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BUCOVINA AS A TOURIST DESTINATION AND THE IMPACT OF THE RECENT INTERNATIONAL

FINANCIAL CRISIS. RECOMMENDATIONS FOR A MODERN DESTINATION MANAGEMENT APPROACH IN INTERNATIONAL DESTINATION MARKETING Heike BÄHRE INTEGRON-Institute, 12621 Berlin, Germany/ Stefan cel Mare University of Suceava, 720229, Romania/ baehre@integron.de Ulrike FERGEN Baltic College Fachhochschule des Mittelstandes (FHM), 19055 Schwerin, Germany fergen@fh-mittelstand.de Carmen CHASOVSKI

16 **Stefan cel Mare University of Suceava, 720229, Romania** carmen
@seap.usv.ro Abstract

Bucovina is a cultural landscape in the triangle bordered between the Ukraine, Romania and Moldova.

5 **Based on a theoretical planning approach in destination marketing management, Bucovina is** to be regarded **as a destination situated at the end of the**

involvement stage of the Tourism Area Life Cycle (TALC).

5 **Literature, internet research, qualitative interviews, and on site-observations**

depict Bucovina as a travel destination. The authors explore the impact of the financial crisis on Bucovina and forecast the destination trend for the next few years. Finally, they give recommendations for development of the Bucovina region in a sustainable, rapid and regulated manner. Keywords: Destination Management; Tourism Marketing; Product Life Cycle; Globalization; Bucovina. JEL Classification: L83 I. GENERAL CONTEXT AND METHODOLOGY Initial input for this study was provided by research on behalf of GTZ (German Technical Cooperation Agency) financed by German Ministry for Cooperation, for the Romanian government in the years 2004 to 2008. Two of the authors worked on this project as consultants: Heike Bähre on the German side and Carmen Chasovschi on the Romanian side. With the help of the faculty for economics and administration at Stefan cel Mare University in 2012, Ulrike Fergen, Heike Bähre and Carmen Chasovschi were able to realize their idea of an international symposium. This symposium, with the title "Bucovina destination - in search of excellence," took place from the 24th until the 30th of March 2012, in combination with a study trip covering the key fields "religious, nature and health tourism". In their analysis of the results of the field trip and in their conclusion from the presentations and discussions during the symposium, Ulrike Fergen and Heike Bähre, together with their B.A. student, Annika Kessler, showed in their study, published in 2012, how novel technologies could be used

5 **as challenges for the positioning of Bucovina as a new tourist destination in a globalized world. For the**

2013 conference "Vision and Foresight in Economic Policies in Times of Crisis" at Stefan cel Mare University, Heike Bähre, Ulrike Fergen and Carmen Chasovschi investigated the impact of the international

financial crisis on demand for the Bucovina region, analyzing official tourism data for Bucovina County. Finally, they rank the destination

19**based on the Tourism Area Life Cycle** (TALC). By forecasting **the**

development through 2015, they further define tasks for sustainable destination management. II. BUCOVINA AS A TOURIST DESTINATION II.1 TOURIST OFFER AND SERVICE SUPPLY First, the tourist product of the Bucovina region in Romania will be discussed based on the official statistical survey of Bucovina County and international studies (see Hesselmann and Chasovschi, 2010; Benchtour, 2010; Bähre and Fergen and Kessler, 2012; statistical survey Bucovina County, several years). Fig. 1: Romania and its regions Source: <http://renaud-invest.ro>. Nowadays parts of the historic cultural landscape “Bucovina” are situated not only in Romania, but also in the Republic of Moldova as well as in the Ukraine. The tourist brand “Bucovina” is only used for the Romanian part, which is the subject of this article. Bucovina offers different products and tourist services for the following types of tourism:

2cultural tourism, rural tourism, treatment and health tourism, business tourism, active, mountain and nature tourism.

The tourist product and service supply combine Bucovina's main assets: nature and culture. There are round-trips to monasteries, life in rural areas, and active tourism in nature resorts (see Benchtour, 2010). The visitors come because of Bucovina's USP, its central values: nature and culture (including religious sites). According to regional statistics (Breviar, 2013, p. 9), in 2012, Bucovina's leading source markets were Germany (23.90% of all foreign tourists), Spain (16.50%) and France (12.6%), followed by Italy, Austria, Poland and the Netherlands (see Section II.2). Accommodations All in all, the accommodation capacity is steadily growing. From 2011 to 2012, the number of beds increased from 8,835 to 9,447 in 2012 (+7%, see Breviar, 2013, p. 15). Agro-touristic boarding houses enjoy the highest percentage of all accommodation types in Suceava County. They offer the highest number of accommodations, even though hotels have much higher capacity (= number of beds) because of their size. The capacity of accommodations in general is explained in the chart below. Fig. 2: Capacity of accommodations in 2012 Source: statistical survey of Suceava County, see Breviar, 2013. A comparison between the growth rates in accommodation and arrivals shows that the growth of accommodation capacity (2012/2011 = 7%) is still higher than growth in the number of tourists (2012: 238,611, 2011: 229,519; 2012/2011 = +4%, see Breviar, 2013, p. 23) as well as growth in overnight stays (2012: 586,237, 2011 = 556,249; 2012/2011 = 5%). But there is a positive development in average length of stay. Average length of stay increased from 2.4 days in 2011 to 2.5 days in 2012 (Breviarul turistic al Judetului Suceava, 2013, p. 51). This is an indicator of growing attraction of the region. Normally, the average length of stay in city destinations is far smaller (e.g. 1.4 days) than in health resorts (e.g. from 4 days up to 14 days) The following table shows the rising number of hotels and other types of agro-tourism accommodation units and boarding houses. This change could be explained by a rising number of entrepreneurs from rural areas supported by EU funds dedicated for tourism businesses in agro-tourism. But only two new hotels opened their doors in 2012, and unfortunately, no foreign investment was made in the sector. Table 1: Types of accommodation in 2011 and 2012 in Bucovina

Types of accommodation	2011	2012
Hotels	34	36
Hostels	12	12
Motels	7	6
Villas	18	16
Chalets	14	13
Boarding houses	68	74
Agro-touristic boarding houses	110	130
Other types	10	9

Source: Breviarul turistic al Judetului Suceava, editions 2012 and 2013. Tour operators Tour operators

are travel agencies specializing in organizing tourist programs and campaigns that are sold directly or through other travel agencies based on agreements and conventions (as defined by the Romanian National Institute of Statistics). Travel agencies with sales activity are agencies that sell the tourist programs and campaigns of tour operators. Most tours offered are

2individual round trips, active bike trips, cultural round trips, especially to Moldovan monasteries, nature trips

and hiking tours. The activities of Romanian tour operators are rated as good to very good. Tour operators are actively involved with external partners. In addition, clients are mostly satisfied with their organizations. Furthermore, the activities of tour operators are becoming better and better. But there are also weaknesses to note, such as working methods. Operating staff is described by partners and customers as not being very dynamic or creative. Communication and language skills could be improved. A lack of packages has been detected in rural agro-tourism. The offer of leisure activities is limited and the special needs of international visitors largely go unconsidered (Hesselmann and Chasovschi, 2010, p.32). Transportation infrastructure Railway networks connect Romanian regions to Vatra Dornei and to Ukrainian border regions. But there is a lack of transportation options, especially for cultural tourism. Public transport is a need which is to be improved. There is a relative good national railway network. International connections are provided by bus companies and airlines from Bucharest (Benchtour, 2010, pp.7 ff.). In the region, there is the domestic airport Suceava and (about 150 km away) the international airport Iasi. II.2 Demand Although from 2000 to 2001 there was a slight decline in arrivals: from 153,500 to 151,400 (2001/2000: down 1%), there was steady growth in visitors from 2002 through 2008. In 2008, Bucovina achieved a peak of 229,100 tourists. The statistical survey in Table 2 shows the effect of the international financial crisis. The international financial crisis, caused mainly in the U.S., came to its culmination with the bankruptcy of Lehman Brothers Holdings in the U.S. in October 2008. The tourism-specific impact of the financial crisis, on income, tourist expenditures and national and international investments, came to the fore only after a delay. All in all, the impact on tourist arrivals became obvious one year later. The drop in international arrivals in 2009 (compared to 2008) was much heavier (down 21%, or one-fifth) than in domestic arrivals (only 6%). The impact of the financial crisis on inbound travel to Bucovina can already be seen in the number of visitors from abroad in 2008: There was a drop by 20% in the

13number of visitors from abroad, compared to

6% growth

13in the number of visitors from Romania. Table 2:

Tourist arrivals in Suceava County / Bucovina Area		Year		Tourist arrivals		Domestic	
2000	153,515	128,085	25,430	2001	151,370	121,442	29,928
2002	162,423	121,204	41,219	2003	162,473	129,401	33,369
2004	187,412	143,358	44,054	2005	192,120	148,847	43,273
2006	211,003	174,088	36,915	2007	226,277	184,531	41,746
2008	229,068	195,803	33,265	2009	209,725	183,477	26,248
Growth in % (= Decline, impact of the international financial crisis)				2008/2007	+ 1	+ 6	./.
2009/2008				./.	8	./.	6
2010				194,365	169,755	24,610	2011
2011				229,519	196,896	32,623	2012
2012				238,611			

200,423 38,188 Growth in % 2012/2000 + 55 + 56 +50 Growth in % Decline =

14 **impact of the international financial crisis**

2012/2007 + 5 + 9% /. 9 Stabilization period since

14 **outbreak of the international financial crisis**

2012/2010 + 23 + 18 +55 Source: Breviarul turistic al Judetului Suceava, editions 2012 and 2013 (own calculation). Tourist arrivals and overnight stays in Bucovina County increased in 2011 for the first time since 2008. The table below shows the growing number of international visitors (see Table 2), although the rate of growth was not as fast (2012/2000 = +50) as in the number of domestic travelers (2012/2000 = +56). In 2012, the structure of tourism demand shows 16% international and 84% domestic visitors (2011: 14% versus 86%). Fig. 3: Structure of Bucovina Visitors in 2011 Fig. 4: Structure of Bucovina Visitors in 2012 Source: Breviar statistic al Judetului Suceava, Directia Judeteana de Statistica, editions 2012 and 2013 (own calculation). The impact of the change to a growing share of international travelers on hotel investments With the growing number of tourists from abroad, there is growing demand for 4-star accommodations. According to the classification of accommodations below, based on a survey in 2011, foreign tourists preferred staying in 4-star accommodations (54.8%), followed by 3-star accommodations (29.5%) and 2-star accommodations (15.4%). Overall, tourists (including the majority of Romanian tourists) preferred the 2-star segment (36.9%), followed by 3-star accommodations (33.5%), 4-star accommodation facilities (22.8%) and 1-star accommodations (6.7%). The following chart depicts the breakdown of the classified accommodation types. Fig. 5: Number of Accommodation Units in Different Categories in 2011

Category	Number of Units
4-star	101
3-star	98
2-star	21
1-star	3

Source: Breviar statistic al Judetului Suceava, Directia Judeteana de Statistica, 2012 (own depiction). As was explained in Section II.1, two new hotels opened in the Bucovina region in 2012, but none was an investment from abroad (see Table 1). By country of origin, there is a growing number of visitors from Spain and, in 2012, the French visitors overtook the Italians and are now in third place. Fig. 6: Structure of Bucovina Visitors by Country of Origin in 2011 Fig. 7: Structure of Bucovina Visitors by Country of Origin in 2012 Source: Breviarul turistic al Judetului Suceava, Directia Judeteana de Statistica, editions 2012 and 2013. A possible reason could be the more intense promotion of Bucovina at tourism fairs in France, as trade, handicraft this target group. As Bähre and Fergen 2012 show in their "Interdisciplinary Geographical/Economic Destination Model", in the travel destination, the tourism sector has to be connected with other sectors like agriculture, in order to create as much as possible well as the existence of a tour operator specializing in closed circular flows of added value (see Bähre and Fergen, 2012, p.150). Holloway and Humphreys, 2012 underline that the

9 **"success in attracting tourists will depend on the quality of three essential benefits that**

are offered:

9 **attractions, amenities (or facilities) and accessibility (or ease**

with which they can travel to an important and outstanding role in the destination management process. Bieger and Beritelli, 2013 define the tourist destination as a "geographic area (location, region, hamlet), which was chosen by the particular guest (or segment of guests) for a travel destination. It contains all amenities which are necessary for the stay: economics and p.15). Given the aspect of the need to cover space, tourism is a phenomenon which has to be regarded as interdisciplinary, requiring study within the sphere of geography, as well as many other scientific disciplines. Economics and geography play the destination)" (Holloway and Humphreys, 2012, accommodation, food/food, entertainment. It is the competition unit in inbound tourism, which has to be led as a strategic business unit" (translated, Bieger and Beritelli, 2012, pp.53-54). Bähre and Fergen, 2012 refer to this (business unit) and stress that the destination is not only a product but also a cruising space(Aktionsraum) for visitors and regional stakeholders. The integration of different sectors in the strategic development of a travel destination/tourism area and comprehensive co-operation among sectors is necessary for its sustainable economic development. The combination of different USP elements improves the attractiveness of the destination and creates significant potential for success as a tourism area. Fig. 8: Interdisciplinary Geographical/Economic Model of a Tourist Destination The tourism destination as an open system with various geographical and (inter- and Attractions intra-) regional aspects, but as a "closed" (attractions but also (integrated), i.e. marketable product. attractiveness/ suitability of space) Guests (covering Consistent overall image and Thedestinationasa close orientation to needs of strategicproduct space/distanc tourists andcruisingspacefor e, export basis touristsandregional theory) actors. Consumers Originalofferings Supplementary derivativeofferings Combinationof private-sectorandpublic servicesundertheaspect ofgeographicunits Access (accessibility) Indigenous population Politics Closedcircularflowsofadded value,ifpossible (multipliereffectsand Other sectors, e.g. conservingresources) agriculture, commerce, crafts... Other groups (associations, media, Amenities etc.) (local tourism and other infrastructure) Source: Bähre and Fergen, 2012, p.150 (translated). II.3 Bucovina as a Tourist Destination according to the Tourism Area Life Cycle Concept With globalization and the increase in tourist arrivals, destinations are developing from an original product into a global product influenced by the tourism industry (Wöhler, 1997, pp.2-3). Tourist destinations and their products can be arranged into a so-called "tourism area life cycle" (TALC) which shows their stages of development. During the strategic planning of a destination's development, management has to determine the position of the destination in its

20tourism area life cycle. According to Butler 1980,

destinations can be considered as products according to life cycle phases. Butler differentiates between six stages:

2exploration, involvement, development, consolidation, stagnation, decline and rejuvenation, as depicted below. Butler 2006

stresses that "although

1other writers, such as Cohen, 1978, have warned against the problems of unilinear models of social change, there seems to be overwhelming evidence that the general pattern of tourist area evolution is consistent.

1 The product cycle concept, whereby sales of a product proceed slowly at first, experience a rapid rate of growth, stabilize, and subsequently decline; in other words, a basic asymptotic curve is followed. Visitors will come to an area in small numbers initially, restricted by the lack of access, facilities, and local knowledge. As facilities are provided and awareness grows, visitor numbers will increase. With marketing, information dissemination, and further facility provision, the area's popularity will grow rapidly. Eventually, however, the rate of increase in visitor numbers will decline as levels of carrying capacity is reached.

...

7 As the attractiveness of the area declines relative to other areas, because of overuse, and the impacts of visitors, the actual number of visitors may eventually decline" (Butler,

2006, pp.4-5, see Figure 9). Thus, based on how the tourism area life cycle has been defined, management can take appropriate measures for the development of a destination, within the context depicted by Bähre and Fergen, 2012 in the above model (see Figure 8). Fig.9: Tourism Area Life Cycle Source: Butler, 1980. In terms of tourist demand and the current tourist infrastructure, Bähre and Fergen and Kessler, 2012 classified the Bucovina region in the second stage, the involvement stage. As Butler 2006 explains, in the

17 involvement stage, the number of visitors increase, and assume some regularity.

1 As numbers of visitors increase, some local residents will enter the involvement stage and begin to provide facilities primarily or even exclusively for visitors.

In II.1 Section of this article, it is explained that the EU has funded this process, especially with respect to agro- tourism boarding facilities in the region. Bähre et al., 2012 state that there was an urgent need for better marketing facilitation (see Bähre and Fergen and Kessler, 2012, p.139, regarding Middleton et al., 2009). Butler, 2006 illustrates the development stage as a phase which

1 "reflects a well-defined tourist market area, shaped in part by heavy advertising in tourist-generating areas. As this stage progresses, local

involvement and control of development will decline rapidly. Some locally provided facilities will have disappeared, being superseded by larger, more elaborate, and more up-to-date facilities provided by external organizations, particularly for visitor accommodation. Natural and cultural attractions will be developed and marketed specifically, and these original attractions will be supplemented by man-made imported facilities. Changes in the physical appearance of the area will be noticeable, and it can be expected that not all of them will be welcomed or approved by all of the local population"

(Butler, 2006, p. 6). The characteristics of the development stage described above can be observed more and more in the Bucovina region. During the peak season in the Moldovan monasteries, critical voices are starting to be heard. As the impact of the international financial crises has subsided, there has been a steadily growing number of visitors (see Table 2 and Figures 3, 4, 6, 7) since the year 2001.

21As can be seen in Table 2, the

number of tourists from abroad increased by 55% in the past two years, but only by 18%

18relative to the number of Romanian visitors. The impact of the

financial crisis was much more heavier on visitor numbers from abroad (2009/2008 = down 21%) than on the number of visitors from Romania (2009/2008= down 6%) and there was a drop in the number of visitors from abroad in 2008 by 20%, while at the same time, there was moderate growth in the number of visitors from Romania: up 6% . Even today, the impact of the international financial crises can be seen in the number of visitors from abroad: even today, the number of visitors from abroad (2012 = 38,188) is still lower than in 2002 (41,219) (see Table 2). As the recovery from the international financial crises continues, a rapid transition can be expected for the Bucovina region from the involvement stage to the development stage in the next two years, through 2015. Russel, 2006 refers to the Butler TALC model in connection with the entrepreneurial environment. She underlines that the "tourism industry is a natural attractor to entrepreneurs. Its uncertainties and volatility are provocative of alertness, innovativeness and dynamic change. It is highly competitive, survival dependent and image related because a number of interlinking industries - day touring, catering, and entertainment - attach to tourism, the scope for entrepreneurial visioning is greater than in most areas of enterprise. This is likely to be greatest in newer destinations where stagnation and rigidity are remote" (Russel, 2006, p.115). Russel, 2006 distinguishes between four entrepreneurship categories related to the six TALC categories: 1. Organic entrepreneurship/Serendipitous entrepreneurship 2. Grand-scale entrepreneurship 3. Revitalizing entrepreneurship and 4. Phase changing entrepreneurship (see Figure 10). Fig. 10: Entrepreneurship categories and the TALC Source: Russel 2006 This diagram shows that the categories "grand-scale entrepreneurship" and "phase changing entrepreneurship" are allocated to the end of the involvement stage as well as to the development stage of a destination. Change is an essential prerequisite for innovation. When a destination collectively encourages change strategies, it may be the cumulative input of a number of entrepreneurial minds that trigger change by bringing economic growth - with minimal

leakage, job growth and new infrastructure (see Russel, 2006, p.116-118). Russel underlines that "the most dramatic variations to the shape of the TALC come about when actions of entrepreneurs are planned, purposeful and introduce elaborate grand development schemes to the region. These entrepreneurs often bring instant change to the destination, attract bigger or different markets and provide an instant trigger for the destination to enter a new development phase" (Russel, 2006, p.119). The grand-scale entrepreneurship described above can be seen today in the Bucovina region. In the new hotels of the region, one will find newly built structures shaped like historic Moldovan churches (a la Disney). The Mayor of Ciocanesti has built a new Moldovan private church on his private property, shaping his village as a unique "historic" landscape. Events and theme-marketing are used to create Ciocanesti as an internationally novel "painted egg destination" with an Easter season all year long. Considering the tourist development of the Bucovina region in the last two years it can be stated now that the destination is in the transition into the third stage, the development stage. III. CONCLUSION In the development stage there will be well- defined source-markets (tourist-generating areas). As the negative impact of the recent international financial crisis has subsided, the foreign demand in Bucovina has recovered in the past two years. International travelers will become more and more important for the tourism providers of Bucovina. This is a new challenge for entrepreneurs in Bucovina tourism. As Bähre and Fergen and Kessler, 2012 underlined, novel technologies used in a modern tourist information system (TIS) should be exploited to develop more effective destination marketing for the region. The successful combination of Bucovina's USP elements, nature and culture, including religious sites, will improve the attractiveness of the destination for travelers from abroad. Seminars and workshops should be developed to foster the exchange of ideas and marketing knowledge regarding new technologies, the successful combination of USP elements for the creation of new tourist offers in the region, entrepreneurial business know-how and the targeting of international source- markets. Other sectors will have to be integrated as well in order to ensure sustainable destination development. The further education of personnel and all stakeholders in the Bucovina region should be planned and realized in a strategic manner on all levels (local, regional and national) of destination management. REFERENCES

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