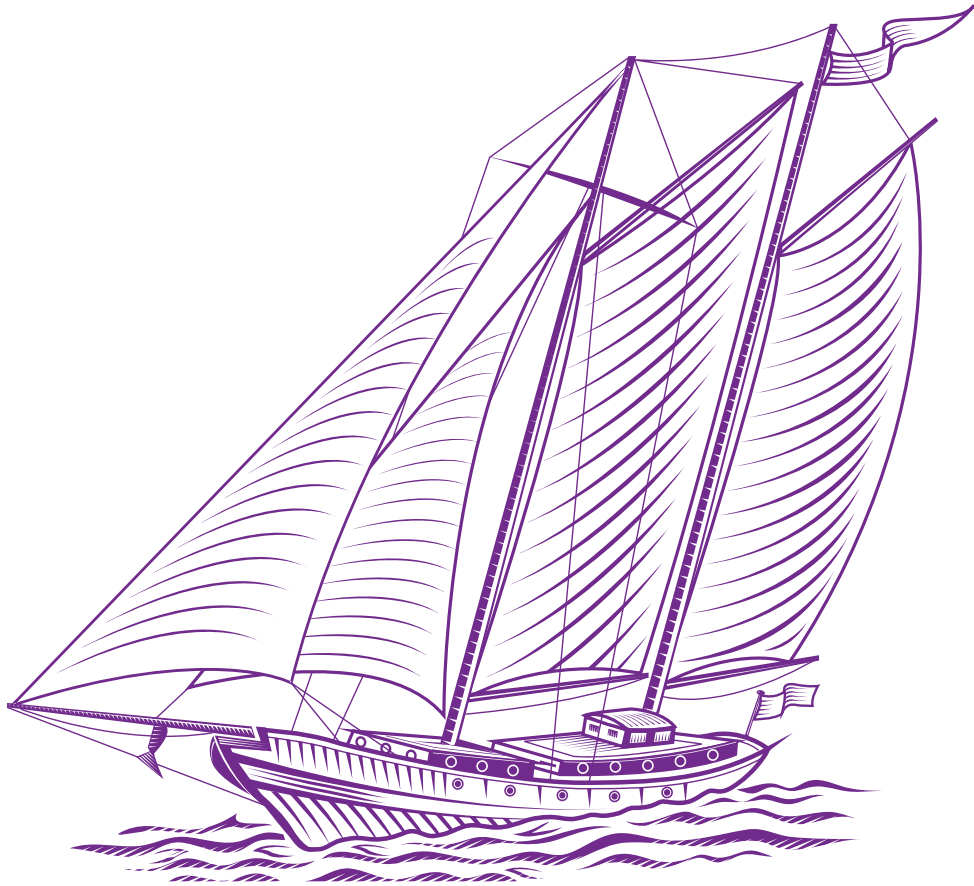




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## **EXTENDED MARKETING MIX (7PS) AND HRM RECRUITING. HOW TO SELL A JOB**

**AURELIAN SOFICĂ<sup>1</sup> AND SMARANDA COSMA<sup>2</sup>**

**ABSTRACT.** The need to merge marketing and human resource management gained momentum in the last two decades. The paper addresses the extended marketing mix, or the 7Ps of marketing, identifies and operationalize specific HRM components that fit this framework. Employment marketing mix (EMM) offers a framework on which, in a social constructionist manner, real and useful tools can be developed.

**Key words:** human resource management, marketing, employee branding, marketing mix, extended marketing mix, employment marketing mix.

**JEL classification:** M51, M31

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## Introduction

Companies should look at the social, political, economic, cultural and technological trends that are shaping the markets and try to position themselves accordingly (Chartered Institute of Marketing, 2009). This kind of marketing strategy started to permeate the HR recruiting strategy because of the challenges posed by recruiting the Y generation, a generation that is described by Eisner (2005, p.5) in laudatory terms, as “the most technically literate, educated, and ethnically diverse generation in the history”. In this context, companies that need valuable human resources cannot afford to wait for the candidates to come to them but they need to proactively identify them (segment the market in great detail), design a job that fits their profile (just like designing a product or services), persuade them to apply for the job (advertising), select and hire them (close the deal and make the sale) and engage them continuously (post sales and support activities). The need to merge marketing and human resource management gained momentum in the last two decades.

The relation between human resource management and marketing is not a new story, now is almost 22 years in to the marriage. Ambler and Barrow (1996) launched the connection between marketing and human resource management coining the term “*employer branding*” “...the package of functional, economic and psychological benefits provided by employment, and identified with the employing company” (Ambler and Barrow, 1996, p.187), a concept that infused pretty quick not only the academic environment but also the HRM practices. (Dell and Ainspan, 2001). Gradually it became generally accepted that “The labour market... has at last become a true market: wide open, uncontrolled by individual companies, and unconstrained by geography. And executives need to start treating it like a market. No longer can recruiting be viewed as a reactive, largely clerical function buried in the human resources department. It needs to be refashioned to look much more like the marketing function itself. The hiring process, after all, has become nearly indistinguishable

from the marketing process. Job candidates today need to be approached in much the same way as prospective customers: carefully identified and targeted, attracted to the company and its brand, and then sold on the job.” (Cappelli, 2001, p. 141). Reasons behind the investment in the employer branding is the fact that a good image create an inertia for the recruiting process, a continuum hands free recruiting campaign, responsible for generating candidates for the specific jobs but also spontaneous or unsolicited candidates, representing a good indicator for the power of the brand. The companies, especially on this rapid changing labour market realized the importance of proactive recruiting attitude, especially in the face of the powerful influence the generational shift exert over the demographic landscape of the labour market.

The paper addresses the extended marketing mix, or the 7Ps of marketing - identifies and starts the process of operationalizing specific HRM components that fit this framework, building on previous literature and connecting practice with literature. According to Constantinides (2006, p.407), marketing scholars should focus their efforts in formulating the conceptual foundations and marketing methodologies that better address the needs of today’s and tomorrow’s marketer. The same need applies to the specific intersection between HRM and marketing practices. The long term purpose of the paper is to develop coherent tools helpful in human resources sourcing in a more structured, efficient and sustainable manner.

### **Literature review**

The link between marketing and recruiting is quite general, covering various marketing concepts but not addressing the marketing mix. Marketing concepts were used to recruit: sports club members (McKnight et al., 2014), army employees (Dertouzos and Garber, 2006), students for doctoral programs (Holdford and Straton, 2000, Davis and



McCarthy, 2005), graduate engineers (Maurer et al., 1992). Articles that address the *specific link between marketing mix and recruitment* are hard to find. Mitchel and Taylor (2004) and Katherine et al. (2008) recommend using the theoretical framework of marketing mix (4Ps) for volunteer recruiting. Extended marketing mix (7Ps) is used by Galli et al. (2014) to facilitate people recruiting for trials in pharmaceutical industry and by Ivy (2008) in order to help recruiting MBA students in a highly competitive market.

O'Donohue & Hanson (2008), Wickham & O'Donohue (2009) seem to be the first ones that started building a sound interdisciplinary bridge between the extended marketing mix and human resource management - employee relationship. In doing so they developed a conceptual infrastructure, showing how a central tool from marketing theory and practice (extended marketing-mix or the 7P's of marketing) can be translated in to the HR practice (the management of the employment relationship). In order to reach the target of being the *employer of choice or EOC* (strategy of positioning on the labour market on a poll position, in order to attract high-quality employees) and to offer a real *employment value proposition (EVP)* or EVP (unique, specific traits embedded in to the employer brand identity, meant to set the organization apart from competitors in some meaningful way), an organization should align in a cohesive manner the extended marketing mix (product, price, place, promotion, process, people and physical evidence) with the employment practices in what authors coined, *employment marketing mix (EMM)*. This mix should be able in a more coherent way to attract, retain and motivate the targeted candidates/employees. They reframe the employment relationship as a product/service, destined to be consumed on the labour market by potential clients, and paid with their labour/skills. Reframing things like this offers a clearer view over this fuzzy domain, solves the implementation issues associated with translation of the marketing concepts in to the practice of HR and opens a canvas for useful tools development.

Marketing Mix (MM) is considered as one of the “*most important conceptual breakthroughs*” in marketing (Sheth et al. 1988) and represents the core theory of this paper. The original format of the MM was developed from McCarthy (1964) as 4 elements: Product, Price, Promotion and Place. The concept was further established by Kotler (1967) which designed a mathematical model allowing the optimal allocation of the marketing effort based on these four dimensions. Due to its simplicity and practical utility, and in spite of various critics from the academic area, the model was quickly embraced by practitioners (Constantinides, 2006). Marketing mix was extended few years later by Booms and Bittner (1980) from four to seven by adding 3 components suitable for services industry: People, Process and Physical Evidence and according to Rafiq and Ahmed (1995) accentuate the importance of this 3 new dimensions especially in the service marketing area due to the level of social interaction ignored in the previous model. So, the Extended Marketing Mix (EMM) gets 7Ps: Product, Price, Promotion, Place, People, Process and Physical Evidence.

Constantinides (2006) warns about two *major limitation of the classic Marketing Mix (4Ps): internal orientation and lack of interactivity*. Internal orientation means that the 4Ps lacks monitoring the external environment (competition) with specific attention to the frequently changing consumer behaviour and needs (trends). It is a process of innovation and adaptation necessary to respond to these challenges. Lack of personalization is based in the significant shifts in the consumer behaviour (individualization, diminishing brand preference, value orientation, increased sophistication, etc.). Technology not only reduces transaction and switching costs but also offers customers more choices, global access to products and services and new possibilities in addressing individual specific needs. The quality of the personal relationship between seller and customer and successful customer retention are becoming central. The academic contesters of the model identified a series of gaps and proposed new elements or substitute the existing one (Constantinides, 2006). Because of the multiple areas/orientations marketing developed in (consumer marketing, relationship

marketing, service marketing, e-marketing, internal marketing, etc.), the marketing mix dimensions/variables became myriad and hyper-specialized.

One such area adding new insight into the Marketing Mix is *Consumers Marketing* and the main concern is the changing nature of consumer's needs, nature and behaviour. The variables added from this area are: • political power and public opinion (encapsulating customers, environment and competition); • services and staff; • customer, competition, and corporation; • value, viability, variety, volume, and virtue; • product-performance, price-penalty, promotion-perceptions, and place-process (Kotler (1984), Doyle (1994), Ohmae (1982), Bennett (1997), Yudelson (1999) as cited by Constantinides (2006)).

Another area contributing to the Marketing Mix is *Relationship Marketing* – developed on the importance of building customer loyalty through meaningful relations. The variables added from this area are: • customer orientation 4Cs: customer needs, convenience, cost for customer and communication; • Retention Marketing Mix: product extras, reinforcing promotions, sales-force connections, specialized distributions, post-purchase communication; • dynamics of relationships, networks and interaction; • pursuit of personalization: personalization, personnel, physical assets, procedures; • information-intensive strategies: communication, customization, collaboration, and clairvoyance; • Marketing Relationship trilogy: relationship, neo-relationship marketing and networks (Lauterborn (1990), Rozenberg and Czepiel (1992), Gummesson (1994, 1997), Goldsmith (1999), Petterson and Ward (2000), Haley (2001) as cited by Constantinides (2006)).

The third area contributing to the Marketing Mix is *Services Marketing* and deals with the differences between tangibles and intangibles. Services can be seen as separated by products but also as an augmented product dimensions that helps with the differentiation. The variables added from this area are: • participants, physical evidence and process; • elements for services: concept, cost, channels, and communication; • traits needed to be considered in Marketing Mix: intangibility, inseparability,

perishability and variability; • differentiation based on market segmentation and positioning, customer contact and unique vision on quality; • critical factor is the customer experience: actors, audience, setting, performance; • price, brand, packaging, relationship (Booms and Bitner (1981), Brunner (1989), Ruston and Carson (1989), Fryar (1991), Grove et al., (2000), Backwith (2001), as cited by Constantinides (2006)).

The fourth area contributing to the Marketing Mix is *E-Marketing* and deals with the greater engagement of the businesses in online activities. The variables added from this area are: • changes that communication capabilities will bring in the Internet era: product – co-design and production, price – more transparency, place – direct contacts with customer, promotion – more control of the customer, interaction; • E-Marketing the 5W's: who – target audience, market, what – content, when – timing and updating, where – findability, why – unique selling proposition; • principles of building a website: web planning – defining mission and goals, web access – how to get web entry, site design and implementation – content, site promotion management and evaluation – commercial and managerial aspects; • Internet based marketing: Potential audience, integration, marketing support, brand migration, strategic partnerships, organizational structure and budget; • five new P's: paradox, perspective, paradigm, persuasion and passion; • online marketing as: community building, original event programming, convenience and connectivity; • end consumer controls the market, network systems should define the orientation, a new triad needs to be taken in to account – marketer, employee and customer; • 4S model: scope (strategic issues), site (operational issues), synergy (organizational issues) and system (technological issues) (Peattie (1997), Mosley-Matchett (1997), Evans and King (1999), Chaffey et al. (2000), Lawrence (2000), Kambil and Nunes (2000), Schultz (2001), Constantinides (2002), as cited by Constantinides (2006)).

The fifth area contributing to the Marketing Mix is *Internal Marketing* and this area deals with the strategy for developing relationships between staff across internal organizational boundaries

(Ballantyne, 2002) in order to enhance market performance. The 4Ps are turned inward toward staff. Employees are seen as internal customers or internal products based on the assumption that staff satisfaction is directly linked to the client satisfaction. Ahmed and Rafiq (1995) propose a multistage schema built around 4Ps with three levels (direction, path and action). For Internal marketing the 4Ps have a clear HRM connotation. The product is considered the “attractive job” a firm must sell to the employee in order to attract the best people; the price refers to the “unattractiveness of a job when an employee has to deal with (aggressive and unpleasant customers); the place refers to the job-living area proximity and promotion refers to the communication taking place within organization (Flipo, 1986). Rafiq and Ahmed (1992) stressed the importance of the extended marketing mix for the internal marketing (product, price, place, promotion, people/participants, process and physical evidence).

## **Material and method**

The paper aims to provide a better alignment between the employment marketing mix (EMM), with the marketing extended-mix (MEM or 7P’s of marketing). This alignment can be achieved by pinpointing the specific HR employment practices that can be included under the umbrella of Employment Marketing Mix (EMM) and by operationalizing these practices to the level of acceptable measurability.

At the basis of the theoretical model the classical marketing mix model is used (Kotler, 1967, 2017) followed by the extended marketing model (Booms and Bittner, 1980). An extra layer of complexity in some cases is added by addressing more elements of marketing mix generated by the debate covering various branches of marketing: consumer marketing, relationship marketing, service marketing, e-marketing (Constantinides, 2006) and internal marketing (Ahmed and Rafiq, 1995).

The Employment Marketing Mix (EMM) components mirroring the Marketing Extended Mix (MEM) discussed below are: The job (EMM1) as product or service; knowledge/attitude/skills offered by the candidate

(EMM2) as price; place (EMM3) as place; recruiting (EMM4) as promotion; process of employment (EMM5) as process; recruiters or talent scouts (EMM6) as people; and realistic preview (EMM7) as physical evidence.

For each EMM component we tried to identify or propose observable and in some cases measurable dimensions that allow organization to build tools for evaluation or implementation of HRM strategies based on the marketing principles.

## **Results and discussions**

### **The job to be sold (EMM1)**

The job represents the product/service sold to the candidate and is the first component of the employment marketing mix. In order to develop a marketable job, according to HR practices, you need to analyse it, design it and state the technical specifications (job description) in an attractive manner for the candidate.

*Job analysis* (EMM.1.1) is the process of collecting data about a job from various information sources or stakeholders, using various methods to collect information, in order to understand it 360°. So the *diversity of the stakeholders* involved in job analysis (EMM.1.1.1), like supervisors, subordinates, colleagues, experts, clients, family, etc. offers social and professional legitimacy. The *diversity of the job analysis methods* (EMM.1.1.2.), like document analysis, interview, focus-group, questionnaire, employee's journal, experiment, observation, etc. offers methodological legitimacy.

*Job design* (EMM.1.2) is the process of playing with the core aspects of the job identified during the job analysis in order to augment the job and make it more marketable for the candidates or employee's needs. For this purpose the first recommended step is the labour market segmentation. *The recruiting sources segmentation* (EMM.1.2.1) identifies: geographical segmentation, demographic segmentation, lifestyle segmentation, behaviouristic segmentation, segmentation by perceived benefits, appropriate sales techniques and price segmentation. *Job design strategy* (EMM.1.2.2.) takes in to account the four layers of design: design for performance (industrial engineering – structuring the job in order to maximize efficiency), design for motivation (traveling in foreign countries, training, leadership opportunities, salary, mentoring, work/life balance, etc.), design for security and health (ergonomics of the workplace, safety laws and regulations embedded in to the job) design for CSR (responsibility for community, environment, and economic help for disadvantaged social classes) (Hollenbeck and Wright, 2011, p. 142).

*Job description* (EMM.1.3) is the output document of the job analysis and it details the core technical specifications of the actual job. The *job purpose* (EMM.1.3.1) is clear in the organizational context (job title, department, supervisors, subordinates, clients, objectives, etc.). The *working environment* (EMM.1.3.2) is well mapped - working schedule, annual leave, pay, physical and social conditions, resources at disposal, travel, authority limits, etc. The *duties* (EMM.1.3.3) and specific activities associated with the job are clearly described and have qualitative and quantitative performance standards attached. The *personnel specifications* (EMM.1.3.4.) identify the essential and desirable traits of the employees occupying the job - education, certificates, experience, knowledge, skills, personality traits, physical traits, etc.

### **Knowledge/attitudes/skills to be offered by the candidate (EMM2)**

EEM 2 is the equivalent of the price in MEM and represents the experience, knowledge, attitudes, skills, etc. that the candidates are ready to pay/ exchange in return to the job they will occupy. In this regards it is important to have a balanced contract, understand how the market condition influence the pricing and have a sound price positioning strategy.

*Balanced "contract"* (EMM.2.1), considering both sides: the candidate's side and the employer's side. What employers ask and what candidates offer needs to be in the concession/acceptance range of the both parties. The opportunity cost is taken in to account from both perspectives (employer and candidate). *Employers perceive the price as fair* (EMM.2.1.1), allowing them to make a profit. *Candidates perceive the price as fair* (EMM.2.1.2), allowing them to make a living. The terms in which the *contract can be modified* (EMM.2.1.3) are clear and established by common agreement. The *market conditions influence over the price of the job* (EMM.2.1.4) is acknowledged. The market is favourable for the candidates and influences the price of the job by pulling it down. The market is favourable for the employers and influences the price of the job by pulling it up.

*Price positioning strategy* (EMM.2.2) is done in terms of balance between the quality of the job and the price. Both parties agree on the *quality of the product* (EMM.2.2.1.) (low quality, medium quality, high quality). Both parties agree on the *fairness of the price* (EMM.2.2.2) (low price, medium price and high price). *Positioning according to Kotler price positioning strategy* (EMM.2.2.3 – see Matrix 1): economy (low price & low quality); false economy (medium price & low quality); rip-off or skimming (high price & low quality); good value (low price & medium quality); average (medium price & medium quality); over charging (high



price & medium quality); superb value or penetration (low price & high quality); high value (medium price & high quality); premium (high price & high quality) (Kotler, 1988). *Positioning according to Higgs model* (EMM.2.2.4 – see Matrix 2) – advantage in segmenting the market and positioning strategically in one the following: *employer of churn* (low rewards and low culture); *employer of cash* (high rewards and low culture); *employer of values* (low reward and high culture); *employer of choice* (high reward and high culture). (Higgs, 2004)

price	+	High price & Low quality RIP-OFF or SKIMMING	High price & Medium quality OVER CHARGING	High price & High Quality PREMIUM
		Medium price & Low quality FALSE ECONOMY	Medium price & Medium quality AVERAGE	Medium price & High quality HIGH VALUE
	-	Low price & Low quality ECONOMY	Low price & Medium quality GOOD VALUE	Low price & High quality SUPERB VALUE or PENETRATION
		-	quality	+

**Matrix 1. Kotler price positioning strategy – Kotler model**

Source: Kotler (1988)

rewards + -	<b>EMPLOYER OF CASH</b> Low commitment High-control, autocratic Excessive hours Large pay pack Buy acceptance (sales)	<b>EMPLOYER OF CHOICE</b> Excellent reputation Well treated employees Large pay pack 100 companies to work for (professional and financial sectors)
	<b>EMPLOYER OF CHURN</b> Lousy treatment and pay High turnover rate Difficult in tight markets Tendency to recruit overseas (low skills industries)	<b>EMPLOYER OF VALUES</b> Poor pay – below the market Meaningful work Security Compensate with well-being (public & voluntary sector)
	-	+
	culture	

**Matrix 2. Labour market positioning – Higgs model**

Source: Higgs (2004) cited by (Taylor, 2011)

Considering the use of 7Ps in recruiting, price is the most difficult concept to equalize or to transfer. A certain discussion is needed here on the nature of the price due to the fact that the price in this case is difficult to monetize and the meaning might depend on the perspective: customer perspective – what customer needs to pay for the product/service (Kotler, 1988) or company perspective – how the company positions the job offer on the labour market (Higgs, 2004).

In marketing there are three major pricing strategies: a) value-based pricing (user perception of value is the key element – difficult to measure but important), b) cost-based pricing (production, distributing and selling costs, represent the key element – important to keep a close eye on fixed & variables costs), c) competition-based pricing (competition strategies, costs and market offering represents the key element) (Kotler, 2017). In this theoretical framework value-based pricing might refer in

HR as the value the users (current or ex-employees) or the potential users (candidates) attribute to the job independent of the evidence. Cost-based pricing might refer in HR to the fact that the on top of the salary total costs, the employee skills need to generate an added value or a profit. In this case making sure that the performance standards are met, assure that the company makes a profit. Competition-based price might refer in HR to the fact that the labour market sometime inflate or deflate the price regardless of the organizations pricing strategies.

### **Place where transaction takes place (EMM3)**

The place represents the real or virtual space where the company promotes the job and potential employees decide to follow the job offer. It is the place where those two actors make contact in the real or the virtual world.

*Physical locations* (EMM 3.1) where the company promotes the job and potential employees decide to follow the job offer. These are the places where the two make the initial contact. *Organizational space* (EMM 3.1.1), following an internal recruiting strategy (e.g. skills review) or external recruiting strategy (e.g. open days, internships) *Potential candidate territory* (EMM 3.1.2), following an external recruiting strategy (e.g. recruiting agent goes to university campuses, headhunting approaches potential candidates directly). *Neutral space or "the third place"* (EMM 3.1.3), following an external recruiting strategy (e.g. job fairs, conferences, etc.) (Rosenbaum et al. 2017)

*Virtual location* (EMM 3.2) where the company promotes the job and potential employees decides to follow the job offer. *Social networks* (EMM 3.2.1) the majority of organizations use for recruiting. *Recruiting websites* (EMM 3.2.2), specialized in intermediating candidates on the labour

market or matchmaking between organizations and candidates. “*Glocalities*” (EMM 3.2.3) are virtual spaces that transcend tangible locales - chat rooms, online gaming centers, open online courses, online communities, etc. (Rosenbaum et al. 2017).

*Place attachment* (EMM 3.3) represent the emotional bond the job candidate has for a certain place where the company promotes the job and potential employees decides to follow the job offer. A continuum can be developed, ranging from utilitarian role of the place (transactional role) to a higher sense of a place, the “lived experience” (relational, social and restorative resources leading to well-being) (Rosenbaum et al. 2017). *Place utility* (EMM 3.3.1) means the perceived value of the utilitarian role of the place in terms of transaction between the company job offer and the candidate needs. *Place “lived experience”* (EMM 3.3.2) represents the qualitative component of the place that ads a certain relational, social and emotional layer and contributes to the well-being of the candidate.

### **Recruiting strategy (EMM4)**

Recruiting is the equivalent of promotion in MEM and in human resource management represents the „process of continuously (identifying) attracting enough people, with the right qualification, and encouraging them to apply for a job within organization”. (Mondy and Noe, 1987, p. 190; Hollenback and Wright, 2011)

*Recruiting strategy* design (EMM 4.1) sources, methods, channels and messages are on the same frequency. *Recruiting sources diversity* (EMM.4.1.1.) - fresh graduated students, competition’s employees, ex-employees, employee’s social network, etc. *Recruiting methods diversity* (EMM.4.1.2) - recruiting agent, job fairs, scholarships, internships, contests, etc. *Recruiting channels diversity* (EMM 4.1.3) formal: newsletters, company’s

website, informal: quality circles, teamwork, lunchtime, unofficial. *Recruiting messages* (EMM.4.1.4) is targeted, attractive, viral and action oriented, etc.

*Reactive vs. proactive* (EMM 3.3) deals with the positioning in time. *Reactive recruiting* (EMM 3.3.1) waits for the need of human resources or the problem of recruiting to get real and then starts the process of recruiting. There is a certain delay between the opening and filling. *Proactive or continuous recruiting* (EMM 3.3.2) does not wait for the human resources shortage to appear, the recruiting strategy anticipates and recruits in advance. There is a short delay between the opening and filling.

### **Process coherence (EMM5)**

The process represents a broad, interconnected perspective over the employment process: pre-purchase phase (job analysis & design and recruiting) closing the deal phase (selection) and post-sales & support phase (induction and probation). It is somehow the big picture. The process is candidate/customer centred, reduces the effort of the user, avoids bureaucracy, provides specific information and keeps the candidate/customer happy.

*Pre-purchase phase* (EMM 5.1) represents the arrangements that are made with the client to purchase a product. *Preparing stage* (EMM 5.1.1) represents job analysis, job design, and job description. *Job marketing stage* (EMM 5.1.2) represents the recruiting.

*Closing the deal phase* (EMM 5.2) or purchase stage represents selection and is the process of filtering the candidates attracted in the recruiting stage by using a series of methods destined to identify the degree of match with the job and the organization.

*Post-sale activities & support phase* (EMM 5.3) deals with induction, probation period and career management and needs to be consistent with the promises made during recruiting and selection. The candidate/employee, doesn't feel like the job was oversold and is treated with the same care and respect.

### **Recruiters or talent scouts (EMM6)**

Recruiter or talent scouts mirrors the people MEM component and represent the *multi-layered human interface* connecting the potential candidate (the customer), the job (the product) and the organization. Staff and supervisors in the HR department are the first layer; functional staff, line senior management and peers outside the HR department but still inside the organization are the second layer and external contractors are the third layer. Their knowledge, skills, representativeness, number and engagement are important.

The *degree of knowledge* (EMM.6.1.1) about the job (core/actual/augmented) and organizational culture (artefacts, exposed values and assumptions and beliefs) the people involved in the recruiting have. The *degree of marketing and sales skills* (EMM.6.1.2) the people involved in the recruiting have. The degree of *representativeness* (EMM.6.1.3) for the company or for the industry the people involved in the recruiting have. The recruiters mirror the profile of the people they are looking for. The *number of internal players* (EMM.6.1.4) involved in the recruiting. The second layer of players (functional staff, line senior management and peers) is turned in to talent scouts in order to reach an internal synergy. The *number of external players* (EMM.6.1.5) involved in the recruiting. The third layer of players or the external contractors and consultants used to externalize recruiting or to amplify the organizational effort. *The*

*balance of process ownership* (EMM.6.1.6), or the degree of externalization or outsourcing of the HR functions. The locus of control is internal (in house design of the recruiting) or external (outsourcing of the recruiting and selection).

### **Realistic preview (EMM7)**

Realistic preview mirrors the physical evidence component of MEM and is meant to alleviate the risk the buyers perceive because of the intangible character of the job. A certain experience of the job and insight in to the organizational culture should be provided prior to the employment. The realistic preview covers the specific pros and cons of the job but also the extended environment of the organization, or the culture.

*Realistic job preview* (EMM.7.1) means to reach a high level of transparency in communication (print/online/phone/face-to-face) between organization and the potential employees by providing enough in-depth and balanced information (the strong points and the weak points) about the *specific job*, allowing them to experience it in a form or another, before taking an informed “buying” decision. *Proactive approach in describing the job* (EMM.7.1.1) in a transparent and balanced manner. High quality, balanced information about the job description, case studies, pros and cons, etc. is provided in a *written form* (EMM.7.1.2), paper based or electronic. High quality and balanced information about the job (job description, case studies, pros and cons, etc.) is provided in a *multimedia format* (EMM.7.1.3) like video testimonials from the employees and ex-employees, testimonials from the clients, etc. High quality and balanced information about the job is provided in a *direct, unmediated form* (EMM.7.1.4) like group realistic job preview; structured observation; meetings with current employees and customers; social media interaction with current and ex-employees.

*Realistic organizational culture preview* (EMM.7.2) means to reach a high level of transparency in communication (print, online, phone, face-to-face) between organization and the potential employees by providing enough in-depth and balanced information (the strong points and the weak points) about the environment or the organizational culture (artefacts, exposed values and assumptions and beliefs), allowing them to experience it in a form or another, before taking an informed “buying” decision.

*Proactive approach in describing the culture* (EMM.7.1.1) in a transparent and balanced manner. Direct access to the organizational *artefacts* (EMM.7.2.2) like objects, uniforms, office spaces, procedures, rules and regulations, etc. Direct access to the organizational *exposed values* (EMM.7.2.3) like strategies, goals, vision, etc. Direct access to the organizational *assumptions and beliefs* (EMM.7.2.4) like unconscious beliefs, perceptions, feelings, the main sources for action, etc. *Realistic leadership preview* (EMM.7.2.5) in terms of style, employee involvement, conflict management, team development for direct supervisor and for top management team.

## **Conclusions**

Although we are aware of the classical critique aimed at the marketing mix and the prescriptive character attached to it rather than evidence based research (Constantinides, 2006), we appreciate the unifying potential that it brings when translated into human resources practices. Employment marketing mix (EMM) offers a framework on which, in a social constructionist manner, real and useful tools can be developed.



The paper opens a promising endeavour in advancing the merging of MEM and EMM. The opportunities that lie ahead are just tip of an iceberg with large amount of challenges to be solved. Each EMM component can represent a research area in its own right. Of added concern is the fact that the marketing landscape is frequently changing the rules and modifies the critical factors affecting the marketing process, so basically it is a never ending story of adaptive and evolutionary process.

The next chapter of this research will aim at developing and testing an instrument capable to measure the degree of fusion between marketing mix and human resource recruiting practices across various industries.

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## DISCOVERING THE ROOTS – ANCESTRAL TOURISM IN ROMANIA. A PILOT STUDY

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**ABSTRACT.** Ancestral tourism is a less explored field in Romania, although it has a great development potential due to the large masses of Romanian immigrants established all around the world, over time. The aim of this paper is to explore ancestral tourism in Romania, to identify what are the main reasons that trigger an individual's desire to start searching his ancestors and to analyze the experience he has during the visit in the country of origin. To reach our research goals, we conducted an interview with six persons of Romanian descent established in several non-European countries that have visited Romania in order to discover their roots, meet their alive relatives or to reconnect with their past. Based on the received answers, we were able to create the ancestral tourist's profile and to identify whether the genealogical experience achieved our respondents' expectations.

**Key words:** ancestral tourism, genealogical research, genealogical experience, roots exploration

**JEL Classification:** L83, Z31

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## **Introduction and literature review**

The genealogical data research phenomenon, both at personal and collective level, started to be analyzed in the field literature at the end of the '70s, when it was intensely discussed in fictional writings and autobiographies (Smith, 1979 in Murdy, Alexander & Bryce, 2018). Also, the desire to connect with origins or birth places determined various TV channels and producers to create different shows, movies or documentaries which allowed people to discover their roots and also inspired masses to start their own ancestral researches. One eloquent example was the TV mini-series "Roots".

According to Iorio and Corsale (2013), one of the most common ways a person uses to discover its origins is by traveling to and exploring the homeland in order to maintain and strengthen personal and emotional bonds. Therefore, people are motivated to travel to places they assume they originate. In consequence, nowadays we assist to an increased interest of immigrants to return to the places their ancestors came from in order to explore the family history as well as to fulfill their sense of belonging (Murdy, Alexander and Bryce, 2018).

Because of the fact that migrants and their descendants are longing to connect with their homeland and ancestors' history, tourism flows can intensify as they decide to travel to places they have personal interest to explore, as Josiam and Frazier (2008) and Iorio and Corsale (2013) stated in their studies. Hence, we can start discussing about the so-called ancestral tourism that besides traveling, also implies learning during the trip in order to accomplish the personal needs of discovering the roots.

The definitions of ancestral tourism can vary mainly because the concept is not unanimously accepted in the field literature, being also referred as roots tourism, genealogy tourism or legacy tourism.

According to Basu (2004 and 2005 in Iorio and Corsale, 2013), an individuals' return to roots can be defined as “[...] a performative act of belonging expressed through visits to ancestral heritage locations, and a more generalized collective project of connection to the homeland”. Another definition of ancestral tourism belongs to Murdy, Alexander and Bryce (2018) who defined the ancestral tourism as “any visit which might be partly or wholly motivated by a need to connect or reconnect with an individual's ancestral past”.

Several authors, such as Santos and Yan (2010), Savolainen (1995) or Yakel (2004) (in Bryce, Murdy and Alexander, 2017) identified that ancestral or genealogy tourism is the type of tourism that makes “the transition from desk-based ancestral research to related tourist consumption”.

In their study, Poria, Butler and Airey (2003), have proved that an individual's motivations, behavior and perceptions are strongly linked to the perception about a certain place or area. Also, the authors suggested that tourists are not only driven by the desire to visit a certain place in order to be there, but also because they tend to consider the place as being part of their personal heritage and to learn more about it and themselves.

Because ancestral tourism is an action done by individuals, we consider it is also important to approach in our paper aspects regarding ancestral tourists. McCain and Ray (2003) defined ancestral or legacy tourists as persons “who travel to engage in genealogical endeavours, to search for information or to simply feel connected to ancestors and ancestral roots”.

According to Russell (2008), the tourist traveling for genealogical purpose can also be called nostalgic tourist, because he is longing for a past experience and is driven by the desire to complete his ancestral identity through the consumption of cultural experiences. When he visits his or his ancestors' country of origin, the nostalgic tourist is actively

seeking to explore the homeland's culture, be profoundly engaged to the experience and even be immersed into the new world that he is discovering (Escalas, 2007; Green and Brock, 2000 in Russell, 2008). All the activities in which the nostalgic or ancestral tourist is involved during his visit to the homeland, can be beneficial even to the economy and the development of that country. In consequence, Newland and Taylor (2010) have tried to analyze the advantages of ancestral tourism in a developing country, such as Romania. They have revealed that in the case of a developing country, the tourism infrastructure is poorly developed or limited to a few touristic areas, the connection to the local economies is weak and the employment rate is low. Moreover, these tourism areas are managed by international companies located outside the country, therefore they are sending their profits back to the countries of origin.

Despite this trend of internationalization, according to Newland and Taylor (2010), tourists who are traveling in order to discover their roots, are more likely to bond with the local economy by choosing smaller accommodation facilities, often owned by the locals or their own relatives, by eating in local dinners or by experimenting the local culture. Therefore, there are higher chances that the money spent by ancestral tourists actually supports the local businesses and the local economy, generating an extremely positive impact on the local economic development.

Furthermore, Iorio and Corsale (2013) stated that tourists seeking for their roots are also behaving as conventional tourists and are engaging to specific tourist social practices such as landscape contemplation, photography or filming, or souvenir purchase. Therefore, encouraging tourism managers and travel agencies to create and promote ancestral tourism packages that would meet the ancestral tourists' expectations, can have positive benefits for the local tourism. Several authors (such as King & Gamage (1994), Duval (2003), Asiedu (2005) and Scheyvens (2007) in Iorio & Corsale, 2013), have also highlighted this aspect, asserting that ancestral tourism implies relatively long stays and is often associated with

other forms of tourism (cultural, natural, rural, mountain, seaside, etc.) in various locations of the same country or same region, helping to the increase of tourism revenues.

According to Scheyvens (2007, in Iorio & Corsale, 2013), another advantage of ancestral tourism is that it more likely resembles domestic tourism rather than international tourism, having therefore less fluctuations over time due to a strong personal interest in a particular destination. Also, by not having a seasonal particularity, as the international tourism, it can support a constant occupancy along the year and also foster off-season hiring opportunities (Perez-Lopez, 2007, in Newland & Taylor, 2010).

An eloquent example is Scotland. Here, most of the ancestral journeys take place between June and September, but they are also happening in other months of the year, especially in the case of tourists traveling on a low budget (Ancestral Tourism in Scotland: opportunities for growth, 2013). Also, ancestral tourism can contribute to the geographical expansion of tourism, mostly because ancestral tourists, in comparison with international tourists, can travel to less visited places in order to discover their roots (Newland & Taylor, 2010).

## **Research methodology**

In order to examine the perspectives of ancestral tourism in Romania, we started a pilot exploratory research based on an interview that we took to six persons. The interviewees were tourists that have visited Romania between 2015 and 2018 and whose main purpose was to explore their genealogical legacy. To contact the tourists, we discussed with the representatives of a Romanian travel agency which is also specialized in organizing private tours for ancestral tourists, as well as assisting them in the process of their genealogical research.



Data were collected using a structured interview that was submitted online, by e-mail, directly to the ancestral tourists that have contacted the travel agency over the past three years. The interview had 21 open questions that required the interviewees to provide details about themselves and their bondage to Romania, their motivations of traveling to Romania, the way they have traveled, the genealogical research process they undertook, as well as the experience they have had in Romania.

The main goal of the study was to analyze the ancestral tourist's behavior, in order to investigate the ancestral tourism phenomenon and its development perspectives in Romania. To achieve this goal, our research objectives were to:

- ✓ identify the ancestral tourist's profile and to validated the hypothesis according to which elderly persons are more likely to start seeking their ancestors and explore their family legacy;
- ✓ identify the motivations upon which the genealogical researches rely, as well as to determine the factor that triggers the desire to begin a genealogical research;
- ✓ analyze the way that ancestral tourists use to travel;
- ✓ analyze the genealogical research process and to identify the means to obtain genealogical data as well as the barriers encountered in the genealogical research;
- ✓ analyze the tourists' genealogical experiences and to establish whether their expectations were achieved.

For a better understanding of the information we gathered, the most relevant statements of our interviewees are presented as quotes.

## **Results**

### ***Ancestral tourist's profile***

The profile and behavior of a tourist traveling for genealogy purposes differs from the one of a regular tourist, as the first one has both a connection with the visited place and different motivations in contrast to the regular one (Poria, Butler & Airey, 2003). The six persons we interviewed have visited Romania at least once and all stated that genealogy was the main purpose of their journey. They live in USA, Canada or Israel, but their background is quite diverse, as three of them descend from Romanian Jews that emigrated to the USA or Israel, one person from Swabs originating from Banat region, while another person from Romanians living in Transylvania. The ancestors of another person are Hungarians and Italians that settled in Valea Jiului for mining.

The age of the interviewees ranges from 40 to 80 years. In average, their age is of 56 years, therefore, the hypothesis that the elderlies are more prone to initiate a genealogical research and undertake a trip in this purpose, is confirmed.

The opinion of Price, Arnould and Curasi (2000, in Rusell, 2008) is similar to the one resulting from our study as, according to them, people tend to develop more reflexivity on life with aging and feel a stronger need for personal accomplishment that cannot be satisfied with tangible goods.

Moreover, studies have shown that tourists who visit important places for their own personal legacy and heritage, prove a tendency to have longer stays in the country and to spend more than the conventional tourists, they have a higher income and a higher level of education (Krestetter et al., 2001 & Travel Industry Association, 1997; in Josiam & Frazier, 2008).

### ***Motivations of ancestral tourists***

In contrast to conventional tourists who observe “the others”, ancestral tourists are motivated to find their own identity which is enriched and reinforced by traveling to the homeland (Love and Sheldon, 1998, in Russell, 2008; Bhandari, 2016). Also, exploring the family history and see the birthplace of their ancestors, as well as visiting the relatives, is another important reason for traveling, as one of our interviewees said.

*“Our goal was to see the villages where our Romanian Grandparents spent their youth as well as meeting the distant relatives we were able to identify.” (A., 67y, USA)*

In addition, according to Highlands and Islands Enterprise organization’s report for Scotland, published in 2013, the main motivations for genealogical traveling, besides the ones mentioned above, are the desire to feel a “special connection” with the country of origin, to further research the family history and to take the parents back home or to pass on to their descendants the story of their family. Also, another motivation to travel identified in the report, was the desire to walk in the footsteps of the ancestors and to find a new significance for what home means.

In our study, we obtained similar results in the cases of several subjects. Most of them stated that their main reasons for traveling to Romania were to come back to their own or their ancestors’ birthplaces, to visit their alive relatives, to discover with their own eyes the landscapes they’ve only heard of or to walk on their ancestors’ footsteps. In addition to the reasons highlighted above, one of our subjects said that she was driven by the loss of her father and the nostalgia to reconnect with his memory and explore the places her father saw, as she wasn’t able to find some information online neither about him, nor about her legacy.

*“The purpose of my travel was to visit the place where my father was born and see for myself the things he saw. When my father passed away, I felt a deep desire to reconnect to him somehow. I felt that sharing something he experienced might help me get a piece of him back. I was very interested in finding out as much information about my family and genealogy as I possibly could. I also wanted to find my father’s house and where he went to school and as many Church records as possible.” (D., 45y, USA)*

Also, another of our respondents stated that

*“Genealogy was my main purpose, but I combined the trip with a European River Cruise.” (J., 40y, USA)*

This response supports the idea that ancestral tourism can also help the development of different types of tourism, increase tourism revenues and enhance the experience ancestral tourists have discovering their roots.

Being asked about what triggered the desire to begin a genealogical research, two of our interviewees mentioned that their relatives were quite mysterious regarding the reason they left Romania, which made them more eager to find out where they come from.

*“My grandmother and her sisters were very mysterious about why they left. I wanted to understand where they came from.” (J., 40y, USA)*

Another factor that made our interviewees start searching their roots, was finding some letters or addresses belonging to their ancestors, findings that determined their further investigations.

*“I have many cousins on my father’s side. One had followed my father’s family and that had me curious about my mother’s family. I used the internet and was frustrated by the lack of information until in approximately 2006 my mother was diagnosed with Alzheimers. After we moved my mother to an apartment and later a nursing facility. In approximately 2009 we went through pictures and papers she had kept where we found an envelope with a Romanian address and an old letter.”*  
(A., 67y, USA)

### ***Ancestral tourists’ ways of traveling***

According to Butler et al. (2002) and Klemm (2002) (in Iorio and Corsale, 2013), the majority of ancestral or roots tourists choose to travel independently in order to have the flexibility they need to visit the places of their own interest.

To find out information about their ancestors, the six respondents of our study have visited city halls, searched in their archives, or reached the National Archives offices. They have also visited churches, synagogues, cemeteries and even contacted Romanian residents (alive relatives or elder people from the ancestors’ community).

Five out of our six respondents have contacted tourism professionals to help them with the research and to accompany them in their journey.

*“I relied on a researcher to do the research for me. It would have been very difficult for me to find this info myself as I don’t speak Romanian.”* (S., 56, Canada)

Often, in a genealogical trip, several family members or even different generations of the same family travel together, although not all of them have roots in the country they visit.

*“We traveled as a family, three sisters and my husband, as a lifelong dream of the sisters.” (A., 67y, USA)*

*“I traveled with my husband and two teenage children.” (D., 45y, USA)*

*“We traveled as a family - my mother, oldest brother, two daughters and myself” (M., 49y, USA)*

Roots tourists have a tendency to visit several destinations during their trip, either because they have familial bonds in more than one part of the country, or simply, because they want to see as much as possible of Romania. Therefore, all Romanian regions have the opportunity to equally benefit of ancestral tourism, as for many of the ancestral tourists traveling to Romania is a good opportunity to visit as many tourist attractions as they can, since some of them have travelled a long distance to get to Romania.

### ***The genealogical research***

According to the answers provided by our interviewees, the genealogical research process started before visiting their homeland, by gathering as much information as possible about the family’s history. They searched on specific genealogy websites (such as *www.ancestry.com* and *www.familysearch.org*) and tried to find out information from family members.

*“I tried to search the internet for my last name but nothing came up. I tried Ancestry.com but there was no information available. I just hoped that I would find something. I was able to find birth records when I visited and the church records regarding baptism and sacraments were found by my wonderful tour guide. I was unable to locate where my grandfather was buried as he was displaced from Aninoasa to Moldova soon after WWII ended. I regret I will never know where he is buried.” (D., 45y, USA)*

Moreover, many of them contacted professionals specialized in genealogy, who have documented in advance about the respondents' ancestors and also assisted them whilst they began their journey. Professionals helped them contact residents and closely guided them for a successful research.

Unfortunately, during the research process, there have also been encountered some barriers, mainly because of the authorities' indifference and their reluctance in providing information.

*“[...] when I tried to find addresses of location that my family owned it was impossible, even when I told them that I do not plan to request return of properties.” (M., 80y, Israel)*

*“We were disappointed when they would not allow us to take photos of the documents but being where my grandfather lived and meeting distant relations made up for that.” (A., 67y, USA)*

In spite of the difficulties, our subjects were satisfied with the information they managed to obtain and pleased to meet their distant relatives. Three of our subjects decided to continue their ancestral research once they got back home.

### ***The genealogical experience***

Bryce, Murdy and Alexander (2017), stated that ancestral tourists are seeking for a participative experience rather than a passive one in order to support their research. Furthermore, previous studies revealed that tourists who are more involved in and are identifying themselves with the experience, can express higher levels of satisfaction (Russell, 2008).

When asked: ‘what is their overall opinion about the genealogical experience they have had in Romania?’, our respondents declared themselves very pleased and grateful to having succeeded in finding information about their ancestors and to explore their homeland.

Another important part of the genealogical experience is to meet the ancestral tourists’ expectations, as these can be very different. A real challenge can be represented by the social, cultural and physical changes that can occur in the visited place. Therefore, a fully turn back in time might not be possible because of the strong hit of reality and the changed image of their homeland (Brah, 1996; Read, 1996; Levy, 2004; Markowitz, 2004 in Iorio and Corsale, 2013).

Regarding the expectations of our interviewees, all of them said that these have been met during their visit in Romania, which was fully worthed.

*“I believe that even if we had not found information and met distant relatives it would have been worth the trip. Everyone we met, regardless of where we were, was friendly. The countryside is so beautiful and I felt like my heart had come home.” (A., 67y, USA)*

Another aspect discovered in our study was that our respondents felt an emotional bond to Romania.



*"I felt connected, like I was home in a sense." (J., 40y, USA)*

Beside these findings, all of our respondents said that the experience gave them a strong feeling of fulfillment and for some even a sense of belonging.

*"The experience absolutely gave me a feeling of fulfillment. I do not feel like I "belong", but I also do not feel like an alien or stranger. The longing to see for myself where my father was born, went to school, played, hiked was fulfilled, and I have gained a sense of peace that I have seen with my own eyes what he once saw and that makes my soul happy. The countryside in Transylvania seems just as it was 70 years ago. It wasn't too hard to imagine what life was like in 1949 when my father left. That's the beauty of Romania. You can get a glimpse into when life was simpler and more pure." (D., 45y, USA)*

## **Conclusions and recommendations**

After conducting our research and discussing with several tourists that wanted to discover their roots, we were able to identify the ancestral tourist's profile. We noticed that tourists who use to travel in order to discover their roots are usually elder persons, who have more leisure time and a higher income. Also, they have the tendency to spend more time visiting the country of origins as well as to use or buy several tourist services.

Another aspect that we focused on was tourists' motivation to travel. We found out that our interviewees' main purpose to make an ancestral journey was to explore their homeland and to discover more

information about their ancestors. They used to travel to their homeland on their own, usually accompanied by family members and reached out to professionals only to help them with the research process and the fieldtrip organization.

The overall genealogical experience our interviewees had in Romania offered them a high level of satisfaction, as well as fulfillment, a feeling of belonging and connection to their homeland.

To develop the ancestral tourism in Romania, tourism authorities should focus on promoting this niche tourism by attracting persons interested in genealogy, who at their turn will attract more tourists interested or not in genealogy. Also, to develop ancestral tourism, it could be helpful to create a network with travel agencies and tourist professionals specialized in genealogy, as well as to develop the tourism infrastructure in more Romanian rural areas.

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## THE LOCALS' OPINIONS AND THE DEVELOPMENT OF SUSTAINABLE TOURISM IN RODNA COMMUNE

**ADELINE-CRISTINA COZMA<sup>1</sup>, MONICA-MARIA COROȘ<sup>2</sup>**

**ABSTRACT.** This study refers to sustainability, a much debated concept at global level. Because of the high levels of pollution and limited resources, sustainability has become an international goal. Furthermore, one of the engines for development in emerging economies is, of course, the tourism industry, which is also Romania's case. Combining these two elements, the authors find that sustainable tourism development is both a long-term goal and a dynamic concept. This concept is represented by three pillars: growing the local economy, protecting and promoting the cultural heritage, and increasing the social well-being.

The present paper consists of a case study that focuses on Rodna commune, a beautiful Transylvanian rural settlement, located in Bistrița-Năsăud County. The research methods used are secondary data analysis (based on the study of different statistics, guides, and specialized sites), comparisons, analogies and syntheses, primary qualitative research (based on face-to-face interviews with the locals), and induction and deduction methods, which all aim at identifying: the current position of Rodna commune from the socio-economic point of view, the locals' opinion related to the sustainable development of the destination's tourism industry, and also the ways in which this objective can be achieved. The subjects interviewed were selected in order to relevantly

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cover most of the local population: honor citizens, teachers, priests, doctors and students, each of them representing stakeholders in the development of the tourism industry.

The research results show that the locals are aware of the strong connection between the development of tourism and the economic well-being of the commune, they helped identifying the major problems that need to be addressed and solved in order for this process to be efficient but also the fact that they are not yet aware of their role and do not acknowledge the ways in which they can make a difference for themselves and for the commune.

The conclusions reveal the current situation of Rodna commune from the subjects' points of view and their proposals for achieving better living standards. Also, the interviews show the lack of implication caused by the fact that the subjects are neither aware of their stakes, nor of their possibilities to help developing the local tourism.

**Key words:** Rodna commune, locals, sustainable development, tourism, interviews.

**JEL Classification:** L83, Q01, Z32.

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## **Introduction and Literature Review**

Rodna is one of the two villages that constitute the commune with the same name, which used to be called Rodna Veche or Rogna Veche. It is located in Bistrița-Năsăud County and it is very close to Rodna Mountains National Park, the second largest protected area in Romania, being in fact one of the access points of the Park. The two villages in Rodna commune are Rodna and Valea Vinului, covering an area of 224 km<sup>2</sup> and being home

for more than 6,000 inhabitants. The local population is mainly Romanian; at the 2011 census the main minorities were Hungarian and Roma citizens. From the religious point of view, most of the inhabitants are Orthodox, the minorities being Roman Catholic, Pentecostal and Jehovah's Witnesses (according to the same census). Politically, the commune is managed by the Mayor Valentin Iosif Grapini, who is part of the Social Democratic Party since 2016; the Local Council consists of 15 councilors, 8 from the Social Democratic Party, 5 from the National Liberal Party and 2 from the Alliance Party Liberals and Democrats (according to the results of the 2016 local elections).

Among the tourist attractions, the most relevant man-made one is the ruins of St. Mary's Church, a Romanesque basilica dating back to the first half of the 18<sup>th</sup> Century and the Orthodox Church, the Museum of Ethnography and Mining in the village of Rodna, as well as the House of Writers from the village of Valea Vinului. Natural resources and attractions provide several highly attractive and valuable tourist resources, such as: the Rodna Mountains National Park, the Poiana cu Narcise Nature Reserve, the mountain trails to Lala Mare and Lala Mic lakes, and the Ineu Peak in the Rodna Mountains.

Regarding Rodna's economic activity over time, mining played a very important role. It is not known precisely when this activity started, but a gold ring found by archaeologists is proof of the fact that mining is practiced in the commune's territory since the Bronze Age. Păiuș (2013) explores various documents and historical writings in his work and states: "It is very likely that there was a metallurgical city of the Dacians".

In this area, just like in many other Romanian destinations, mining has experienced ups and downs due to macroeconomic factors over the years, but has for a long time been a very important source of income for the commune. In 1992, E.M. Rodna was transformed into a trading company by decision no. 184/1992 of the Autonomous Administration of Lead and Zinc Baia Mare, being subordinated to the Gura Humorului Mining Branch. In 1997 the National Company of Precious and Non-ferrous Metals

“REMIN” S.A. Baia Mare, E.M. Rodna transforming itself into the Rodna Mining Branch, which at that time counted 812 employees. On the 30<sup>th</sup> of December 2006, mining processing operations ceased to be carried out for two reasons: the activity was no longer profitable, the costs becoming very high, and in order to reduce them, polluting and toxic substances were supposed to be used in the ordinary activities, which would have led to population illness and environmental pollution in the medium term. Between 2007 and 2010 the necessary activities were performed in order to close the galleries, and from 2011 the existing objectives in the patrimony of the unit are preserved.

Thus, after the closure of the mine, the unemployment rate has grown enormously, in the absence of other industries developed in the area. People who have been able to leave the area or even the country in search of a job have taken advantage of those opportunities, but the number of people without jobs is still high today.

The current economic situation of the commune can be analyzed considering the number of companies that have their registered office and operate within the commune. Their structure according to the sector of activity is presented in Table No 1.

**Table 1.** Companies in Rodna village grouped by activity sector

<b>Forestry companies</b>	<b>Accommodation units</b>	<b>Breeding animals</b>	<b>Bars</b>	<b>Restaurants</b>	<b>Car services</b>
14	6	5	4	2	4
<b>Supermarkets</b>	<b>Mixed shops</b>	<b>Gas stations</b>	<b>Bakeries</b>	<b>Others</b>	<b>Total</b>
4	20	1	1	59	120

Source: Primăria Comunei Rodna, 2018.

Thus, there is a preference for the forestry sector, as the forest resources of the area are still hardly negligible for the entrepreneurs, but not for the hospitality industry, the potential of which will be outlined throughout this paper.

Furthermore, according to the National Institute of Statistics (INS), in the Rodna village, arrivals amount to a little more than 1,000 tourists per year (see Table No 2).

**Table 2.** Tourism activity in Rodna Commune

Year	2013	2014	2015	2016	2017	2018
Arrivals	25	517	620	654	1,300	1,343
Overnights	43	597	664	701	3,243	2,316
Average length of stay	1.72	1.15	1.07	1.07	2.49	1.72

Source: National Institute of Statistics, 2019.

The indicator of the average length of stay shows a rather low attractiveness of the tourist offer at the commune level and a poor capitalization of the park's tourist potential; the values of the length of stay suggesting transit tourism and some business tourism. However, perhaps partly due to the promotion of tourism at national level lately and partly due to local action, the current trend is on the rise, which confirms a better capitalization on the destination's great natural resources and nature-based tourism potential.

As previously mentioned, Rodna commune is part of the nearby areas of the Rodna Mountains National Park. The conservation for the area where the park is today began in 1932, when the 183 hectares of alpine pit in the Pietrosu Mare Peak were recognized as a scientific reserve, this area becoming the first such reservation in Romania.



Obviously, the Rodna Mountains National Park is an important protected area that contributes to the preservation of the Carpathian biodiversity, a highly valuable resource both at European and global levels. This great value is proven by the Carpathian Convention, a convention signed in 2007, which includes Romania, together with other 6 Carpathian countries (Czech Republic, Poland, Serbia, Slovakia, Ukraine and Hungary). This partnership aims to facilitate the collaboration between governmental and non-governmental organizations, specialized institutes, international experts and financiers. The goal of the partnership is, of course, to protect the Carpathian biodiversity and to facilitate the durable and sustainable development of the area.

From the point of view of destination management, the Administration of the Rodna Mountains National Park (APNMR) was established in May 2004, when the Ministry of the Environment and Water Management, the current Ministry of the Environment and Forests, has entrusted the National Forestry Directorate of Romsilva, through the Bistrița Forestry Directorate, on the basis of the management contract Nr. 734/22 May 2004, the responsibility of the park management attributions and of financing its proper functioning and activity. Thus, the Rodna Mountains National Park Administration has its headquarters in Rodna – Bistrita-Năsăud County, and in Borșa – Maramureș County, a working point has been set up. Some of the main objectives of the park's administration include:

- “to implement the actions foreseen in the management plan,
- to make project proposals,
- to access various sources of financing,
- to start attractive tourist programs,
- to generate revenue for the park administration and the neighboring local communities, facilities for tourists (refuges, stops with banks, parking lots, information boards), maintenance and renovation of

existing ones, carrying out scientific and diverse volunteer activities within the park, mapping of habitats and species of community interest by digitizing satellite imagery or aerial photography on the park range and their verification in the field, the calculation of the population optimum for a number of key species of flora and fauna, steps to include the park within international networks that promote ecological tourism and harmonious communion of man with nature (PAN Park, MAB UNESCO),

- the establishment of management lines for a number of conservation priority habitats, exchanges of experience with other protected areas in the country and abroad, and
- the development of adequate infrastructure for the park, by setting up sightseeing centers, information points, mountain hikes, offering visitors and tourists the opportunity to enjoy information and safety during the visit of the park” (Jauca, 2013).

This brief presentation of the current situation of Rodna commune, based on secondary data, reveals that tourism represents a viable alternative to stimulate the local economy, to increase the living standards, and to support the local well-being. It can easily be shown that Rodna offers a very large concentration of natural and tourist resources, but also has serious tourism infrastructure problems. Of course, having a mountain relief and being close to protected natural areas represent an opportunity for mountain and rural tourism. In this context, a question may be raised: What about sustainable development? Through the joint work of IUNC (International Union for Nature Conservation), WWF (World Federation for Nature Conservation), EFNNP (European Federation of National and Natural Parks), sustainable tourism has been defined as “the development of all forms of tourism, tourism management and marketing respecting the natural, social and economic integrity of the environment,

ensuring the exploitation of natural and cultural resources both in the present and for the future generations”. Therefore, any form of tourism must respect the principles of sustainable development.

Regarding the development of sustainable tourism, Cucculelli and Goffi (2016) state in their paper that although it is very hard to come up with a definition which applies to most cases, and since each destination has its specific attributes, what can be said without being wrong is that the development of sustainable tourism is a long-term goal and a dynamic concept. The unique characteristics of sustainability are to minimize negative impacts on the environment, to protect cultural heritage, and at the same time to contribute to the social well-being.

### **Research Methodology**

This research is part of a larger and more complex study which aimed at analyzing the impact of the development of a sustainable tourism offer in the neighboring areas of the Rodna Mountains National Park. Another research paper, entitled *The Development of Tourism in Rodna Mountains National Park: Public Administration, Central Actor*, was published by the same authors in 2017; it aimed at analyzing the key role played by the public sector in stimulating the growth of the local tourism industry, but also the entrepreneurs’ point of view and their response to the public sector’s actions and opinions.

The present paper aims at establishing the current position of Rodna commune from the socio-economic point of view and at identifying the locals’ opinion relative to the sustainable development of the tourism industry, and also at uncovering certain measures that can be adopted in order for this objective to be achieved.

The following research methods were used for this purpose:

- the analysis of secondary data by processing different statistics, guides, specialized sites, comparisons, analogies and syntheses;
- qualitative research based on interviewing certain representative locals of Rodna commune (honor citizens, teachers, priests, doctors and students); the interview was considered appropriate for the current research due of the fact that by the way of its application, the opinions of locals could be properly captured and not restrained by almost any communication barrier;
- quantitative research, based on questionnaires (for tourists); and
- induction and deduction, which are interdependent and contribute to the interpretation of the current situation of the commune and to the identification of the possible future situation if the tourism industry will rise.

Besides the entrepreneurs and the public administration representatives, other persons were considered relevant and representative for the destination's population. They are presented in Table no 3.

**Table no 3.** Details regarding the interviewed locals

<b>Initials</b>	<b>Profession, qualifications, titles</b>
L.P.	Honor citizen, teacher and man of culture
M.L.M.	Higher education professor and manager
L.C.	Sports teacher at Rodna School
L.N.	Priest in the Romanian Orthodox Parish
D.U.	Doctor General Practitioner
D.A.G.	Student
M.H.	Student

## **Results and Discussions**

The previous research paper (Cozma & Coroș, 2017) revealed an incomplete development of Rodna Commune “a very high unemployment rate, low living standards, a poorly developed infrastructure and a poor valorization of tourist areas, but also an improvement in progress of this situation”. One of the interviewed entrepreneurs suggested that “the encouragement and intensification of tourism in the winter season, the development of a sustainable infrastructure, the implementation of some more strict rules, the establishment of visiting fees for certain areas, and the marking mountain trails” would be appropriate actions for the public sector to take in order to stimulate the growth of the local tourism industry. It is also shown that the City Hall created a development strategy with high potential for job growth, adequate capitalization of tourist areas and places to visit, improvement of infrastructure and attraction of new investors in the area. One of the final conclusions of the first study pointed out that because foreign tourists tend to be mainly oriented towards active mountain tourism in the Rodna Mountains National Park area, it is obvious that the encouragement and the support towards the development of this form of tourism within the Rodna commune is necessary.

Apart from the business owners and the local authorities, in order to have a complete picture of the manner in which the commune is presented in terms of tourism, it is also necessary to analyze the opinions of the locals, which have an influence either in relation to the tourists or from the labor force perspective in this industry or even as potential investors.

The following paragraphs present the opinions of the local population related to the further development of Rodna Commune. Most of those interviewed have lived in Rodna since they were born. Only the priest and the sports teacher were not born in the village. The priest arrived here in 1990, as did the teacher in 1997. The students attend faculties in Cluj-Napoca and come home on weekends and during the

holidays. In fact, a very small part of the locals come from other parts of the country, while many of the young people study either in Bistrița, Cluj-Napoca or Târgu Mureș, and only a few of them return. The elderlies say that they did not leave the village, because there is a habit of one of the children taking care of the elderly and not leaving the parental home, while the middle-aged people say they have faced certain administrative barriers specific to communism when they tried to leave the village in their youth, and then they stayed because they have made a family here.

Asked if they have relatives who have gone abroad to work, 6 of the 7 local respondents sadly answered that yes, some of their relatives have gone abroad for a better living and for higher wages. More than that, L.P. believes that: "The possibility of exploiting agricultural land has never been sufficient to support the lives of people in the commune. This is the only and most painful problem that caused people to move away from their original home. Even if one or two locals come and develop a small business, this is still an exception".

Another perspective is presented by M.L.M.: "Freedom of movement is a good thing, especially for young people. Going over deserted customs, crossing borders that turned into simple drawings is the greatest gain that young people can have today. The youth often do not come back because they feel that during the last 27 years there has been done very little work for them. Jobs are now in the parish of the private environment, but if this private environment is not supported by governmental and specific political factors, then, instead of dealing with a multiplication of small and medium enterprises that could create new jobs, we are dealing daily with their massive falling, unfortunately, because they are not encouraged. And then, implicitly, some young people who have a place and a purpose under the sun in some other country and do not what to go back". In fact, many of the respondents argue that the major fault for the significant emigration of the population lies with the national authorities. It is obvious that the issue of jobs and the opportunities offered to the workforce is as real as possible, at least locally.

The cultural activities undertaken over time or attended by the interviewees are indeed numerous. L.P. managed to publish 15 printed works, 8 edited works, and claims that “Rodna’s Monography” is the result of a 60-year work that has over 520 bibliographic sources and over 1,000 A4 pages. Also, M.L.M. was involved in Rodna’s past research, publishing a series of articles and studies about the destination, including research papers in ISI indexed journals. L.C. managed to form a team of students who perform traditional dances, and organized for 15 years in a row camps for children at the seaside and in the mountains, in the home-country and abroad. Together with the town hall and the fanfare, the church annually commemorates the heroes of the nation on the occasion of the Ascension Day. D.U. participated in various volunteer campaigns to treat patients and conducted various donations for needy children. The young people were very pleased with the events organized by the City Hall on The Days of Rodna Commune. One can therefore see an attempt to preserve the past of the commune, but also to educate young people by involving them in various cultural activities organized for them.

Another aspect examined concerns how the locals relate to the current state of the commune. Among the positive aspects listed by the interviewees there are the natural resources (the “Terrarium Paradise sequence” of M.L.M., the relief, the beauty of the area, the tranquility, the landscapes, the clean air) and the proximity to the Rodna Mountains National Park. Negative aspects are represented by economic decline, lack of an adequate education system, state of road infrastructure and the small number of restaurants and places of entertainment for young people.

Locals say Rodna is distinguished mainly by landscapes and relief. A truly impressive description of the commune is made by M.L.M.: “Without any doubt, the landscape has elements of uniqueness, of a certain personality, but also when it comes to the anthropic touristic potential, Rodna has certain values to show to tourists because it has one of the most tumultuous histories on the Upper Someş Valley. Rodna has long been the portrayal of the interests of all the upstream and downstream settlements

of the Someş Valley human habitat. Rodna has been a center of local polarization since the early Middle Ages, because mining activities were very present here and gold-silver cubes have been exploited before the year 1,000. There is clear evidence in this regard. Rodna was formed in a geo-demographic diffusion basin where inhabitants climbed upstream, and downstream, over the water hills, whenever the geo-demographic pressure appeared on the restriction of agricultural space. Most of the localities upstream and downstream of Rodna and over the hills are based on Rodna's core. Another beautiful thing that the village has is a series of extremely interesting historic vestiges. Here we can talk about a stratification of medieval civilizations. Here are the ruins of a Dominican basilica of the 13<sup>th</sup> Century, demolished during the Mongol-Tatar invasion of 1241-1242, but it seems that under this basilica there are the remains of a basilica that was originally Benedictine. There have been some religious orders that have built elements of civilization and ecclesiastical culture at Rodna, so here we can talk about a stratification of civilization. Keeping the proportions accurate, we can talk about a formidable stratification of urban civilization in Cluj-Napoca, there is medieval Roman and Daco-Roman Napoca, then medieval Cluj and contemporary Cluj-Napoca. Rodna has the same miniature stratification". Besides these aspects, other locals list elements of tourism potential through historical and natural aspects. The locals' love for their commune is obvious, but so is the awareness of the cultural and tourist resources it has.

Desiring to identify the local people's vision related to how the state of the commune can evolve and how this can be accomplished, they were asked to describe how they think their way of living can be improved.

While L.P. argues that "the standard of living can only be improved by developing an industry and, in particular, the mining and logging industry", M.L.M. says that none of these industries provide a viable solution in the future; he identifies tourism as a solution and explains how the community can further develop "if the authorities would come to the force to support large projects for this purpose". He also states that "tourism



could represent the day after today for the youth” and believes that only Rodna “can heal its own wounds from which it suffers now”. Furthermore, L.C. considers that the rehabilitation of the road infrastructure and thus the increase in the capitalization of the destination’s tourism potential can lead to a better standard of living, as “there would be more people interested in opening their own accommodation units, and surely they will bring revenues to this village”.

Thus, the link between the development of tourism and the economic situation of the commune is acknowledged by the locals. Another aspect highlighted by them, besides the rehabilitation of the road infrastructure and the development of the hospitality industry, is the creation of more jobs, a problem to which the development of the tourist supply can respond successfully. Thus, L.C. states that “the current mayor has vision and openness to creating as many jobs as possible and should find a solution to inform and educate citizens about agro-tourism”.

Regarding the local people's openness towards future tourism prospects, the issue of tourism development has been discussed in more detail. When asked about the impact that tourism development could have on the commune, except for L.P. who considers this process to be difficult and lacking potential, the interviewees mainly highlighted the financial benefits, in terms of developing the commune's economic condition by creating jobs, adding revenues to the local budget, and developing related activities such as crafts, public catering and guidance services tourism. Moreover, the aspect of the cultural enrichment of the commune's inhabitants as a result of the interaction with the tourists was also brought up by some respondents during the interviews. Asked about the agro-tourist potential of the area, which combines the preservation of cultural heritage and the improvement of the local economy, all interviewed locals stated that this potential exists, but there is no education in this direction. M.L.M. provides more details related to this aspect: “In 2012 I [M.L.M.] participated in an investigation, where I found enough households willing to practice agro-tourism specific activities, but they said that until their

grandchildren or relatives who know a foreign language come home, they are not willing to receive strangers, but only Romanians, because they could only communicate with the foreigners by the means of gestures and signs. There is, therefore, this barrier of language skills, the cultural differences and, last but not least, they are not convinced that whatever they can provide will eventually be appreciated by the tourists, especially in terms of comfort”.

The main argument that supports the touristic potential of this destination is represented by the cultural and natural resources that Rodna manages to conserve better, compared to the rest of the communes in the area, which are even better represented and more generous in this commune.

When approaching the aspect related to the proximity of the commune to the Rodna Mountains National Park and the advantage it presents for the development of tourism, apart from L.P. who believes that this is not an advantage because, he says, “the park has no other role but to preserve the richness of the fauna and flora of Rodna Mountains”, the rest of the locals see it as: “the most suitable playground for practicing and promoting eco-tourism” (M.L.M.), “the administration definitely tries to capitalize on this potential” (L.C.), “the specific flora and fauna are highly valuable, especially mountain peonies, but also tourist attractions such as Lake Lala and Ineu Peak” (L.N.).

An equally important role in this process is played by the Administration of the Rodna Mountains National Park, which is why the director of the park administration, Mrs. Doina Jauca, was also interviewed. She states that 30,000 tourists arrive annually in the park, 20% of them being foreign tourists, mainly from Hungary, the Czech Republic, France and the United Kingdom. The park visitors arrive especially during the spring and summer period. There is also a concordance regarding the dissatisfaction of the visitors with the tourist infrastructure, which is intended to be improved by “creating paths and thematic routes, creating tourist information points and visiting centers. Up to now, five thematic

routes have been created in the areas most frequently visited by tourists and we [the park administration] will continue to place such facilities in other areas of the park". In terms of awareness related to the tourist potential of the area, the director says: "the influx of tourists in Rodna would bring a number of material benefits to the locals. For this, it would be necessary to modernize and rehabilitate the road infrastructure and to involve local and county authorities, together with the park administration, to access financial resources". Thus, it can be noticed that the park administration sees a close link between the development of tourism and the development of the local economy as long as all stakeholders cooperate in this respect.

Another aspect revealed by the responses offered to the questionnaire for tourists is related to the activities for which tourists opt during a mountain holiday. Among their preferences the following are most commonly mentioned: hiking, tourist orientation, barbeque and skiing on the slopes. These responses are in line with the conclusions of the interviews with the entrepreneurs and the park administration, which identify mountain hiking as an activity preferred by the great mass of visitors and tourists, and moreover, their ski preference supports the project of opening the slopes in the village of Valea Vinului, which represents a viable solution to the problem of local tourism development, eventually contributing to the diminishing of the impact of seasonality.

It has been observed, however, that locals consider it absolutely necessary to develop and improve the way in which the promotion of the area and of the park is being carried out, but also to organize a larger number of tourism-related events and build a closer cooperation between local authorities. In terms of the barriers that underlie insufficient promotion, besides the lack of an efficient and large enough budget, due to the subordination of the National Forest Administration – Romsilva, which in turn is further subordinated to the Ministry of Waters and Forests, and which is anyway a problem at the national level, there also is a lack of open labor-positions in the administration to cover these responsibilities;

furthermore, the staff of the organization is made up of the park manager, the park manager assistant, the community relations environmental education provider, the information technology specialist, an economist, a biologist and 12 field agents (rangers). Thus, the problem of budgeting more extensive promotional activities has the solution at a higher level than that of the local administration. Regarding the ability of the locals to receive larger numbers of tourists, the interviewees say that its level is low, but there are various programs which focus on the exchange of professional experience and camps for training the beneficiaries in order to develop the much needed skills. Locals also proposed that local authorities organize free English courses aiming at overcoming the well-known linguistic barriers at local level.

The need for proper marking of tourist trails, more intense promotion of protected areas and improvement of access infrastructure were mentioned both in the interviews with the entrepreneurs and the locals, but also in the results of the questionnaire addressed the destination's tourists. The awareness of these issues and their stage of solving were discovered in the interviews with local authorities, but the social education of the tourists has not been discussed so far. Thus, in order to observe the civic responsibility of the tourists, they were asked if they took part in one of the most extensive forest waste collection programs, namely "Let's do it, Romania!". But also the reasons why they had participated or not. The results show that the vast majority of respondents did not participate due to the poor promotion of the event at local level (I do not know the program) and the respondents' lack of spare time (loaded program); however, among the reasons that prompted them to participate in the cases of those who had attended "Let's do it, Romania!", they remind them of the desire to actively participate in promoting change and reducing the level of pollution.

In order to be able to understand whether locals are optimistic or pessimistic about how the commune will develop in the future, they have been asked how they think the commune will evolve in the next five years.

The separation was very clear in two equal sides. On one hand, there are those who believe in the vision and the determination of the local authorities to take advantage of the current and future opportunities, and, on the other hand, those who believe that political instability, corruption, and how public issues are managed at national level will not allow Rodna commune to evolve, and even have a major negative impact. It has already become obvious that locals believe that both local and national authorities are primarily responsible for solving the current local problems and for improving the level of the living standards.

The last aspect discussed with the locals aimed at highlighting their general perception of tourism development in Rodna Commune. With the exception of L.P., which considers tourism to be a positive aspect only if the commune is to become a strong industrial area, the rest of them see in this development several positive aspects, once again conditioned by solving the same shortcomings previously listed: improving road infrastructure, greater involvement of the authorities, and more intense promotion of the area.

M.L.M. recalls that: “an example for this is the small tourist objective in the Măria Valley, where there was the Poiana Zânelor, a mini-mountain resort conceived and realized through private initiative. But credits were taken excessively and without coverage, and the beautiful initiative fell. Poiana Zânelor was in vogue at one point. My colleagues from Cluj County were asking me about this place. In Ilva Valley there was equestrian tourism, staged by the Englishman Julian Ross, who had a horse stud at Lunca Ilvei on a piece of land he had bought, which passed through the Lunca Ilvei and descended on the Măria Valley and wandered to Poiana Zânelor. There were American, English, Spanish tourists. Eighty percent of tourists were foreign tourists and many came from overseas. An efficient marketing mix created by the former owner was the key means by which he managed to attract and keep a clientele of at least 100 Americans who came each summer. So things can move, but some appropriate and efficient formulas must be found, more challenging than what is

happening now". In addition to these examples, which give hope to the tourism development outlook, D.U. enumerates an impressive series of positive effects this development might have: "tourism can generate a positive development for Rodna as it leads to job creation, increasing demand for local products (vegetables, fruit, meat or dairy ), development on a horizontal basis, development of services and the emergence of new services, capital influx due to the (higher) spending of the tourists, stimulating new investments such as multiplying or renovating holiday homes, pensions, tourist routes, ski slopes and the rowing activities on Someș river, but also the increase of the City Hall's income".

It can easily be observed that the locals are aware of the commune's touristic potential, they have beautiful ideas for developing this industry, but they lack direct involvement and initiative. Moreover, most of them, as the interviewees pointed out, are not educated enough in order to have the necessary skills to support the growth of the tourism industry. This is a problem that can be solved both by the cooperation of the public or private actors interested in improving the destination's attractiveness by organizing English classes and basic management and leadership trainings.

Moreover, as revealed by the questionnaire responses, tourists report a problem of major importance for nature protection, namely the problem of waste-management, as observed by the majority of the survey respondents. However, their level of involvement in solving this problem is very low, inferred from the very low participation in the events "Let's do it, Romania!"; this situation's main motivation is the people's lack of interest. It is, therefore, the issue of the clandestine passenger in the sense that they want others to strive and enjoy together the result and common benefits in the sense that the involvement in conservation activities is reduced due to the fact that the power of the example is not properly understood. A lack of tourism education results from the fact that activities such as the observation of fauna and flora are preferred, but at the same time, the overwhelming majority of respondents do not address tourist guides. One

positive aspect is related to the fact that the Rodna Mountains National Park is one of the most popular tourists. Furthermore, the questionnaire respondents revealed: a good general impression about the interaction with the mountain and the protected areas, their preference for internal destinations compared to the foreign ones regardless of the season, the budgets they allocate per night, per stay and annually for mountaineering activities are quite high, so the purchasing power seems to be great. Consequently this provides a solid foundation for the decisions taken for the future tourist development of the area. The need for holidays and the savings that tourists make throughout the year in order to be able to go on holidays, regardless of their income level, lead this opportunity to viability.

Both tourists and locals are dissatisfied with the level of information and promotion of the park and propose raising this level as a solution for the development of tourism demand. However, mass promotion of these areas may jeopardize their protection, since mass tourism does not allow for sustainable development and is not in line with the area protection measures. However, an appropriate and balanced promotion, midway between the current promotion and mass promotion, can lead to the desired results and a development that respects the principles of sustainability.

## **Conclusions**

The conclusions of the interviews taken with the locals led to the identification of the major problems faced by the area: poor infrastructure, insufficient promotion, high unemployment rate, reduced professional opportunities. The link between the development of tourism and the socio-economic development of the commune is well drawn in the minds of the locals. A big contribution from the interviewees is represented by

the proposal of various methods through which this development can be achieved, in particular with the support of the local authorities: the rehabilitation of the roads, an intensive promotion of the area, the creation of jobs by attracting investors, especially in the hospitality industry, and the development and implementation of programs to educate locals and to overcome language barriers.

Some proposals of the local people refer to increasing their engagement in organizing local events, in promoting them online (given the indisputable advantages of online marketing activities), in proposing new events that have the potential to attract many tourists, and, why not, the locals' involvement in the organization, conservation and protection of cultural heritage and natural resources. Some forms of a proactive attitude can be identified in disseminating pieces of information related to the benefits of agro-tourism activities and how local people can provide such services or in the establishment of non-profit organizations to help families and disadvantaged people by selling handicraft items. Of course, it is compulsory that the locals show support to the local authorities by involving as many people as possible in their activities. A big positive impact in promoting the destination can achieve by the creation of an online platform and by the opening of a travel agency that focuses especially on this issue. Basically, the establishment of a Tourism Destination Management Organization can provide the institutional solution for sustainable tourism development in Rodna.

Furthermore, the reactive attitudes among tourists, locals and administrators of the accommodation units, the concordance in pointing out problems (such as the poor condition of the road infrastructure, the inadequate marking of routes, the lack of adequate marketing and promotion activities), the lack of involvement and support from national administrative bodies and an attempt of the local authorities to start actions and think about projects for tourism development represent the highlights of this research. Locals, local authorities and entrepreneurs are fully aware of the benefits of such a development, both in economic



and financial terms, as well as in terms of culture and education. Civic responsibility and the strength of one's own example are still issues that need to be solved. Some macro-economic factors, especially political instability, are seen by those involved as threats for the goals they have proposed. However, the optimism, the beliefs and the clear evidence of thorough attempts to achieve these goals cannot be overlooked.

In the end, the more categories of actors act in a common framework and take proactive attitudes, the more exponentially the results will grow. It is well-known that the power of one's own example and the question "why me?" are well-rooted in the national mentality, but it does not mean that change is not possible. The acknowledgement of all these aspects is the first step towards change and this is the true purpose and the true meaning of this work. This first step will eventually lead as many other subjects as possible to the common end goal, namely the improvement of the living conditions and capitalizing on natural resources, and the further development of Rodna Commune as a sustainable destination.

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## **COMPETITIVENESS IN TOURISM: A THEORETICAL OUTLOOK**

**IOANA MARIA TRIPON<sup>1</sup>**

**ABSTRACT.** Present-day, tourism is declared as one of the leading sectors of development, a major source of revenues, jobs and prosperity. Competitiveness is a key element of the tourism industry. The ability to compete in a rapidly growing world tourism market is a prime concern. Understanding competitiveness and performance in tourism and measuring it is challenging. Although a large amount of literature about tourism destination competitiveness has been produced, including measurement models applied, it is a topic that still offers an important range of debate.

This paper aims at presenting the progress of research on tourism competitiveness term and tries to provide a general framework that could be expanded to further study. Since the 1990s, research efforts have been conducted towards developing a theoretical and conceptual basis for competitiveness assessment. Many researchers have applied the competitiveness theory as a critical concept to explain tourism development, destination management and tourism strategies.

The paper concludes that, in spite of the various attempts to explain the competitiveness in tourism, the literature is still confronted with the ambiguity of the concept and the complexity of its elements, which are difficult to measure.

**Key words:** Tourism, Destination, Competitiveness, Destination Awareness

**JEL classification:** L83, M31

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## **Introduction**

In the last decades, travel and tourism and the related network have proven to be significant factors of economic growth, contributing 10.2% to global GDP in 2016, an increase for the sixth consecutive year and accounting for 1 in 10 jobs in the world (WTO, 2018). Research shows that for every 30 new tourists that go to a destination, a new job is created. (WEF, 2017)

Destination competitiveness is one of the main areas of interest and research, a key concept of the tourist industry, over which researchers and practitioners have not yet reached a consensus on how it should be defined. The term competitiveness is used on a large scale, both in the professional and academic environment. Today, the notion of competitiveness is strong and widespread, with origins in the writings of Michael Porter (1980, 1985, and 1990).

The notion of destination competitiveness should be consistent with the concept of competitiveness in economics. It is widely accepted that economic growth and competitiveness involve a complex interactive process of social, political and institutional development (Dwyer and Kim, 2003). Scott and Lodge (1985) viewed competitiveness as “a country’s ability to create, produce, distribute and/or service products in international trade while earning rising returns on its resources”. They also consider that this ability is “more and more a matter of strategies, and less and less a product of natural endowments” (Ritchie and Crouch, 2003). For Newall (1992), competitiveness “is about producing more and better-quality goods and services that are marketed successfully to consumers”.

Dwyer and Kim (2003) present competitiveness as a multi-faceted concept associated with three major groups of thought that are:

- a) Comparative advantage and/or price competitiveness perspective,
- b) A strategy and management perspective,
- c) A historical and socio-cultural perspective.

The World Competitiveness Yearbook (IMD, 2000) examines competitiveness in terms of four fundamental forces that “are often the result of tradition, history or value systems and are so deeply rooted in the ‘modus operandi’ of a country that, in most cases, they are not clearly stated or defined.” The four dimensions used are attractiveness versus aggressiveness, proximity versus globality, assets versus systems, and individual risk taking versus social cohesiveness (Ritchie and Crouch, 2003).

Many researchers have applied the competitiveness theory as a crucial approach to explain destination management and performance, tourism strategies and development. The literature on the competitiveness of tourism destinations has focused on the sustainability of the place while maintaining a favourable market position towards other destinations. According to OECD “tourism competitiveness for a destination is about the ability of the place to optimise its attractiveness for residents and non-residents, to deliver quality, innovative, and attractive (e.g. providing good value for money) tourism services to consumers and to gain market shares on the domestic and global market places, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way” (OECD, 2013).

The main purpose of this study is to review the progress of research on tourism competitiveness term and to outline the multiple aspects that influence it. There are several issues that need to be addressed in understanding and measuring the competitiveness of tourism destinations.

An audit of the literature (empirical studies, literature review articles, case studies, books, conceptual papers and so on) reveal the importance and evolution of the tourism competitiveness concept.

### **The evolution of competitiveness in tourism**

Over the years, the researchers have tried to explain the concept of competitiveness in relation to the tourism destination. Studies on the development and management of tourist destinations have multiplied lately, with the aim of providing viewpoints and guidelines to some of the questions and challenges that destinations encounter. Since the '90s, research efforts have been aimed at developing a theoretical and conceptual basis for understanding competitiveness. However, the literature still faces the unclearness of the concept and the puzzling of its elements, which are difficult to measure.

The discussion dates back to the first studies that came out in the mid-1970s by Goodrich (1977, 1978), Mayo and Jarvis (1981) and goes until nowadays, with an increase in the number of studies published on the subject of competitiveness of the destination and its elements around the years 1990s. Although a large volume of research about tourism competitiveness has been produced over the last two decades, the literature review reveals that there is no complete definition of competitiveness that is commonly agreed and has full and perfect content. An evaluation of the literature indicates that much has been written about the competitiveness between different tourist destinations, either at regional, national or international level. According to Bordas (1994), competitiveness is established between destinations and tourism organisations rather than between countries, because of the different aspects and characteristics of destinations in a country. This depends

entirely on how much a destination is more popular than its country. However, according to this approach, each geographical part of a country may be in individual competition with other similar foreign regions on the basis of facilities, cultural and natural heritage and history. (Kozak and Baloglu, 2011)

However, a full analysis of the competitiveness of a destination did not receive widespread recognition in the tourism literature (Pearce, 1997). An early definition of the competitiveness of the destination is given by Chon and Meyer (1995) as a reformulation of the concept of competitiveness in the economy (taken from *Global Competition: The New Reality. Report on the President's Commission on Industrial Competitiveness, 1985*), as follows: "the competitiveness of the destination is the degree to which it can, under free and fair market conditions, produce services that meet the taste of international markets, while simultaneously expanding the real income of its employees (citizens)". This assertion shows that both quantitative and qualitative indicators are essential in defining the term of destination competitiveness. (Kozak and Baloglu, 2011).

Competitiveness in the tourism industry has moved from international competitiveness and between companies to competitiveness among destinations due to the impact of globalisation. Unlike as for a certain manufactured product, competition between tourism destinations has a different structure. The competitiveness can be influenced by customer expectations, motivation, past experiences, location and accessibility (Kozak and Baloglu, 2011).

Linked to the notion of destination competitiveness are numerous variables. These include objectively measured variables such as visitor numbers, market share, tourist expenditure, employment, value added by the tourism industry, as well as subjectively measured variables such as "richness of culture and heritage, quality of the tourism experience, etc. (Dwyer and Kim, 2003)



The destination competitiveness research considers two main approaches: conceptual and empirical. The literature reveals a variation in defining, understanding and measuring competitiveness. The first tourism competitiveness studies, between 1977 until 2000, focused their research mainly on tourists' perceptions (regarding facilities, attractions, accessibility, prices, etc.). Beginning with researchers Enright and Newton in 2004 and Lopez, Navarro and Domingues (2004), they evaluated the destination competitiveness based on the performance, analysing several economic factors and indicators. Currently, there is limited information regarding the connection between the tourism performance and the destination competitiveness.

Over the years, competitiveness studies were carried out by several researchers (e.g. Goodrich, 1977; Haahti and Yavas, 1983; Edwards, 1993; Driscoll, Lawson and Niven, 1994; Chon and Meyer, 1995; Pearce, 1997; Dwyer, Forsyth and Rao, 2000; Kim, 2000; Buhalis, 2000; Dwyer and Kim, 2001; Yoon, 2002; Ritchie and Crouch, 2003; Enright and Newton, 2004; Bahar and Kozak, 2007; Kozak, Baloglu and Bahar, 2010), but the most comprehensive study so far is that of Ritchie and Crouch (2003) who applied the competitiveness of the services industry to the context of tourism destinations based on countries, industries, products and companies. In this respect, the possibilities of a destination that ensures a high standard of living for its citizens is the competitiveness of that destination.

To better illustrate the variety of tourism destination competitiveness approaches, few of them are presented, in chronological order, in Table 1:

**Table 1.** Tourism competitiveness approaches

<b>Author</b>	<b>Definition</b>
Pearce (1997)	'Destination development techniques and methods that can systematically analyse and compare the different attributes of competing destinations within a planning context.'
Hassan (2000)	'The destination's ability to create and integrate value-added products that sustain its resources while maintaining its market position relative to competitors.'
d'Hautesserre (2000)	'The ability of a destination to maintain its market position and share and/ or to improve upon them through time.'
Go and Govers (2000)	'Competitiveness is an arising strategic value and the destination competitiveness represents the success in integrated quality management.'
Dwyer, Forsyth and Rao (2000a)	'Tourism competitiveness is a general concept that encompasses price differentials coupled with exchange rate movements, productivity levels of various components of the tourist industry and qualitative factors affecting the attractiveness or otherwise of a destination.'
Yoon (2002)	'Competitiveness represents innovation and continuous change.'
Dwyer and Kim (2003)	'Destination competitiveness is linked to the ability of a destination to deliver goods and services that perform better than other destinations on those aspects of the tourism experience considered to be important by tourists.'

Source: Own elaboration based on Kozak & Baloglu (2011) and Dwyer & Kim (2003)

Some studies have tried to estimate the competitive position of tourism destinations from the perspective of using *quantitative measures* (i.e. Papatheodorou, 2002; Mangion, Durbarry and Sinclair, 2005). This group of researchers analysed the secondary data, such as prices, number of tourist arrivals, duration of stay and revenues. The second group of studies examined the tourism competitiveness by using *qualitative measures* (e.g. socio-economic and socio-demographic profiles of tourists, level of satisfaction or complaints, quality of staff working in tourism, the quality of tourism facilities and services) and applying direct comparison (i.e. Driscoll, Lawson and Niven, 1994; Yoon, 2002; Enright and Newton 2004, 2005). It is also necessary to mention the existence of studies using both quantitative and qualitative assessments (Campos-Soria, Garcia and Garcia 2005).

The definitions offered in the literature provide both a micro and a macro connotation of competitiveness. Crouch and Ritchie (1999) believe that micro and macro (global) environment are the general factors that influence the competitiveness of a destination. The advantage of this model is its superiority in considering the role of destination management and entrepreneurs. (Kozak and Baloglu, 2011)

## **Conclusions**

The brief review of the literature on tourism destination competitiveness revealed that none of the definitions that have been asserted is entirely satisfactory, as they do not provide a comprehensive approach of the various aspects that the notion of competitiveness encompasses. Within this research stream, the authors explored the possibility of applying concepts and theories about the management of organisations to the study of destinations. Understanding and measuring

the competitiveness in tourism raises a great interest, but the available information shows that there is still a need to explore the concept from the different perspectives relevant to the specific contexts.

Some researchers focused on the methodology while others tried to expand the competitiveness theory using different attributes and research criteria. However, a major issue involves the integration of objective and subjective features of competitiveness. An important aspect for further research is to explore the possibility of incorporating qualitative factors into the construction of competitiveness models. There seems to be a common opinion that economic prosperity and tourism performance are important issues for further research on the competitiveness of tourism destinations.

Based on the studies of the researchers it can be concluded that the competitiveness of tourism destinations is a multi-faceted, evolving concept influenced by many factors.

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