

## SECTION: MARKETING AND TOURISM

### PARTICULARITIES OF BALNEARY TOURISM IN ROMANIA

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#### **Abstract**

*Tourism is one of the main engines of any nation's economy and the national and regional capacity to provide attractive tourist products plays an important role in the local, regional and national economy.*

*Balneary tourism detaches itself from all other forms of tourism due to the multiple social and economic benefits generated as result of the positive effects on the physical and psychological health-state of individuals. The role of balneary tourism is becoming more and more important, as the aim is to replace current treatments with some less harmful, such as those based on natural cure factors.*

*Romania's effort to become an important tourist destination in the international tourist circuit, dominated by countries that excel in the variety and quality of services, must be sustained both materially, respectively by investments and from the managerial view point.*

*The paper presents a brief analysis about the evolution of Romanian tourism in general, and of the spa tourism in particular, in the post-crisis period. The impact of this sector is included regarding economic growth at the level of Romania's development regions.*

**Key words:** balneary tourism, economic recovery, tourist capacity

**Clasificare JEL:** L83

#### **Introduction**

According to studies by tourism representative organisations, the development trend at world level of the touristic phenomenon is ascending and forecasts reveal the fact that in the next two decades the number of travelling persons will double against the current levels.

The evolution of tourism is marked at world level by a complex of economic, financial, technological, investment, political and military factors that by their independent or combined action contribute to the phenomenon's dynamics.

Romania's efforts to be acknowledged as an important tourism destination in the world tourism circuit dominated by countries excelling based on the variety and quality of services must be supported from the material, respectively investment, and managerial perspective as well.

The efficient and full exploitation and valuation of all natural and cultural resources in Romania that are characterised by diversity and harmoniously distributed throughout the country's territory might lead to a particular and expected progress in the tourism field and to the country's repositioning on a much better position in the touristic destinations' rankings.

A specific form of leisure tourism, the balneary tourism or treatment and balneo-medical cure tourism developed considerably in the last decades together with the increase in stress and professional illnesses triggered by the accelerated pace of modern life in large urban agglomerations. Thus, the need of health is the main motivation for the display of balneo-touristic activities demand. The role of balneary tourism is increasingly more important, because of the aim of replacing current treatments with other less toxic ones, such as those based on natural curative factors.

From the perspective of the following years, this form of tourism will have even higher volumes, constituting thus one of the greatest sources of incomes, especially for Romania a country with extraordinary richness of balneary-climatic resources in Europe.

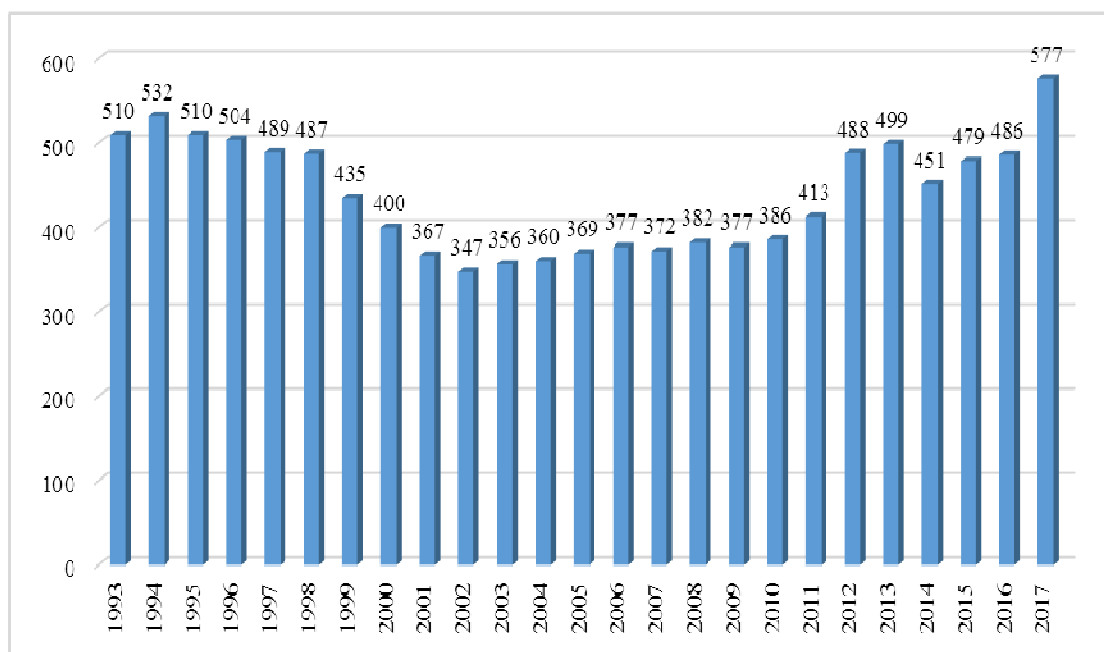
The present paper is a brief analysis of Romanian spa tourism, of its characteristics and particularities.

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### 1. Developments of balneary tourism in the context of national tourism

The investments of the past years have lead to increases in the total number of tourist accomodation structures located in spa resorts reaching a total number of 577 entities in 2017, the highest number recorded up to date in Romania (Fig. 1). The numbers for this type of entities underwent constant decline after 1994, and from a total of 532 entities, only 347 entities were recorded in 2002. The impact of the economic-financial crisis on the total number of tourist accommodation entities located in spa resorts was insignificant, and in the post-crisis period their number continued to grow (when a significant number of tourist accommodation entities were closed for modernisation works).

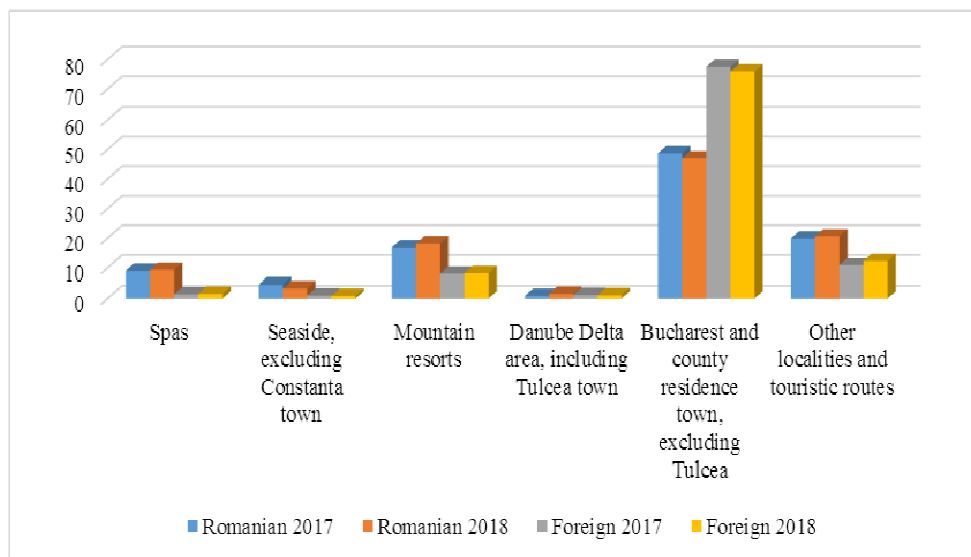


**Figure no 1** Development in time in the total number of tourist accommodation entities located in spa resorts in Romania

Data source: TEMPO-online databank of the National Institute of Statistics, [www.insse.ro](http://www.insse.ro)

The investments of the last years in tourism in general, and the ones dedicated to entities located in spa resorts in particular, despite their unsatisfying share, have led to an increased interest of tourists, both Romanians and from abroad.

Thus, tourist arrivals recorded in tourist accommodation structures in May 2018 totalled a number of 1022,2 thousand persons, on increase by 4.3% against the ones of the same months for the preceding year. Even if in this period some categories of tourist accommodation structures registered decreases in the number of tourist arrivals (both Romanian and foreigners), the spas recorded only increases from 9% to 9.3% for Romanian tourists, and from 1.4% to 1.6% for tourists from abroad (Fig. 2).



**Figure no. 2** Distribution of Romanian and foreign tourist arrivals in tourist accommodation structures from Romania, in tourist areas for May 2018 compared with May 2017 (%)

Data source: TEMPO-online databank of the National Institute of Statistics, [www.insse.ro](http://www.insse.ro)

A high flow of tourists was generated in the balneary sector by the use of treatment vouchers paid by the National House of Public Pensions, and their quantitative evolution was relatively constant for the last years.

The investments regarding balneary tourism proposed during the debates for the draft of the National Strategy for Sustainable Development of Romania, Horizon 2013-2020-2030 include “the expansion and diversification, in balneary-climatic resorts of treatment procedures based on natural factors, on the development of a balneary parks network that will provide complex services of the wellness-type, and by promoting gerontology treatments with drugs and Romanian original recipes”.

At the same time, the development measures for health tourism are a priority on the list of major actions aimed in the framework of the Master Plan for investments in tourism, followed by other activities such as development of skiing domains, of the leisure tourism infrastructure, and the balanced and integrated development of the touristic area of the Danube Delta and of the Black Sea resorts, along with the development of the tourist infrastructure along the Danube river and in the high mountain area.

In order to develop health tourism, in the framework of the Master Plan for investments in tourism were considered investments for: “arrangement/rehabilitation/ creation of balneary parks, curative routes, construction/rehabilitation of kinetotherapy bases, construction/rehabilitation for valuation of curative theraml spas and mineral waters, construction/rehabilitation of aquaparks/acvatic parks, construction/rehabilitation of traditional baths, arrangement for tourism purposes of natural lakes with therapeutic properties, creation/rehabilitation of facilities for using mineral waters, beach arrangement (Resolution no. 558/2017 regarding the approval of the “Programme for developing investments in tourism – Master Plan for investments in tourism – and of the eligibility criteria of investment projects in tourism, 2017”).

Financing the proposed measures by accessing public national and European funds is facilitated and much easier to develop by positioning the National Authority for Tourism at the core of the action plan (Table no. 1).

**Table no. 1** Action plan for developing balneary tourism

Main objective	Working topics	Actions to be implemented
Improving and promoting the offer	implementing an innovative approach and a public-private partnership	developing a balneary-touristic cluster at national level
	support for the development of medical tourism	Creating a DMO (Destination Management Organization) for the medical tourism in Romania
	innovative positioning on a new product “green balneary tourism”	improving the revitalisation of balneary resorts
		identifying measures for fiscal stimulation and financing opportunities for supporting the modernisation of the accommodation capacities and of treatment centres
		developing and implementing a communication plan
		creating a task force specialised on urban and touristic arrangements
	developing curative treatments in the field of combating ageing effects	creating an expert task force specialised on the segment of combating ageing effects
		natural encouraging the development of anti-ageing products based on thermal water or other natural elements
		creating and implementing a common anti-ageing charter

Source: *Updating the Master Plan for Developing Balneary Tourism*, the Government of Romania, Ministry of Tourism, the National Authority for Tourism, Bucharest, 2016

## 2. Balneary Tourism in Romania: characteristics, particularities

Romania has an important natural touristic potential which includes, among others also a wealth of mineral and thermal springs included in all the types known up to date (over 3000) which represents a third from the resources of mineral waters from Europe, ranking the country on the first position on the entire continent.

Mineral waters are spread out over more than 20% of the country's surface at various depths and cover a wide range of physical-chemical and therapeutic properties, according to their genesis.

Isothermal and hyperthermal mineral waters called also thermal-mineral are not pure, as they display various concentrations of soluble salts, thus existing bicarbonated, sulphuric, and chlorinated waters. They have multiple uses in external cures and are found in the resorts: Baile Herculane, Calimanesti, Caciulata, Baile Felix, Calacea and Vata de Jos.

Romania has also an impressive total number of lakes, about 3500 with permanent character, from among which 63% have natural origins, and 27% are anthropic. From the viewpoint of their genesis they are divided into three distinct categories: liman/lagoon lakes (Techirghiol), flatland lakes (Amara, Slobozia, Strachina, Jirlău, Balta Amară, Câmpeni, Movila Miresii, Ianca și Sărat-Brăila) and lakes in the mountainous salt massives (Sovata, Tg. Ocna, Slănic, Ocnele Mari și Cojocna).

The therapeutic mineral substances are found both in mineral waters and in the one of therapeutic lakes, as well as in sapropelic muds and peats. Their use is for external spa cures with sapropelic mud baths, and other procedures, the most requested resorts being Techirghiol, Bazna, Sovata, Amara, Ocna Sibiului, Vatra Dornei, Ocnele Mari, Govora. Regarding the treatments based on sapropelic muds Romania has a long tradition and experience.

Another resource is the one of moffette gases encountered in the area Harghita-Caliman, respectively Băile Tuşnad, Borsec, Balványos, Buziaş and Covasna. These are exclusively for external cures in treating peripheral circulatory disorders, high blood pressure disorders, disorders of the nervous system or in rheumatic disorders.

Sulphuric-moffette-type gases are another balneary resource as they are natural emissions of sulphuric hidroxide, a mixture of carbon and sometimes radon gases (in special mine caves). High altitude carbonated sulphurs that are unique in Europe and used for therapeutic purposes are found in the counties Covasna and Harghita in: Turia (Pucioasa Cave), Şugaş Baths and Harghita.

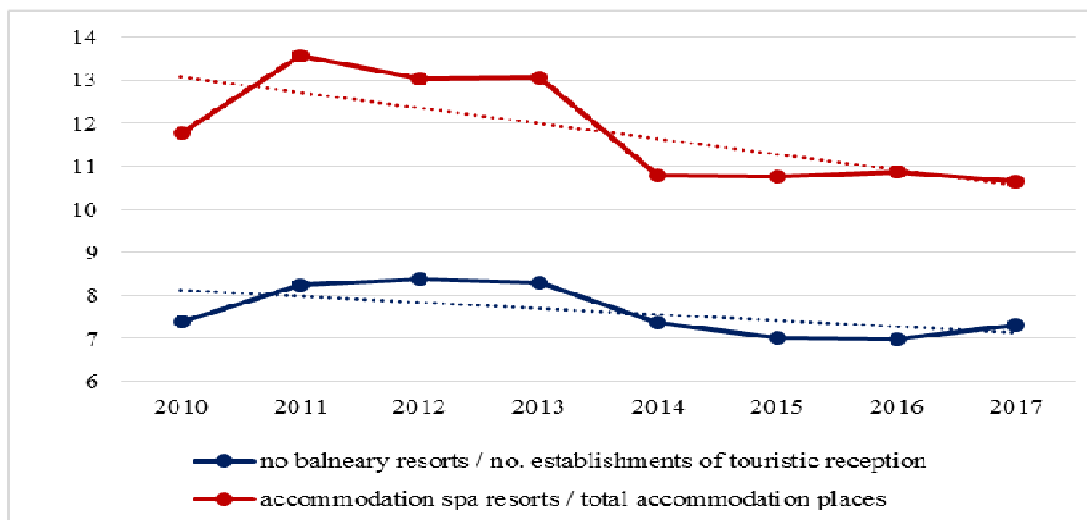
Therapeutic salt mines represent also an important resource, as Romania has some of the largest natural salt mines in Europe. Speleotherapy was described as medical procedure already in 1843, and is based on the benefic effects of dried salt aerosols and on the favourable mine environment due to temperature, low microbial load and the lack of allergenes in this environment.

The Black Sea shore is also regarded as an important resource good for therapeutic purposes based on thalasso therapy, psanotherapy, thermo therapy, or marine aerosols.

Practically, all types of main bioclimatic factors are found in various regions of Romania. Thus, the steppe bioclimate and the sea shore is valorised for helio-marine cures, the sedative-neutral bioclimate is recommended to individuals suffering from stress disorders and other persons who suffer due to the pressure of other climate factors, the tonic-stimulative mountain climate assists in improving cardio-respiratory and circulatory functions, in rebalancing the central nervous system, the metabolism and for increasing the immunologic capacity, and the salt mines and caves microclimate is another favourable bioclimate for obstructive and chronic respiratory disorders.

The varied landscape from Romania facilitated the existence of several natural curative factors that led to the emergence of a very high number of balneary-climatic resorts some of national interest, others of regional or only local interest.

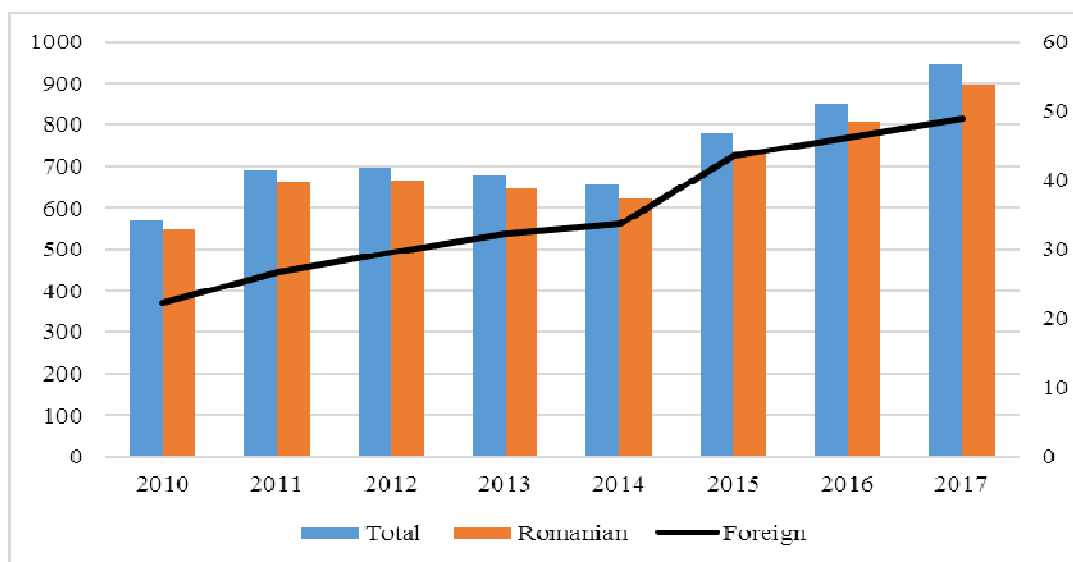
Currently in Romania there is a number of 117 localities with natural therapeutic factors, and the accommodation capacities of the over 577 tourist accommodation entities placed in the most developed 13 balneary resorts from Romania represent an aggregated number of over 36631 permanent accommodation locations. In the post-crisis period, as well, the weight of balneary resorts in total touristic structures had a descending trend. If, as of 2012, the total capacity for tourist accommodation increased, nevertheless, the one of balneary resorts had an oscillating development, the weight of accommodation units in balneary resorts in total tourist accommodation structures being on continuing decrease (Fig. 3).



**Figure 3** Weight of balneary resorts in the national tourist accommodation structure and in the tourist accommodation capacity (%)

Data source: TEMPO-online databank of the National Institute of Statistics, [www.insse.ro](http://www.insse.ro)

The arrivals of Romanian tourists in tourist accommodation structures with accommodation function in balneary resorts recorded a constant decrease in the period 2011-2014, followed by a slight increase. Regarding the number of foreign tourist arrivals in the touristic accommodation structures with tourist accommodation functions in balneary resorts from Romania, the situation is reversed and the increases were constant throughout the period 2010-2017 (Fig. 4).



**Figure 4** Evolution of Romanian and foreign tourist arrivals in tourist accommodation structures with tourist accommodation functions in balneary resorts from Romania, (thousand persons)

Data source: TEMPO-online databank of the National Institute of Statistics, [www.insse.ro](http://www.insse.ro)

Regarding the number of overnight stays in tourist accommodation structures with tourist accommodation functions in the balneary resorts from Romania, the weight of foreign tourists in the number of Romanian tourists is, on average, for the period 2010-2017 by 3.45 pp, and for the period 2014-2017 by 4.23 pp.

The index of accommodation capacity use in the balneary resorts from Romania had an oscillating evolution in the period 2010-2017, registering increases in 2010 and 2011, and thereafter decreases from about 45% in 2012 to 40% in 2013, and representing again 43.3% in 2017.

Based on the SWOT analysis (Table no. 2) it results that the sector of balneary tourism from Romania might represent an important element for revitalising Romanian tourism if the transport and tourist infrastructures are developed, and thus increasing competitiveness with respect to balneary tourist products also for foreign tourists (who arrive in small numbers).

**Table no. 2 SWOT Analysis of the balneary sector from Romania**

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>▪ important balneary tradition</li> <li>▪ low prices</li> <li>▪ the existence of natural-mineral resources as elements and an extremely rich and high potential curative framework</li> <li>▪ the existence of a balneary resorts' network</li> <li>▪ attractive and varied locations;</li> <li>▪ competent and professionally dedicated staff, partially inherited from the past;</li> <li>▪ varied range of curative procedures;</li> <li>▪ considerable medical probity;</li> <li>▪ balneary resorts that succeeded in diversifying the customer basis and in eliminating te dependency on treatment vouchers</li> <li>▪ the existence of representative associations in the sector</li> </ul>	<ul style="list-style-type: none"> <li>▪ difficult access to some balneary resorts</li> <li>▪ accommodation and treatment units of poor quality</li> <li>▪ poorly maintained ambience of the resorts</li> <li>▪ insufficient luxury or high quality services</li> <li>▪ resorts depending almost entirely on treatment vouchers and cannot succeed in investing for the restoration and reparation of the infrastructure and in creating new balneary products</li> <li>▪ a low level of services, in general</li> <li>▪ poor food standards</li> <li>▪ the corresponding staff for wellness and SPA products requires better training</li> <li>▪ lacking medical staff in some treatment bases</li> <li>▪ the increase in the weight of social tourism, respectively in the number of treatment vouchers simultaneously with a general decrease of demand</li> <li>▪ the extremely imbalanced seasonality of 2-3 months in the summer, and by the end of the season which has extremely low demand</li> <li>▪ decrease of tourist demand for resorts</li> <li>▪ mic poor competitiveness of balneary tourist products for foreign tourists who arrive in very small numbers</li> <li>▪ limited acknowledgement of the current modernisation and diversification needs</li> </ul>

THREATS	OPPORTUNITIES
<ul style="list-style-type: none"> <li>▪ the anchoring of balneary tourism at legal and public policy level only in the medical-recovery area</li> <li>▪ the difficulties encountered by local public authorities in accessing European structural funds dedicated to the balneary sector; poor administrative capacity, low resources for co-financing, few authorities having the effective ownership on balneary infrastructures;</li> <li>▪ the repositioning towards wellness of some tourist operators in a sector dominated by the social component bears risks of too quick and strong decreases of their incomes</li> <li>▪ the need of transport and utilities infrastructures in many resorts make difficult investments in new accommodation structures and balneary treatment structures</li> </ul>	<ul style="list-style-type: none"> <li>▪ the development of some balneary and wellness products that aim at the foreign customer base, and especially foreign insurers in the context of enforcing the Directive 2011/24/EU;</li> <li>▪ the existence of European structural funds in the period 2014-2020 for developing the balneary infrastructure</li> <li>▪ ensuring legislative coherence that would encourage the cooperation between responsible central and local institutions and that would allow for coordinated strategic investments</li> </ul>

### Conclusions

In the current conjecture, tourism represents one of the most important and dynamic sectors of the national and world economy. The resources that can be valorised by tourism, if managed in a sustainable manner by vast investments oriented on long-term based on the principles of sustainability contribute to ensuring prosperous and equitable regional development

Due to the significant impact on economy and on the local and regional society, tourism is an engine that renders dynamic the economic and social progress. A particularity of tourism is the one of being a sector of high importance and interest both for individuals and for the society.

.Required for satisfying the vital demands of the modern human, determined by the development in the living and health condition of the population, travelling for treatment and leisure is placed among the main objectives regarding tourist destinational all over the regions of the world. With a wealth of curative natural factors, Romania might become one of the most important destinations for the international balneary tourism.

For developing Romanian tourism in general, and balneary tourism in particular, it is necessary first to exploit efficiently the natural and anthropic exceptional potential from Romania. However, this effort presupposes also an important support provided by investments directed both towards the tourism field, but also to closely linked fields with direct or indirect influence on tourism.

For revitalising and modernising the Romanian balneary tourist product, consideration should be given to attracting new population segments, by implementing modern elements. Thus, persons from more age categories might be attracted to balneary cures and thus the age of tourists spending their holidays in balneary resorts could continue to decrease. This is mentioned because of the current state-of-affaires when balneary cures are



regarded as a way of not only spending leisure time, but increasingly more as an option of preserving health also by healthy people, as well.

Romania should undertake more investment and institutional efforts for turning into a tourist destination just as important as the natural and cultural patrimony in this respect. Taking into account the resources of the country, it might be stated that balneary tourism by its potential is that branch of tourism that could create a favourable bias for Romania in the competition with the other countries for tourists, and its proper development could lead with certainty to positioning Romania as one of the most demanded balneary destinations and among the first such locations not only in Europe, but in the world.

At the same time, the development of balneary tourism has positive effects and contributes to increasing the gross domestic product, sales' volume, and to the creation of new jobs, increases to state-budget incomes, improvements in the payments' balance, and altogether to better quality of life.

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