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The Challenges of International Tourism and Analysis of Romania's Competitiveness

Abstract. *Tourism is a key economic sector for sustainable regional development and economic growth. Tourism development is necessary to promote anthropogenic and natural areas and elements with high tourist potential. The study is embodied as a benchmark analysis of Romanian and Spanish tourism, whose main objective was to identify performance indicators of Romanian tourism and to analyse Romanian competitiveness. The study ends with a Pareto analysis, which allowed us to point out the main causes underlying the identified performance indicators.*

Keywords: *tourism, competitiveness, performance, Benchmark Analysis, Pareto Analysis.*

JEL Classification: C00, H12, K32, M54.

1. Introduction

Benchmarking is continuously improving performance by identifying, understanding, adapting, and implementing the best practices found inside and outside the organisation. This involves building partnerships to share information on processes and evaluations, which leads to the setting of realistic goals.

Although the term benchmarking has a history of hundreds of years, the founder of modern benchmarking is considered to be the Xerox company, which applied this methodology to position itself in relation to the Japanese competition. Originally, benchmarking was used in the business and manufacturing sectors as a method of improvement and performance management, not only to identify gaps but also to express ideas for closing them. The concept was later applied to service sectors such as the tourism industry.

Since the 80s, benchmarking has been considered a method that helps to achieve competitive goals, promote knowledge gained, develop the strengths, and reduce weaknesses of a company.

This method consists of "the systematic comparison of two or more organisations or sectors through the analysis of precisely established indicators in order to determine the performances that must be equalled or surpassed and the managerial and economic practices that can be taken over and adopted" (Nicolescu & Verboncu, 2002).

By benchmarking, managers understand the differences in performance. By analysing the collected information, they make decisions towards an efficient organisation.

The main objective of this study is to evaluate the competitiveness of Romania in tourism compared to Spain. The main indicators related to tourism are selected and grouped by category, and these categories form the basis of the comparative analysis. The analysis allows the identification of progress, gaps, and the formulation of directions of action for a better exploitation of tourist resources. Since tourism is an important component of modern economies, bringing to attention a comparative analysis of tourism in Romania and Spain could be the basis of a model for increasing competitiveness and performance in a country's tourism.

The present paper is structured as follows: the second part is a synthesis of the reference literature, the third part presents the research methodology, the fourth part applies the methodology, and the last part is dedicated to the conclusions.

2. Literature review

According to Statista (2024), the contribution of tourism to world GDP was 9.1% in 2023. Tourism is based on different resources (artists, craftsmen, tangible and intangible objects, the relationship between the act and the arts, practised for the benefit of the consumer of cultural tourism) that have given rise to other subforms of tourism: cultural - religious, pilgrimage, archaeology, urban, rural, museum, museography, ethnography, etc. Practicing tourism involves problems related to overcrowding and loss of authenticity, affecting the daily life of the local population, as well as the culture and heritage of the respective areas (Valter C.A., 2012). That

is why some local communities and heritage experts have sometimes opposed tourism and its development, focusing on sustainable tourism, characterised by good conservation practices and supporting the local economy.

Europeans account for over 60% of the number of international tourists, and the contribution of tourism to the European GDP exceeded 2.25 trillion euros in 2023. According to a study published by the European Commission (2011), 20% of visitors to Europe have a cultural background and 60% of European tourists are interested in cultural activities. The World Tourism Organization estimates that travel with cultural interest is growing by 10-15% every year (Ministry of Economy, Comercio y Empresa, 2023).

For this analysis, we selected two important European countries with developed tourism, high population density, and high natural and anthropogenic potential: Romania and Spain. Spain was chosen as a benchmark because it was the country with the highest receipts from tourism in the EU in 2022 and 2023, far exceeding the next three ranked, Great Britain, France, and Italy. In 2024, it is predicted that tourism will represent approximately 5% of Romania's GDP (Statista, 2024) and 13% of Spain's GDP (Caixa Bank, 2024). According to the WP Travel study (2023) based on official data provided by UN Tourism Spain was the second most visited country in the world after France in 2022 and 2023, with more than 85 million tourists in 2023. Furthermore, while many countries reported a decrease in visitor numbers in 2021, Spain recorded an increase, receiving 26.3 million visitors (UNWTO, 2021). Spain has a lot to offer, especially thanks to its culture, festivals, and gastronomy, which have become its main attractions for tourists. In 2022, Spain received more than 71 million foreign tourists.

In Romania, tourism is a rapidly growing sector, the share of this sector in GDP having increased more than twice in the period 2020-2023, without yet reaching the level before the pandemic. The main countries from which tourists come to Romaniaare (National Institute of Statistics, 2023): Germany, in the first place with -220,448 tourists in 2023, followed by Italy with -188,072 tourists, and Israel with 151,454 tourists. The United States had more than 136,000 tourists in 2023. The next six countries are: Hungary (115,301 tourists), the United Kingdom (111,505 tourists), France (105,440 tourists), Spain (89,474 tourists), Poland (89,408 tourists), and the Republic of Moldova with 83,864 tourists (INS.000 Tourists, 2023).

After surveying the literature (Baltaretu, 2016; Coros, 2015), we found that comparative analyses of tourism in Romania and different European states have been carried out, with few studies that apply benchmarking analysis. Martin and Tomáš (2012) used benchmarking of destinations to build an evaluation model of tourism development strategies. Doğanalp and Arslan (2021) demonstrated through data development analysis that Spain, Italy, and Greece effectively capitalise on its tourist resources. The same approach, the data development analysis, was used by Lozano and Gutiérrez (2011) and Barišic and Cvetkoska (2020) to analyse the efficiency of tourism in the European Union (EU-25 and EU-28, respectively). While the first study identified Spain as inefficient, the last found that Spain and Romania are relatively efficient, which shows that the results of the performance analysis depend not only on the indicators taken into account, but also on the analysed period. Munteanu et al. (2014) investigated by a best practice benchmarking analysis the

alternative competitive strategies for hotels in Mamaia, Romania, using as a reference the experience of France, Italy, Spain, and Turkey.

This study performs a benchmarking analysis of Romanian and Spanish tourism in order to identify the performance indicators of Romanian tourism and to analyse Romanian competitiveness. To make it easier to observe the results obtained from the benchmarking analysis, we linked them with a Pareto analysis and used a spider chart to graphically display the obtained results.

3. Model specification

This part of the paper presents the methodology for the benchmark analysis of tourism at the macroeconomic level. The countries studied are Romania and Spain, for which the analysis of the tourist indicators from the year 2023 was carried out, in order to identify the level of competitiveness of the two countries considered., The benchmark study consists of four phases:

- planning: establishing the team, the research area, the objective, and the methods used;
- identifying suitable sources of information and data that facilitate the evaluation and recognition of potential partners.
- the analysis process: comparing the data from the current performance of the organisation with the data from the selected partners. The difference in performance results from the comparison of own performances with those of the benchmarking partners;
- reporting results: data processing and creating reports on performance improvement results.

The assessment of tourism's competitiveness and performance in the two countries can be made using the following scorecard as a tool (Table 1):

Table 1. Scorecard

Groups of characteristics	Characteristics	Weighting Group of characteristics	Weight of characteristics	Analytical weight	Maturity level (10%-100%)	Romania's weighted score	Spain's weighted score

Source: Authors 'processing.

The evaluation criteria and sub-criteria relate to the aspects of the matrix analysed. Benchmarking analysis consists of comparing data collected over a certain period. Benchmarking includes the analysis of groups of characteristics (features) or indicators, sub-groups of characteristics or indicators, and indicators or characteristics. The weights assigned to the sub-groups represent the importance of each sub-group in the whole group, and the analytical ranking is created by multiplying the proportion of indicators in the sub-group by their assigned importance and dividing by 1000. The analytical weights are then calculated by multiplying the weights of the evaluation sub-criteria by the weights of each indicator within each analytical criterion and dividing by 1000.

Next comes the calculation of the analysis weights, which are obtained by multiplying the weights of the assessment sub-criteria and the weights of each indicator within each analysis criterion and dividing by 1000.

Maturity levels can be expressed as a percentage between 10% and 100%:

- 10 % – it indicates a very weak situation;
- 50% – it reflects an average situation;
- 100% – the situation is excellent and no longer needs any improvement.

The percentages are awarded according to the actual situation, as indicated in the document. The analysis weights are multiplied by the maturity level of each studied aspect to calculate a weighted score.

4. Results and discussion

When conducting the benchmarking, we considered indicators grouped into five indicator categories: hospitality and hotel industry, cultural tourism, infrastructure, and human resources.

Hospitality industry

In 2023, there were 74,100 restaurants in the hospitality sector in Spain. Measured in terms of income from the catering industry and operators, this amounts to a total of 25.7 billion euros, ranking Spain in third place in Europe. The total number of employees in the industry was 510,606 (OECD, 2023).

Compared to Spain, Romania had 13,844 restaurants and operators operating in this sector in the same year. With a turnover of 3.3 billion euros in Romania, the company ranked 15th in Europe. The total number of employees in this industry in Romania was 109,121 (IBIS World, 2023).

Based on the "Hospitality" characteristic group, we analysed the characteristics of restaurants, employees, their position in Europe, and revenue from this industry. Spain scored better compared to Romania, reaching the same 720 points for restaurants and employees. Two characteristics also show the biggest differences between the ratings: Romania receives 320 points for restaurants and 270 points for employees. Both countries have low scores for "Placement in Europe", with Spain receiving 90 points and Romania receiving 50 points (Table 2).

Table 2. Hospitality industry

Groups of character-ristics	Characte-ristics	Weighing Group of character-ristics	Weight of characte r-ristics	Analyt i-cal weight	Maturity level										Scp RO	Scp ES
					1	2	3	4	5	6	7	8	9	10		
The hospitality industry	Income from the hospitality industry		100	20						R			S		120	180

Groups of character-ristics	Characte-ristics	Weighing Group of character-ristics	Weight of character-ristics	Analytical weight	Maturity level										Scp RO	Scp ES
					1	2	3	4	5	6	7	8	9	10		
	The place they occupy in EU	200	50	10					R				S		50	90
	Employees		450	90			R					S			270	720
	Restaurants		400	80				R					S		320	720
Total		-	1.000	200											760	1.710

Hotel industry

In 2023, Romania had 2,651 hotels, while Spain had 12,104. Romania ranked 17th in Europe in revenues from hotels with 1.3 billion euros, while Spain ranked second with up to 24.5 billion euros. The number of hotel employees in Spain was 265,302, while in Romania it was 38,352 (Country Reports, 2023).

The second group of characteristics analysed is that of the hotel industry. Romania scored very low in all characteristics compared to Spain. The largest difference in scores between employees was observed in Romania with 225 points and in Spain with 1,012.5 points. Both countries achieved the lowest values in their respective European regions: Spain scored 125 points and Romania 37.5 points (Table 3).

Table 3. Hotel industry

Groups of character-ristics	Characte-ristics	Weighting Group of characteristics	Weight of charact-e-ristics	Analytical weight	Maturity level										Scp RO	Scp ES
					1	2	3	4	5	6	7	8	9	10		
Hotelier industry	Income generated by the hospitality industry		100	25			R						S		75	225
	The place they occupy in Europe	250	50	12.5			R							S	37.5	125

Groups of character-istics	Characte-ristics	Weighting Group of characteristics	Weight of characte-ristics	Analytical weight	Maturity level										Scp RO	Scp ES
					1	2	3	4	5	6	7	8	9	10		
	Employees		450	112.5		R							S		225	1.012,5
	Hotels		400	100		R							S		200	900
Total				1.000	250										537,5	2.262,5

Source: Authors 'processing.

Cultural tourism

In 2023, Spain had 1,500 museums and Romania had 759 cinemas. Ticket prices vary widely: from 10 euros in Spain to 2 euros in Romania. 116 cultural tourism routes were identified in Romania, compared to only 30 in Spain.

In cultural tourism, Romania performed better than Spain in terms of price and cultural tourism routes, scoring 675 and 67.5 points, respectively, while Spain achieved 472.5 and 60 points, respectively. Spain performed better than Romania in the Cinema and Museums categories (240 and 315 points, respectively), while Romania only managed to score 60 and 270 points (Table 4).

Table 4. Cultural tourism

Groups of charac-teristics	Charac-teristics	Weighing Group of characteristics	Weight of charac-teristics	Analy-tical weight	Maturity level										Scp RO	Scp ES
					1	2	3	4	5	6	7	8	9	10		
Cultural tourism	Prices		450	67.5							S		R		675	472.5
	Cultural touristic routes	150	50	7.5					S			R			67.5	60
	Cinema		200	30	R							S			60	240
	Museums		300	45							R	S			270	315
Total				1.000	150										1.072,5	1.087,5

Source: Authors 'processing.

Infrastructure

Air transport infrastructure

Romania has 16 airports, and Spain has 50. The revenue from the airport industry in Spain reaches 6.6 billion euros, placing Spain in second place. The airport industry in Romania ranks 16th in Europe, with an estimated size of revenue of 338 million euros. The price of a flight ticket to European countries ranges from 50 to 150 euros in both Romania and Spain, depending on the flight distance between countries.

Ground infrastructure

Romania's railway network, with a total length of 20,077 km, is quite behind other countries in the EU. Considering a population of 19 million people, there are less than 1,000 kilometres of motorways and highways and less than 500 kilometres of railways where trains can travel at a speed of 160 kilometres per hour. As far as modernisation is concerned, only a few kilometres of motorways and railways have been modernised. In comparison with Romania, Spain has a railway network of more than 15,000 kilometres, including high-speed and conventional railways, and takes the leading position in the world. It is considered the country with the third best-developed high-speed railway system.

Port infrastructure

Romania has 39 ports, and Spain has 46. Romanian ports recorded 67.5 million tons of goods turnover, while Spanish ports recorded more than 560 million tons.

In terms of infrastructure, Romania received equal points for port infrastructure and air transport infrastructure with 105 points and 10 points for land infrastructure. Spain scores higher than Romania in three categories: 120 points for port infrastructure, 50 points for land infrastructure, and 280 points for air transport infrastructure (Table 5).

Table 5. Infrastructure

Characteristics group	Characteristics	Weighing Group of characteristics	Weight of characteristics	Analytical weight	Maturity level										Scp RO	Scp ES
					1	2	3	4	5	6	7	8	9	10		
Infra-structure	Shipping		150	15							R	S			105	120
	Terrestrial	100	500	50		R							S		100	500
	Air transport		350	35			R					S			105	280
	Total		1.000												310	900

Source: Authors 'processing.

Human resources

The total number of employees in the tourism industry in 2023 was 2,367,560 in Spain and 235,000 in Romania. Furthermore, Romania's employment rate was 6.3%, while in Spain it was 13.3%. The salary of workers in this sector in Romania ranges from 2,000 to 3,000 lei but can be below 2,000 lei, compared to Spain, where the salary of a worker in the tourism industry ranges from 1,200 to 1,400 euros. When comparing the unemployment rates of Romania and Spain, we can see that in Spain the rate is significantly higher than in Romania, 13%, compared to 6.1%.

The Spanish healthcare system is well-developed and of high quality. Spain is one of the healthiest countries in the EU. Life expectancy is 84 years, higher than any other EU member state. The Romanian healthcare system generally does not meet Western standards and basic medical care is limited. There are some providers in Bucharest and in the main cities that meet Western quality standards, but they are harder to find. The hygiene in hospitals has left much to be desired, as nursing staff has gone missing or has become indifferent in some hospitals.

Regarding prices, in both countries, inflation started to slowly decrease in 2023 compared to 2022, from 13,8% to 10,4% in Romania and 8,39% to 3,53% in Spain (World Bank, 2024). Electricity tariffs in Romania are €0.13/kWh for consumption up to 100 kWh and €0.16/kWh for consumption up to 300 kWh. In comparison to electricity prices in Romania, electricity prices in Spain are 0.15€/kWh and 0.23€/kWh, respectively, for consumptions up to 100 kWh, but for consumptions up to 100 kWh, the price can rise to 0.42€/kWh. Up to 300 kWh, it is 0.19-0.26€/kWh. Natural gas prices in Romania are 0.061€/kWh, while in Spain it is 0.24€/kWh (Trading Economics, 2023).

The analysis shows that in the latest group of characteristics, "Human Resources", Romania performs better than Spain in two of the six characteristics, namely price competitiveness, where Spain scores 168 points, and unemployment rate, where Spain scores 30 points and Romania 75 points.

Table 6. Human resources

Characteristics group	Characteristics	Weighing Group of characteristics	Weight of characteristics	Analytical weight	Maturity level										Scp RO	Scp ES
					1	2	3	4	5	6	7	8	9	10		
Human resources	Minimum wage		160	48			R							S	144	480
	Health	300	100	30		R								S	60	300
	Prices		140	42				S			R				336	168
	Employees		350	105						R		S			630	945

Characteristics group	Characteristics	Weighing Group of characteristics	Weight of characteristics	Analytical weight	Maturity level										Scp RO	Scp ES
					1	2	3	4	5	6	7	8	9	10		
	Unemployment rate		50	15		S			R						75	30
	The workforce's employment levels		200	60	R								S		60	540
	Total			1.000	300										1.029	2.256

Source: Authors 'processing.

The World Financial Gathering analysed 117 nations around the world, having as fundamental characteristics markers of tourism and travel improvement. The foremost later examination was made in 2023, and with the assistance of this ponder, we conducted a benchmarking examination between Spain and Romania. Romania was positioned 53rd and Spain positioned 3rd out of the 117 countries analysed.

As can be seen within Table 7, for nearly all markers, Romania is positioned underneath Spain, except for indicators „competitiveness of prices" where Romania is positioned in the 37th position, Spain is in the 90th position, and „durability of the environment" where Romania is on 34th, and Spain on 39th.

Table 7. Indicators of Tourism and Travel Development in 2023

Categories	Ranking		Score	
	Romania	Spain	Romania	Spain
International opening	29	5	5	5,8
Organization of tourism and travel sector	90	22	3,6	4,6
ICT availability	49	17	4,5	5,9
Human resources and the labour market	45	38	4,5	4,7
Health and hygiene	30	25	5,7	5,8
Safety and security	38	18	5,7	6
Business environment	75	47	3,7	4,2
Competitiveness of prices	37	90	5,6	4,4
Environmental sustainability	34	39	4,3	4,3
Air transport infrastructure	58	8	3,2	5,3

Categories	Ranking		Score	
	Romania	Spain	Romania	Spain
Land and port infrastructure	57	16	3,6	5,1
Infrastructure related to tourism services	46	3	4	6,1
Natural resources	63	11	2,6	5,1
Cultural resources and business travel	51	3	2,4	6,5

Source: adapted after: Travel HYPERLINK "https://www.weforum.org/reports/travel-and-tourism-development-index-2021? Tourism Development Index 2021: Rebuilding for a Sustainable and Resilient Future | World Economic Forum

The general scores obtained by the nations dissected were calculated by gradually combining the scores, beginning from the indicator level to the column level, utilising the arithmetic mean to combine the components (Table 8).

Table 8. Total Weighted Scores

No.	Features groups	Romania	Spain	Ip Romania/Spain
1	Hospitality industry	760	1710	0.44
2	Hotel industry	537.5	2262.5	0.23
3	Cultural tourism	1072.5	1087.5	0.98
4	Infrastructure	310	900	0.34
5	Human resources	1029	2257	0.45
TOTAL		3709	8217	0.45

Source: Authors 'processing.

Performance $I_{RSM} = 0.45$

Where, I_{RSM} = performance index
= total weighted score Romania
= total weighted score Spain

After determining the performance indices, we discover that Romania has a favourable situation only for cultural tourism, where the performance index was almost 1, while all the other analysed groups have the performance index below 0.5, which shows that tourism in Romania is uncompetitive compared to that of Spain (Table 9). In order to identify the indicators that have the greatest importance in the results obtained, the work continues with the PARETO analysis.

Table 9. Pareto Analysis

Indicator	Analytical weight	Frequency	Increasing cumulative frequency
Employees of hotels	112.5	11.25	-
Employees tourism	105	10.5	21.75
Hotels	100	10	31.75
Employees in hospitality industry	90	9	40.75
Restaurants	80	8	48.75
Prices	67.5	6.75	55.5
Level of employment	60	6	61.5
Terrestrial infrastructure	50	5	66.5
Minimum wage	48	4.8	71.3
Museums	45	4.5	75.8
Prices	42	4.2	80
Air transport	35	3.5	83.5
Cinemas	30	3	86.5
The health system	30	3	89.5
Revenue from the hotel industry	25	2.5	92
Revenue from the hospitality industry	20	2	94
Port infrastructure	15	1.5	95.5
Unemployment rate	15	1.5	97
The place the country occupies in Europe - the hotel industry	12.5	1.25	98.25
The place the country occupies in Europe - the hospitality industry	10	1	99.25
Cultural-touristic routes	7.5	0.75	100
TOTAL	1000	100	–

Source: Authors 'processing.

The analysis shows that the first 8 indicators are the most important, weighing 80% of the total. Therefore, these indicators are the ones that require intervention to

improve tourism performance in Romania. The other indicators have a smaller weight of 20% and do not play a very important role in the result.

5. Conclusions

Romania has a high tourism potential, as highlighted by the reports of INS (2023), Statista (2024), and the work of Barišic and Cvetkoska (2020). The performance of the benchmarking analysis of Romania versus Spain showed that in the hospitality and hotel industry, Spain is much more developed, especially from the perspective of the workforce. The labour force is one of the most important weak points, as it is necessary to provide additional training to the people who work in tourism and to offer more attractive salaries and working conditions.

Another weak point of Romania is the infrastructure, given that Spain ranks 2nd in Europe, and Romania ranks 16th in terms of the number of airports. Regarding cultural tourism, Romania has more cultural-tourist routes, fewer cinemas, and museums, and lower prices, while Spain has more museums and cinemas, but fewer cultural-tourist routes and higher prices.

To improve the performance of tourism in Romania, the directions of action presented in the following table can be followed in relation to the identified problem:

Table 10. Action directions for improving tourism performance in Romania

Problem	Defining the problem	Measures
Infrastructure	The infrastructure in Romania is deficient. Although the transport infrastructure has started to improve, it still has many shortcomings and affects Romanian tourism. The road infrastructure is of low quality, the transport systems are limited, some digital applications to help with travel planning are missing, and the railways are in a slow modernisation process.	• Improving access roads to destinations with high tourist potential; • Development of several railway routes for tourist purposes; • Expansion of the infrastructure intended for bicycle tracks and mountain trails; • Development of applications for bicycle rental; • Realisation of better port infrastructure to increase foreign tourist arrivals.
Human Resources	Romanian tourism is faced with the shortage of staff in accommodation units and restaurants. Many employees refuse to work in this field because of the low wages, and many are not very well trained.	• Hotels and other accommodation units should associate with schools that can help in the proper training of the staff; • Increasing the salaries of both skilled and unskilled employees; • Offering bonuses to satisfy employees; • Creation of programmes through which staff can develop their digital skills; • Renovating and equipping vocational education units with technical equipment.

Problem	Defining the problem	Measures
Lack of access to tourist information	Romania has six tourist information centres, very few compared to the country's tourist areas.	• The establishment of at least one tourist information centre for each area with tourist potential; • Development of several information boards; • Implementation and digitisation of kiosks where tourists can buy tickets.
Promotion of both tourist destinations and accommodation units	Romania has many unexplored places, many wonderful landscapes, every area of this country has something special. The country's potential is high, but untapped.	• Participation in many international fairs and exhibitions. • Preparing events to highlight the traditions of this country. • The use of influencers from the online environment who can promote certain areas or tourist attractions, but also certain activities through which they can attract tourists.

Source: Authors 'processing.

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