

The Place of Religious Tourism in Romania's Tourist Industry

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Abstract: - At global level, the industry of tourism represents the most dynamic activity sector, the most important generator of workplaces, and a source of recovery for the national economy. Specialists consider that, in the global perspective, travel and tourism, together with information technology and telecommunications will be the three industries of services with the highest turnover. Religious tourism is an essential component of cultural tourism. This form of tourism exists for centuries and shows some features of pilgrimage proper, but has undergone considerable changes, nevertheless. Nowadays, religious tourism involves high educational and cultural level of the tourists, which would allow appreciation of cultural-religious sights from the point of view of the architecture, value construction, spiritual significance and content of works of art. In the present paper the authors realized a comparative analysis of the Romanian religious tourism and the sector of tourism in general and highlighted the main issues this sector is currently confronted with.

Key-Words: - tourism, religious tourism, SWOT analysis, development strategies, development perspectives, Romania.

1 The economic impact of tourism

At the end of the 20th Century, the industry of travel and tourism represents worldwide the most dynamic activity sector, and, at the same time, the most important generator of workplaces. Belonging to the tertiary sector of the national economy, tourism plays the role of a barometer that strictly measures its development, and the changes that occur in the economy bear upon it. Tourism plays a dual role:

- A direct economic role, which consists in generating revenues and creating receipts that feed the national income. These incomes contribute to the economic and social development of localities and regions that already are or were recently included in the tourist circuits.
- An indirect economic role, that assumes the development of other branches of the national economy, which, on their turn, support the carrying out of tourism connected activities: tourism-transportation, telecommunications, trade, etc.

Placed in correlation with the economy as the whole, the industry of tourism is an element that

stimulates the entire global system, as it is a multidimensional sector.

The human dimension is due to the capacity of the tourism to generate contacts among people, contacts that are accompanied by specific behaviors, attitudes, and experiences.

The social dimension of tourism may be highlighted both at a microsocial level – representing a means of recovery for the labor force and of the people’s health –, and at a macrosocial level – through the absorption capacity of the exceeding labor force from other fields of activity, generated by the restructuring or closedown of large enterprises. This can also be done by including certain areas in the national and international circuits, and by creating new workplaces in the field of tourism, as well as in sectors directly or indirectly related to this industry. Thus, the development of tourism contributes to the diminishing of the unemployment rate.

The economic dimension of tourism has many facets. Firstly, tourism is a business, thus, a revenue

source. It enables many individuals to become entrepreneurs and to implement their own business ideas. Secondly, tourism is a complex of an “industrial” type. This name is due to the fact that satisfying tourists’ needs cannot be realized through a single activity. There appears the need to simultaneously carry out many sophisticated activities. Thirdly, tourism is a basic sector of the national economy; it is an important source of currency and a specific type of export.

Beyond the three above-mentioned dimensions, we ought to point out a transversal dimension, too: the ecological dimension of tourism. This is of great notoriety, and lately it has been given an increasing attention. Finally, one should not forget the strong multiplying effect of tourism, which acts as a stimulating element of the global economic system. Tourism generates a specific demand for goods and services, which implies an increase in their production, thus contributing to the diversification of the structures of the national economy. The impact of the inclusion of new areas in the tourist circuit is their fitting out and development, through the creation of a specific infrastructure for tourism: tourist accommodation facilities and public alimentary organizations, etc. Such an action also contributes to the creation of the general infrastructure needed for carrying out all the activities in the area.

Keeping in mind the importance, the role and the multidimensionality of the tourism industry, we have asked ourselves: *Which can be the reasons why Romania’s tourism does not yet seem to display its beneficial effects upon the national economy?*

2 The industry of tourism in Romania

2.1 Beginnings

The beginnings of the tourist industry – characterized in an article published by the *International Economic Review* [13] as being “the most suitable placement of capital” – date from 1850. At that time, the first travel office was established in England, having as single purpose the organizing of travels. Then, in 1872, the first American travel agency was opened – *American Express*, aiming at selling voyages to Europe. Only after the Great Union of 1918, was Romania included in the international tourist circuit. Naturally, the basic elements needed for carrying out the tourist activity have existed for centuries but it was only in the 19th Century when they were

joined by companies aiming to promote tourism. *The Carpathian Society* was founded in 1895. It organized trips to the Bucegi Mountains. In 1903 *The Society of Romanian Tourists* was founded, and, at the initiative of the Romanian scientist Emil Racoviță, there *The Romanian Fraternity* was founded in 1921, an organization with a tourist profile.

From the point of view of the institutional structure of tourism, Romania did not stay behind the other European countries for a long time. In 1924 the *National Tourism Office* (NTO) was founded. It was initially integrated into the *Health Ministry*, and it became a joint-stock company only at the end of the 20th Century. In 1936, under the supervision of the NTO, the *România* magazine was published, issued in three international languages. The first tourist bimonthly publication, *Bucegii from Bușteni* was issued in 1911, and the first monthly tourism paper was *The Bulletin of the Romanian Tourism Academic Society*, issued between 1929-1932. Another publication issued between the two world wars was *Touring-Clubul României* (1930); its aim was to promote tourism in Romania and to protect the nature. The Association was founded in 1921, and the first review was issued in 1926. The first monument of tourism (if not the only one worldwide) can be admired in Rușca Montană, Romania. It was built of Rușchița marble, in 1936 by the *Tourist Club of Banat*. The day of the monument is celebrated each year on the 12th of September.

2.2 Problems

Deepak Lal, in a philosophic investigation of economic development along history, reaches the conclusion that where there is no sense of guilt and shame (when guilty) it is impossible for people to progress as a society. [5]

Why should the Romanian feel guilty? Because they have almost destroyed the very activity sector where Romania has the most obvious advantages comparatively speaking – the tourism sector – by wasting and failing to use properly an invaluable national resource.

Romania has almost all the features to be one of the preferred tourist destinations: it is blessed with a beautiful landscape, it can offer different types of tourism (mountain tourism, heritage and cultural tourism, rural tourism, spa tourism, geo-tourism, MICE tourism – meeting, incentives, conferences and exhibitions, seaside tourism) and it has a diversified supply and lodging capacities. Despite this, the travel and tourism economy

contribution to Romanian GDP varied around 2 percent. [4].

Before 1990 Romania used to be an important tourist destination for the Eastern-European market. Our country especially promoted tourist products such as: littoral / seashore, spa resorts, cultural programs or the monasteries from Northern Moldavia and Bucovina. The national tourist offer has not changed too much in time. Thus, it has become uncompetitive in relationship to the exigencies of the demand and of the international competition of similar tourist products [10].

According to the data offered by the *National Institute of Statistics* (NIS), by 2006 the economic performances of Romania's tourism were rather modest:

- 6.6 million foreign visitors;
- 6.9 million departures of Romanian tourists abroad;
- 607 million USD receipts registered from international tourism;
- 105,000 workplaces offered by the tourist sector, that means 1.2% of the total workplaces.

If in the case of EU, tourists spent abroad approximately 780 Euro, while for Romania the average of these expenditures rose only up to 220 Euro. The number of foreign tourists who visited Romania between 1995 and 2000 continuously decreased, registering a slight increase by 2001. The number of Romanian tourists spending holidays abroad continuously increased. This has led to the appearance of a negative trade balance. Romania, as a tourist destination, ended up on an unfavorable position: from the 30th place in 1997, to the 40th place by 2000. Consequently, the net usage of the tourist accommodation capacity decreased from 50% in 1991, to 35% by 2000.

The ratio of companies in this sector was of 5.16% in 1992 that dropped to 3.22% in 2000. Even if the situation started to slowly improve after 2000, in 2006 the 1992 ratio remained still unachieved. Between 1996-2006, the number of active companies grew 1.46 times, but in the sector we are interested in, it slightly exceeded this rate (2.07 times). [8]

The rate of investments in tourism as compared to the total of investments rose only insignificantly from 0.005% in 1990 to 0.008% in 2000 and to 0.013% in 2006. [8]

The rate of the population occupied in the tourism sector remained of 0.01% during the whole post communist period while the rate of employees raised insignificantly: from 0.016% to 0.019%. [8]

By comparing the evolution of the main economic branches between 2000-2006 a clear

falling behind of the tourism sector is to be noticed. The rate of turnover in the "Hotels and Restaurants" sector as compared to the total turnover remained constantly of 0.01%; gross investments in 2000 represented only 0.01% of the total and 0.02% in 2006. [9]

The sector of tourism is not meeting requirements from the point of view of work productivity either, since the rate of occupied population raised only with 43% while the gross national product dropped with 10%. Such an unnatural situation leads us to the conclusion that in the tourism sector all the resources are inefficiently used, in other words wasted. The sector, which is expected to be the main driving force of catching in Romania, is presently acting as a hindrance of economic growth.

One cannot but wonder about the causes of this poor impact of tourism upon the Romanian economy. In this respect, we made use of a SWOT analysis, that led us to the following observations and conclusions.

2.3 Strengths and Weaknesses of the Romanian Tourism

The **natural tourist potential** is of a great variety and complexity. It enjoys a worldwide recognition of the tourist value, and it constitutes an important part of the "basic" tourist product [2]:

- The *mountainous* tourist potential possesses great landscape diversity and complex tourist resources. It offers great exploitation and valorization possibilities in tourism activities: winter sports, alpinism, sportive hunting and fishing, spa and wellness cures, religious or rural tourism, ecotourism, etc.
- The *spa and watering* potential is renowned worldwide (mineral and thermal waters, therapeutic mud and gases, salt mine bioclimat, therapy based on natural plants, etc) partially valorized through the national spa resorts and through the regional and local ones, as well as through the unclassified watering towns and sites. In fact, 35% of the European natural mineral and thermal water sources are situated in Romania, and our country has 117 settlements with therapeutic factors.
- The tourist potential of the *Black Sea littoral* has an advantageous position in the territory (good accessibility from Europe and Asia: E 60 and E 87 motorways; Constanța and Mangalia harbors; Constanța airport; railways; etc).
- The tourist potential of the *Danube Delta* raises the tourists' interest through its ecologic, landscape

and faunistic resources, valorized by means of cruises and expeditions in an original landscape, etc. The Reservation of the Danube Delta Biosphere is included in the UNESCO World Heritage.

- The tourist potential of the *Danube River* and of the neighboring area presents multiple attractions (the Danube Notch, the Iron Gates, the ponds of the Danube, etc).

But between the exquisite value of the natural tourism potential and the level of their technical endowment, there is a huge difference, compared to other countries that also have tourist tradition. The technical endowment of the mountainous tourist resorts (as well as that of the littoral or spa resorts) is both physically and morally worn-out, respectively totally insufficient. Ski areas are only partially modernized. Mountainous tourist routes and accommodation facilities are not arranged according to the modern exigencies. Very often tourist accommodation facilities either lack or are inefficient, respectively of poor quality. Treatment or cure, and leisure or amusement services are low. The environment is badly maintained and improperly arranged. The labor force is unsuitably qualified and the salary / labor conditions quota is an unfavorable one, fact that leads to an important migration of the human factor. The fact that only a few of the tourist resorts fulfill international standards adds up to all the other inconveniences. Overcrowding led to their natural tourist potential degradation.

The cultural-historic potential of Romania is highly illustrative, due to the millenary history of our people. There are over 680 exhibits and values of national cultural interest and heritage that enjoy a huge diversity:

- 197 churches and monastic ensembles;
- 36 architectural monuments and ensembles;
- 11 castles, mansions and palaces;
- 70 urban architectural ensembles;
- 20 historic centers and archaeological sites;
- 7 tourist objectives / areas and sites are

included in the UNESCO World Heritage [11].

In general, the cultural tourism in Romania is centered on four locations: the painted monasteries of the Bucovina region; the castles in Transylvania and the art galleries; the wooden churches and houses in the Maramures region; museums and historical and contemporary sites in cities such as Bucharest, Sibiu, Cluj Napoca and Sighisoara. The main cultural points of interest in Romania are represented by monasteries and churches, which attract most of the foreign tourists who want to learn some of the traditions and history. [3]

Romania can be proud of the richness of its cultural-historic material and immaterial heritage, of the multi-cultural features of the Romanian space, or of its globally renowned personalities (Enescu, Eliade, Brâncuși, etc) but this heritage is not properly promoted. Accessibility of archaeological sites and historic monuments is very often reduced and poor. Tourist infrastructure is inappropriate and tourist guides are poorly trained. Unfortunately, many historic monuments and buildings are in an advanced state of degradation and the legislation concerning their conservation is not appropriately implemented.

The technical-economic potential (infrastructure, transport, and communications) consists of engineering art-works, bridges, viaducts, dams, old smokestacks, mines and salt mines, vineyards, stud farms and many more. Romania has an ample railway network, a good network of airports; the country has a developed network of roads, with numerous border-crossing points. The telecommunications network is quite well-developed –fixed telephony, radio, GSM, satellite, Internet, etc.

But the endowment of the airports is poor; the electrification of the railway network is insufficient. The quality of most trains and of other public transportation means (buses) is quite inappropriate. The road and air infrastructures are not in a very good condition and this stops tourists from coming to Romania because they do not want to destroy their cars on Romanian streets. Transportation and international flights are only a few. Usually, they end in Budapest and from there you have to come by car or train. [6]

One may also mention the absence of tourist signs and indicators, or the limited access facilities provided to people with disabilities. Moreover, tourist accommodation facilities are both physically and morally worn-out. Camping facilities are limited and of poor quality. Tourist information points are insufficient and poorly endowed. The access to many tourist attractions and destinations is rather difficult.

Human resources represent a decisive factor of the tourist activity efficiency. Romanians are a hospitable people and the young population has remarkable linguistic abilities. There are numerous and experimented tour-operators. By 2006 [15] in Romania there were 2,822 registered tourism agencies, of which 2,638 were authorized to function as tour-operators. Also, there were 937 authorized tourism guides, while 151,000 people worked in hotels and restaurants.

But the apprehension of the importance of tourism for the national economy is still very weak. Thus, the professional preparation of the hotel sector workers is inappropriate. Work-conditions in the tourism industry are hard and the wages are low, facts that lead to a high migration of the labor-force either towards other economic sectors or even abroad [12].

Legislation, management, promotion. The legal framework is somewhat appropriate but it still needs a permanent perfecting and alignment to the legal norms of the European Union. There are laws concerning environmental protection, tourist heritage conservation, and the insuring of tourists' protection and safety.

But the criteria for granting tourism authorizations and licenses do not fulfill the current requirements of the market. Yet, legal issues concerning land and building ownership have not been solved. There are no plans of integrated development of towns and resorts still. Also, incentives and support mechanisms for investors are to be expected. In tourism, most of the entrepreneurs do not have any economic education and, thus, no knowledge of tourism and / or hospitality management at all. Romania's promotion as a tourist destination is inappropriate and insufficient. As a consequence, Romania lacks a positive image of its tourist offer.

Given the above observations, we can build the EMIF matrix for the Romanian tourism (Table 1.) [7].

Table 1: The Evaluation Matrix of Internal Factors (EMIF) for Romania's Tourism (Evaluation 0-5)

	Internal Factors	Grade
I.	Natural	3.81
•	mountains	4
•	spa resorts	3
•	Black Sea coast	3
•	Danube Delta	4
•	Danube River	4
•	faunistic and floristic resources	4
•	protected areas	4.5
•	speological heritages	4
II.	Cultural-historic	3.3
•	values of cultural-historic heritage	4
•	museums	2.5
•	spectacles	3
•	folklore, traditions	3
•	legends	4
III.	Technical-economic	2.57
•	works of engineering art	2

	Internal Factors	Grade
•	salt-mines, mines, vineyards, stud farms	3
•	air, fluvial and sea transport	2.5
•	railroad transport	2
•	motorway networks	3
•	accommodation facilities	2
•	telecommunication networks	3.5
IV.	Human resources	2.2
•	Hospitality	5
•	Linguistic abilities	3
•	professional preparation	1
•	salary / labor conditions quota	1
•	specialized educational system	1
V.	Legislation, organization, promotion	1.7
•	environment and tourist heritage protection	2
•	organization and management	2
•	quality of tourist services	1.5
•	promotion	1
•	image	2
	General average	2.71

2.4 Opportunities and Threats of the Romanian Tourism

Nowadays, Romanian tourism enjoys many development opportunities. Among the most important ones there are: the increase in the international demand for different types of tourist destinations (mountain, spa, rural, ecotourism, etc), for which Romania has an extraordinary potential.

Since 2000, a slow but determined trend of recovering and refreshing has been showing in the Romanian economy. This generated a beneficial effect upon our tourist infrastructure. The quality of tourist services has also begun to improve.

After Romania's adhesion to the EU structures the extending and modernizing of tourist accommodation facilities was initiated, and it intensified, under the conditions of an increased access to international financing programs and sources. In parallel, the improvement of Romania's tourist legislation and its harmonization with that of the EU takes place.

But one should not forget the fierce international competition of other tourist destinations, nor the decrease in the purchasing power of most Romanians. Romania's level of economic development is lower than that of most Eastern-European countries. The quality / price quota for tourism is much more attractive in Bulgaria, Croatia, Slovenia or Hungary.

Given the above observations, we can build the EMEF matrix for Romania's tourism (Table 2.) [7]

Table 2: The Evaluation Matrix of External Factors (EMEF) for Romania's Tourism (Evaluation 0-5)

	External Factors	Grade
1	The development of international demand	5
2	The diversity of the tourist offer	4
3	Number of tour-operators and tourism agencies	3
4	The quality of being an EU member state	5
5	International competition	1
6	The economy's development level	3
7	Economic, political, military stability	4
8	Access to financing sources	5
9	Urbanization of the rural population	1
10	Waste-management system	1
11	Management systems of protected areas	2
12	The quality / price quota	1
13	The migration of the labor force	1
14	The decrease of the buying-force / capability	1
15	Legislation	3
	General Average	2.66

The SWOT matrix of the Romanian tourism is presented in the figure no. 3 together with the SWOT matrix of the Romanian religious tourism.

3 Romanian religious tourism - methodological aspects

Religious tourism is an essential component of cultural tourism. Nevertheless, it has remained a "stepchild" hardly mentioned in statistics. Not even the Romanian Statistical Yearbook does offer data concerning religious tourism, which makes research in this field rather difficult. The only means of information are the questionnaires and direct investigations on the sight.

In order to assess the state and issues of religious tourism we have made up a questionnaire and forwarded it to the most important religious establishments in the country. The main questions concern the resources available, the extent to which they are exploited, the most important problems they are up against, and perspectives of development envisaged. Most questions were open

in order not to limit the range of the answers and in order to allow the emergence of as many specific problems as possible.

Out of 100 questionnaires 81 have been returned, which is an indicator of the seriousness our initiative has been dealt with. Reliability and clear-sightedness are also to be noted as far as the answers given are concerned.

Besides this means of research, we have also resorted to direct investigation carried out on the site. The students residing in the proximity of monastic establishments have been of great help. The processing of information and analysis of conclusions has been done using the SWOT analysis.

4 Specific issues of religious tourism

The classical form of tourism is known as a series of leisure time or sporting activities, involving visiting picturesque sights or scientifically, historically, geographically etc. relevant ones. However, the idea of promoting a new kind of tourism has recently been put forward based on the spiritual potential and cultural traditions of the country. Seen as such, the idea of religious tourism implies not only the idea of spiritual recreation – by taking part in the daily life of holy places – but also creates ties with spirituality old like centuries.

Even if hardly promoted in most of Romanian publications, pilgrimage to monasteries is unanimously recognized as the most important segment of cultural tourism, while the phenomenon keeps concerning thousands of people annually from home and abroad.

In Romania the main forms of religious tourism are diverse, including visiting holy places, religious pilgrimage and religious youth camps, mainly during the summer holidays.

Worldwide figures show that religious tourism represents about 26% of the global flow of tourism. As far as Romania is concerned, the number of tourists involved in religious and cultural tourism is about 500,000 a year. [14] The figures are not exact since the pilgrims going to great religious celebrations (Saint Paraschiva – Iași; Holy Mary – Nicula (Cluj); Pentecost – Suceleu; Saint Demeter the New – Jucuști etc) are not included. Every year the number of visitors to Suceleu at Pentecost exceeds 100,000. So we can reasonably estimate that the number of tourists of this special kind in Romania exceeds 1,000,000 per year.

In the last three years The Saint Paraschiva Pilgrimage Centre has organized 354 pilgrimages: 31 abroad (1009 pilgrims) and 323 in Romania

(10,017 pilgrims). But religious tourism touches upon other activities as well, such as religious conferences, cultural-Christian events, exhibitions of icons and cultic objects, concerts of sacred music (the ones organized at Sibiu in the Black Church and at Cluj are outstanding).

The term of “religious” emerged as a result of the understanding of the tourists’ motivation. Even if religious tourism is a form of tourism as old as centuries, it has undergone significant changes. [1] A new tendency of the last decades of the 20th century is that of spending time in the vicinity of renowned holy places. Many monastic orders have established their own guesthouses where a limited number of believers are accommodated and who are expected to obey certain rules during their stays in order not to disturb the order of monastic activities.

Some monasteries have set up museums of icons painted on glass belonging to the 18th and 19th centuries, which are a great attraction. Others have valuable libraries and painting workshops (where a new style of the traditional painting on glass has been adopted as well as new approaches - most recently at Sâmbăta de Sus – County of Făgăraș). Many monasteries have created Ecumenical Centers that house theological seminars and conferences attended by clergymen, teachers, theology pupils and students, as well as average people. These centers offer accommodation as well.

Unfortunately some managers of holy places keep rejecting the idea of religious tourism. On the occasion of the site investigations some of them declared: “The monastery cannot be treated as a mere tourist sight where one comes to look, to take pictures, to eat, to sleep and then off you go” (...) “On no condition should the holy monastery be confounded with tourism, trade, pleasure cruise or hotels. Such a behavior is out of question and we cannot be treated that way either!”

Tourism and religion are entwined by several interactions and combinations as determined by the type of relation between the holy place and the motivation of tourists. There are many pilgrimage centers that have become modern means of promoting spirituality and culture against the local and international ecumenical background. Their role is to guide, co-ordinate and control the process of organizing pilgrimage and to offer different services: trips for Christians from home and abroad, pilgrimages for pilgrims of other confessions, sightseeing tours, expeditions and study camps, accommodation in guesthouses and reception facilities of the church, pilgrimage counseling, services of information for religious tourism etc.

Modern pilgrimage can be considered an agreement between the industry of tourism and religion. Nowadays “modern” pilgrimage is a form of sacred or spiritual journey. A means of leaving behind one’s usual environment in order to find one’s inner self, that is to say a journey by modern means of transport and accommodation in 3 star hotels.

The religious objectives in Romania are numerous and varied, which is due to the country’s being mainly Christian. The Romanian Patriarchy alone comprises 574 monastic settlements, out of which 392 monasteries, 177 hermitages and 5 succursal monasteries, with 1748 monks and 4883 nuns. [10] Even if some sights are old as centuries, they are well preserved, and besides their symbolic importance they reflect as a whole the evolution of religious architectural styles. The integration of stylistic components developed abroad and their adaptation to local specificity has often given birth to genuinely original styles.

In Romania (63.6% members of the Orthodox Church, 15% Roman-Catholics, 2.2% Unitarians și 1.7% Greek-Catholics) the face of God sells well, challenging the monopole position of the Church. In the last 15 years in our country a prosperous business has developed in this domain. Even if according to law 103/1992 the Church has exclusive rights over producing and trading cultic objects, there are a growing number of independent dealers trading such objects.

Nevertheless the Church prefers organizing itself pilgrimages in order to make sure that each group is accompanied by a priest, who would carry out specific activities during the trip: prayers, discussions on spiritual topics, etc. On such occasions other activities are reduced to a minimum, which makes us wonder to what an extent this approach could be called tourism.

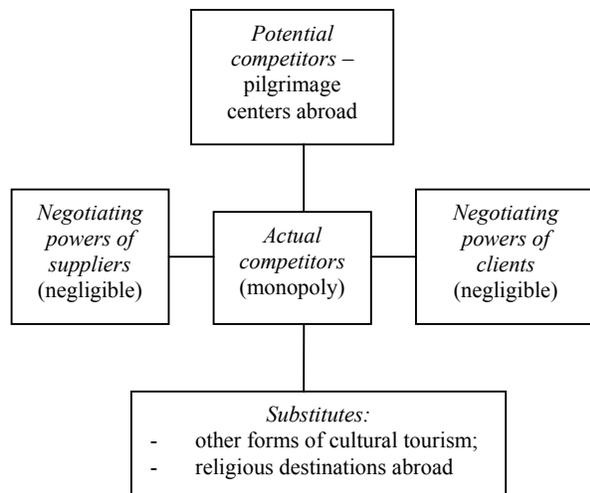
We are of the opinion that there should not be made a clear separation between cultural and religious tourism. Tourists, who visit monasteries out of curiosity, the need of getting acquainted with new things and places, attracted by their beauty as represented in art, by their remoteness and picturesque character, but also by the extraordinary life led by their inhabitants, at the very moment of facing the cultic sight suddenly turn into pilgrims: they change their clothes, light candles, cross themselves in front of the icons, pray and meditate. The encounter with the sacred modifies their external motivation and visitors discover an internal one, of other nature than merely tourism-related.

5 Problem Solution - The competitive capacity of religious tourism

Even if religious tourism has been flourishing in Romania after 1989, its status is presently rather uncertain. Legally speaking, the monopoly of the Church being the case, theoretically we could say that there is no competition in this domain. But if we take competition in a broader sense, things change. Taking as starting point the 5 competitive factors established by Porter, we could conclude that the negotiating powers of clients and suppliers cannot be considered a real threat. Pilgrims, groups and even pilgrimage organizers have limited negotiating powers with ecclesiastic establishments. As far as suppliers are concerned, these do not negotiate too much. Moreover, they often make donations to religious establishments.

The real threat is on the behalf of substitutes and potential competitors:

Fig. 1: Porter's Five Forces of Competitive Position



The greatest challenge comes, of course, from across the borders. The most challenging countries are Bulgaria, Hungary, the Czech Republic and Croatia, which are all mainly Christian countries and their patrimony is rather rich and diverse (there are wooden churches in Hungary as well, there are fortified churches in Slovenia as well etc.). Moreover, along with the growth of the population's income remoter destinations become affordable: Jerusalem, the Vatican, Mecca, Medina, India etc.

A significant threat is represented by other forms of tourism, especially the cultural one, which are more flexible and more in the attention of the media.

If we compare the competitive capacity of religious tourism with that of tourism in general, we

can conclude that religious tourism is in a less favorable position.

Fig. 2: The Competitive Position Matrix

Characteristics	Evaluation (0-5)				
	Weaknesses			Strengths	
	-	-	0	+	+
Number and diversity of tourist sights				X	
Geographical distribution					X
Accommodation capacity		X			
Degree of modern facilities	X				
Originality					X
Guides	X				
Visiting hours	X				
Accessibility		X			
Media attention	X				
Co-operation with local authorities		X			

The only competitive assets of religious tourism are in the number, diversity, originality and geographic distribution of tourist sights. These are all objective aspects, while the subjective ones, depending on us, are nothing but substantial competitive disadvantages. The accommodation capacity is insignificant; the level of equipment is low, there are no tourist guides, no road signs, and no infrastructure, which reduces accessibility. Visiting hours are very limited, inflexible and not reasonable enough. Media attention is reduced, almost inexistent. In other words, we have extremely valuable potentials that we allow to go to waste and do not exploit properly.

6 Conclusion

By analysis of the conclusions resulting from the processing of questionnaires we have delimited the following strengths/ weaknesses and threats/ opportunities, respectively:

Strengths:

- a) richness and diversity of the religious tourism patrimony;
- b) confessional diversity of the country;
- c) the great number of objectives registered on the UNESCO list of world patrimony;
- d) the existence of a reception facility network in important towns and ethnographic regions.

Weaknesses:

- a) the low number and relatively poor training of tourist guides;
- b) the lack of envisaging religious sights as a supplementary source of income;
- c) poor marketing, especially at regional and local level;
- d) insufficient market studies;
- e) lack of flexibility on the behalf of religious establishments concerning visiting hours;
- f) lack of awareness/education of what religious patrimony means and its importance;
- g) lack of co-operation between local authorities and the civil society;
- h) very poor accessibility of many religious sights;
- i) lack/insufficiency of tourist infrastructure.

Opportunities:

- a) liberalization of cults;
- b) the growing interest for religious tourism;
- c) the extension of the tourist space after the fall of communism that isolated the country;
- d) the extension of the geographic space of the EU;
- e) diversification of the offer in the domain;
- f) international financed programmes.

Threats:

- a) international competition;
- b) competition at the level of monuments registered on the UNESCO list of world patrimony in central and eastern Europe;
- c) urbanization of rural population directly involving loss of religious patrimony;
- d) Romania's slower economic development as compared to other countries in the region.

Table 3: The Evaluation Matrix of Internal Factors (EMIF) for Romania's Religious Tourism (Evaluation 0-5)

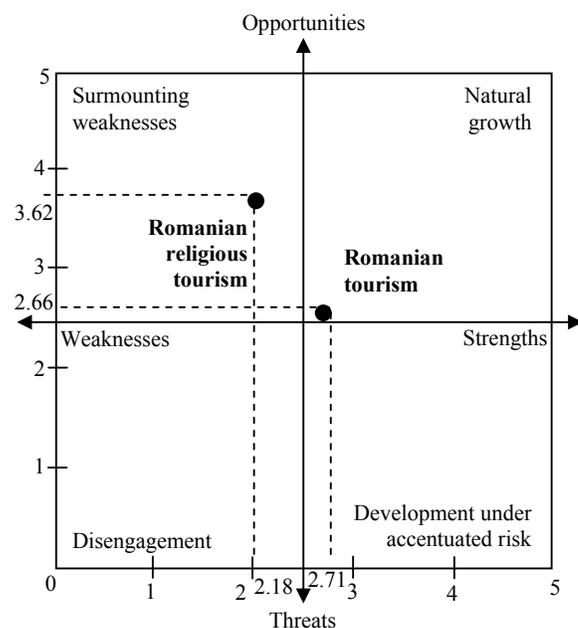
	Internal factors	Grade
1	Tourist potential	5
2	Infrastructure	1
3	Accomodation capacity	2
4	Geographic distribution	5
5	Facilities	2
6	Marketing	1
7	Accesibility	1
8	Range of services offered	3
9	Visiting hours	1
10	Predisposition	2
11	Co-operation	1
	Average	2.18

Table 4: The Evaluation Matrix of the External Factors (EMEF) for Romania's Religious Tourism (Evaluation 0-5)

	External factors	Grade
1	Liberalisation of religion	5
2	Urbanization of rural population	2
3	Development of national economy	3
4	Accession to theEU	5
5	External competition	2
6	The growing interest of the population	4
7	International and national financed programmes	4
8	Diversification of the offer	4
	Average	3.62

In a previous study [7] we placed Romanian tourism in general in the SWOT matrix. Based on the averages obtained, tourism was placed in the segment of opportunities - strengths. As it can be seen, the strategic position of religious tourism is weaker, being placed in the segment of opportunities-weaknesses. This means that the strategies to be adopted are the ones aiming at reducing weaknesses:

Fig. 3: SWOT Matrix of Romanian Religious Tourism



7 Perspectives

The potential of religious tourism in Romania is extremely rich and diverse, represented by shrines erected over the remains of saints, the Dacian sanctuary of Dacian Sarmisegetuza, cultural-religious sights (monasteries, fortified churches, wooden churches, Catholic cathedrals etc.) the religious destinations where religious events are held. However religious tourism is in a strategically inadequate position as it is shown in the SWOT matrix (weaknesses predominate).

Taking into account that the resources of religious tourism are practically inexhaustible, this represents an economic sector with real perspectives of long-term development. As a consequence, we consider that the approach of Romanian religious tourism should be a modern one that respects and promotes the principles of sustainable development and contributes to the protection, conservation and efficient exploitation of the country's cultural, historic, folk and architectural heritage.

The mission of this tourist sector has to be the exploitation and capitalization of the complexity of ecclesiastic tourist resources, along with their advertisement on the national and especially on the international market in order to turn it into a supplementary source of income.

This vision and mission being ambitious we are of the opinion that the main strategic objectives to be followed in the future by religious tourism could be formulated as follows: creating a global partnership and coordinating all the initiatives concerning the present and future of this important sector of cultural tourism; developing civic partnership, with the active participation of all public authorities, of academic circles and of the civil society; coordinating the efforts of actors interested in the development of Romanian tourism in general, of the public and private investors; correlation with similar national or regional initiatives; raising the number of religious tourists.

According to the "Strategy of developing tourism in Romania" (1st August 2006) the contribution of tourism to the GDP will raise between 2007-2013 from 1.7% to 6% and 350,000 new jobs will be created. The occupation in the sector will rise from 3.15% in 2006 to 3.83% in 2016, and if we take into account the indirect impact of tourism as well, from 5.76% in 2006 to 6.92% in 2016, religious tourism can bring a very substantial contribution to this development.

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