

The Spa

Business opportunity or a 'dime per dozen' affair?

Dissertation

*I hereby declare that this dissertation is wholly the work of Raluca Paris.
Any other contributors or sources have either been referenced in the prescribed manner or are listed in
the acknowledgments together with the nature and the scope of their contribution*

R. Paris

Student at NHTV University of Applied Sciences
Master program Tourism Destination Management

December. 2012

Page left blank on purpose

Motivation

"If all else perished, and he remained, I should still continue to be; and if all else remained, and he were annihilated, the universe would turn to a mighty stranger."

– Emily Brontë, Wuthering Heights

Mankind has always had a pure connection with nature and all of its elements. No matter how far society has gone, it has always come back to the one thing which is not lost by the passing time. No matter though how much hardship we put ourselves in, without the occasional escape in an unaltered environment, the world would seem too dark.

The following dissertation was written in the final phase of my master studies of Tourism Destination Management, at NHTV, Breda University of Applied Science. My research focused on how the simple process of bathing has evolved into a very profitable industry, in current times. This research was conducted in order to see if the results can be applied to a destination which already has an existing Spa industry, but has forsaken it because of a series of unfortunate events.

Conducting this research has helped me discover different sides to subject which is of close interest to me. It has increased my knowledge and will hopefully benefit other that wish to study and contribute more to the topic of assisting destination development, with the help of Spa industry.

I would like to thank Boukje Strous as my supervisor, for her positive nature, concise feedback and for pointing me on a right path. Her understanding was an important factor throughout this study. I would also like to thank all of the contributors to my research, such as the individuals who have been so kind as to respond to surveys and give comments and pointers. In addition, I would like to thank my family and friends, who have supported me more than I would have imagined and have joined forces in helping me pass any bumps I have encountered. And last, but not least, I would like to send my deepest thanks to the teachers and leaders of this program, for their thoughtful characters and for giving me the opportunity to experience more than many others ever will in a lifetime. Thank you!

Raluca Paris

Bucharest, 2012

Page left blank on purpose

Executive Summary

This dissertation has been written as part of the final phase for the master course program "Tourism Destination Management" of NHTV Breda, University of Applied science. As the global Spa Industry is becoming a highly demanded form of tourism, it is hard to understand if such a product is a real benefit to the market, or just another hyped trend, which will soon fade. As a study case, two destinations from Romania were analysed, in order to see if such an industry can apply and increase tourism demand, incomings and revenue. For the purpose of this research, the following aim was set:

'The aim of this report is to conduct research on the importance and relevance of the health and spa industry in the tourism markets (local and international) of Romania and to discover if this sector is capable of boosting Romanian tourism and create a link towards other forms of tourism. In addition, recommendations for the stakeholders in the area of interest will be provided, for future development.'

The subsequent research questions were formulate and applied in order to create a clear research:

- ❖ How and why did the Spa industry become a global tourism business?
- ❖ What are the existing conditions of tourism in Romania? Can the Spa industry benefit this country?
- ❖ Depending on the assessment made from both primary and secondary research, can the Spa industry be considered an opportunity for the destinations? If so, in which of the locations will it be more efficient?
- ❖ What advice and recommendation can be given to the existing and future investing stakeholders, taking into consideration the destinations market interest, location, facilities?

The methods used for this research consisted in using materials from secondary/desk research, found in specialised books, journals, reports, local media, internet and databases from NHTV and outside sources. Primary was also conducted, under the form of a survey with tourists from both local and international market. A sample of 50 interviewees was collected, in attempt to have insight on what determines people to choose certain destinations for their holiday. Stakeholders were analysed as well. Since every research is restricted by certain limitations, these should be taken into account when reading this study.

December 13, 2012

First of all, research was made for presenting a picture of the current Spa Industry and how it came to be. Secondly, a current image upon the situation in Romania was made, mentioning current development strategies for tourism. A comparison between popular Spa destinations was made, two of which were standing out and were chosen for further investigation. After the secondary and primary research results came into focus, it was possible to decide which destination presented more interest for the market.

Recommendations were provided according to the current landscape and stakeholder implication: keeping to the developed strategies and plans and bringing the destination to European levels was suggested, by developing and modernising the infrastructure. Educating the society, but also the government in becoming more transparent and involved was also a recommendation. Finally, creating a special brand for the destination was advised, so that markets recognise it and remember it.

List of acronyms

ANAF	Agenția națională de administrare fiscală (National monetary administration)
ESPA	European Spa Association
FIHR	Federația Industriei Hoteliere din România (Hotel Industry Federation Romania)
FPTP	Federația Patronatelor din Turismul Românesc (Tourism Employers Federation Romania)
INS	Institutul Național de Statistică (National Statistics)
ISPA	International Spa Association
MEC	Means En-Chain
MRTD	Ministry of Regional and Tourism Development
MTR	Ministry of Tourism Romania
NATO	North Atlantic Treaty Organization
NGO	Non-Governmental Organisation
UNESCO	United Nations Educational, Scientific and Cultural Organization
OPTBR	Organizația Patronală a Turismului Balnear Romania (Spa management Romania)
PWC	Pricewatershouse Coopers
RTO	Romanian Tourism Office
SPA	Sanitas per Aqua
UN	United Nations
WWI	World War I
WWII	World War II

List of figures and tables

Figures:

Figure 1 Theoretical Framework	- 16 -
Figure 2 Romania Brand Logo	- 34 -
Figure 3 Map of Bucharest.....	- 42 -
Figure 4 Study areas from Bucharest.....	- 42 -
Figure 5: Map of field research HB.....	- 43 -
Figure 6: Chart of answers to Question 3 – Appendix D	- 48 -
Figure 7: Chart of answers to Question 6 – Appendix D	- 48 -
Figure 8: Chart of answers Question 7 – Appendix D.....	- 48 -
Figure 9: Chart answer to Question 8 – Appendix D.....	- 49 -
Figure 10: Stakeholder typology	- 53 -
Figure 11: Map of Romania.....	- 70 -
Figure 12: Map of Romanian Spas	- 71 -
Figure 13 Respondents by location.....	- 77 -

Tables:

Table 1 Room capacity comparison between Bucharest and other European capitals	- 36 -
---	--------

Table of Contents

Motivation	- 3 -
Executive Summary	- 5 -
List of acronyms	- 7 -
List of figures and tables	- 8 -
Figures:.....	- 8 -
Tables:.....	- 8 -
- CHAPTER I - INTRODUCTION -	- 12 -
1.1 Background	- 13 -
1.2 Goal and objectives.....	- 14 -
1.3 Research questions.....	- 15 -
1.4 Dissertation structure	- 15 -
- CHAPTER II – LITERATURE REVIEW –	- 17 -
2.1 The evolution of the Spa industry within societies (till WW II)	- 18 -
2.1.1 Classical age – Greece and the Roman Empire.....	- 18 -
2.1.2 Rise of Christianity	- 19 -
2.1.3 Renaissance.....	- 20 -
2.1.4 19 th century and the two World Wars	- 21 -
2.2 The use of health and Spa facilities.....	- 22 -
2.3 Birth of Spa tourism – advantages, infrastructure, reshaping cultures, etc.....	- 24 -
2.3.1 Birth of a new global industry.....	- 24 -
2.4 Current situation.....	- 26 -
2.5 The evolution of holiday selection, in the case of Spas	- 27 -
- CHAPTER III – THE SITUATION IN ROMANIA –	- 29 -
3.1 General information on the country.....	- 30 -
3.1.1 Geography and climate.....	- 30 -
3.1.2 History.....	- 31 -
3.1.4 Society.....	- 32 -
3.2 Tourism situation in the country	- 32 -

3.3 Branding Romania	- 34 -
3.4 Research for the most important locations with Spa potential.....	- 34 -
3.5 Research on the two locations (comparison)	- 35 -
3.5.1 Bucharest – Capital of Romania	- 35 -
3.5.2 The Herculaneum Baths – the ancient city of Roman baths.....	- 37 -
- CHAPTER IV – METHODOLOGY –.....	- 38 -
4.1 Secondary Research	- 39 -
4.1.1 Literature	- 39 -
4.1.2 Internet	- 40 -
4.2 Primary Research	- 40 -
4.2.1 Surveys.....	- 40 -
4.2.2 Observations.....	- 44 -
4.3 Limitations.....	- 44 -
4.3.1 Unwillingness to participate.....	- 44 -
4.3.2 Seasonality.....	- 45 -
4.3.3 Lack of knowledge	- 45 -
4.3.4 Subjectivity.....	- 45 -
4.3.5 Lack of previous studies	- 45 -
- CHAPTER V – ANALYSIS OF RESULTS –.....	- 46 -
5.1. Approach	- 47 -
5.2 Survey results.....	- 47 -
5.3 Analysis of stakeholders	- 50 -
5.4. Analytical conclusions.....	- 54 -
- CHAPTER VI – CONCLUSIONS & RECOMMENDATIONS –.....	- 55 -
6.1 Conclusions.....	- 56 -
6.2 Recommendations	- 59 -
Recommendations for future research	- 60 -
Reference List.....	- 62 -
- APPENDICES –.....	- 70 -
Appendix A - Maps.....	- 70 -

December 13, 2012

Appendix B – More information.....	- 72 -
Appendix C – Survey Results	- 74 -
Appendix D - Survey	- 78 -



- CHAPTER I - INTRODUCTION -

1.1 Background

Health and spa therapies have been around societies since ancient times. But the spa industry, as Cohen (2008) presents it, is still a new and growing sector for tourism. Depending on the culture, social and political background of provenience, traditional practices are mixed with new elements, rediscovering, reintegrating and rebranding. The same author, Cohen (2008), defines the spa industry as the sector that combines beauty, massage, hospitality, tourism, architecture, property development, landscape, fashion, food and beverage, fitness and leisure, personal development with medical practices in order to achieve a product which will not only help the development of certain sectors (as the initial medical one), but create a melting pot of which most economical branches can profit from (Cohen, Spas, wellness and human evolution, 2008). Although considered an industry in its 'infancy', spa management is fast developing with over 50,000 institutions world wide and \$40 billion dollar worth of revenue (SpaFinder, 2007).

Combining the idea of rediscovering and rebranding the potential of a destination through spa management and using this as an element to define a destination, cannot be considered a bad decision. Anholt (2003) sees it as the item that can set a destination as being different and memorable; it makes it easier to differentiate it for potential markets (Anholt, 2003). Efficient use of potential can make a great difference for both a developed country and a seeking to develop one. When looking at the process of decision making, those factors which are divers can link markets and destinations. Boga and Weiemair (2011) have developed the theory of MEC (means en-chain) that analyses the judgment of individuals which are keener in choosing a product that has a deeper meaning with them and which also has a connection with their personality.

Located at the south-east side of Europe, north of the Balkan Peninsula, Romania was one of the countries that linked the Occidental with the Oriental, influences which can also be seen today. Because of its geographical situation, the country can be seen as having almost all elements at hand for this development: the Danube, the Delta, the Black Sea, the Carpathians, the numerous valleys and hills, the culture and traditions which are still strongly rooted and a large quantity of fresh or mineral springs and subterranean water (European Spas Portal, 2012). This resource is spread out through the entire country, making the waters be available in almost every part. Last year, Romania has received 7,002 million tourists, figure which has grown with 16% in comparison with the year before. The local market was the leading one with 76,7% of the incomings and 21,6% were foreign (National Institute of Statistics , 2011).

December 13, 2012

Although considered one of the least 'tourism intensive' countries, Romania is part of the fastest growing destinations in tourism demand and supply (Mintel, 2007), but it lacks the necessary acknowledgment or distinctive image branding. Within the Country Brand Index, Romania is the 81st country out of the 102, place which shows that the country profile does not present any distinction (Branding Romania, 2009) nor does the country have a portrayed image, or branded image.

Because of the presented factors above, the following dissertation will assess the current tourism sector in Romania, focusing on the spa industry. Analyzing the facets of this section will provide a clear image for stakeholders on which region and parts to focus on. Also, the paper can be used for third parties as researched work for implementing spa tourism in the brand image of the country.

1.2 Goal and objectives

The Spa business is becoming a sector which is more and more sought after. Romania is a country which can easily link the existing resources with this domain, not only to grow and strengthen its tourism sector, but to also make awareness of other branches and regions within the country. In order to connect all of these elements, the destination and markets need to be analysed. Consequently, the following goal for this dissertation has been created:

The aim of this report is to conduct research on the importance and relevance of the health and spa industry in the tourism markets (local and international) of Romania and to discover if this sector is capable of boosting Romanian tourism and create a link towards other forms of tourism. In addition, recommendations for the stakeholders in the area of interest will be provided, for future development.

In order to achieve this goal, a number of objectives have been put together:

- ❖ To acquire from past studies and report the importance of the health and spa industry;
- ❖ To analyze the current situation of tourism in Romania, focusing after on the sector in cause;

- ❖ To gain information on the present projects and working process of the directly linked infrastructural elements with the spa industry;
- ❖ To attain a market insight by adding questionnaires and interviews to the research.

1.3 Research questions

In order to provide appropriate information for the goal to be reached, a main research question has been created. This will sum up the aim and process of the research, while the sub-questions will be used for a better study of the subject.

Can the health and Spa industry be seen as an opportunity for tourism development, tourism awareness, increased incomings and linkage to other divisions of the tourism sectors in Romania?

- ❖ How and why did the Spa industry become a global tourism business?
- ❖ What are the existing conditions of tourism in Romania? Can the Spa industry benefit this country?
- ❖ Depending on the assessment made from both primary and secondary research, can the Spa industry be considered an opportunity for the destinations? If so, in which of the locations will it be more efficient?
- ❖ What advice and recommendation can be given to the existing and future investing stakeholders, taking into consideration the destinations market interest, location, facilities?

1.4 Dissertation structure

The following dissertation will contain six chapters. In the first chapter, an introduction has been made. It presents the background and purpose of the paper and the overall goal and objectives. It also introduces the research questions on which the study will be based and explains the structure of the dissertation. The second chapter contains theory and literature review relevant for the topic of the thesis; it will present various studies and research done on the impact and potential the spa sector can have on a tourism destination

and boost the market demand. The third chapter will provide an insight on the situation at hand, in the country of study. This will include the prospective infrastructure and markets, to create an image on the existing conditions.

The used methods for the research and the process of interviewing relevant stakeholders will be included in the fourth chapter. This will assist the researcher in answering the goal and research questions, in the next chapters. Based on the findings and the analysis of these, results will be provided in chapter five. These will show if the Romanian Spa industry can be a potential answer for the tourism sector and be part of the brand image. Chapter six features the conclusions and recommendations for the considered locations and the stakeholders involved in the decision process. This will be based on the outcome of the entire qualitative and quantitative findings. The final chapter will also include suggestions for future study, relating to the context of the research.

The dissertation will end with a list of references and appendices. For a more visual aspect, the paper will be structured as follows:

1. Introduction
2. Literature review
3. The situation in Romania
4. Methodology
5. Results
6. Conclusion & Recommendations
7. References and Appendices

In order to have better understanding of the author's way of managing the information for this report, the following framework (Figure 1) has been developed. This framework will demonstrate how various factors can influence the process of decision making:

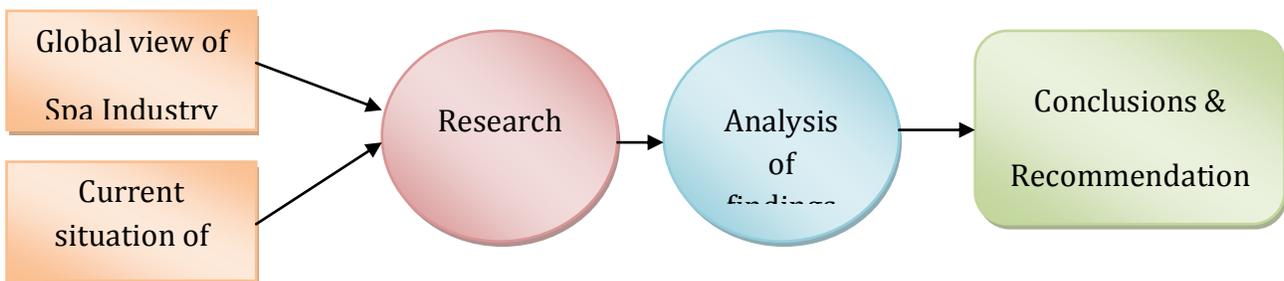


Figure 1 Theoretical Framework



– CHAPTER II – LITERATURE REVIEW –

An overly and loosely used term in current times, the notion of healing and rejuvenation through water has been recognized and taken advantage of for as long as history can take us back. The close bond between an individual and his need of water has been exploited in full, discovering new means in which the natural element can be more effective. Used for both practical, work and house hold activities, but also for cleansing both the body and spirit, has brought forth a new chapter for human society, as it learned to have a greater use for medical, relaxation and beauty purposes. The following chapter will present the evolution of Spa, how it has appeared, changed and how it has influenced society.

2.1 The evolution of the Spa industry within societies (till WW II)

2.1.1 Classical age – Greece and the Roman Empire

Using water treatments was a widely spread conduct in the classical age, fact which can be seen in the history of Greece. What started out as a custom confined to the more wealthy individuals, who preferred fresh spring water, soon became public when the first bath houses were opened. Such facilities also tended to diseases, which in turn started to make them be seen as sacred and were dedicated to a number of deities (Croutier, 1992). Even if spring water was mainly used, the idea of bathing in the sea and practicing 'thalassotherapy' was not uncommon (Jackson, 1990).

In the beginning, bathing was primarily used for hygienic purposes. In his work, Jackson (1990) presents Hippocrates hypothesis on how bathing can be used for more than cleaning: *'all diseases lay in an imbalance of the bodily fluids. To regain the balance a change of habits and environment was advised, which included bathing, perspiration, walking, and massages.'* This hypothesis was the founding idea for combining baths with sports and education, becoming the precursor of the gymnasium (Looman & Pillen, 1989).

The Roman Empire, as it was highly influenced by the Greeks, adopted the notion of bathing and started constructing their own baths, using thermal and mineral water. In contrast with the Greece, Roman bath houses were often found close to a military settlement. Jackson (1990) points that such facilities were not only used to help recovering soldiers, but also by healthy ones for rest and recreation. To this Schadewalt (1989) adds that Romans saw bathing more highly than the Greeks, which used the waters only after intensive training. Soldiers used the bath houses for socializing, relaxation and worship. Medical care was still applied with complete or partial submersion of the afflicted areas or ingestion of large quantities of water (Jackson, 1990).

December 13, 2012

A number of medical records can be found from this period, portraying the treatments conducted by both Greek and Roman physicians. Besides Hippocrates, Jackson (1990) also mentions Aclepiades (c.124 BC) a Greek physician which practiced in Rome and introduced general hydrotherapy and drinking cures as treatments. He also recommended bathing for preventive purposes. In contrast, Routh, Bhowmik, Parish & Witkowski (1996) refer to Pliny the Elder (ad 23-79) as the one which appointed specific properties to each type of thermal and mineral spring and made special cures out of them for each disease. Galen (ad 131–201) also advocated the use of water for the treatment of a variety of diseases. He preferred cold water, a concept that was reconsidered periodically throughout the following ages (Routh, Bhowmik, Parish, & Witkowski, 1996).

As soldiers were returning home, the need for similar conditions found on military ground, started to come into focus. This marks the point where three different types of baths were developed in the cities of the Empire (Schadewalt, 1989):

- For wealthy households which could afford the space and resources needed, the notion of indoor baths came to be (bome baths – *lat. Balnea*);
- Private baths were made for different social or religious groups (private bath – *lat. Balnea Privata*);
- And also public, state run bath houses (public baths – *lat. Balnea Publica*). Once the aqueducts were common in the empire, public baths became immense and impressive edifices (*lat. Thermae*). Such building could hold a capacity of thousands of people.

Military tropes which stayed in the new conquered lands started building their own Spas, using the local sources. This detail can be witnessed in a number of constructions all throughout Europe. In time, the Roman bathing culture changed from using the water as a healing agent, to a place of relaxation and pleasure, but medical care was still provided (Croutier, 1992; Schadewalt, 1989).

2.1.2 Rise of Christianity

The Roman Empire fell in the year 476 and with it, most of the highly regarded cultural attributes of this nation. A new God made its way, as Christianity rose, and treating the body and mind was done through worship and prayer (Looman & Pillen, 1989). The bathing custom also fell; so much, that it became prohibited and bath houses were turned into churches. Few survived, since they were used by aristocrats as private or home baths.

This prohibition was kept for a long period of time, people refraining from washing themselves, sometimes for years (Routh, Bhowmik, Parish, & Witkowski, 1996). In her book, Croutier (1992) mentions how 13th century, the notion of bathing started to be re-used and public bath houses re-appeared, especially in the southern part of Europe which was under the influence of the Moors (Appendix B for more information).

2.1.3 Renaissance

In the 16th century the image of public baths declined, a number of institutions being closed down. Such places were seen as pest holes, source to contagious diseases (syphilis, leprosy, plague, etc.) and dangerous meeting places for low life. Nonetheless, a certain clientele remained, but those preferred to visit baths which waters came from natural springs with thermal and mineral water.

Going to bath houses and taking the waters was an activity mostly prescribed by doctors and no longer something spontaneous. Some medical texts with specific treatments in which water was applied, were discovered, especially in Italy. This added value to the use of balneology in therapeutic treatments. *'De balneis omniae qua extant'* was published, in 1553, being one of the first encyclopaedias to focus on an overview of both modern and ancient literature for baths and medicinal water. Palmer (1990) presents the writings of Andrea Bacci, which studies and contradicts the earlier work of Galen (presented in subchapter 2.1.2), because of his lack of information and experimentation of the treatments Galen proposed¹. For Bacci, using the healing waters *'was not a matter of empiricism, but a sound discipline with its own rationale, institutes, and doctrine, which the learned physician alone was qualified to understand'*. Palmer (1990) shows how Bacci tackles almost every subject in the area of balneology, but not to revive the concept of Spas and health by water. In Bacci's book *'De Thermis'* one can see that this therapy was beginning to be more popular, but an underlying fact is that Bacci believed that bathing was governed by individuals that did not know what they were handling. His book was seen as an impulse for Spas to be returned under medical control, with a methodical approach.

Because of this, understanding the waters from a scientific point of view was important. Distilling the water was a start, but the analysis of all the minerals and irons was still rudimentary done and sometimes seen as very controversial. Physicians still did not know the effects of the minerals on the body or to which body part they should apply the treatment to. This was the time when various and strange treatments were invented and their effects were mediated, such as: bathing, drinking, internal douches, showers, applying hot mud and left to cool or vice-versa. Purging and sweating the body was also practiced, or

¹ Andrea Bacci – *De thermis*, 1571

December 13, 2012

by injecting water or mineral water through the nasal passage, in order to clean not only the direct area, but also internally. Knowing the disease and presenting the treatment, taking into consideration the constitution, age and sex of the patient was necessary. Again, Bacci argued with the suggestion of ancient physicians, to also use the water as a preventive measure. In his opinion, '*a healthy man who use the baths unadvisedly risked his health*' and cases of deaths were accounted, from a wide set of side-effects (Palmer, 1990).

Besides Bacci, Palmer (1990) also refers to Minardo, a man of clergy. In his book², a compendium referring to two baths³, he shows not only the uses of the baths (first for drinking and bathing and second for skin condition usage, washing off therapeutic mud or washing the animals), but also the fact that there was a season, from June till August, patients were set in nearby accommodations and there was a strict diet and treatment. Recurring visits were also advised. From the authors, one can conclude that both recommended combining the medical aspect with a healthy diet, pleasant surroundings and comfort, much as the ancient doctors.

Becoming a reinstated cultural aspect, bathing spreads outside of Italy in other part of Europe and was very popular with the elites. Medical movements, such as Paracelsianism (Appendix B for more information), promote the use of water and mineral treatments. More Spas are rediscovered, especially in France (Brockliss, 1990). Using Spa treatments was seen as a very serious activity in France. Facilities were created only for treatment and not for relaxation. Such treatments included purging, bathing, drinking the water and balancing it with a healthy diet. Patients were allowed to indulge in easy social activities in the afternoon, but were motivated more into walking and running, spending time in open spaces. There was an 'early to be' conduct, which contracted from other places in Europe, where the evenings were very animated (Brockliss, 1990).

2.1.4 19th century and the two World Wars

At the beginning of the 19th century and the increase in science and experimentation, the interest in balneology and health by water became of more interest. The water was more analyzed and introduced in medicine. Soon, mixtures were made, close or identical to the famous mineral waters (Coley, 1990). Through their work, Looman & Pillen (1989) explain the theory behind every doctor from this age: they were convinced that every illness had a

² Ventura Minardo, *Compendio delle regole date da diversi eccellentissimi autori intorno ai bagni di Caldiero*, Verona, 1594.

³ The two baths were situated in Caldiero, Verona.

cure which could have been found in nature; this could be potentially discovered through chemical analysis of the waters.

Treatments are developed for people individually, taking into account the composition and temperature of the water. Doctors also start including herbs into the bath, alternating hot and cold treatments or applying mud packs. They also include physical effort, massages and diets to their healing (Looman & Pillen, 1989). And with a growing middle class, common man is also targeted, not only the elites.

But such behaviour was not universal. In Britain, the use of the baths was diminishing. British Spas were kept by people with no interest to tend to them. They were poorly organized and aiming more towards a pleasure house, being exploited by those with interest (Harley, 1990). Estate developers started buying the institutions and changing them for commercial purposes. Having competition from other countries and episodes of economic and war depression, the English Spas decline further, until spa therapy is excluded from the National Health Service. This led to the closure of most centres, leaving only the known ones intact, such as Bath, Somerset ⁴.

After the second World War, Spa facilities became widely available again, for all types of clients, but mainly to reimburse the state medical system (Looman & Pillen, 1989; Croutier, 1992). New treatments are introduced under balneology, hydrotherapy and physiotherapy departments, health by water becoming one of the medical mainstream cures (van Tubergen & van der Linden, A Brief History of Spa Therapy, 2002).

2.2 The use of health and Spa facilities

Despite the long history of spa therapy, there is little empirical work on the actual benefits of the treatments conducted. Without the study of these therapies and states would offer medical grants for this kind of rehabilitation it would seem to be a social loss. On the other side, if spa therapy produces worthy benefits, governments and insurers can expand and counteract the high cost of conventional healthcare, promoting alternative healthcare with both sided benefits (Klick & Stratmann, 2008).

The outcome of theories

A number of theories suggest that therapy by water is beneficial mainly because of its capacity to detoxify the blood and improve circulation which in turn improves immunity

⁴ City of Bath, Somerset, England has become a World Heritage site in 1987

December 13, 2012

and digestion. Most treatments involved applying a source of heat to the area, either by submerging under warm water, applying hot mud or hot patches. This brought the blood to the surface of the skin, relaxing the muscles.

Another well documented theory was presented by Haywood (1990), which reviewed documented records from the 18th and 19th century, England, on how Spa treatments were used in lead poisoning treatments. Lead was a common product used in the household in those times, but it was also put in salt, wine, cosmetics, food colorants and medicine. The result of lead poisoning was paralysis and to cure this, physicians proposed a season long stay at one of the baths. At the beginning of 16th century, the city of Bath, England, was already known for curing paralysis, even in those cases where it seemed to be incurable. Many patients were treated before in other institutions, but without success. But after their stay at Bath, documents show that a high percentage got better⁵. The success of such a treatment was due to the fact that water immersing produced diuresis and increased the elimination of lead. Good diet helped and taking large quantities of water with calcium and iron supplemented the loss of minerals from the body. This is why the treatment was such a success (Nasermoaddel & Kagamimori, 2005).

In the past decade a few studies have also focused on the effects of spa therapy in rheumatoid arthritis and osteoarthritis. Patients were randomly selected in order to receive the spa therapy. Authors such as Sukenik, et al. (1995), Hall, et al. (1996) and Sylvester (1989) reviewed the effects of spa therapy in rheumatoid arthritis and osteoarthritis, after various treatments were applied, but in the end all stated that a definite judgment about the efficacy of these cures is impossible to give because of methodological flaws in the studies. But overall, the results showed seemed to maintain for a period starting from three to nine months. In 2001, a randomised controlled trial was done and it showed that spa therapy is clearly effective in ankylosing spondylitis. Van Turbergen, et al. (2001) made a report on two intervention groups which were followed a three week spa treatment at two different health resorts, and in the end were compared with a group who stayed at home and continued standard treatment which consisted in anti-inflammatory medicine and weekly group physical therapy. Significant improvements in function, pain, global wellbeing, and morning stiffness were found, up till nine months after the intervention, for the two groups that followed the Spa therapy.

Along side the studies done by scientists and from the medical corporations, investigations were being conducted also by public and private insurers, as well as the government. In 1996, the Italian Ministry of Health undertook a large investigation in the efficiency of

⁵ From 1760 to 1879, 3377 patients were admitted in Bath for paralysis due to lead intoxication. Forty five per cent were cured and 93% had at least improved.

Italian Spas for a number of medical problems, in order to see how much the country's Health Service should subsidise Spa treatments. The development was called '*Project Naiade*' and even from the start it showed a significant benefit, in both healing and prevention. It reduced missing workdays and hospital visits (Coccheri, Nappi, Valenti, Di Orio, Altobelli, & DeLuca, 2002). But Naiade studied a large scope and a large number of patients, leaving the possibility to self select the result. The lack of control groups limited the ability to link other European Spas to the report (Fioravanti, et al., 2003).

With the use of marketing channels, more focus is being brought up to Spa treatments and their usefulness. Investigations for almost all diseases are being made, from local pain in the joints and bones, to internal problems as digestion, detoxifying, infertility, etc. Documentation and trials are made, even if on a small groups (Klick & Stratmann, 2008). But in the last years, the concept of '*going to the Spa*' is based substantially on the traditional perception and historical value, the patients not necessarily informing themselves on the current study⁶.

2.3 Birth of Spa tourism – advantages, infrastructure, reshaping cultures, etc.

Using the baths and having a nearby accommodation was a notion that developed simultaneously through Europe and North America. Croutier (1992) explains how every bath house or Spa resort had, besides the bathing rooms, their own theatre, entertainment halls, and later on casinos and promenades. Since Spa resorts almost always seemed to offer their services to the more highly looked gentry, opulence and luxury became important aspects when constructing a resort. Grand hotels were built with dancing spaces and casinos. But Croutier (1992) also points out that Spa resorts were not only a melt pot for the rich and nobility, but also for painters, musicians, composers and writers. Baden Baden⁷ was the most alluring choice if one wanted to see and be seen.

2.3.1 Birth of a new global industry

As presented before, Spa therapies have been a part of the human culture, social and political milieu ever since ancient times. More ancient therapies are being discovered and

⁶ Information has been deduced from the interviews conducted for this dissertation. More information can be found in chapter 4;

⁷ Located in Germany.

December 13, 2012

implemented, branded into a new industry which involves a range of aligned industries. These include departments as beauty, massage, fashion and fitness, architecture, property development and landscape design, but also the industry of tourism and hospitality, food and beverage and leisure. It also involves traditional and contemporary medical practice as well as social development (Cohen, 2008).

Today, the global spa industry is a melting pot for a wide range of therapies, products and services which enhance health and wellness. All of them are taken from all over the world and combined, with Asian service ethics, holistic therapies and spiritual practices; American commercialism with its emphasis on beauty, pampering and destination experiences; European medical traditions and clinical acumen and the indigenous knowledge and environmental consciousness from tribal cultures. Because of this junction Spa treatments have been included in the international hospitality industry, merging the demand for travel and comfort with that of health and wellbeing found at the destination. This is why there is a 'Spa Boom' all over the world and has become a standard for luxury hotels and resorts (Cohen, 2003).

The global Spa industry is still evolving, but wellness can always be found at its core. This shows in the social interest for alternative medicine, but in a conscious context, even if globalised. This emphasis, on wellness and sustainability combined with the health, travel and hospitality segments allows a good evolution for Spa industry. Along side these, there is the need for documentation of the therapies, transparency in the use of products and services and a well based system for evaluating the performances in every Spa.

As development of the planet pushes all natural limits to elimination and inequality and the environment reaches chronic levels (Cohen, 2007), the Spa industry is one of sectors that highly depends on nature, but also offers a solution. The global Spa industry is capable of raising awareness and contributes in creating a high conscious and lower consumption habits. It can also be a base for a sustainable business model, one which managed well can last through generations. It can unite numerous societies, bringing together ethnic, geographical and cultural diversity (Meadows, Meadows, Randers, & Behrens, 1972).

The example of Elisabeth Arden's Red Door Salon and how day Spas came to be

Throughout Spa history, one can easily see how Spas and wellness have been reshaped and 'rediscovered' by each generation. The concept of bathing has been shaped in so many ways, just as the public demanded.

December 13, 2012

In the early 20th century, Elizabeth Arden (Appendix B for more information) opens the Red Door Salon, being a pioneer for the modern day spa. Services did not provide bathing and massages, with the added intense physical effort, but rather facials and manicures. Even though it was situated downtown New York, it was considered a place apart and calm, a place of wellbeing (EA Corporate, 2012).

The 1980s bring a new change in the industry, by integrating day Spas in hotel management. Dube & Renaghan (1999) point out the tactics used by hotel chains in order to get the upper hand in a new and demanded market segment. They first implemented health clubs, but after witnessing the popularity of day Spas, they soon opened their own, offering the services to both hotel guests and 'walk-in's. Joining day Spas with hotels creates the largest segment in the Spa industry. Soon after, in order to keep their new wellbeing and health attributes, managers also include healthy meal choices or menu plans for the entire stay.

2.4 Current situation

Spa industry has become a global phenomenon that is poised to unite humanity in the universal goal of working out how to be 'well'. For this reason, this sector is keen on leading the way and offering solutions on how to achieving sustainable wellbeing on a finite planet (Tabbachi, 2008).

The global Spa industry is still in its infancy, but even so, it presents strong figures documenting its size and scope. In 2011 there were 19,850 in the US alone, with 156 million visits and a revenue of \$13,4 billion dollars in the US (ISPA, 2011) and more than \$255 billion dollars world wide (CNN Money, 2010). The industry sustains a percentage of 17, 8 annual growth, even if it slightly declined because of the international economical crisis (ISPA, 2009). Spa industry has surpassed in revenue other forms of tourism, such as ski resorts and amusement parks (Tabbachi, 2008).

But the rapid growth of the industry is presenting some challenges. Being a high people-based business, recruiting and training competent staff is of major importance. Other problems are in the development of appropriate models and evaluation charts, in order for investors to asses transparently their affairs. Sustainability is also a factor to be taken care of: many individuals are becoming more aware of the environmental and social performances, demanding disclosure for business practices (Tabbachi, 2008).

Once wellness based services started to be integrated in the hospitality industry, more than in health care, the collaboration between the Spa industry and other sectors has increased, involving also new relations with the government and non-government agencies, as well as the private corporate sector. This makes Spas have a huge potential business success, for more than one domain.

Currently, an upcoming market in Spa industry is Asia. With a dramatic rise and a growth of 154% in the past years, in Thailand alone, shows the interest for the therapies practiced in wellness facilities. Shiatsu⁸, Ayurvedic⁹ and Tui-na¹⁰ techniques are being raked just as high as traditional European treatments and more techniques are making their way from smaller countries as Malaysia, Vietnam and Indonesia (CNN Money, 2009).

European Spa facilities are represented by ESPA, which promotes the indispensability of health resorts in Europe for the health system. Moreover, ESPA influences European Spas to keep to their local culture and traditions, use local sources and employment (ESPA, 2011).

2.5 The evolution of holiday selection, in the case of Spas

The global spa culture appears to be emerging from the intersection of the international, jet-set elite and the new hippy counterculture (such as backpackers), both of which go beyond national borders and have concepts made by the '*baby boomer*' generation. '*Baby boomers*' grew up with an ever changing world, with no subjugated views of individual freedom, feminist movement, civil, gay, handicapped and animal rights, and a turn from religion towards the emphasis of personal and spiritual experience . Additionally, '*baby boomers*' were the first modern generation to witness how the world was turning towards a globalised marketplace and the creation of an economy that valued individuals more than groups of people (Pine & Gilmore, 1999).

'*Baby boomers*' became well acquainted with the concept of healthy nutrition and sports, especially with the help of mass media. Running and aerobics were introduced as pass time activities by Kenneth Cooper (1968) and became very popular with the help of Jim Fixx (1978). People from this generation began the quest for staying fit and young, and with so many adepts, Spas slowly began to benefit.

⁸ Japan

⁹ India

¹⁰ Chinese

December 13, 2012

Even if *'baby boomers'* are no longer youthful, both this generation and the following one (also called Generation X) are frequent customers of Spas. Hatman Groups discovered, in their Consumer Trend Report for ISPA, that there is *'an increased trend towards adult children introducing their parents to the benefits of spas. Gifts for anniversaries, birthdays, and Mother's and Father's Day appear to be the catalysts for children sending their parents on an expense-paid visit to a spa. Gen-Xers are removing the 'old taboos' of spa-going – such as it being a luxury or an unnecessary indulgence – and are teaching their parents the value of taking care of themselves from the inside out'* (Hatman Group, 2004).

Presently, Spas are no longer used primarily for healing and therapies. Going to the Spa gives a feeling of escape, from social and society daily demands. It is the close, on hand way of diminishing mental and physical stress. Since the current generation is becoming more digitalized, being *'in the grid'* at all times and live in a polluted surroundings, Spas create a separated environment, with no perturbation, no noises. Younger clients start to make use of the facilities far more early in their life than their parents or grandparents. This is a new shift in the Spa industry which can be studied.



***- CHAPTER III – THE SITUATION IN
ROMANIA –***

In the following chapter the country of study will be presented, analysing the markets and tourism situation, in order to focus on locations most capable of sustaining and developing Spa tourism. The author will also cover the existing brand, investment plans and future development for a valid outcome.

3.1 General information on the country

3.1.1 Geography and climate

Situated in the southeast part of Europe, Romania shares borders with Hungary, Bulgaria, Serbia and Ukraine, being the second largest country in the area, after Poland (See the map in Appendix A). It also has opening to International water, though the Black Sea, but also by following the Danube River towards Northern waters. The Danube River ends its eight country long trail in Romania, forming one of the most unique and biodiverse wetlands in the world, the Danube Delta (4340 km of water wilderness. Also, The Danube River is a natural border between Romania and Bulgaria, Serbia and Ukraine, 'travelling' a distance of 3000km, before parting into three branches (Chilia, Sulina & Sfântu Gheorghe) and forms the delta. (RTO, 2012).

Romania is one of the countries that have as a national resource all forms of landscape. Besides the Black Sea and the Danube River, two thirds of the Carpathian Mountains can be found. Occupying one third of the countries territory, the mountains present rich forests and plenty of fauna. They are divided in three major sections: The Eastern, or Oriental Carpathians, the Southern Carpathians (also known as the Transylvanian Alps) and the Western Carpathians. Alongside mountains, Romanian landscape presents regions of hills and plateaus, with rich soil that allows the production of orchards and vineyards. Lastly, the fertile plains are devoted to agriculture, occupying a third of the countries territory (RTO, 2012).

The country is one of the most abundant lands in fresh water and natural mineral and thermal springs. Close to 4% of the countries territory is covered by lakes and rivers (approx. 3500 lakes) and 98% of them come from the Carpathian Mountains.

Having such a diverse geography, the climate is highly dependant on the region. Predominantly, Romania has a temperate climate with pleasant springs, quite warm summers, dry autumns and cold, snowy winters. Averages in summer vary from 27 to 30 degrees Celsius, while in winter, temperature can go as low as -30 - -40 degrees Celsius in the mountains or higher altitudes (Ministry of Tourism, 2012).

3.1.2 History

Romania's history has been shaped by migrations, conquest wars, territory loss and gain, and through large number of political changes. It was a country which was seen as a good asset, because of its geographical position, being considered a gate between Asia Minor and Western Europe (Deletant et al., 2003).

The first historical element that put Romania on the map was the Roman conquest and colonisation (106 a.d.). The conquest turns the former country of Dacia into a new, Roman law abiding country, Romania. This conquest has puzzled a number of historians, since people living in Dacia accepted the Roman government, laws, culture and social aspect, combining them with their own. Adopting the name which derived from the believed founder of the Roman Empire, Romanus; changing the language and becoming '*a Latin island in a sea of Slavic*'; and become a colonised province, with standing government in less than 200 years shows that the Roman empire took a lot of interest in the wellbeing of this new province, but the change was also welcomed by the people (Klepper, 2003).

The Middle Ages found Romania divided into three principalities (13th century): the Romanian country (also known as Wallachia), Moldavia and Transylvania. Only Wallachia kept its independence throughout history, by choosing to pay tribute towards invaders. Moldavia follows the same policy towards the Ottoman Empire, but in 1821 loses parts of its territory to Russia (Klepper, 2003). In 1859, Alexander Cuza reunites Moldavia and Wallachia, by making a political move in order to be elected for both governments. Transylvania was successively under the rule of the Hapsburg Empire (which strongly pushed towards a Magyarisation of the territory, while under its suzerainty), the Ottoman Empire and finally, to be reunited with Wallachia in 1918 after WWI (Deletant et al., 2003).

Before WWII, Romania is forced by Germany and Italy to cede northern Transylvania to Hungary, and the Cadrilater to Bulgaria. In this moment, the king abdicates in favour of his young son and Marshall Antonescu seizes the opportunity to impose military dictatorship. In order to regain the lost territories, Romania joins the war by siding with Germany. Three years into the war, the king succeeds in arresting Antonescu and turning arms against Germany and joining the Soviet Union (Dan, 2011). At the Yalta Agreement (1945) (Deletant et al., 2003) Romania becomes part of the Soviet Union and only the northern part of Transylvania is returned.

Under the Soviet sphere of influence, Romania becomes a communist state, till 1989. In that year, people unite against the communist leadership and after a violent uprising, the communist party and rule is ousted (Tiu, Giurescu, & Al., 2010).

In 2004 Romania joins NATO and in 2007, it becomes member of the European Union.

3.1.4 Society

Approximately 19 million people live in Romania, out of which 89% are Romanian. 7.5% Hungarian and 1.9% Gypsy, German, Ukrainian, Armenian, Croatian, Serbian and Turkish. More than 55% of the population lives in urban environments (INS, 2011). Romania is divided in 41 counties (județe) and the capital, Bucharest accounts as one of the counties. The capital is situated in Bucharest and some of the provinces still keep their historical names, such as Transylvania, Moldavia, Wallachia, and so on (Pop et al., 2007)

The main language spoken is Romanian, a Latin based language, but with influences coming from Slavic, old French, Slavonic German, Greek, Turkish and pre Roman dialects. Even the name of the country derives from the Latin name of "Romanus". Foreign visitors which have studied or come from other countries with a Latin background easily understand Romanian. The language is phonetic, so studying it is fairly easy, since the vast majority of words are pronounced just as they are spelled (information known because the author's nationality is Romanian). Around 80% of Romanian speak a second language, mostly English or their maternal language (in the care of Hungarians, Germans or Gypsy living in the country). 25% speak two foreign languages (French or German, studied in schools) and only 4% know three or more foreign languages (RTO, 2011). Other studied languages are Spanish, Italian or Russian.

The main religion is Eastern Orthodoxism, with 78% adepts and Greek Catholic, which has 10% of the countries adepts. Other religions are Roman Catholic, Protestant, Jewish and other minor religions (RTO, 2011).

3.2 Tourism situation in the country

In December 1989 Romania became a free country after more than fifty years of communisms suppression, under Nicolae Ceaușescu. It was for the first time that the national borders were open to all nations and the country welcomed tourists to experience the culture, traditions, scenery and leisure opportunities it provided. Having both water and land resources, a number of tourism related activities can be enjoyed all year long, from winter sports to summer holidays, cultural and religious tourism, cruises, natural mineral and thermal Spas, gastronomy tourism or tourism which focuses on flora and fauna . For example:

The Black Sea coast stretches for 241km, with wide sandy beaches; being a continental sea, the water has low tide and salinity (Ministry of Tourism, 2012);

December 13, 2012

Being the second largest river in Europe, The Danube is an important water route for commercial use, international trade and tourism cruises; the most important port is Constanța, which can be reached through a canal build in 1984; other important cities along are Drobeta, Giurgiu, Călărași, Galați and Tulcea; the closest one to the capital is Giurgiu (RTO, 2012);

The Danube Delta is a swamp area, with marshes, floating islands and sandbanks; It is an UNESCO world heritage site, protected for its biosphere and for being a natural habitat for many endangered animals, birds and plants (Ministry of Tourism, 2012); popular tourist products involve natural and cultural tourism, bird watching, flora and fauna documentation, fishing (in certain time periods) and gastronomy.

Romanian Carpathians are a great destination for activities and sports done out in nature, such as climbing, hiking, biking and river-rafting; some of the most popular locations are Sinaia, Predeal, Brașov, Bâlea Lake and Păltiniș;

Having one third of Europe's mineral and thermal springs, there are over 70 natural Spas, with alternative therapies for physical, internal and stress related disorders; the most sought after destinations are: Mangalia, Neptun, Eforie Nord, Slănic Moldova, Vatra Dornei, Borsec, Felix Baths and the Herculaneum Baths (OPTBR, 2011) (See map of Romanian Spas in Appendix A).

Having such an important natural treasury, Romania has pledged towards European and international conventions to protect the environment (Pop et al., 2007).

Romanian tourism can be divided in three major segments: ecotourism (cultural and religious tourism; rural and ethnographical tourism; adventure tourism; etc.), aqua tourism and business tourism (meetings; incentives; conferences; urban tourism & MICE).

A large variety of old churches, monasteries and cathedrals preserve a part of the Romanian cultural heritage. Close to 30,000 historical monuments, architectural sites and vestiges add to his heritage, with representative styles from: Romanic, Gothic, Renaissance, Baroque and French Art Nouveau. A representative style for Romania is the one named after the famous architect C. Brâncoveanu (Pop et al., 2007). Many of these architectural wonders are part of the UNESCO heritage.

In 2011, according to WTTC report (2012), 184,500 jobs existed in the tourism sector, being only 2.2% of total employment. Adding indirect contribution, the percentage rises at 5.1% (435,000 jobs). Visitor exports generated RON 6.1 billion, being close to 3% of total exports and made a direct contribution of RON 7.7 billion to the countries GDP (1.4% of GDP). The total contribution was RON 25.1 billion in 2011, being 4.5% of the GDP. Over 7

million international tourists visited Romania in 2011 (coming from Hungary, The Republic of Moldavia, Bulgaria, Ukraine, Germany, Italy, Turkey, and so on) (National Institute of Statistics , 2011). The leading market for Romania remains the domestic one (WTTC, 2012).

3.3 Branding Romania

Having a country brand is a new concept for Romania. Since the fall of Communism, Romania has not made any major steps in creating an image for its self. Having a country brand has direct impact on trade, investments and tourism (Aaker D. A., 1991).

Romania's newest tourism campaign was launched in 2010, Shanghai, with a new logo / motto (See Figure 2), being designed in order to bring more international awareness towards Romania's tourism brand. MRTD conducted a market research in the eight most important markets (Germany, United Kingdom, Italy, Russia, Austria, United States, France and Hungary) and in Romania, in order to combine the most competitive touristic programs which would have a big impact on the markets (MDRT, 2010).

Figure 2 Romania Brand Logo



3.4 Research for the most important locations with Spa potential

Romania has almost one third of the thermal and mineral water supply of Europe. Romanian Spas have been well known ever since ancient times, but became famous in current ages since 1860s. Underground thermal and mineral springs, salt mines and sulphurous waters are resources which can help Romania become an ideal place for wellness and relaxation (Pop et al., 2007). Most popular resorts are:

December 13, 2012

1. Felix Baths, which offer warm baths and mud, thermal pools and electro & hydro-therapy (OPTBR, 2011);
2. Sovata, with waters that are recommended in the case of gynaecological and locomotors system issues, digestive and endocrine diseases, or for post traumatic recovery (OPTBR, 2012);
3. Călimănești – Căciulata, known for mineral waters that help in healing and preventing digestive, urinary and kidney syndromes (OPTBR, 2011);
4. The Spas close to the Black Sea (an example is Techirghiol) which combine recreational activities with spa treatments, involving mud therapy for dermatological diseases;
5. The Herculaneum Baths are one of the oldest Spa cities in Romania, dating all the way back from Roman times. Waters are recommended in the treatment of rheumatic pains, inflammatory diseases, nervous system issues or relating problems (OPTBR, 2012).
6. The capital, Bucharest, also has abundant water resources. In the north of the city, is the Ana Aslan Institute, which specializes in geriatric therapy based on the use of products made by the professor Ana Aslan (Appendix B for more information) (Ana Aslan, 2008).

3.5 Research on the two locations (comparison)

From the list above, two destinations have been selected for further analyses and comparison of products.

3.5.1 Bucharest – Capital of Romania

Known for the influences of the French Belle Époque, Bucharest became famous between the two world wars and was given the nickname of 'Little Paris'. It is currently the largest city in Romania becoming a busy European metropolis. It has a population of 2.2 million people and it has welcomed more that 1.12 million visitors in 2010 and more than 1.85 million spent nights (MRTD, 2010).

Although the city offers possibilities for week-end breaks, holidays, seasonal holidays and more, the primary form of tourism is business orientated. This created a seasonality around the programs of large multinational companies, which offer holidays and time between the months of July – August, December or end of the week.

The supply side of the market is dominated by luxury or high-end accommodations, as the 4 or 5* hotels, that represent 70% on the total capacity (MRTD, 2010). In comparison to other European countries, Bucharest does not have the same room capacity (See Table 1).

Table 1 Room capacity comparison between Bucharest and other European capitals¹¹

Name of city	Population	No. of hotels	No. of rooms	Rooms / 1000 locals
Bucuresti	1 944 367	92	9240	4.75
Budapesta	1 721 556	219	19465	11.31
Varsovia	1 709 781	77	11251	6.58
Sofia	1 247 059	116	2455	1.97
Atena	4 088 447	690	33167	8.11
Roma	4 110 035	1365	62283	15.15
Berlin	3 431 675	572	44255	12.90
Praga	1 233 211	555	32786	26.59

In order to attract tourists from other market sectors, the ministry has developed a plan of making the city more alive, fun, to allow tourists to find small hidden places, in order to enhance their experience, but also be a practical city, with 'marked' objectives, close to each other and something to do for every individual (MRTD, 2010).

Spa tourism came to be known in Bucharest especially because it was integrated in the offer that came with large hotels from international groups. An exact number of how many such facilities exist has not been researched, so this can be a proposition for future study.

Being the capital of Romania, Bucharest has openings to all communications and transport lines. The only means of transportation which cannot be used is travel on water. A canal leading to the Danube River has been proposed over a decade ago, but the plan was

¹¹ Source: MRTD

abandoned. Today, it is being revised, in order to connect the only capital which is not linked on the line of the Danube (RTO, 2012).

3.5.2 The Herculaneum Baths – the ancient city of Roman baths

The Herculaneum Baths are one the oldest Spas in Romania and one of the oldest in the world. The city is situated in the Valley of Cerna and it's integrated into the National Park found in this area. The architectures still shows a number of buildings from the Roman times (aqueducts, baths, statues), but they are poorly taken cared of, which is taking a toll on the vestiges.

In the 19th century, the bath city was extremely popular with the Austrian monarchy, but with the start of the communist era, tourism altogether was left at odds, including the beautiful baths (OPTBR, 2012).

In 2007, the Minister of Tourism (then Elena Udrea) signed a collaboration protocol for the development of the Herculaneum Baths (MORTD, 2011). While rediscovering the history of the city and conserving the natural aspect of the location, slow works are being conducted for rehabilitation of the administration, and in creating a better path between potential investors and the local community.

Development programs include:

- Rise of accessibility (the bath city is quite remote, especially for international tourists; it can be accessed by car or by train, but it has no direct or close access to an airport);
- Rehabilitation of the infrastructure;
- Creating an information program, in order to have open market channels and bring knowledge about the resort;
- Creating a stimuli program for balneology tourism, but also local producers and entrepreneurs;
- Promoting SME' for commercial and tourist services;
- Promotion of the cultural background through festivals, cultural events.

This information has been taken from the Urban Development, Herculaneum Baths, made by the Ministry (MRTD, 2012)



- CHAPTER IV – METHODOLOGY –

The methodology of this report is an important aspect as it demonstrates how the research has been conducted and how the author sees the presented subject. It is a set of practices from which specific methods may derive in order to interpret a number of factors within the scope of a particular discipline (Business Dictionary, 2012). When a methodology is incomplete or doesn't follow the imposed set of practices, it can affect the quality of a report. For this research, the author has combined quantitative and qualitative research; primary data involves both qualitative and quantitative analysis, while secondary research is based only on qualitative research.

4.1 Secondary Research

Secondary research has been conducted in order to serve as a background for the topic of this thesis. The information used created a clear image of the existing state of affairs and how this point was reached. Aaker, Kumar & Day (2001) write about secondary research as being a very useful research instrument, saving time and resources. It offers rich insight in the subject and the capacity of answering the proposed research questions.

For this dissertation, secondary research was done by combining written documents, reports and articles with internet sources, as it will be presented below:

4.1.1 Literature

For this report, books, articles and reports have been used in order to create a base of knowledge before analysing and recommending certain actions for investors and government. Firstly, a brief history of how Spa industry became a global factor was presented. This evolution lasted, even through ages when it was shun on, due to the fact that it has such a strong connection to humanity. Secondly, the country of study was presented, pointing available resources and current situation, important for Spa industry further development and reaching the potential in both client satisfaction and revenue.

The two researches have demonstrated that necessary sources and capacity exists, but need to be directed efficiently, in order to create a memorable destination, which is known by both national and international markets.

Since literature available for the comparison of the two study cases (Bucharest and Herculaneum Baths) and why one is chosen over another, is limited, the author has also

explored other fields, relating to marketing, psychology and sociology. This gives a new take on the subject at hand, making it more interesting and offering the possibility to contribute to academic findings. The literature was qualitatively analysed.

4.1.2 Internet

The World Wide Web was a valuable source in finding information for this topic. Data and statistics are likely to be updated more frequently, than books or articles, on the internet. Through this research techniques a number of documents were found, which otherwise would have been lost or not available in print. Databases and libraries provided by NHTV have been used for previous studies, statistics, articles and study cases. Other sources have also been taken into account, once they were validated as peer-reviewed information. Internet research helped broaden the field of research for this thesis, helping the author use facts found in various languages, by providing alternative translation. Qualitative analysis has been used in order to understand the gathered secondary data and help define the parameters of primary research.

4.2 Primary Research

As Driscoll (2011) states, research is not limited to findings in the library or on the internet. Individual conducted research is to collect first hand information, not from books, reports or other materials.

4.2.1 Surveys

Surveys were implemented among domestic and international tourists. The survey was made in order to understand the market demand and if people knew the presented form of tourism and use / have used it. The survey consists of open enquiries and single or multiple choice questions. The first half of the questions found in the survey were set in order to see what determines tourists to choose a certain resort over another, making a special focus on destinations that include Spa centres. Since the topic of thesis is to see if people would be inclined to travel to the country of study, again, focusing on the Spa industry, the second half of the survey contained questions that related to this. Those that were interviewed were given the option, in the second half of the interview to chose 'I do not wish to travel...'

December 13, 2012

or 'I didn't know of this...', in order to see if the people filling the survey were aware or at all interested in the destination.

Gender, age and nationality were included in order to see on what grounds each category bases its decision making and which of those would more likely travel to the country of study. Also, the survey was written in two languages, for both international and domestic tourists to be able to participate.

Surveys were placed online and also conducted face - to - face, in field research (questionnaire can be found in Appendix C).

Area of research

Having two areas of field research, the author has selected several areas in which to conduct the interviews. Those areas were selected for being touristic areas (information known by the author) and having a multi-cultural and background subjects, from both international and domestic markets. In the following figure, the circled areas represent the locations where the questionnaire was conducted.

December 13, 2012

BUCHAREST

Figure 3 Map of Bucharest¹²

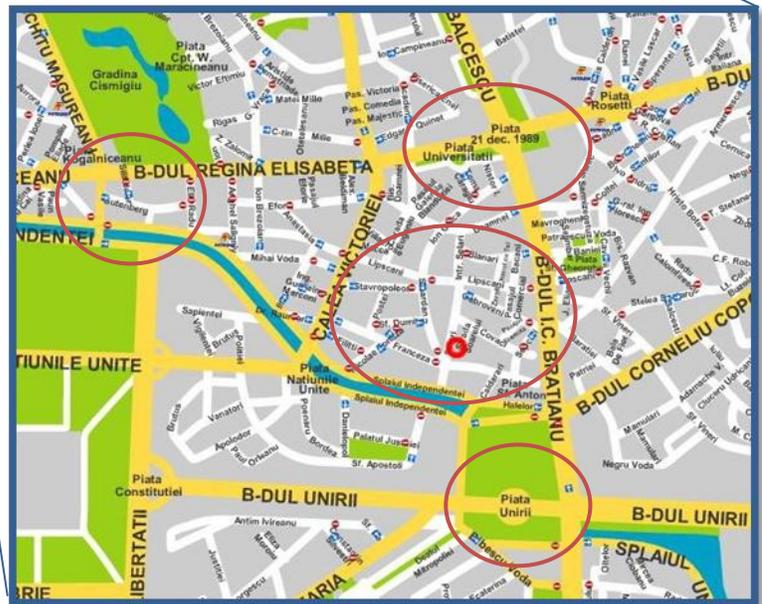
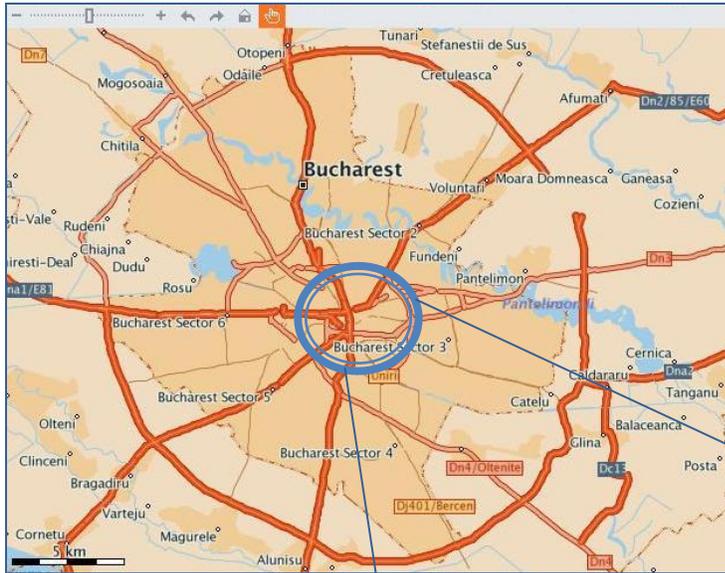


Figure 4 Study areas from Bucharest¹³

¹² Source: www.seminee.webro.info/harta-bucuresti.JPG

¹³ Source: www.funromtour.ro/images/poza_admin_harta_fun_8_214_2635.jpg

HERCULANEUM BATHS

Figure 5: Map of field research HB¹⁴



In Bucharest, the targeted areas are part of the city highlights for tourists: the Arch of Triumph, Victory Avenue, Cantacuzino Palace, Revolution Square, the Royal Palace, the Romanian Athenaeum, Athenaeum Palace Hotel, the Military Club, the Palace of the Savings Bank, Old Historical Center of Bucharest, Lipscani District, Manuc's Inn, University Square, Parliament Palace and Union Square.

Being such a small city, Herculaneum Baths was taken into account as one entity, for this research.

Sample

In the case of the present research, the method of stratified sampling technique has been used. This sampling method was used in order to reduce, or in some cases even avoid some of the sampling errors encountered in random sampling. Stratified sampling is used in the case of at least one common characteristic, in this case, the author focusing on the nationality of the individuals surveyed (international or locals) (StatPac, 2012). The aim of this investigation is to have a wide sample of tourists, from both studied markets. The research resulted in 50 respondents.

¹⁴ Source: www.zenophotos.com/romania/herculane/info/BaileHerculane_harta.jpg

In every interviewed group there are mixed genders participants and variation in age. There was no main focus group, since global Spa industry currently addresses members of a society from all cultural, social, political, religious, and so on, backgrounds (Boga & Weiermair, 2011). In this case, the researcher has tried to gather as various persons, in order to have a representative for each age category, gender, education and past experience.

4.2.2 Observations

Observations are often misjudged tools when doing primary research. This study instrument can be applied to almost every subject matter, depending only on the research questions. The two common ways of observing are: participant observation and unobtrusive observation (Driscoll, 2011). For this thesis, observing marketing channels, physical surroundings or body language, during interviews brought an increase of information and improved the validity of the research.

4.3 Limitations

Certain limitations to the research need to be taken into account. It is not uncommon for unforeseen elements to disrupt the process of a study. In the case of this thesis, the author has experienced the following drawbacks:

4.3.1 Unwillingness to participate

A very strong limitation was due to the fact that all organisations or private companies contacted by the author refused to become commissioners or even participate in any interviews. Because of a large existing request from other students, privacy, lack of time or interest, or even not understanding the subject and purpose of the research, the author was unfortunately turned down.

In many cases, the organisations and private companies suggested the use of provided materials, such as pamphlets, books or internet data. Information was supported by desk research, but it may impact the final result.

Another limitation was the reluctance in participating in surveys of individuals. This was especially present in the case of face-to-face surveys, done by the author on location. This resulted in a small survey sample. A fact that needs to be kept in mind is relative social

adversity towards answering surveys because of how historical events have shaped the public opinion. Also, nowadays there are so many companies or individuals conducting surveys, that people simply walk past them.

4.3.2 Seasonality

Certain limitations are to be accounted for because of seasonality. In case of Bucharest, and being the capital of the country, this factor is not as present as in the Herculaneum Baths. Since the last destination is more sought by elderly individuals, who receive medical subventions, there are certain periods when the baths do not receive a lot of incomings. Also, business or accommodation owners conduct their affairs in the city, but live in other locations, where they spend their time when the resort does not have tourists.

4.3.3 Lack of knowledge

Both national and international survey respondents had difficulties, or did not possess certain information, in answering some of points in the questionnaire. This made the results sometimes be predictable and not useful for the research.

4.3.4 Subjectivity

This entire study was done by one researcher. Because of this, the end result can be predisposed to a level of subjectivity. In order to minimise this level, the author has tried to be objective in her work and adapt quantitative and qualitative research accordingly.

4.3.5 Lack of previous studies

Finally, a limitation is that there are previous studies done on the comparison between Bucharest and the Herculaneum Baths. Murphy, Moscardo & Benckendorff (2007) suggest that there is a difference in research when taking destinations together as opposed to independently.



- CHAPTER V – ANALYSIS OF RESULTS –

The following chapter will present the analysis of the results from the survey. These results will answer the third proposed question in the introduction, that: *'Depending on the assessment made from both primary and secondary research, can the Spa industry be considered an opportunity for the destinations? If so, in which of the locations will it be more efficient?'*

5.1. Approach

After all of the data has been collected, the analysis of finding and results of the survey was conducted in the month of October and November 2012. The researcher used the literature review and combined it with the findings, in order to have create a connection between the global industry of Spa tourism, the national situation of tourism in the country and then selecting two study points and finally having the result of the conducted survey.

This approach was done using the technique of coding information and then grouping similarities between the groups (Bailey, 2007). Stakeholders and surveyed people were clustered according to their origin: local or internationals, in order to facilitate the study and give a clear and valid conclusion (Rustema, March 2012).

5.2 Survey results

We have already seen in the second chapter (subchapter 2.5) how the process of choosing a Spa holiday has evolved. In order to analyse what drives people to choose a destination over another, we must define the process of decision making. For this purpose, the definition made Zeleny (2006) applies to the present study, and that being, that the process of decision making is a dynamic, complex search of information, enriched with feedback, uncertainty and sometimes conflicting concepts. For complete survey results please go to Appendix C

The survey conducted for this research included multiple choice questions which can help the author have a clear image on the drivers of decision making. Most answers showed that personal preference and past experiences are key factors when choosing a destination. Location, price, type of accommodation and optional services are also important elements. On the other side, the size of the hotel, optional packages (for example, full and half board) or paperwork impediments seem not to be of high interest among those that completed the survey (Analysis of survey for Questions 1 & 2 – Appendix D). This can be seen as how the market fluctuates between going somewhere inexperienced before, but still holding on to

criteria learned in the past. Keeping a great value on price shows a certain awareness for price –quality balance.

When analyzing the results of the survey further, the information researched in subchapters 2.2, 2.3 and 2.5 come evident. 88% of the people interviewed have heard at some point in life, of Spa services and more than half have used such facilities (Figure 6).

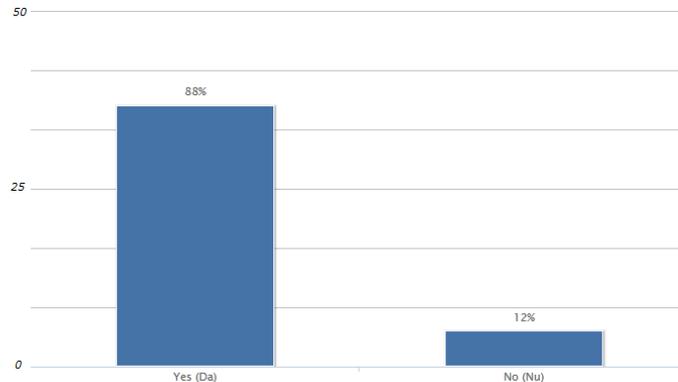


Figure 6: Chart of answers to Question 3 – Appendix D

Implementing day Spas or other forms of Spa tourism in accommodation complexes has proven to be innovative management, because 52% have made use of these services when found in vicinity (Figure 7). But having modern means of transportation or the hotel did not include a Spa service, has provoked 48% of the people questioned to use the facilities of other, separate health complexes (Figure 8). Even so, having a Spa close to the resort is important since close to 70% prefer this service to be included (Figure 9).

Figure 7: Chart of answers to Question 6 – Appendix D

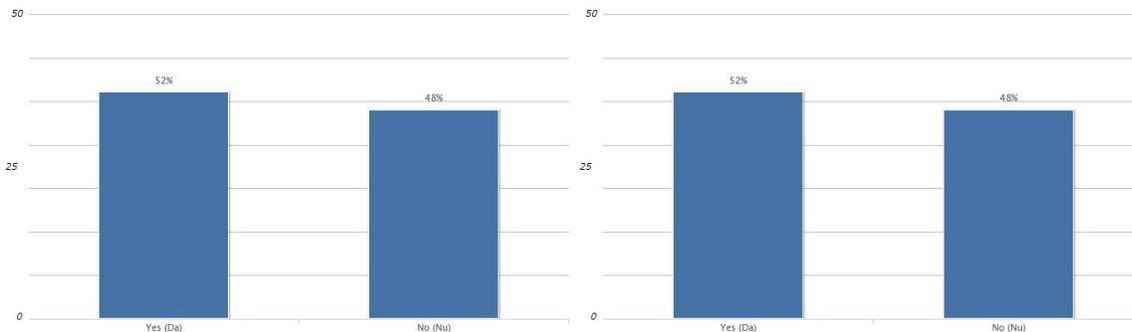
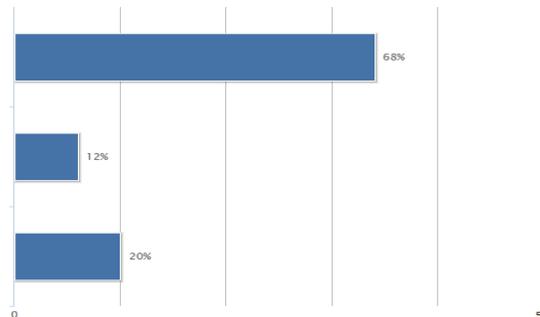


Figure 8: Chart of answers Question 7 – Appendix D

Figure 9: Chart answer to Question 8 – Appendix D



When asked why, answers such as commodity, practicality, preference in what time and convenience were among the top choices of words. But also, some individuals thought that Spa services were not designed for their age group.

The following questions of the survey relate to the country of study for this dissertation. Special answers were created for both international and domestic tourists. In the case of face – to – face interviews, the researcher has changed the time of action in grammar for some answers, in order to minimise error. In the second part of the survey, the two market segments can be clearly seen and analysed accordingly. Also, separate answers for the two destinations have been integrated.

The main reason for travelling towards the country is to actually return from another destination home. 48 % of those interviewed were returning from business or leisure travelling, while only 16% arrived in order to spend their holidays and 16% to visit family and friends. Close to 20% express that they did not travel to Romania, for any purpose and nobody was interested in travelling for business or academic purposes. But out of those that did arrive to this country, almost all engaged in travelling out side of the place they first arrived in. So did the locals; they have visited other locations in the country.

When asked where they have travelled, the vast majority pointed destinations close to the capital, but situated either in the south part of the Carpathians or in the Transylvanian Plateau. Since both are part of the Romanian international brand, this outcome can relate to the study of Ionela Cretu (2011) which reaches how images of a destination can change the perception of tourists, though mass-media, books and other non-touristic sources (requoted from Fakeye & Crompton, 1991).

December 13, 2012

Even if there was no focus group for age or gender, the most answers came from people from the ages of 20-30 years old and most surveys were done by women. The sample was clustered according to their nationalities

5.3 Analysis of stakeholders

Upon becoming a member of the European Union, a strategy project for the future of tourism in Romania was conducted, for the period of 2007-2013. Its main purpose was to draw attention to the lack of attractiveness of Romania, especially from the point of view of quality – price levels. Any country that wants to benefit from long term tourism needs the implementation of a long term development plan.

MTR established that it is extremely necessary to draw-up a tourism development plan for laying the bases for implementing a sustainable approach of tourism development in Romania, by also contracting the World Tourism Organization for this action. The Master Plan included a 6-year action plan (2007-2013) and financial support through the structural funds to which Romania has access due to its integrating in the European Union in January 2007, but refers to tourism development for a period of 20 years, until 2026 (MDRT, 2010).

The master plan presented before and the strategies for the two cities (subchapter 3.5) have been done in order to attract more investors and make stakeholders work together towards a common goal. Since actually discussing the situation in either of the destinations was refused, the researcher had to rely on her own observations in order to classify the stakeholders.

The implications of stakeholders varies from one destination to the other. While in Bucharest, being the capital, everything is watched and criticised by the media and public opinion, the Herculanium Baths only come into view when the tourist season starts. The public opinion drives a hard opinion, even if sometimes the government and large organisations do not take it into account. For this, NGO's come into play, but they take more the side of the forgotten baths than that of a vibrating city, which can have income from other industries. Even so, these organisations are not strong enough to stand in front of the government, so they quickly disintegrate, usually from lack of funds.

National tourism organisations have been established in order to protect the interest of each stakeholder involved in tourism for the two destinations. These are:

December 13, 2012

❖ Romanian Government

Romanian Government is the body that receives the input, concerning tourism related issues, from the following presented organisations. After evaluation, it allows or denies the integration of forwarded strategies and developments from them.

❖ Ministry of Regional and Tourism Development

MRTD creates the governmental policies for regional development, territorial development, interregional and transnational cooperation, land use, urbanism and architecture, inhabitation, constructions and tourism. In case of tourism and as presented before, MRTD has created strategy plans and a Master Development Plan in order for the countries tourism to rise to the same level as other European country members. It has also created the current country brand (presented in Chapter 3, subchapter 3.3) – *'Romania. Visit the Carpathian Garden'* (MRTD, 2010; MDRT, 2010).

❖ ANAF

Founded in 2003, ANAF coordinates the national finances for both the counties of the country and its capital. It revises public expenses, collection and administration of all taxes and division of budgetary income (ANAF, 2003). Since most Romanian edifices and buildings are still under governmental care, ANAF insures that budget is allocated for maintaining the. But this burden is created according to the importance of each construction.

❖ OPTBR

OPTBR was founded in 1993 at the initiative of 19 representatives from main balnear resorts (the Herculaneum Baths being one of them). It currently has 62 members. The organisations objectives are to lobby the interests of its members and to promote a favorable image of Spa tourism. It is also an active participant in making the business environment for its members by providing information for development. With the help of OPTBR, Spa cities create programs for collaboration and investment (OPTBR, 2009).

❖ FIHR

The Hotel Industry Federation of Romania lobbies for the hospitality industry, presenting the interest of its members in front of the Ministry of Tourism (FIHR, 2002).

❖ FPTR

Is a non – governmental, non – profit organisation, based on professional criteria for tourism. It has representation in National Confederation of Romanian Employers. It activates since 1992 and the purpose of the company is to promote a favorable image of Romanian tourism, both to domestic markets and international ones. It represents small,

December 13, 2012

medium and large tourism enterprises and is actively involved in creating strategy development for bringing in new markets (FPTR, 2012).

❖ Local governments

Local governments come with propositions and questions to the presented organisations, in order for them to be assessed and resolved.

International organisations also have an impact on how tourism is developed in Romania:

❖ European Travel Commission – is concerned with how value is added to tourism, though the natural resources and cultural diversity of the membering states; it promotes Europe as a tourist destination; and it assists member NTO's in exchanging information and work collaboration (ETC, n/a).

❖ World Tourism – it is the UN instrument for achieving a responsible, sustainable and universally accessible tourism; it promotes economic growth, inclusive development and sustainability, while offering leadership and support for its members (WTO, 2011)

❖ International investors

In order to assess the typology of the presented stakeholders, the diagram model (Figure 10) created by Mitchels, et al. (1997) has been used. For it to be interpreted, definitions for each of the major three attributes have to be taken into account:

- Power refers to *'the ability of those who possess power to bring about the outcomes they desire'* (Mitchell et al., 1997);
- Urgency is defined by Mitchels, et al. (1997) *'as the degree to which stakeholder claims demand immediate attention'*;
- And lastly, legitimacy is defined by Suchman (Mitchell, Agle, & D., 1997) as *'a generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions'*.

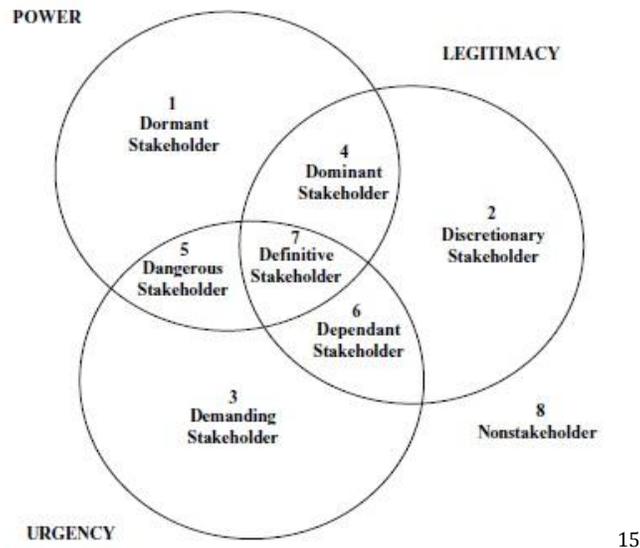


Figure 10: Stakeholder typology

According to the definitions and description, the stakeholders have been categorised in relation to their roles and scope, by power, urgency and legitimacy attributes (this concerns development in both Bucharest and the Herculaneum Baths):

Dormant – Romanian Government

Discretionary – European Travel Commission & World Tourism

Demanding – Local Governments,

Dominant – ANAF

Dangerous – FPTR

Dependant – OPTBR & FIHR

Definitive - Ministry of Tourism Romania

Since no interviews were allowed with any of these organisations, the categorisation was based on the observations of the researcher (via mass media, prints and personal experience), descriptions made by the stakeholders of themselves and their impact on the areas of study.

¹⁵ Source: Mitchell et al., 1997

www.community.mis.temple.edu/mis5102sec401/files/2011/02/stakeholder-analysis-for-rd-projects.pdf

5.4. Analytical conclusions

After analysing the results of primary and secondary research, the question posed at the beginning of this paper can be answered.

'Depending on the assessment made from both primary and secondary research, can the Spa industry be considered an opportunity for the destinations? If so, in which of the locations will it be more efficient?'

Even if the Herculaneum Baths present abundant resources, not only for practicing Spa tourism, but also alternative activities, the city is not maintained, despite the best interest of the before mentioned NGO's or local government. Due to the location, lack of public information or market interest, former popularity of the resort diminishes.

On the other hand, Bucharest is becoming a well thought international tourism trademark. By creating a memorable experience, stakeholders can attract leisure tourists from the business sector and maybe even invite leisure guests in becoming business tourists.

Because of this, the answer for which location will present more benefits for investments is Bucharest.



***- CHAPTER VI – CONCLUSIONS &
RECOMMENDATIONS –***

The final chapter of this dissertation will conclude the research and help in making valid recommendations for developing Spa tourism as a means of raising the income from tourism in Bucharest. In the chapter before, it was demonstrated that the capital was the destination more in which more investments in proposed, in order to level the city at European capital standards.

6.1 Conclusions

Now that the literature review, methodology and analysis of the results have been shown, conclusions can be drawn from the research findings. The main question will be answered and the final outcome will be formulated. The main question is:

'Can the health and Spa industry be seen as an opportunity for tourism development, tourism awareness, increased incomings and linkage to other divisions of the tourism sectors in Romania?'

In order for the main question to be answered, sub questions were made at the beginning of the thesis. The conclusions drawn from the answers for the sub questions will presented bellow, in order to see if any omissions or errors have been made.

✧ How and why did the Spa industry become a global tourism business?

Spa therapies have been a part of the human culture, social and political milieu ever since ancient times. More ancient therapies are being discovered and implemented nowadays, branded into a new industry, which also involves a range of aligned industries. These include sections from beauty, massage, fashion and fitness, architecture, property development and landscape design, but also the industry of tourism and hospitality, food and beverage and leisure. It also involves traditional and contemporary medical practice as well as social development (Cohen, 2008).

Today, the global spa industry is a melting pot for a wide range of therapies, products and services which enhance health and wellness. All of them are taken from various parts of the world and combined: Asian service ethics, holistic therapies and spiritual practices; American commercialism with its emphasis on beauty, pampering and destination experiences; European medical traditions and clinical acumen and the indigenous knowledge and environmental consciousness from tribal cultures. Because of this junction

December 13, 2012

Spa treatments have been included in the international hospitality industry, merging the demand for travel and comfort with that of health and wellbeing found at the destination.

- * What are the existing conditions of tourism in Romania? Can the Spa industry benefit this country?

In December 1989 Romania became a free country after more than fifty years of communisms suppression, under Nicolae Ceaușescu. It was for the first time that the national borders were open to all nations and the country welcomed tourists to experience the culture, traditions, scenery and leisure opportunities it provided.

Romania is one of the countries that have as a national resource all forms of landscape. Besides the Black Sea and the Danube River, two thirds of the Carpathian Mountains can be found. Alongside mountains, Romanian landscape presents regions of hills and plateaus, with rich soil that allows the production of orchards and vineyards and the Danube River ends its eight country long trail in Romania, forming one of the most unique and biodiverse wetlands in the world, the Danube Delta (4340 km of water wilderness).

The country is one of the most abundant lands in fresh water and natural mineral and thermal springs. Close to 4% of the countries territory is covered by lakes and rivers (approx. 3500 lakes) and 98% of them come from the Carpathian Mountains. Having one third of Europe's mineral and thermal springs, there are over 70 natural Spas, with alternative therapies for physical, internal and stress related disorders; the most sought fater destinations are: Mangalia, Neptun, Eforie Nord, Slănic Moldova, Vatra Dornei, Borsec, Felix Baths and the Herculaneum Baths (OPTBR, 2011)

Romanian Spas have been well known ever since ancient times, but became famous in current ages since 1860s. Underground thermal and mineral springs, salt mines and sulphurous waters are resources which can help Romania become an ideal place for wellness and relaxation (Pop et al., 2007).

- * Depending on the assessment made from both primary and secondary research, can the Spa industry be considered an opportunity for the destinations? If so, in which of the locations will it be more efficient?

Secondary research has been conducted in order to serve as a background for the topic of this thesis. The information used created a clear image of the existing state of affairs and

December 13, 2012

how this point was reached. Firstly, a brief history of how Spa industry became a global factor was presented. This evolution lasted, even through ages when it was shun on, due to the fact that it has such a strong connection to humanity. Secondly, the country of study was presented, pointing available resources and current situation, important for Spa industry further development and reaching the potential in both client satisfaction and revenue. As an outcome of the secondary research, two destinations were chosen:

1. The Herculaneum Baths, as being one of the oldest Spa cities in Romania, dating all the way back from Roman times. Waters are recommended in the treatment of rheumatic pains, inflammatory diseases, nervous system issues or relating problems (OPTBR, 2012).

And

2. The capital, Bucharest, which also has abundant water resources. In the north of the city, is the Ana Aslan Institute, that specializes in geriatric therapy based on the use of products made by the professor Ana Aslan (More information in Appendix ???).

Primary research was conducted, consisting of surveys that were implemented among domestic and international tourists. The survey was made in order to understand the market demand and if people knew the presented form of tourism and use / have used it. The survey consists of open enquiries and single or multiple choice questions.

The two researches have demonstrated that necessary sources and capacity exists, but need to be directed efficiently, in order to create a memorable destination, which is known by both national and international markets.

After analysing the findings, even if the Herculaneum Baths presented abundant resources, not only for practicing Spa tourism, but also alternative activities, the city is not maintained, despite the best interest of the before mentioned NGO's or local government. Due to the location, lack of public information or market interest, former popularity of the resort has diminished.

On the other hand, Bucharest is becoming a well thought international tourism trademark. By creating a memorable experience, stakeholders can attract leisure tourists from the business sector and maybe even invite leisure guests in becoming business tourists.

Because of this, the answer for which location will present more benefits for investments is Bucharest.

Finally, the only question which remains to be answered is:

- * What advice and recommendation can be given to the existing and future investing stakeholders, taking into consideration the destinations market interest, location, facilities?

For the purpose of answering this question, the following recommendations have been made:

6.2 Recommendations

As deduced from the conducted research, keeping to the proposed strategies and plans and actively implementing them, by the leading tourism bodies is not completely done. It might seem the normal thing to do for a ministry, which makes strategies for developing tourism in a location, to keep to the plan. In chapter 5, in the outcome of the research it can be easily seen that Herculaneum Baths had a set of plans in order to bring back tourist interest towards the resort. Faulty implementation or sometimes even lack of implementation are turning, this once very fashionable and admired city to a near ghost town. Such a case will not happen in Bucharest, as it is the capital of the country, but executing designed strategies is important for current and future investment, maintaining market interest and having increased revenues.

In Chapter III (subchapter 3.5) research on the capital of Romania points that the city does not bring itself at the same level as the same European capitals, in terms of market supply. Levelling Bucharest and Romania at European standards is mandatory, since the country is a member of the EU and a number of tourist forums and organisations. In order to achieve this, it is recommended to develop modern infrastructure, better transportation routes and start integrating a sense of 'caring' for the public. It's of no use to develop a European metropolitan city, if the locals do not understand the purpose, turn against these implementations or even start vandalizing them. Educating the community for public behaviour is of high value when trying to achieve quality. As is also educating the workforce in tourism and teaching a second language, not necessarily only English, but also German, Chinese or Indian, if we were to look at the global trend.

But not only Romanian society needs to have integrated proper public behaviour, but also the organisations need to become transparent and willing to participate in researches conducted by third parties. Providing information when it is demanded, it imperative for

December 13, 2012

gaining an overall trust from the population. Because of this, the researcher would also like to suggest trying to 'leave' history and concepts of state owned assets, imprinted ever since communism. Coming back to the Herculaneum Baths, the resort would have been much more developed if private investors would have been allowed property on certain constructions or have contractual advantages (as an example: shared ownership) given by the state and government.

Also, following the plans of urban development for Bucharest should also include a new brand of the city, having those special places where memorable events can drive markets into visiting. The city has an important advantage of having a large thermal spring resource and close access from the airport for it. With a well balanced and controlled development, the north side of the city can become a valid Spa target.

Recommendations for future research

Looking at the recommendations in the previous subchapter (subchapter 6.2), but also at the findings in the rest of the thesis, future research should be carried out on:

- ❖ Discovering and testing new ways of using the waters

Research should be done for improving data, on how each of the treatments should be used and for what disorder. Trials and tests should be conductance, not only for discovering new bathing and wellness techniques, but also for medical research. This can open the Spa industry towards specialised medical tourism, acquiring expert equipment and using it with alternative medicine. This will give the opportunity for tourists which, in the other case would not be able to travel, use the facilities of both accommodations and wellness centres.

- ❖ Market research on customer behaviour

Another future research can be done in order to have more data reflecting the consumer behaviour, regarding the Spa industry. This research can be especially helpful for investors and business owners. Seeing towards what the market is inclined, is useful for keeping the market interested in the product for a longer period of time.

An interesting fact is that more and more young people (as seen in subchapter 2.3 & 2.5) make use of therapeutic baths or Spa services. The concept of using Spas is changing as society is constantly being shaped. The survey results show that individuals between the ages of 20 to 30 years old are more inclined to go to wellness canters that those of previous years. A study of this trend can become of great addition to the academic world.

❖ Including all stakeholders

Because of external circumstances, not all the stakeholders (from public and private areas) have been interviewed. Some of the information has been based on secondary research more, or primary research done by analysing the observations. A more, in depth study is recommended for the future, in order for all of the stakeholder insights to be included, resulting in a clearer internal perspective.

❖ Investigating links between old and new destination resorts

This study has focused on the comparison of two very distinct destinations, which have a common binder and that being Spa tourism. Alternating these two particular cities in a study, in order to show which is more popular for further investigation, has not been done before. Future studies on how actual Spa resorts in Romania can become more important that important cities, for their actual purpose, are recommended. This will not only create awareness to the market, but will also help develop the region and its peers.

Reference List

Books

Aaker, A., Kumar, D., & Day, G. (2001). *Marketong research*. New York: John Wiley and Son Inc.

Aaker, D. A. (1991). *Building Strong Brands*. New York: Free Press.

Anholt, S. (2003). *Brand New Justice: the upside of global branding*. Oxford: Butterworth Heinemann.

Bailey, C. (2007). *A guide to Qualitative Field Research*. Thousand Oaks: Pine Forge Press.

Cohen, M. (2003). *Integrative medicine, principles of practice*. Clayton: Holistic Health in Practice , Australian Integrative Medicine Association.

Cohen, M. (2008). *Understanding the global spa industry - Spas, Wellness and human evolution*. Oxford: Butterworth-Heinemann - Elsevier.

Cooper, K. (1968). *Aerobics*. New York: Bantam Books.

Cretu, I. (2011). *Destination image and destination branding in transition countries: the Romanian tourism branding campaign 'Explore the Carpathian garden'*. York: University of York - The York Managemnet School.

Croutier, A. L. (1992). *Taking the waters: spirit, art, sensuality*. New York: Abberville Publishing.

Dan, I. (2011). *The trial of Marshall Ion Antonescu*. Bucharest: Lucman.

Deletant, D., Hitchins, K., Mihai, B., & Pompiliu, T. (2003). *History of Romania*. Bucharest: Corint.

Driscoll, D. L. (2011). *Writing Spaces: Readings on Writing*. Washington: Library of Congress Cataloging-in-Publication Data

Fixx, J. (1978). *The complete Book of Running*. Random House.

Klepper, N. (2003). *Romania: An illustrated History*. New York: Hippocrene Books.

Pine, J., & Gilmore, J. (1999). *The Experience Economy*. Boston: Harvard Business School Press.

Pop, C., Cosma, S., Negrusa, A., Ionescu, C., & Marinescu, N. (2007). *Romania as a Tourist Destination and the Romanian Hotel Industry*. Newcastle: Cambridge Scholars Publishing.

Tabbachi, M. (2008). American and European Spa. In M. C. Bodeker, *Global Spa Industry* (pp. 27-40). Oxford: Butterworth-Heinemann - Elsevier.

Tiu, I., Giurescu, D., & Al., S. (2010). *Romania and Communism*. Bucharest: Corint.

Journal Articles

Boga, T. C., & Weiermair, K. (2011). Branding new services in health tourism. *Tourism Review, Vol. 66*, 90-106.

Brockliss, L. (1990). The development of the spa in seventeenth-century France. *Medical History*, 23-47.

Cohen, M. (2007). Environmental toxins and health: the health impact of pesticides. *Australian Family Physician, no. 36*, 1002-1004.

Cohen, M. (2008). Spas, wellness and human evolution. *Understanding the global spa industry - Spa Management*, 4-25.

Coley, N. G. (1990). Physicians, chemists and the analysis of mineral waters: "The most difficult part of chemistry". *Medical History, no.10*, 56-66.

Fakeye, P., & Crompton, J. (1991). Image Differences between Prospective, First-Time, and Repeat Visitors to the Lower Rio Grande Valley', *Journal of Travel Research*, 9-16.

Gruescu, R., Nanu, R., & Epure, T. (2008). THE ROMANIAN TOURISM INDUSTRY IN THE ENLARGED COMMUNITY. *Analele Universității din Craiova - seria Științe Economice*, 694-702.

Harley, D. (1990). A sword in a madman's hand: professional opposition to popular consumption in the waters literature of southern England and the Midlands, 1570-1870. *Medical History*, 48-55.

Heywood, A. (1990). A trial of the bath waters: the treatment of lead poisoning. *Medical History, no. 10*, 82-101.

December 13, 2012

Jackson, R. (1990). Waters and Spas in the Classical World. *Medical History*, no. 10 , 1-13.

Klick, J., & Stratmann, T. (2008). Do Spa Visits Improve Health: Evidence From German Micro Data. *Eastern Economic Journal*, no. 34 , 364-374.

Looman, J., & Pillen, H. (1989). The development of the bathing culture. *Integraal*, no.4 , 7-24.

salience: Defining the principle of who and what really counts. *The Academy of Management Review* , 853-886.

Mitchell, R., Agle, B., & D., W. (1997). Towards a theory of stakeholder identification and

Mitchell, R., Agle, B., & Wood, D. (1997). Towards a theory of stakeholder identification and salience: defining the principle of who and what really counts. *Academy of Management Review* , 853-883.

Murphy, L., Moscardo, G., & Benckendorff, P. (2007). Using brand personality to differentiate regional tourism destinations. *Jornal of travel reserach*, no 46 , 5-14.

Nasermoaddel, A., & Kagamimori, S. (2005). Balneotherapy in Medicine: A Review. *Environmental Health and Preventive Medicine*, no. 10 , 171-179.

Palmer, R. (1990). In this our lightye and learned tyme: Italian baths in the era of the Renaissance. *Medical History*, no. 10 , 14-22.

Routh, H., Bhowmik, K., Parish, L., & Witkowski, J. (1996). Balneology, mineral water, and spas in historical perspective. *Clin Dermatol*, no. 14 , 551-554.

Schadewalt, H. (1989). The history of Roman bathing culture. *Integraal* , 25-35.

Sukenik, S., Neumann, L., Flusser, D., Kleiner Baumgarten, A., & Buskila, D. (1995). Balneotherapy for rheumatoid arthritis at the Dead Sea. *Israel Journal of Medical Science* , 210-214.

Sylvester, K. (1989). Investigation of the effect of hydrotherapy in the treatment of osteoarthritic hips. *Clin Rehabil*, no 4 , 223-228.

van Tubergen, A., & van der Linden, S. (2002). A Brief History of Spa Therapy. *Annals of Rheumatic Diseases*, no. 16 , 273-275.

Zeleny, M. (2006). Multiple Criteria Decision Making. *Oxford Journal* , 84-95.

Reports & Lectures

Coccheri, S., Nappi, G., Valenti, M., Di Orio, F., Altobelli, E., & DeLuca, S. (2002). *Changes in the Use of Health Resources by Patients with Chronic Phlebopathies after Thermal Hydrotherapy. Report from the NAIADE Project, a Nation-Wide Survey on Thermal Therapies in Italy*. Bologna: International Angiology.

Dubé, L., & Renaghan, L. (1999). Sustaining competitive advantage: lodging industry best practices. *Cornell Hotel and Restaurant Administration Quarterly*, 29.

Fioravanti, A., Valenti, M., Altobelli, E., Di Orio, F., Nappi, G., Crisanti, A., et al. (2003). *Clinical Efficacy and Cost-Effectiveness Evidence of Spa Therapy in Osteoarthritis. The Results of the 'Naiade' Italian Project*. Torino: Panminerva Medica.

Hall, J., Skevington, S., Maddison, P., & Chapman, K. (1996). *A randomized and controlled trial of hydrotherapy in rheumatoid arthritis*. New York: Arthritis Care & Research.

Hatman Group. (2004). *ISPA 2004 Consumer Trends Report*. Lexington: ISPA.

Meadows, D., Meadows, D., Randers, J., & Behrens, W. (1972). *The Limits to Growth: A Report for the Club of Rome's Project on the Predicament of Mankind*. London: Earth Island Institute.

MRTD. (2012). *BĂILE HERCULANE PLAN INTEGRAT DE DEZVOLTARE URBANA*. Baile Herculane: The Ministry of Tourism Romania.

MRTD. (2010). *Elaborarea planului de marketing (strategic si operational) pentru Mun Bucuresti in domeniul turismului pe perioada 2011 - 2015*. Bucharest: Detente Consult.

National Institute of Statistics . (2011). *Romanian Tourism Statistical Abstract*. Bucharest: National Institute of Statistics.

Rustema, C. (March 2012). *Second Phase Lecture*. Chiang Mai: NHTV, Breda.

SpaFinder. (2007). *Day Spa Industry Report*. online review.

StatPac. (2012). *Survey Sampling Methods*. Retrieved 2012, from StatPac: <http://www.statpac.com/surveys/sampling.htm>

van Tubergen, A., Landewé, R., van der Heijde, D., Hidding, A., Wolter, N., Asscher, M., et al. (2001). *Combined spa-exercise therapy is effective in patients with ankylosing spondylitis: a randomized controlled trial*. Maastricht: Department of Medicine, University Hospital Maastricht, The Netherlands.

WTTC. (2012). *Travel and Tourism Economic Impact 2012*. London: WTTC.

WebPages

- Ana Aslan. (2008). *The Institute of Gerontology and Geriatrics 'Ana Aslan*. Retrieved 2012, from Ana Aslan:

http://www.ana-aslan.ro/index_en.htm

- Branding Romania. (2009). *FutureBrand: Romania nu este dezvoltata ca brand, ocupa locul 81 din 102 tari* . Retrieved June 2012, from Branding Romania:

<http://www.brandingromania.info/futurebrand-romania-nu-este-dezvoltata-ca-brand-ocupa-locul-81-din-102-tari/>

- Business Dictionary. (2012). *Definition*. Retrieved 2012, from Business Dictionary:

<http://www.businessdictionary.com/definition/methodology.html>

- CNN Money. (2009). *Spas take off in Asia*. Retrieved 2012, from CNN Money:

http://money.cnn.com/2009/08/20/news/international/spas_asia_boom.fortune/index.htm

- CNN Money. (2010). *Spas take off in Asia*. Retrieved 2012, from CNN Money:

http://money.cnn.com/2009/08/20/news/international/spas_asia_boom.fortune/index.htm

- EA Corporate. (2012). *About Elisabeth Arden*. Retrieved 2012, from Elisabeth Arden New York:

<http://corporate.elizabetharden.com/about-elizabeth-arden/>

- ESPA. (2011). *The Association*. Retrieved 2012, from European Spas Association - Official WebSite:

<http://www.espa-ehv.eu/>

- ETC. (n/a). *ETC Aims & Objectives*. Retrieved 2012, from European Travel Commission:

<http://www.etc-corporate.org/modules.php?name=Content&pa=showpage&pid=16&ac=2>

December 13, 2012

- European Spas Portal. (2012). *Romania - spa resorts and hotels*. Retrieved May 2012, from VisitSpas.eu:

<http://www.visitspas.eu/romania/>

- FIHR. (2002). *After reaccessing the page, it was discovered that the page is currently under construction*. Retrieved 2012, from FIHR:

<http://www.fihr.ro/>

- FPTR. (2012). *About us / Mission*. Retrieved 2012, from Federatiei Patronatelor din Turismul Romanesc:

<http://www.fptr.ro/>

- INS. (2011). *Rezultate recensamant 2011*. Retrieved 2012, from Institutul National de statistica:

<http://www.recensamantromania.ro/wp-content/uploads/2012/08/TS1.pdf>

- ISPA. (2009). *ISPA Releases 2009 U.S. Spa Industry Statistics*. Retrieved 2012, from International Spa Association:

<http://www.experienceispa.com/articles/index.cfm?action=view&articleID=190>

- ISPA. (2011). *The U.S. Spa Industry - Fast Facts*. Retrieved 2012, from Industry Stats:

<http://www.experienceispa.com/media/facts-stats/>

- MDRT. (2010). *Tourism Promovation*. Retrieved 2012, from Ministerul dezvoltarii regionale si turismului:

<http://www.mdrt.ro/turism/promovare-turistica>

- Ministry of Tourism. (2012). *Black Sea Resorts*. Retrieved 2012, from Ministry of Tourism Romania:

<http://www.romaniatourism.com/black-sea-resorts.html>

- Ministry of Tourism. (2012). *Climate*. Retrieved

<http://www.romaniatourism.com/climate.html> 2012, from Ministry of Tourism Romania.

- Ministry of Tourism. (2012). *The Danube Delta (Delta Dunarii)*. Retrieved 2012, from Ministry of Tourism Romania:

December 13, 2012

<http://www.romaniatourism.com/danube-delta.html>

- Mintel. (2007). *Travel and Tourism - Romania - February 2007*. Retrieved May 2012, from Mintel Oxigen:

http://academic.mintel.com.proxy1.dom1.nhtv.nl/sinatra/oxygen_academic/search_results/show&/display/id=237160

- MORTD. (2011). *Dezvoltarea statiunii Baile Herculane prin parteneriatul dintre MDRT, autoritatile publice locale si operatorii de turism locali*. Retrieved 2012, from Ministerul Dezvoltatii regionale si Turismului:

<http://www.mdrd.ro/comunicare/presa/comunicate/dezvoltarea-statiunii-baile-herculane-prin-parteneriatul-dintre-mdrt-autoritatile-publice-locale-si-operatorii-de-turism-locali>

- MRTD. (2010). *Presentation*. Retrieved 2012, from Ministerul de Dezvoltare regionala si Turism:

<http://www.mdrd.ro/ministerul/prezentare>

- OPTBR. (2009). *About us*. Retrieved 2012, from OPTBR:

<http://www.spas.ro/>

- OPTBR. (2011). *Baile Felix*. Retrieved 2012, from OPTBR:

http://www.spas.ro/statiuni/Baile_Felix/

- OPTBR. (2012). *Baile Herculane*. Retrieved 2012, from OPTBR:

http://www.spas.ro/statiuni/Baile_Herculane/

- OPTBR. (2011). *Calimanesti - Caciulata*. Retrieved 2012, from OPTBR:

http://www.spas.ro/statiuni/Calimanesti_-_Caciulata/

- OPTBR. (2011). *Romanian Spa List*. Retrieved 2012, from Organizatia Patronala a Turismului Balnear Romania:

<http://www.spas.ro/statiuni/>

- OPTBR. (2012). *Sovata*. Retrieved 2012, from OPTBR:

<http://www.spas.ro/statiuni/Sovata/>

December 13, 2012

- RTO. (2012). *About Romania*. Retrieved 2012, from Romanian Tourism Office:
<http://www.romaniatourism.com/location.html>
- RTO. (2011). *People*. Retrieved 2012, from Romanian Tourism Office:
<http://www.romaniatourism.com/people.html>
- WTO. (2011). *Who we are*. Retrieved 2012, from World Tourism Organization (UNWTO):
<http://www2.unwto.org/en/content/who-we-are-0>

- APPENDICES -

Appendix A - Maps

Map of Romania

Figure 11: Map of Romania¹⁶

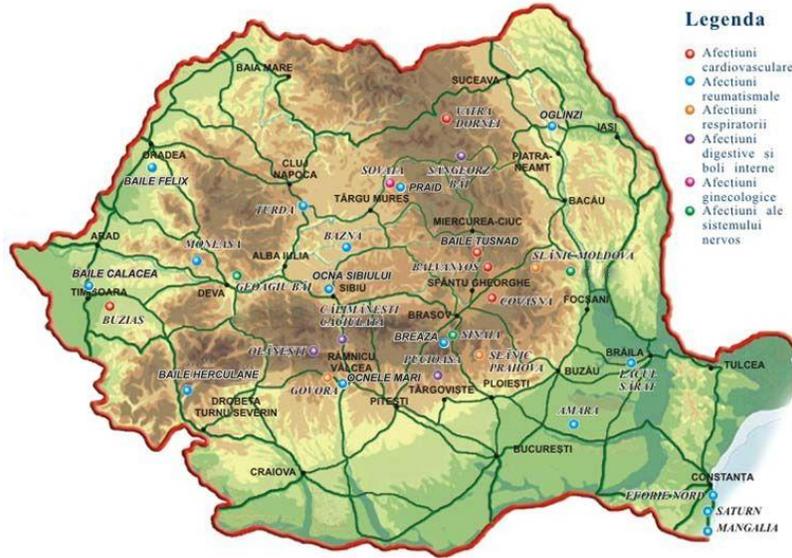


¹⁶ Source: CIA World Facts – Romania

December 13, 2012

Map of Romanian Spas

Figure 12: Map of Romanian Spas¹⁷



¹⁷ Source: OPTBR Map of Romanian Spas

[Appendix B – More information](#)

The Moors

The Moors were nomadic people of the northern shores of Africa, originally the inhabitants of Mauretania. Their contributions to Western Europe and especially to Spain culture are almost incalculable—in art and architecture, medicine and science, and learning (Dictionary, 2002).

Paracelsianism

Paracelsianism was a medical movement based on the theories and therapies of Paracelsus, a German-Swiss alchemist and physician who introduced the concept of disease to medicine. He sustained that illness was the result of external agents attacking the body, rather than the popular concept of imbalances within the body and advocated the use of chemicals against disease-causing agents (Dictionary, 2002).

Elizabeth Arden

Starting in 1910, an age when it was rare for women to wear make-up much less run their own businesses, Elizabeth Arden opened her first spa on Fifth Avenue and began to build one of the world's first global beauty brands. Not only was Elizabeth Arden among the first to apply scientific innovation and rigor to the beauty industry, she was world-famous for her holistic approach to beauty. As far back as the 1920's she was encouraging women to hydrate, avoid the sun, and practice yoga daily.

Information was found on the official page dedicated to Elizabeth Arden (EA Corporate, 2012).

Ana Aslan

Ana Aslan (1897-1988, born in Braila) studied at the Faculty of Medicine in Bucharest (1915-1922). She was professor of Cardiology at the Faculty of Medicine in Timisoara (1945-1949). Between 1949 and 1952 she was head of department at the Institute of Endocrinology in Bucharest. Starting in 1952 she became General Director of the *Institute of Geriatrics*. As one of the pioneering scientists in the world on medical gerontology, Ana Aslan focused also on social gerontology. Ana Aslan proposed systematic countermeasures in order to create a system to stimulate third-age people's activities. Ana Aslan became aware of the long-term biotrophic action of Procaine and introduced it as a medicine to be

December 13, 2012

taken in small quantity on long terms, for curing and prophylactic benefits. The Gerovital H3 is the first Romanian original biotrophic product and also the first medicine designed to delay human aging processes. It was developed between 1946 and 1956 by Prof. Ana Aslan and her followers, as a result of numerous clinical and experimental studies.

Information was found on the official page for the Institute of Gerontology and Geriatrics (Ana Aslan, 2008).

Appendix C – Survey Results

1) When planning to go on a holiday, what are the main drivers for choosing a location over another? - Multiple choice, choose what you find applicable to you

- Personal past experiences (19.8%)
- Friends or family members experiences (16.3%)
- Your personal preference (25.6%)
- Your partner's or your family's preferences (12.8%)
- Need for pre-holiday paperwork - the need for a passport, visa, special health service, etc. (5.8%)
- Your ability to have a holiday within your country of origin / current place of living (7.0%)
- Your ability to travel abroad (10.5%)
- Other (2.3%)

2) When choosing an accommodation for your holiday, what are the key factors you include in the process of your decision making? - Multiple choice, choose what you find applicable to you

- Location (20.8%)
- Size of the hotel / Number of rooms(3.0%)
- Hotel Group (3.0%)
- Type of accommodation - hotel, number of stars, motel, hostel, guesthouse, etc. (19.8%)
- Price(21.8%)
- Facilities present in the room (9.9%)
- Optional hotel services - restaurant, pool, shops, gym, bar, spa, beauty center, etc. (12.9%)
- Optional packages - half board, full board, all inclusive, etc. (7.9%)
- Other (1.0%)

3) Have you ever heard of spa institutions or 'health by water' therapy?

- Yes (88.0%)
- No (12.0%)

4) Have you ever used such facilities?

- Yes (56.0%)
- No (44.0%)

December 13, 2012

5) Have you been to accommodations which include Spa services?

- Yes (84.0%)
- No (16.0%)

6) Have you made use of them?

- Yes (52.0%)
- No (48.0%)

7) Have you used the services of a separate Spa or health complex, outside of your accommodation, while on holiday?

- Yes (48.0%)
- No (52.0%)

8) Which do you prefer?

- Included in the place of the accommodation (68.0%)
- Separate (12.0%)
- I didn't use any Spa facilities (20.0%)

9) Why?

Analysis for this question has already been made. Please refer to Chapter V.

10) Have you ever been to Romania or plan to? Or do you live / lived in this country?

- Have never been, but plan to visit.(16.0%)
- Have never been and don't plan to. (8.0%)
- Have been and plan to visit again. (0.0%)
- Have been, but don't plan to visit again.(0.0%)
- I live / have lived in Romania. (72.0%)
- Other (Please Specify): (4.0%)

11) By what means of transportation did you arrive? - Choose the most used

- By plane(16.0%)
- By train (0.0%)
- By bus (0.0%)
- By personal car (8.0%)
- I live in Romania (52.0%)
- I have not traveled to this country (24.0%)
- Other (Please Specify): (0.0%)

December 13, 2012

12) What was the purpose of your travel?

- Holiday (16.1%)
- Business (0.0%)
- School and study (0.0%)
- Visiting family and friends (16.1%)
- I live here / Returning home (48.4%)
- I have not visited Romania (19.4%)
- Other (0.0%)

13) If you have traveled to Romania, have you been to other places besides the destination of arrival? Please answer 'Yes' if the place of arrival was different from the place you spent most of your time.

or If you live /have lived in Romania, have you traveled to other places of the country?

- Yes (28.0%)
- No (0.0%)
- I am a local and have visited other destinations within country (44.0%)
- I am local, but I have not visited other destinations within the country (0.0%)
- I did not visit Romania. (28.0%)

14) Can you please specify where you have traveled?

Analysis for this question has already been made. Please refer to Chapter V.

15) Did you know that Romania is one of the countries with the highest percentage of thermal waters and springs and has been renowned for this and used since ancient times?

- Yes (60.0%)
- No (40.0%)

16) Have you ever heard of specific destinations in the country, which focus on 'health by water' and Spa treatments, such as Baile Herculane? Have you ever traveled there?

- Yes / Yes (24.0%)
- Yes / No (52.0%)
- No (24.0%)

17) If you haven't, would you be inclined to travel there, for the sole purpose of using the Spa facilities? Or would you also take advantage other forms of tourism, such as cultural tourism or sports inclined tourism?

Analysis for this question has already been made. Please refer to Chapter V.

18) If you have arrived in Bucharest and stayed in this city, did you make use of your accommodation facilities (especially the Spa)? Or did you use another, different complex?

- Yes, I have used the services from the accommodation (0.0%)
- My accommodation did not offer such facilities (8.0%)
- I used the services of another business (8.0%)
- I did not use any such type of services (36.0%)
- I did not travel to Bucharest (40.0%)
- Other (8.0%)

19) Age?

- <20 (4.0%)
- 20 – 30 (72.0%)
- 30 - 45 (20.0%)
- 45 - 55 (4.0%)
- >55 (0.0%)

20) Nationality?

Figure 13 Respondents by location



21) Sex?

December 13, 2012

- Male (28.0%)
- Female (72.0%)

Appendix D - Survey

Master Dissertation Survey

Hello! My name is Raluca Paris and I am currently following a master class, at NHTV University of Applied Science. For concluding my study I need to prepare a master dissertation thesis. The purpose of my paper is to see what elements influence a person to decide on where they would spend their holiday. The study focuses on Spa and health tourism, which currently is one of the key factors people search for when deciding for a destination or accommodation. The following survey takes the case of two different locations in Romania, Bucharest and Baile Herculane, the first city being the capital and usually the first city of arrival and the second being an ancient know Spa destination.

Thank you in advance for filling out this survey and helping me!

Raluca Paris

- 1. When planning to go on a holiday, what are the main drivers for choosing a location over another? (Atunci cand va planificati concediul, care sunt elementele de care tineti cont cand alegeti o locatie?) - Multiple choice, choose what you find applicable to you (Alegere multipla)
 - Personal past experiences (Experiente personale anterioare)
 - Friends or family members experiences (Experiente ale prietenilor sau membrii

ai familiei)

- Your personal preference (Preferinte personale)
- Your partner's or your family's preferences (Preferintele partenerului sau ale familiei)
- Need for pre-holiday paperwork - the need for a passport, visa, special health service, etc. (Necesitatea unor documente speciale, precum pasaport, viza, asigurari medicale, etc.)
- Your ability to have a holiday within your country of origin / current place of living (Capabilitatea de a va desfasura concediul in cadrul tarii de provenienta / locul actual in care locuiti)
- Your ability to travel abroad (Capabilitatea de a calatori in strainatate)

Other (Please Specify):



- 2. When choosing an accommodation for your holiday, what are the key factors you include in the process of your decision making? (Atunci cand alegeti un loc pentru cazare, care sunt factorii principali pe care ii includeti in formarea unei decizii?) - Multiple choice, choose what you find applicable to you (Alegere multipla)
 - Location (Locatia)
 - Size of the hotel / Number of rooms (Volumul / Numarul de camere intr-un hotel)
 - Hotel Group (Grupul hotelier de care apartine)
 - Type of accommodation - hotel, number of stars, motel, hostel, guesthouse, etc. (Tipul de cazare - hotel, numar stele, motel, hostel, pensiune, etc.)
 - Price (Pret)

December 13, 2012

- Facilities present in the room (Facilitatile prezente in camera)
- Optional hotel services - restaurant, pool, shops, gym, bar, spa, beauty center, etc. (Servicii optionale - restaurant, magazine, piscina, sala fitness, bar, spa, centru de infrumusetare)
- Optional packages - half board, full board, all inclusive, etc. (Pachete optionale - demi-pensiune, pensiune completa, all inclusive, etc.)

Other (Please Specify):

- 3. Have you ever heard of spa institutions or 'health by water' therapy? (Ati auzit vreodata de institutii cu profil Spa sau terapii ce se bazeaza pe apa?)
 - Yes (Da)
 - No (Nu)
- 4. Have you ever used such facilities? (Ati folosit facilitatile dintr-o astfel de institutie?)
 - Yes (Da)
 - No (Nu)
- 5. Have you been to accommodations which include Spa services? (Ati fost in hoteluri / pensiuni ce includeau servicii spa?)
 - Yes (Da)
 - No (Nu)
- 6. Have you made use of them? (Le-ati utilizat?)

December 13, 2012

- Yes (Da)
 - No (Nu)
- 7. Have you used the services of a separate Spa or health complex, outside of your accommodation, while on holiday? (Ati utilizat serviciile unui centru spa sau complex de sanatate, separat de cazare, in timpul concediului dvs.?)
 - Yes (Da)
 - No (Nu)
 - 8. Which do you prefer? (Ce tip de servicii ati preferat?)
 - Included in the place of the accomodation (Incluse in locul cazarii)
 - Separate (Separate)
 - I didn't use any Spa facilities (Nu am utilizat servicii spa)
 - 9. Why? (De ce?)
 - 10. Have you ever been to Romania or plan to? Or do you live / lived in this country? (Ati fost vreodata in Romania sau planuiti sa o vizitati? Sau locuiti / ati locuit in aceasta tara?)
 - Have never been, but plan to visit. (Nu am fost niciodata, dar planuiesc sa vizitez)
 - Have never been and don't plan to. (Nu am fost niciodata si nici nu planuiesc)
 - Have been and plan to visit again. (Am fost si planuiesc o noua vizita)
 - Have been, but don't plan to visit again. (Am fost, insa nu planuiesc o noua

vizita)

- I live / have lived in Romania. (Locuiesc / Am locuit in Romania)
- Other (Please Specify):

- 11. By what means of transportation did you arrive? (Prin ce mod ati ajuns in tara?)
- Choose the most used (Alegeti cel mai utilizat mod)

- By plane (Avion)
- By train (Tren)
- By bus (Autobuz)
- By personal car (Automobil personal)
- I live in Romania (Locuiesc in Romania)
- I have not traveled to this country (Nu am calatorit spre aceasta tara)
- Other (Please Specify)

- 12. What was the purpose of your travel? (Care a fost motivul calatoriei?)

- Holiday (Concediu)
- Business (Afaceri)
- School and study (Academic)
- Visiting family and friends (Vizitarea familiei si a prietenilor)

December 13, 2012

I live here / Returning home (Locuiesc aici / Ma intorceam acasa)

I have not visited Romania (Nu am vizitat Romania)

Other (Please Specify):

- 13. If you have traveled to Romania, have you been to other places besides the destination of arrival? Please answer 'Yes' if the place of arrival was different from the place you spent most of your time.

(Daca ati calatorit spre Romania, ati mai fost in alte locuri in afara de orasul in care ati ajuns prima data? Va rog sa raspundeti cu 'Da' daca prima destinatie a fost diferita fata de cea unde v-ati petrecut cel mai mult timp.)

or

If you live /have lived in Romania, have you traveled to other places of the country?

(Daca locuiti / Ati locuit in Romania, ati calatorit si in alte locatii ale tarii?)

Yes (Da)

No (Nu)

I am a local and have visited other destinations within country (Locuiesc in Romania si am vizit si alte locatii decat cel in care se afla domiciliul)

I am local, but I have not visited other destinations within the country (Locuiesc in Romania, inasa nu am vizitat alte locatii)

I did not visit Romania.

- 14. Can you please specify where you have traveled? (Puteti spune unde ati calatorit?)
- 15. Did you know that Romania is one of the countries with the highest percentage of thermal waters and springs and has been renowned for this and used since

ancient times? (Stiati ca Romania este una dintre tarile cu cel mai mare procent de ape termale si izvoare, ce sunt renumite si utilizate inca din antichitate?)

Yes (Da)

No (Nu)

- 16. Have you ever heard of specific destinations in the country, which focus on 'health by water' and Spa treatments, such as Baile Herculane? Have you ever traveled there? (Ati auzit vreodata de destinatii din aceasta tara, care se concentraza pe tratamente balneo-climaterice si spa, precum Baile Herculane? Ati calatorit vreodata acolo?)

Yes (Da) / Yes (Da)

Yes (Da) / No (Nu)

No (Nu)

- 17. If you haven't, would you be inclined to travel there, for the sole purpose of using the Spa facilities? Or would you also take advantage other forms of tourism, such as cultural tourism or sports inclined tourism? (Daca nu ati auzit, ati fi dispus sa calatoriti in acea destinatie, pentru unicul motiv de a folosi facilitatile spa? Sau ati profita si de alte forme de turism, precum cel cultural sau sportiv?)



- 18. If you have arrived in Bucharest and stayed in this city, did you make use of your accommodation facilities (especially the Spa)? Or did you use another, different complex? (Daca ati ajuns in Bucuresti si ati ramas in oras, ati folosit serviciile oferite de catre hotel / pensiune (in special cele spa)? Sau ati utilizat facilitatile unui salon diferit?)

Yes, I have used the services from the accommodation (Da, am folosit serviciile oferite de catre hotel / pensiune)

December 13, 2012

- My accommodation did not offer such facilities (Cazarea nu a oferit astfel de facilitati)
- I used the services of another business (Nu, am folosit serviciile unui alt salon)
- I did not use any such type of services (Nu am folosit nici un fel de astfel de servicii)
- I did not travel to Bucharest (Nu am calatorit catre Bucuresti)

Other (Please Specify):

• 19. Age? (Varsta?)

- <20
- 20 - 30
- 30 - 45
- 45 - 55
- >55

• 20. Nationality? (Nationalitatea?)

• 21. Sex? (Sex?)

- Male
- Female