a tourist destination brand.

Two distinctive aspects were taken into consideration in the analysis of Romania's competitiveness: Romania's economic competitiveness and the country's tourist competitiveness. Thus, although Romania surpasses destinations such as Albania, Bulgaria,

Croatia, Greece, Republic Moldavia, Serbia and Ukraine, when it comes to tourism the list is reduced to Albania, Republic Moldavia, Serbia and Ukraine. At the same time, Romania has a worse ranking than her main competitors, both from an economic and tourist point of view. On the whole, the destination is situated in the first half of the classification, but, as we have already demonstrated it shows weak performances, the only positive aspect is its higher ranking in the classification. Compared to its competitors, except Serbia, Romania has a lower ranking pertaining to Pillar I, *The Legislative Framework of Tourism and Travel*. The Second Pillar *Environment. Business Infrastructure* does not provide Romania competitive advantages, the only countries Romania surpasses are Ukraine, Serbia, Albania and Republic Moldavia. Finally, Romania's situation does not change with regard to the Third Pillar, *Human, Cultural, and Natural Resources*. Romania is in advantage only compared to Ukraine, Serbia, and Republic Moldavia. It is also important to mention that the nature is not the greatest advantage of Romania, the destination being ranked in the second half of the classification and it is surpassed by the majority of its competitors from the point of view of the sustainability of the environment, therefore the perspectives for the development of the Romanian eco-tourism are not the most optimistic ones.

The empiric research study that was realized consisted of a sum of inquiries based on the implementation of questionnaires, respectively on the realization of certain perception studies. The main objective of the study was the research of certain aspects regarding Transylvania as a national and an international tourist destination with the final purpose of determining the region's tourist potential and of sketching Transylvania's tourist identity aiming at identifying its most important problems and the most appropriate means for the promotion of its tourist supply.

The results obtained after having processed the questionnaires designed for the foreign and Romanian tourists (regarding the manner in which they perceive Transylvania as a national and an international tourist destination, respectively, regarding their tourist behavior and the manner in which they perceive the supply of the local providers of tourist and hospitality services) have led to several aspects, such as those discussed below.

Only very few of the investigated foreign and Romanian tourists have never visited Transylvania; their large majority associate good and very good sentiments to Transylvania. The destination is appreciated as a pretty safe one; it is obviously not associated to dangers as those generated by terrorism; but the tourists, are most probably, conscious that there is a relatively large number of beggars and pick-pockets (issue also identified through the perception studies). Transylvania's supply is evaluated in an objective manner, being appreciated as a relatively cheap destination with rather modest services; more exactly, the low price is associated to services of poor quality both by the international tourists and by the natives.

Transylvania's landscapes are highly appreciated by those who visit the region; still, the Romanians are less enthusiastic when it comes to the well-preserved nature in the context of the well-known problems of the Romanian tourism, also confirmed by the perception studies (pollution, deforesting, humans' lack of civilization, the lack of tourist amenities, etc). The international tourists, as well as the Romanians perceive the leisure supply as yet insufficiently developed; this appreciation is somewhat lower in the case of the Romanians, who seem not to have finished the refinement process regarding their tourist expectations.

Transylvania's cultural heritage, materialized especially into well-preserved customs and ancient traditions, enjoys a positive appreciation both among and Romanians; in fact these elements constitute in the view of the questioned tourists a consistent and attractive supply of cultural tourism. Transylvania's gastronomy does not enjoy in the case of the international tourists an appreciation as high as that among the natives, probably because of the low notoriety of the regional foods and wines abroad; at the same time, to this situation there

also contributes the insufficient number of restaurants with local and regional specific, respectively of other public restoration facilities that aim at promoting the local gastronomy, while the international cuisine is too well represented.

The quality of the people and the legendary hospitality of the Transylvanians enjoy a high appreciation both among the international tourists and the Romanians. Multiculturalism represents one of the most valuable elements of the region, for the foreign tourists, while this statement is only partially valid for the Romanian respondents. Moreover, the processing of the responses obtained for the perception studies has revealed that this feature of the destination tends to be negatively perceived by the local population. The Romanian tourists consider that Transylvania enjoys a very generous and highly valuable eco-tourist potential.

Despite the fact that given the relatively low prices Transylvania could have a competitive advantage in the context of the economic crisis, the Romanian tourists have agreed with this idea only in a low measure, perhaps because they seem to be more dissatisfied by the quality of the provided tourist and hospitality services than the international tourists are. Another reason for this perception lies in the fact that Transylvania is not very popular among the Romanians because it does not have a clear identity in their minds. Thus, an image of the destination must be created which must be promoted on the internal market. On the other hand, from the point of view of the destination's identity, it is clear that it enjoys a better recognition among the foreign tourists. Finally, still closely linked to the destination's brand, the idea of promoting Transylvania in association with Dracula emerges. This would only be attractive for some of the international tourists, while the Romanians would not give it a high appreciation.

In the case of the foreign tourists the stress has fallen upon the cultural offer and the natural potential of the destination. The mountain destinations enjoy a good appreciation as they enable the practice of outdoor activities and of sports, such as hiking and tracking. Gastronomy is also positively appreciated by the international tourists. The most relevant aspects highlighted by the Romanian tourists were: mountain tourism, medieval towns, traditional villages, Saxon fortified churches, religious tourism supply, regional gastronomy and local drinks, as well as the Transylvanian proverbial hospitality.

After having processed the responses regarding Romania's most recognized personalities abroad, we can note the most frequent and relevant nominations: Dracula, Ceaușescu, Mihai Eminescu, Lucian Blaga, Liviu Rebreanu, George Coșbuc, but also Gheorghe Hagi, Gică Petrescu, Cristian Chivu, Ilie Năstase, Nadia Comăneci or Adrian Mutu. His Majesty King Mihai the Ist of Romania, a true ambassador of Romania's culture and national interests abroad, may be added to the list. Of course, many more potential carriers of Transylvania's tourism promotional messages can be identified, both abroad and in the country. The lists of the Romanians and those of the international tourists had many common elements. When asked to mention tourist destinations from Romania, most of the foreign respondents provided examples from Transylvania. In this case there is a significant overlap between the answers of the international tourists and those of the Romanian's, with the observation that the latter ones were asked to mention outstanding destinations from both urban and rural areas. The tourists were also asked to indicate the most interesting festivals and cultural events. Briefly, in Transylvania there are some key destinations: Maramureș, Sighișoara, Sibiu, Brașov, Cluj-Napoca, mountain destinations in the Făgăraș and Retezat Mountains and also the Apuseni Mountains National Parc. The most notorious cultural events and festivals are: TIFF, The Jazz Festival from Sibiu, The International Theatre Festival from Sibiu, The Peninsula Festival, The Medieval Arts' Festival from Sighișoara, The Golden Stag from Brașov, The Girls' Fair on the Găina Mountain, etc. In Transylvania's promotion different local products and brands must also be included, such as: *mititei*, Dacia, Ursus, Gerovital, Syekely Kalacs, Năsal and *burduf* cheese, Jidvei wines, Borsec, Herculane etc. mineral waters, plum and fruit *țuica* etc.

The answers provided by the tourists when asked to mention positive and negative aspects they link to Transylvania as a tourist destination are very similar to those indicated by the young Romanians (involved in the perception studies). Thus, the main positive aspects named by the Romanians and by the tourists (Romanian and foreign) refer to: the destination's cultural heritage and to its multiculturalism; these are doubled by an attractive tourist supply generated by a relatively well-preserved natural environment. Transylvania is perceived as a destination that enjoys a rich and diversified supply, respectively very hospitable people. Most of the problems faced by Transylvania as a tourist destination include: the access and support infrastructure, the political-administrative environment, the poor quality of the services provided by accommodation and restoration facilities, the unattractive quality/ price quota, the level of education of the employees and the quality of their interaction with the customer. The most significant difference noticed among the perspectives of the tourists and of the host-population appears in the case of multiculturalism, as shown: positively perceived especially by the foreign tourists but with negative connotations in the case of the Romanians.

The main conclusions drawn, based on the researches regarding the tourist behavior of the international tourists and of the Romanians who have visited Transylvania, are briefly presented in the coming lines. Thus, the international tourists choose Transylvania for: visiting friends and relatives, relaxation, cultural interests and rural tourism. For the Romanians the main purpose is also visiting friends and relatives; other preferred purposes include: weekend tourism and mini-vacations, respectively longer breaks; cultural tourism and mountain tourism (hiking during the summer and winter sports). Significant percentages of both foreign and Romanian visitors intend to revisit the destination. In the case of the preferred activities similar preferences can also be identified in the case of the foreign and Romanian tourists; the top preferences of both categories include: visiting of religious and cultural objectives, discovering the local specific, eating in restaurants, carrying out various cultural and recreational activities, hiking, discovering the nature, and, of course, visiting friends and relatives.

The study of 2009 regarding the behavior of the Romanian tourists has revealed that they are still relatively highly interested in the native destinations, among which Transylvania enjoys a privileged position. Moreover, compared to the international tourists, the Romanians tend to be more conservative, preferring to celebrate the important religious holidays at home with their families. Most of the Romanians' tourist travels take place during the summer and they mainly target national or international seaside destinations; these are followed by the mountain destinations, especially frequented for winter sports. Still, an increasing demand for external destinations, both seaside and ski, is registered.

The international tourists mainly opt for Transylvania during the summer but there are a considerable number of respondents who do not depend upon a certain season. The main chosen Transylvanian destinations are: the medieval towns, the mountain resorts and the rural areas. A significant proportion of the foreign tourists (almost a third) prefer tourist circuits. The Romanians prefer to visit Transylvania during the summer, respectively in the winter, or in any seasons. Their favorite types of tourism are: rambling, mountain active and adventure tourism and ecotourism. To following must be added to these: rural and agritourism, respectively cultural, spa and circuit tourism. About half of the respondents are not interested in gastronomic and religious tourism, while nearly a third rejects citybreaks, circuits and even spa tourism. The international tourists are especially interested in medieval towns, the Castle of Bran, traditional villages, Transylvanian churches and the Carpathian Mountains.

Regarding the chosen lodging facilities, international tourists prefer: hotels, urban and rural boarding houses, respectively villas, classified at 3-4 stars/ flowers; seldom structures

classified at 2, respectively even 5 stars/ flowers are taken into consideration. A significant percentage of the foreign respondents opt to accommodate with relatives and friends. Rural boarding houses, followed by urban ones, respectively by villas and hotels represent the top preferences of the Romanians: regarding the level of classification, the same trends appear as in the case of the international tourists. In fact, about a half of each category of the respondents choose lodging facilities classified at 3 stars/ flowers, which indicates their orientation towards average budget accommodations, that provide a decent level of comfort and a set of needed services, without being luxurious. One must note that the Romanians have lower expectations regarding the provided services and the quality of their overall experience, as they prefer rural boarding houses, while international tourists opt for hotels, which offer a superior comfort level. The international tourists tend to spend longer vacations in Transylvania as compared to those of the Romanians. Thus, 40 % of the international tourists declare average durations of stay of 2-5 nights, while 59 % of them spend 6-10 nights at the destination, as opposed to the Romanians: 48 % of them have journeys of 2-5 nights and only 10 % stay between 6 and 12 nights in Transylvania. These facts suggest a diminishment of the Romanians' interest towards the spa tourism supply but indicate both in the case of the international tourists and of the Romanians a clear preference for cultural tourism (more obvious for the international tourists and rather under the form of weekend and short break trips for the Romanians).

The internet represents the means of information that is most frequently used both by the international tourists and by the Romanians. Specialized TV shows and documentaries enjoy a great credibility. At the same time, the relatives and acquaintances of Romanian origin, respectively the persons who have already visited the destination are considered highly reliable information sources. Most of the Romanian respondents are willing to get directly involved in promotion activities for the native destinations (and have already done so).

Based on the provided responses, the competing destinations chosen both by the international tourists and by the Romanians have been identified. Once again, several identical responses occur, the most relevant being: Hungary, Czech Republic, Slovakia and Bulgaria. In the case of the Romanians, the most attractive external competing destinations are: Austria, France, Switzerland, Italy, Czech Republic, Croatia, Germany and Hungary.

In the case of the Romanians a few other aspects considered relevant have been studied. Thus, the main conclusions that can be drawn are: most of the social programs dedicated to the stimulation of inbound tourism do not raise the interest of the Romanians and only have a limited impact upon the tourist activity. Transylvania is the favorite tourist destination of the large majority of the Romanians (around 80 %) but linking this information to the fact that only 40 % of the same respondents prefer native destinations to external ones, we end up having to point out that it becomes compulsory to increase the interest of the Romanians towards internal tourism; in this respect there ought to be initiated coherent tourism development and promotional programs. Such measures would also contribute to the increase of the percentage of those who choose Transylvania as a tourist destination for its supply and not for reasons such as not having enough money to travel abroad or because it is nearby. The Romanians admit only partially that the Transylvanian destinations have a competitive advantage determined by the lower prices compared to those of other similar external destinations; this opinion is most clearly also influenced by the fact that they perceive negatively the quality of the provided services. Around 70 % of the respondents have admitted that they have chosen native destinations in favor of external ones because of the economic crisis. The respondents do not perceive the development of tourism as a factor that would lead to the destruction of the cultural-historic heritage of the region.

Finally, based on the study concerning the tourist demand of the Romanians, three types of tourist packages worth to be developed have been identified: tourist circuits centered on myths and legends, adventure tours, and gastronomic circuits. Circuits such as: theme circuits focused on black tourism, respectively on literature would also enjoy some interest. Around a fifth of the respondents are not interested to experience any new tours, being only interested in those types of tourism that they already practice.

The verification of the existence of certain correlations among the identification variables of the respondents and the provided responses facilitates a better understanding of the tourist behavior of the international tourists and of the Romanians. In the coming lines the results obtained after having calculated the *Pearson* correlation coefficient and having run the *ANOVA* test are briefly presented.

A first analyzed aspect was to verify if there is a relation between the age of the respondent and the type of tourism they practice or the destination they choose in Transylvania. It has been concluded that in the case of foreign tourists the only type of tourism influenced in a moderate measure by the age of the respondent is adventure tourism and practicing extreme sports. Moreover, it has been observed that the age of the foreign respondents does not have an influence upon the chosen destination (urban area, rural area, mountain resort, spa resort or circuit).

After having run the tests it has been concluded that the international tourists' incomes do not have any influence upon a considerable set of parameters (tourist travels for adventure purposes; the level of planned/ estimated expenses per person in the case of Transylvanian destinations; the appreciation of the destination's safety level; the appreciation of the services' quality; the evaluation of the quality/ price quota, and the appreciation of the local gastronomy). In fact, in the case of the foreign tourists there could not be identified any variables directly influenced by the respondents' income level.

The level of education is another important parameter as it was also included in the process of establishing the samples' quotas but the statistical tests have revealed that there does not exist any obvious relationship between the level of education and certain variables that characterize the international tourists' tourist behavior (cultural purpose, participation in cultural events, practicing ecotourism or appreciating multiculturalism as an attractive value of Transylvania). No relevant situations regarding the significant influence of this variable upon the tourist behavior of the international tourists have been identified.

It has also been verified whether the decision to choose Transylvania as a tourist destination for cultural purposes determines any significant influences upon variables such as: the preferred lodging, the sought level of classification and the allotted budget per person. It was concluded that no significant relation between the considered variables occurs. Moreover, the budget allotted per person does not influence the appreciation of the staff involved in accommodation services, respectively in the restoration services. Furthermore, the international tourists' expectations regarding the services they expect to receive for free or for which they are willing to pay do not depend upon the allotted budgets.

The previous visits have not influenced the foreign tourists' in their decision to return to the destination but they have positively affected the sentiments they associate to Transylvania.

Finally, practicing gastronomic tourism is not related to the appreciation of the wines produced at the level of the destination but it has led to the establishment of a statistically significant relation between the independent and the dependent variables, in the sense of appreciating the food as being good.

The relation between the age of the respondent and the purpose of their visit in Transylvania has also been studied in the case of the Romanians. Thus, an influence of the age upon the decision to practice escape and relaxation tourism, respectively upon the visits

realized for special interest (romantic vacations and the celebration of the major Christian holidays) has been revealed, as well as in the case of business tourism. In the case of the Romanians, the age has proven not to influence elements like: appreciating multiculturalism as the most valuable feature of Transylvania; accepting Dracula as regional brand; appreciating the quality/ price quota; considering social programs as being attractive or characterizing Transylvania as the favorite destination in Romania.

In the case of the Romanians it has been concluded that the income does not influence variables such as: the type of the chosen lodging facility; the purpose of the visit; the practiced type of tourism; the length of stay; the characterization of Transylvania as cheaper than other similar external destinations; the interest towards the development of adventure circuits; the approval of the statement that the economic crisis has determined the choice of Transylvania as a tourist destination in favor of an external destination; the previous selection(s) of the destination; the intention to revisit the destination; or considering Transylvania to be the favorite Romanian destination. But the income generated statistically significant changes upon the following variables: the budget allotted per person who travels for tourist purposes in Transylvania; the appreciation of the quality/ price quota as being optimal in the context of the provided services; and the attractiveness of the social programs.

As in the case of the international tourists, in the case of the Romanians the level of education has proven not to significantly influence elements such as: practicing cultural tourism or visiting for cultural purposes; but relations between this variable and the appreciation of multiculturalism as the most valuable feature of the region, respectively the acceptance and support of using Dracula's name in the region's brand have been identified. Regarding the tourist behavior of the Romanians, one may note that their average duration of stay is not influenced by the manner in which they perceive and evaluate the accommodation, restoration, and auxiliary and leisure services. The tourist purpose does not always generate significant influences upon this parameter (visiting friends and relatives, or cultural, medical or religious interests). The area of origin has proven to be a determining factor in the establishment of the length of stay at the destination in the case of the Romanians.

Finally, unlike in the case of the international tourists, in that of the Romanians, the previous decision(s) to choose Transylvania as destination is indirectly correlated with the intent of returning to the destination.

The study regarding the tourist and hospitality supply of Transylvania has led to several relevant aspects that are presented further on. The analysis regarding the services that the foreign visitors expect to be provided for free, respectively for which they are willing to pay extra has revealed that the providers are in a great measure realistic, their supply managing to properly respond to the international tourists' expectations. We consider that in the case of rural and agritourism the development of some products that would also include the possibility to carry on traditional activities is welcome and has good success chances. Moreover, based on the expectations of the international tourists, it is recommended that some providers extend the services they offer by including babysitting, rent-a-car, beauty salon, mini-casino, fitness room, transfer services to/ from the railway station/ bus station/ airport etc; these would not imply high investments, in most cases implying the association with other providers but they would increase the clients' satisfaction, and, even more, they would generate more revenues.

Another relevant aspect is the identification of the customers' profile. The percentage of over 50 % of business tourism arrivals, declared by the providers, is surprisingly high. As expected, the tourist arrivals are dominated by the Romanians, followed by Romanians and international tourists in equal proportions (more precisely, there are two types of firms, some

that have mainly Romanian clients and others that register national and international arrivals in equal quotas; there are no firms that have mainly international arrivals). According to the purpose of the visit, the facilities declare especially leisure and holiday arrivals (70 %) but also transit (60 %). These are followed by cultural tourism (25 %), visiting friends and relatives (18 %) and medical tourism (18 %). The large majority of the arrivals are registered at any moment during the week, respectively during the weekend. The average durations of stay are mainly 2-3 nights, respectively of one night and 6-7 nights. Only a very small number of the firms register average lengths of stay of 10-12 nights. Almost a quarter of the respondents have not provided any information regarding the moment of the arrival, respectively the length of stay. A deeper analysis has revealed that in the rural areas mainly arrivals for one night or 6-7 nights and most of the weekend arrivals are registered. As expected, most of the tourist arrivals registered by the investigated facilities occur during summer (75 %); the seasonality character is higher in the case of the lodgings from the rural areas; then the cold season follows (at a great distance). The other two seasons account for very few arrivals. Only around 9 % of the structures have tourist flows that are independent from the seasonality character. The relatively short lengths of stay can be explained through the poor supplies of the destinations, which can only maintain the interest of the tourists for a short while. The fact that the urban area is less affected by seasonality is linked to business tourism and also to cultural and medical tourism.

Around 43 % of the companies consider that the local or regional events do not influence their tourist activity. The rest of the respondents have indicated local and regional cultural and folkloric events, respectively gastronomic festivals and the celebration of the locality, as well as also sports competitions and business reunions as being the main types of events that determine an intensification of their tourist flows. Most of these events actually coincide with those mentioned by the foreign and Romanian tourists. Most of the firms declare that their activity equally relies on accommodation and restoration services (42 %) or mainly on accommodation services (38 %), the remainder either provide mainly restoration services or have other revenue generating activities, as well.

The communications means which are mainly used by the tourists in order to make reservations are the telephone, followed by the internet (through their own websites and through specialized sites). The travel agencies and the front desks of the lodging facilities follow, in almost equal proportions (obviously, mainly used by transit travelers). The specified order perfectly reflects the behavior of the foreign and Romanian tourists.

The analysis concerning the materials the lodging facilities provide their visitors has revealed that most of them offer informative materials regarding the destination, about half of them provide the portfolio of the lodging facility but only a little over a third of them use customer satisfaction surveys. About a quarter of them provide lists of the restoration facilities, respectively calendars of the cultural-artistic and folkloric events that take place in the area. The fact that 9 % of the units do not provide anything must be corrected, given the fact that the international tourists, as well as the Romanians, expect to receive at least informative materials referring to the tourist objectives and attractions of the destination.

The study designed for the lodging facilities has also aimed at identifying certain aspects regarding their management. When asked to appreciate the position of their facilities in relation with the targeted clients, most of the facilities have responded *good* and *very good*. Only a few structures (less than a fifth) consider their position neither good, nor bad related to their customers, while only a very low percentage (3 %) of the sample members consider it weak. The representatives of the accommodation facilities have proven to be at least as optimistic when they were requested to evaluate the performances of their staff. We dare doubt the excellent evaluations (graded *very good* or, even, *excellent*) of their own employees from areas such as: accommodation (92 %), restoration (74 %) and auxiliary and

leisure services (77 %) because of the fact that both the foreign and Romanian tourists evaluate them as being no more than satisfactory and tolerable but under no circumstances excellent. In fact, the same position, if not even less favorable, was expressed by the young people who have expressed their opinions regarding the positive and the negative aspects that characterize the Transylvanian tourism.

The correct appreciation of the human resources and the capacity of properly anticipating the actions of the competitors are determinative for the success of any company. Thus, based on the received responses it has been noted that approximately a half of the respondents appreciate that they do not have any competitors on the market (another questionable position from the perspective of the respondents' realism!). Most of the respondents who consider that they have market competitors identify them among the similar structures (by type and by level of classification). Among the identified competitors other types of lodging facilities that are classified at the same level or above appear. The lodgings that have a lower level of classification are ignored although the market provides many examples that contradict such opinions. Paradoxically, despite the fact that many firms declare that they do not have any competitors on the market, or that they only have one or two, most of the respondents have indicated the fact that they clearly surpass their competitors when it comes to the quality of the provided services (another position that enables the questioning of the respondents' seriousness). The exaltation of the tourist and hospitality services providers referring to their own performances is harmful and, moreover, explains the current state of Romania's tourism. The answers provided when asked to identify the distinctive features of the lodging facilities do not manage to prove any more the respondents' realism. Once again, there are paradoxical situations. Thus, the quality of the provided services is declared as being the main distinctive feature (70 %) under the conditions in which only 40-50 % has identified at least one competitor. The assumption that the name of the lodging facility generates a distinctive element for nearly half of the investigated samples, is even more peculiar, under the condition that the names of most of the facilities are, in fact, absolutely common.

A positive aspect results from the fact that most of the promotional activities for the offers of accommodation services are realized through the communication means used by the targeted clients. On the other hand, the fact that 61 % of the respondents have declared not to have taken part in any governmental program for the stimulation of the Romanian tourism suggests, up to a point, the lack of attractiveness of such programs from the perspective of the suppliers, as well, not only from the perspective of the consumers. *Vacation Tickets* is the program preferred by the firms, followed by *Countryside Vacations*, *A Week of Recovery* and *The spa Decade*.

The fact that the large majority of the respondents have shown that next to the promotion of their own supply they also take into consideration the promotion of the destination is encouraging from the perspective of the present approach. Such a position can release some of the financial pressure exerted upon the destinations' promotion budgets but it raises the problem of developing coherent promotional materials at destination level. Only about half of the respondents get involved in the life of the community.

In the case of the responses provided by the representatives of the lodging structures the existence of certain statistically significant relations among certain variables has also been verified.

Thus, a first observation was that the type of the lodging facility does not influence the number of the services provided for free, nor those dictated by the level of classification but it influences the number of services provided for extra charges and the number of services that are not provided. Similar situations also occur in the case of the influence determined by the level of classification, respectively by the localization of the lodging facility upon the

number of provided services. Statistically significant relations between the level of classification and the services provided for extra charges, the services dictated by the classification system, and the services that are not provided have been identified. Relations between the localization of the structure and the paid services have also been identified.

The analyses have proven that there are no statistically significant connections between the localization of the facility and the average duration of stay (in the cases of: one overnight, 1-3 and 10 overnights) but a relation between the localization and the stays of 6-7 nights has been established.

The level of classification has proven to directly influence in a relatively strong measure the price of a single room and in a low measure that of a double room. The pricing policy for a single room does not determine any influences upon the number of services provided for free of for charge but it determines the number of paid services, of services dictated by the system of classification and by that of the services which are not provided (in this case the relation being a relatively strong one).

The localization of the facilities regarding the targeted clients has proven not to determine any influences neither upon the occupancy rates, nor upon the price per single room. The occupancy rate does not depend neither on the level of classification, nor on the number of provided services free of charge, nor on the number of services dictated by the level of classification; but a direct link between the occupancy rate and the number of services provided for extra fees has been identified. There is also an indirect connection between the number of services that are not provided and the same occupancy rate. Finally, no statistically significant relationship between the price per single room, respectively that per double room and the occupancy rate of the lodging facility could be identified.

After the research conducted in 2011 regarding the international tourists' and the Romanians' spontaneous associations with Transylvania, one can remember several tags and expressions that define the tourist destination: archaic, beginning of the world, legendary, rural, rustic, secular, heritage, ancient, old, architectural, architectonic, artistic, cultural, folklore, folk music, historic, medieval, new and old in equal measures, authentic, inimitable, genuine, original, with personality, unique, unforgettable, rich, plentiful, complete, sought, famed, convincing, culminant, known, famous, curious, civilized, European, occidental, classic, clean, neat, tidy, smart, developed, evolved, dynamic, strong, diverse, complex, mixed, generous, full of possibilities or of resources, varied, interesting, mysterious, profound, romantic, valuable, harmonious, hilly and mountainous, outstanding, different, indescribable, novel, memorable, priceless, precious, special, spectacular, ecologic, natural, pure, savage, luxurious vegetation, colorful, green, grown green and beautiful, flourishing, outstanding landscapes, picturesque, splendid, marvelous, stunning, brand-new, clean air, fresh, hardworking, hospitable, friendly, welcoming, sociable, tolerant and happy, multicultural and multilingual, human, honest and true, warm, calm, quiet and tranquillizing, mild, slow, soothing, relaxing, comfortable, easement, cosmopolite, modern, progressive, Christian, pious, spiritual, open, positive, energizing, inculcating thirst for life, tonic, glad, veiling and vibrant, living, eternal, forever, breathtaking, charming, a dream come true, story-like, enchanting, enthralling, fabulous, fantastic, charming, formidable, mythic, idyllic, conquering, marvelous, wonderful, outstanding, mystic, "Near a low foothill/ At heaven's doorstep", amazing, luring, fascinating, inciting, intriguing, passion, surprising, attractive, inviting, grandiose, impressive, imposing, magnificent, majestic, important, big, remarkable, unaltered, traditional, traditionalist and yet modern.

Referring to the hypotheses established before the implementation of the research studies we can establish which ones have been confirmed, respectively rejected by the results obtained.

The processing of the responses provided in respect with the general hypothesis of this paper, *Transylvania is an interesting destination for both foreign and Romanian tourists*, leads us to the conclusion that it is valid for both categories of tourists.

After having analyzed the results, one may determine which of the secondary hypotheses meet the opinions of the foreign and Romanian tourists. The statement *As an international tourist destination, Transylvania is perceived positively by the foreign tourists* is valid, being confirmed by a very large majority. The next assumption was: *Transylvania enjoys a better international image than that of Romania*; one may conclude that indeed Transylvania's image is better than the image of Romania but not in the categorical sense of the hypothesis; it is only somewhat better than Romania's image, thus, the country is not placed on an inferior position. Therefore, it is considered that this hypothesis is only partially valid. The next hypothesis was: *Transylvania has a huge tourist potential that has not been properly exploited and promoted*. The conclusions of the analyses regarding the destination's supply confirm the assumption, as an extremely large number of tourist resources are situated in areas where the specific infrastructure has not been developed and the support infrastructure is poor. Moreover, foreign tourists, as well as the Romanian ones are highly interested in the cultural and natural tourist potential of the region. Another hypothesis was formulated as it follows: *The cultural elements and ecotourism represent the most appropriate elements for Transylvania's positioning on the international tourist market*. By studying the responses provided by both Romanian and foreign tourists one may conclude that it is valid in both cases. The statement according to which *Business tourism is a component that must be exploited in the development of Transylvania as a tourist destination* can be validated under the conditions in which, indeed, compared to Bucharest, Romania's main business destination, Transylvania does not have a very well developed supply of business tourism services but one should keep in mind that the development of business tourism is closely linked to the general development of the businesses and that it is one of their consequences. On the other hand, the analyses have revealed that the providers consider that their supplies are largely oriented towards business tourism and they also appreciate them as adequate. We have tried to verify the measure in which the Romanian tourists admit the fact that Transylvania is a tourist brand by the next hypothesis: *Transylvania does not have a clear image in the minds of the Romanians*. As only very few of the respondents have accepted the hypothesis, it was invalidated; thus, the authorities are recommended to concentrate their efforts towards the consolidation and promotion of the destination's image on the internal market.

The next two hypotheses were rejected: Considering the provided services, the foreign tourists appreciate the quality/ price quota as optimal and: Considering the provided services, the Romanian tourists appreciate the quality/ price quota as optimal because of the fact that the international tourists, as well as the Romanians accept (tolerate) the quality level and do not consider the price to be optimal but no more than a questionable quality. In the cases of the next two hypotheses there is only a partial acceptance (somewhat enforced): For the foreign visitors and for the Romanian ones, too, Transylvania is known as a destination with good food and For the foreign visitors and for the Romanian ones, too, Transylvania is known as a destination with good wines. Gastronomic tourist products have not yet been developed but the local supply of food and wines is indeed appreciated by those who discover it. The hypothesis: Foreign and Romanian tourists consider that Transylvania is a safe destination has been validated in both cases. The fact that The Romanian tourists are less and less interested in the native destinations leads to the acceptance of the hypothesis as it was formulated and strengthens our belief that the destination must also be promoted on the internal market.

From the perspective of the foreign tourists the hypothesis *Multiculturalism is a key element of the region* is validated, while only a few Romanians agree with that. In order to successfully use multiculturalism in sketching the region's brand and in promoting its supply, this cultural value must be recognized and accepted by the local population.

Finally, the last hypothesis was also validated: There is a close relationship between the poor level of the services provided in Transylvania and the moderate interest shown by the visitors of the region.

One of the most important objectives established at the beginning of this research was to identify the elements that can be used by the DMOs, established at the destination level and within its regions, in order to increase the efficiency of their destination management activities and to increase their success chances through the elaboration of the tourist destination brand for Transylvania; thus the following lines are dedicated to the presentation of the most relevant aspects in this respect.

The first step of the brand strategy consists in establishing the region's strategic elements and identifying the uniqueness elements of the destination, that can be used in its brand construct. Thus, a first strategic element results from Transylvania's position on the map of Europe: the milestone that marks the center of the European continent [Oprîș, 2000] is situated in the North of Maramureș; as one may notice, the region is practically situated in the center of Europe (equal distances in straight line towards East, West and North), therefore we suggest to promote Transylvania as the *heart* of Europe.

Considering the identified multicultural character one may point out the second strategic area of Transylvania. The very rich but unexploited tourist potential, corroborated with a great variety of types of tourism provided by the region; most of these are covered by cultural and nature based tourism (ecotourism, ethnic tourism, literary circuits, religious tourism, sports tourism, leisure tourism, health and cure tourism, themed circuits, rural and agritourism), indicate a third strategic field.

In order to define or to identify the uniqueness features of Transylvania from the point of view of tourism, we recommend the use of the following variables: a) *the experiences offered by the region*: multiculturalism, rural life, direct contact with the nature, access to traditions, getting to discover the local gastronomy, the possibility of getting healed by the aid of natural objectives, gastronomic tours and wine routes, themed circuits (*Dracula*) and other tours; b) *the values and virtues of the Transylvanians*: renown hospitality, the increased role of the family in social life, religiosity, love of traditions, the relationships human-nature and human-culture; c) *the emotional benefits generated by visiting Transylvania*: the region's heritage generated by multiculturalism, the people's friendliness and hospitality, the enrichment of the visitor's culture with the unique experiences provided by Transylvania, the joy to discover a region that offers pleasant surprises, the possibility to taste the beauties of a still savage nature; d) *the sentiments induced by the region to its visitors*: safety, inner peace, simplicity, naturalness, freshness, legends and myths, multiculturalism, urban and rural conviviality, traditions.

An important aspect regarding the orientation of the DMOs' efforts consists in the identification of the general features of the targeted tourists: a) foreign tourists from the target- and opportunity-markets; thus, they will be from Europe (EU and non-EU) but also from North America and Asia (especially from Japan and China); b) with ages mainly between 20 and 55 years but also above 55 years; c) with average or above-average incomes; d) interested in ecotourism, multicultural values, and especially in cultural tourism. A special attention must be granted to the Romanian visitors.

The effects expected based on these actions of the region's DMOs are: the increase of the number of the foreign and Romanian tourists who visit Transylvania; the loyalization of both foreign and Romanian visitors; the development of side industries; the increase of the

Transylvanians' standard of living; the increase of the region's notoriety and prestige. The main purpose of this approach is to: promote Transylvania as an eco-tourist and a multicultural destination on national and international levels; the established objectives are: the development of the market; the personalization and the positioning of Transylvania among other destinations of the EU; the discovering of the true Transylvania; the region's prosperity based on tourism and on the adjacent services, and indirectly by increasing the number of foreign investors.

The symbols and tourist objectives recognized as key values by the foreign and native visitors, respectively by the host-population occupy an important position in the DMOs' strategies because they represent means of differentiation for the region. The region's multiculturalism is a value recognized by the international tourists and it must be promoted abroad as such; at the same time, there must be initiated actions for its acceptance among the local population. The well-preserved nature represents another symbolic element of the area. The wooden churches – genuine masterpieces that have survived over centuries – have a special heritage value and also represent a unique element of the region. Another category of tourist objectives worth to be promoted are the earth or stone fortification and the Saxon and Hungarian fortified-churches, quite numerous in Transylvania. The rural architecture is also included in this category of symbolic elements. Transylvania abounds in fascinating examples regarding the variety of its buildings.

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