ABSTRACT. The city of Cluj-Napoca is one of the biggest from Romania, an important academic, cultural and business centre, combine with a various tourist offer - cultural and historical monuments, a diversified portfolio of accommodation establishments, restaurants, clubs, tourist agencies and an attractive natural-geographic space. All those make from Cluj-Napoca an interesting tourist destination for various type of tourist.

The paper analyses the tourist supply and identifies the demand for the destination. The study underlines possible differentiation elements for the city comparing with its main competitors. In conclusion, we try to find a correlation between the offer and the customer needs.

Keywords: tourist marketing destination, regional development, positioning map, perception map

Introduction

The industry of tourism represents one of the sectors with the highest development at global level. 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 of lodging capacities. Despite this, the travel and tourism economy (direct and indirect impact of visitor activities, capital investment, export and government services) contribution to Romanian GDP varied around the 2%. The causes for the small percentage are multiple, various and complex: the slow pace of privatisation process in tourism and hotel industry; the degradation of the existing lodging capacities; an old road and railway infrastructure; the lack of financial resources; the absence of a strategy for tourism development at national level etc. Probably these are the reasons why in the last few years, travel and tourism sector has been identified by Romanian government as a focal point of the National Development Plan. Despite healthy economic growth over recent years, Romania’s population still remain one of the poorest in Europe.

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The WTTC has forecasted for 2006 that travel and tourism economy is expected to contribute 4.8 per cent of Romania’s GDP and account for 485,000 jobs (5.8% of the total employment). Over the next 10 years travel and tourism sector is forecast to achieve annualised real growth of 6.7% and 1.6% in terms of employment. In 2016 the share of GDP will be 5.8 per cent.

A study of Romanian National Institute for Research and Development in Tourism (INCDT) reveals that from a total of 5,452,651 tourists in 2004 (INCDT 2005):

- 47.63% choose urban tourism,
- 14.29% mountain tourism,
- 13.17% seaside, including Constanta,
- 12.21% spa tourism,
- 1.29% Danube Delta,
- 11.41% other forms of tourism.

For the first nine months of 2005 the number of urban tourists increased with 6.67%. From those, 54.92% were Romanians and 45.08% foreign tourists. The average length of their stay was 1.8 days/tourist and the average occupancy rate was 36.19 per cent. The research shows an interesting situation regarding the occupancy rate for different types of lodging capacities: the highest value (42.7%) is for 5* lodging units, followed by 1* (37.79%) and 3* units (37.67%). The total revenue for lodging capacities increased with almost 20 per cent in 2005 comparing to the same period in 2004 (INCDT 2005).

During 1999 and 2000, the National Agency for Regional Development was created and Romania – for a better development – was ‘split’ in 8 regions (North-East, South-East, South-Muntenia, South-West Oltenia, West, North-West, Centre, Bucharest-Ilfov), with a regional branch of the Agency functioning in each region (figure no. 1). The North-West Region includes 6 counties (Cluj, Bihor, Maramureş, Bistriţa-Năsăud, Satu-Mare, Sălaj), representing around 15 percent from the total Romania’s territory and is situated on the fourth place taking into account the population and the area. Cluj county is situated in the heart of historical province of Transylvania and is one of the most important communication point (roads, railways, airway) in the country. In the Cluj county, the urban population represents 67.2%, even if in Romania, in total, is 52.7%. The average net wage in Cluj county is 728 RON (around 210 EUR). The density is 105 peoples/km². Cluj county represents 2.8 per cent of the Romanian territory and is one of the most important communication point (roads, railways, airway). The 52.68% of the population works in services and trade. The main foreign investors of the Cluj county is Hungary with over 117 millions $ (ADR North-West, 2000).
TOURIST DESTINATION CLUJ-NAPOCA, ROMANIA

Its economy is one of the most balanced developed from Romania. The most important sector is the manufacturing with an turnover average per enterprise about 1388000 RON, in the second position is transport, storage and communications (with turnover mean about 949000 RON) and the third position came wholesale and retail (723000 RON) [2]. Hotels and restaurants section represents 1.09 % from the total taking into account the evolution of turnover for the active enterprises. Regarding the structure of Cluj economy by size class, almost 87% of the active units are micro enterprises, with less then 10 employees and the number of macro enterprises with more then 250 employees is just 0.57% from the total.

Cluj-Napoca, the municipality of the Cluj county, is the second city in the national hierarchy as a polarisation potential after the capital – Bucharest –, influencing the entire Transylvania. Cluj-Napoca is one of the most important and biggest cities in Romania and is the only one in the North-West Region with over 300.000 peoples. The City of Cluj is considered the ‘capital of Transylvania’ because it is an important academic, cultural and business centre. All those factors make from Cluj an important tourist destination for various type of tourist.

The initiative of Cluj-Napoca City Hall regarding the tourism development strategy at the local level as a potential source of increasing the total revenue is welcome, but the strategy was formulated late, only by the end of 2005.

From the accommodation establishments point of view, Cluj county is situated on the 9th place out of 41, representing around 3.5 per cent of the total Romanian number of hotels (table no. 1).
Table 1.

<table>
<thead>
<tr>
<th>No.</th>
<th>County</th>
<th>Number of hotels</th>
<th>Number of hotels (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Harghita</td>
<td>773</td>
<td>11,957</td>
</tr>
<tr>
<td>2</td>
<td>Constanta</td>
<td>745</td>
<td>11,524</td>
</tr>
<tr>
<td>3</td>
<td>Brasov</td>
<td>622</td>
<td>9,621</td>
</tr>
<tr>
<td>4</td>
<td>Prahova</td>
<td>514</td>
<td>7,951</td>
</tr>
<tr>
<td>5</td>
<td>Maramures</td>
<td>340</td>
<td>5,259</td>
</tr>
<tr>
<td>6</td>
<td>Suceava</td>
<td>309</td>
<td>4,780</td>
</tr>
<tr>
<td>7</td>
<td>Bucharest</td>
<td>276</td>
<td>4,269</td>
</tr>
<tr>
<td>8</td>
<td>Sibiu</td>
<td>269</td>
<td>4,161</td>
</tr>
<tr>
<td>9</td>
<td>Cluj</td>
<td>220</td>
<td>3,403</td>
</tr>
<tr>
<td>10</td>
<td>Valcea</td>
<td>200</td>
<td>3,094</td>
</tr>
</tbody>
</table>

Compared with the county rank, Cluj-Napoca -the municipality- stands on the third place after the capital Bucharest and Timisoara (table no. 2).

Table 2.

<table>
<thead>
<tr>
<th>No.</th>
<th>County</th>
<th>Municipality</th>
<th>Number of hotels</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>-</td>
<td>Bucharest</td>
<td>83</td>
</tr>
<tr>
<td>2</td>
<td>Timisoara</td>
<td>Timisoara</td>
<td>33</td>
</tr>
<tr>
<td>3</td>
<td>Cluj</td>
<td>Cluj-Napoca</td>
<td>30</td>
</tr>
<tr>
<td>4</td>
<td>Constanta</td>
<td>Constanta</td>
<td>23</td>
</tr>
<tr>
<td>5</td>
<td>Brasov</td>
<td>Brasov</td>
<td>15</td>
</tr>
<tr>
<td>6</td>
<td>Arges</td>
<td>Pitesti</td>
<td>15</td>
</tr>
<tr>
<td>7</td>
<td>Iasi</td>
<td>Iasi</td>
<td>12</td>
</tr>
<tr>
<td>8</td>
<td>Sibiu</td>
<td>Sibiu</td>
<td>12</td>
</tr>
<tr>
<td>9</td>
<td>Arad</td>
<td>Arad</td>
<td>12</td>
</tr>
<tr>
<td>10</td>
<td>Suceava</td>
<td>Suceava</td>
<td>11</td>
</tr>
</tbody>
</table>

The occupancy rate decreased in the first nine months of 2005 at 37.89% from 44.4% in the same period of 2004. On the other hand, the average turnover increased with 4.67% in 2005 compared to 2004, at 81.42 RON.

The tourist offer for Cluj-Napoca has a great variety:
- cultural and historical monuments (medieval and modern monuments, churches, museums, festivals, exhibitions);
- a diversified portfolio of accommodation establishments, restaurants, clubs, tourist agencies;
- an attractive natural-geographic space.

Despite this, for now, Cluj-Napoca can not compete with Bucharest – the capital and with other municipalities, especially with Timisoara, from the foreign investments and the business opportunities point of view or with Brașov and Sibiu for the leisure and cultural tourism.
The number of tourists in Cluj-Napoca increased constantly in the last few years (figure no. 2):

![Figure 2. Number of arrivals in Cluj-Napoca](image)

**Material and methods**

For our investigations we used exploratory, descriptive and causal research. We obtained primary and secondary data through: statistical data and published studies; visits and accommodation establishments' websites analysis; two personal (face to face) interviews based on short questionnaires – one for the demand and the other for the supply; the information we got was neither sensitive, nor threatening; we used clear, unambiguous, structured and unstructured questions; for the tourist supply we got responses from a representative group of 34 accommodation establishments out of 45 (75.55%); for the tourist demand we used for identifying the representative sample STATGRAPHICS software; for a standard error of ±0.03 the sample was 1068 tourists; SWOT analysis for the tourist destination.

**Results and discussions**

A. **Tourist supply**

Cluj-Napoca’s accommodation establishments represent around 56% of the Cluj county [6]. We investigated the situation of hotels on Cluj-Napoca's crowded market. The starting point in our investigation was the explosion in the number of the lodging capacities. In 1990 the number of hotels in Cluj-Napoca was 10. Between 1990 and 1999, the number of hotels in Cluj-Napoca grew slowly from 10 to 17. At this moment are more than 60 accommodation establishments on the market. Our study revealed that 50% of Cluj accommodation establishments are hotels as figure no. 3 shows.
We included in our further research only hotels. By the end of 2005 (30 November 2005) on the Cluj hotels’ market we were able to identify 29 hotels which had the up-dated authorisation. Unfortunately, at the beginning of 2006 one of the hotels – Continental – was closed. From 29 of the hotels, 50% were open between 2000 and 2005. The development of Cluj-Napoca accommodation establishments was triggered by the need for various types of accommodation services and by an easier access to financial resources (bank loans mostly) between 2000 and 2005. Figure no. 4 presents Cluj lodging capacities’ structure using the year of construction.

Our study revealed that 83% of the operational lodging capacities are small, offering under 50 rooms, as the figure no. 5 shows.
After the retrenchment of Cluj Continental Hotel, owned by the Continental Inc., we have for the moment only one hotel chain on the Cluj hotels’ market (Best Western Topaz). The situation would not be so simple for the following years because two of the hotels (City Plaza and Capitolina) try to enter with new entities. For the moment, Capitolina owns another 3* hotel and the single Apartment Hotel on the market and City Plaza want to extend its brand not only in Cluj, but in other important cities from Romania, like Timișoara.

We want to highlight that only three (Hotel Belvedere, Hotel Sport and Hotel Vladeasa are owned by Unitat Turism Inc.) of 28 hotels are owned by big, incorporated companies (and this are hotels present on Cluj market before 1989) and one – Hotel Victoria – is owned by the local authorities. Small companies own the others 25 hotels – at least from the number of employee point of view.

Almost a half of these lodging capacities are included in 3 stars category – using the National Stars’ Classification System and the second place is taken by 4 stars hotels. Figure no.6 present these situations.
Analysing the Cluj lodging capacities location, the conclusions are mixed:
- 8 hotels - Hotel Agape (hidden location), Hotel Meteor, Hotel City Plaza (hidden location), Hotel Victoria, Hotel Melody Central, Hotel Fullton (hidden location), Hotel Cristian, Hotel Vladeasa - are situated in the city centre, but the location for 3 of these hotels can be considered hidden (those hotels are not situated on main streets or on open places); a strange situation can be observed for Hotel Cristian (2 stars) which is located in the very heart of Cluj market; we consider that this location limits the type of potential clients for this hotel;
- 2 hotels (Hotel Pax and Hotel Beta) are situated very near Cluj’s railway station;
- the other 18 hotels are situated near city centre or could be considered hidden; a peculiar situation for Hotel Olimp – its location is behind a construction material warehouse and many potential clients ignore the hotel.

Figure 7. Localisation map
If the hotels opened between 1990 and 1999 could choose a hidden location due to the lack of lodging capacities during that period and an increasing demand – allowing them to keep their clients, the hotels opened after 2000 could not afford to copy that behaviour without a good strategy and without a good co-operation with travel agencies. Their only strength – when a hidden location situation is discussed – is the small lodging capacity, often under 50 rooms.

The information gathered through the interviews and some analysis of web-sites, was used for the construction of a positioning map. This positioning map uses 2 dimensions: the price (axis Oy) and the number of services (axis Ox) offered by Cluj hotels. The prices are between 22 EUR and 116 EUR (average 46.52) and the number of services varies between 5 and 22 (average 15.52).

![Positioning Map](image)

**Figure 8.** The positioning map
The positioning map shows the position desired by the hotel on the market; it does not represent the customer point of view on the hotel services’ quality and prices. The map has 4 quadrants:
- in the high-high quadrant there are 17 hotels/ lodging capacities;
- in the high-low quadrant there are 1 hotels/ lodging capacities;
- in the low-high quadrant there are 3 hotels/ lodging capacities;
- in the low-low quadrant there are 7 hotels/ lodging capacities.

The map shows that the correlation exist between prices, number of services and hotel/ lodging capacity category (number of stars). The most crowded quadrants are high-high and low-low, but there is enough space for new hotels, if they choose a right balance between services and prices. The quadrant low-high, also, shows that the existing and/or new hotels could offer more satisfaction to their guests. Unfortunately, one hotel is in the high-low quadrant, where they should not be.

This negative situation – from the consumer point of view – could be explained by the fact that this hotel is situated near the main Exhibition Centre from Cluj-Napoca and probably try to exploit its localisation.

We like to highlight that the average prices are relatively high (46.52 EUR – around 18% from the average wage/ Romanian economy in 2005) and the average number of services is relatively low – in fact very few lodging capacities in Cluj level the international standards for their category\(^2\). This situation is generated both by a level of demand above the market offer and by a low level of clients’ expectations regarding the number of services and brand name.

**Study about the hotel’s role in promoting the cultural assets of Cluj-Napoca**

From tourist point of view, Cluj county can be considered an access gate to the Western Carpathians, an area with a great tourist potential due to the beautiful landscapes, the picturesque villages, the geological phenomena and precious flora. But the city offer also important cultural elements which define the historical evolution of life in Transylvania.

Some of the important cultural assets included in Cluj-Napoca tourist offer are the following:

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\(^2\) This situation must be appreciated with a lot of flexibility, due to the fact that the classification systems vary widely all over the world and – sometimes – these systems are not compulsory.
The Botanical Garden – is an appreciated place of recreation and a valuable research resource for students and researchers, having connections with 450 similar institutions from 80 countries. The garden spread on 14 hectares and constitute the largest green area of Cluj-Napoca, displaying a large variety of flora specific to every season. The Garden hosts the Botanical Institute, the Botanical Museum, a Herbarium, a Roman and a Japanese Garden.

The St Michael’s Cathedral is one of the oldest and most appreciated Transylvanian monuments of gothic architecture. It was built between 1350 and 1487, and the altar is the oldest part of nowadays’ building, dated from 1390. The church is well preserved and outside, in the right there is placed the Statue of Matei Corvin. The statue dated from 1894, when Hungarian authorities decided to make this state to commemorate 450 years from his birth and 400 years from his death.

The Memorial Matthias Corvinus House – it is known as the oldest lay building in Cluj-Napoca, well preserved and having many functions along the time. Built around XIV-XV centuries in gothic style, along the time, the outer walls were altered with Renaissance elements. For a while the house hosted the Ethnographic Museum and since 1950, the owner of the building is The Design and Fine Arts University. The Institution organizes here many temporary exhibitions for its students and professors, which do not however affect the building.
Ethnographic Museum of Transylvania – is the largest museum of the kind in Romania. The museum was founded in 1922. The Ethnographic Park, part of the Ethnographic Museum, is currently the first open-air museum in Romania and the sixth in Europe. It was founded on April 12, 1929. Nowadays, the park exhibits the following items: 34 peasant technical installations; 5 workshops, 12 households comprising 90 individual buildings featuring the regions of Maramures, Tara Oasului, Nasaud, Secuime, Campia Transilvaniei, Zaran, Podgoria Alba, Mocanitea Muntilor Apuseni, Depresiunea Calatele, Bran, Bistritsa (sasi), Gurghiul; 3 wood churches and a cemetery gate. Among this array of exhibits, 19 date from 1678 to 1913.

The Babeș-Bolyai University Cluj-Napoca was established in 1581 and it is the largest university in the country. With more than 45,500 students, the university offers 105 specialisations, of which there are 98 in Romanian, 52 in Hungarian, 13 in German, and 4 in English. The university was named after two prominent Transylvanian scientists, the Romanian scientist Victor Babeș and the Hungarian mathematician János Bolyai. The university has 21 faculties and over 1,700 faculty members. The University offers bachelor's, master's, and Ph.D. degrees, along with advanced postgraduate studies.

Fortress Hill – got its name from the Austrian fortress built there, the oldest representative of baroque secular architecture in Transylvania. Dominating the historical center of the city, the fortress was built in the 18th century, in order to ensure the control of the city, more than for defensive purposes. With an altitude of 405 meters, this place offers to tourist one of the best panoramas of the city and the surrounding hills, rivers and even mountains.

The National Art Museum, branch of Cluj – is the former Banffy Palace, built by a German architect between 1774-1785. Starting with 1951 the building has a cultural destination hosting the National Gallery. The museum was developed from the original collections of the Transylvanian Museum, making today the most valuable nucleus of the patrimony of The National Art Museum. The National Gallery offers a four-century synthesis of Romanian art with a stress on the artistic phenomenon in Transylvania.

Regarding the cultural potential given by events, Cluj-Napoca has a stable calendar of festivals and other socio-cultural events of local interest and some of them gain an national and international attraction. Occasionally Cluj hosts festivals
or cultural events, like this year The MTV Music Awards Romania, the first edition organized outside Bucharest, which could develop a flux of tourists. The main important cultural events are:
  ⇒ Lucian Blaga\(^3\) International Festival
  ⇒ Toamna muzicala clujeana Festival (Fall Cluj Music Festival)
  ⇒ The Transylvania International Film Festival (5\(^{th}\) edition in 2006, one of the prime cultural events in Romania)
  ⇒ The Puck-Animafest International Marionettes Festivals (5\(^{th}\) edition in 2006 and will participate 10 theatrical companies from Romania and 7 from Europe)
  ⇒ Zilele municipiului Cluj-Napoca (Cluj-Napoca’s Days)
  ⇒ Ziua Europei (Europe’s Day)
  ⇒ Beer Festivals
  ⇒ The Wine Festival
  ⇒ ManInFest Theatre Festival
  ⇒ Delahoya Rave Festival

Based on these we can say that Cluj-Napoca is an important cultural city, which offer a wide range of cultural values for interested tourists. The main problem remains the promotion of cultural image and the interest of companies from tourism infrastructure to develop that kind of activities and services.

The basic assumptions that we tried to verify in the study were:
1. The hotels are aware of playing a role of cultural messengers on the tourism market
2. The hotels want to be involved in cultural activities only when those activities are related to the hotels’ image in the market or when their products are involved.
3. The hotels are so oriented toward the business segment of clients that they ignore the potential of cultural tourism, due to their impossibility to forecast the benefits which can result from it.

First of all, our intention was to identify if Cluj-Napoca’s hotels have any perception of the possibility to play a cultural role in the market. Using a Likert scale for measuring their responds, 1- strongly agree, 5 – totally disagree, results an average of 2.16. We interpret this result as an important interest of hotels for developing cultural tourism and for attracting this type of clients. 70% from the managers inquired about this matter, believed that the hotel can play the cultural messenger role. The question address to them was in general, so the results do not refer to the effective implications of hotels in this direction. But it is a positive sign the fact that the Cluj-Napoca’s hotel managers are aware of this potential.

Further more, we were interested to identify which are the most specific elements – considered important - that hotels have, upholding the cultural activities offer by hotels. It had resulted a quite balanced spread among architecture, interior

\(^3\) Lucian Blaga, Romanian philosopher, poet and dramatist, 1895-1961.
design and cultural events. Nevertheless, cultural events were indicated in a higher proportion because they are the most dynamic elements which assure the growing flow of tourists. Even if the cultural events that a hotel can organize are at of small dimensions, like exhibitions or local meetings, the managers know and understand the potential for their hotels by participating as supporters for unroll some events at a higher scale in the local community.

![Figure 9. Holding element for playing the role of cultural messenger](image)

We correlate these results with other specific information about the distinctive elements of the hotels; in the first position was indicated logo, symbol. In the last position were indicated elements of interior design and architecture. We concluded from this that hotels are not interested in creating a unique image for themselves, based on cultural values or assets. Spite of this, our study reveals that almost 11% from the hotels indicated that have tourists with cultural purpose for visiting the city. This figure is not much, compared with the business segment, 46.4%, but represents a stable and promising share of client market.

The benefits of the cultural tourism are first of all for the local community, because all people involve in creating the tourism package of services will gain the opportunity to develop their business and in the second level the tour operators and hotels because they can create a special package of services addressed for this types of clients. Knowing that the most important segments of cultural tourism it is represented by foreign clients, the economic development at individual level and as a whole it is obvious. The hotels inquired seem do not see the direct positive impact on tourists flow.
The cultural activities chosen to be promoted by the hotels were in the first place, representing 35%, and consisting in presentations inside the hotels of some actions with cultural specific like wine tasting or specific food preparations. In the second position, with 26%, were indicated the initiation and organization of some cultural events of small scale, but important on local area. On third place, was place the use of the hotel’s interiors as a space for various exhibitions. The results highlight the hotels’ interest for those actions which can be managed by themselves and promote the hotel on the market. Spite of this results, until now, there were few initiates in organizing such cultural activities by the Cluj-Napoca’s hotels, the most common being the hosting of exhibitions in the lobby. The study reveals that the hotel managers are aware of how the cultural tourism could be put to work for their economic benefits, but are not interested to do more.

In general, the hotels from Cluj-Napoca are concentrated on the business clients and gradually become aware of their role as cultural messengers. They do not think at the competitive advantage the unique features can offer and to become a tourist destination by promoting and organizing cultural events in correlation with the business tourism is a strange idea.

**B. Tourist demand**

The second part of our research analyses the demand for Cluj-Napoca tourist market. We compared our results with the information obtained by the Romanian National Institute for Research and Development in Tourism in 2005 [10]. Even if the sample is representative for total Romania, the research of INCDT regarding the Cluj-Napoca market was applied only to 20 tourists. From those, 6 were managers and they came in Cluj-Napoca for business. The study does not underline an important category for Cluj-Napoca: students. There are enclose in “other” category. Most of the results are similar, but our study will complete the obtained information.
Our research reveals that the main purpose of visiting Cluj-Napoca is personal interest, followed by professional training and business (figure 11). In “personal interest” category are included the relatives and friends of the students and of the residents who, most of them, do not use the lodging capacities and also persons how come for medical services.

The tourist choice regarding lodging capacities come to support the information obtained from the visit purpose in Cluj-Napoca.

The preferred lodging type is offered by relatives and friend and on the second place are hotels. From the meals point of view Cluj-Napoca tourists use restaurants, followed by fast-foods units. “Other” category includes meals taken at relatives and friends (figure 12).

The high percentage of personal interest visits is in correct correlation with the accommodation at relatives and friends.

Almost half of the tourists prefer to stay in Cluj-Napoca 2-3 days. The average period is higher compared with the average length of stay in Romania which is 1.8 days. This mean that tourists come especially for weekend to visit their relatives and friends (figure 13).
Regarding the allocated amount of money, the tourists do not spend very much. The majority spends between 100 and 500 RON (figure 12), which represents a low amount compared with 1440 RON – the result obtain by the Romanian National Institute for Research and Development in Tourism (INCDT). This big difference can be explain by the purpose of the visit: our study reveals that the main purpose of the Cluj-Napoca’s visit is personal interest (24%), followed by
professional training (21%) and business (18%) and in the INCDT’s research the main segment is business and professional training (80%) and leisure (20%). Also, the result can be explained by the fact that the tourists stay especially at relatives and friends and they don’t spend money for accommodation.

Figure 14. The allocated amount of money

We obtain for the perception of the tourists regarding Cluj-Napoca cleanliness 3.7 points out of 5, which is a medium result (1 – dirty, 5 – clean).

For tourist services offered by Cluj-Napoca, the subjects ranked the city very well: 1.9 points, where 1 represent very good and 4 very bad. The best evaluation was obtained for food and beverage services, followed by accommodation services and business environment (table no. 3).

<table>
<thead>
<tr>
<th>Tourist services</th>
<th>Points (1 – very good, 4 – very bad)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation</td>
<td>1.78</td>
</tr>
<tr>
<td>Food and beverage</td>
<td>1.77</td>
</tr>
<tr>
<td>Tourist attraction</td>
<td>1.92</td>
</tr>
<tr>
<td>Commercial attraction</td>
<td>1.85</td>
</tr>
<tr>
<td>Business environment</td>
<td>1.79</td>
</tr>
<tr>
<td>Residents attitude</td>
<td>1.96</td>
</tr>
<tr>
<td>Transport infrastructure</td>
<td>2.28</td>
</tr>
</tbody>
</table>
The tourists agreed that Cluj-Napoca is one of their preferred Romanian destination (2.33 points, where 1 – total agree and 5 – total disagree).

Most of the subjects perceive Cluj-Napoca as being an academic centre and only at a big distance a business and cultural centre (figure 15).

Figure 15. Main characteristic of Cluj-Napoca

The most needed information for tourist guide are: city map, tourist attraction, public transportation, cultural objectives and bar and clubs list.

The identification data for the respondents are presented in figure 14 a) and b). The Cluj-Napoca’s tourists are young, 41% between 20-30 years and 27% between 30 and 40 years. Most of the subjects were males, but the percentages are nearly, with higher education (46% undergraduates and 27% with high school, where are included the students). The revenue of the tourists is under the Romanian average wage. These results come to support the main purpose for visiting Cluj-Napoca.
a) Age and gender of the respondents

![Age and Gender Pie Charts]

b) Education and revenue of the respondents

![Education and Revenue Pie Charts]

Figure 16

Cluj-Napoca tourist market slowly becomes a competitive and crowded one, but the competition is tough from Romanian and international destinations. To summarize all the analyses before we can conclude that Cluj-Napoca has three major tourist segments:
Table 4.

<table>
<thead>
<tr>
<th>Segment</th>
<th>Main competitors</th>
<th>Comments and objectives</th>
</tr>
</thead>
</table>
| Academic tourists (students, professors, tourists coming for professional training who are in connection with the Cluj-Napoca’s universities and persons who come for medical services offered by university hospitals) | Bucharest Timisoara Iasi | - Cluj-Napoca is well known in Romania  
- Purpose: to maintain and develop its second place after Bucharest |
| Business tourists (come for the developing environment offered by Cluj-Napoca’s market) | Bucharest Timisoara | - developing business centre, offering new opportunities but can not compete with the capital – the preferred place for making business; hard to compete with Timisoara which was more opened to the foreign investors after 1990 and now is more developed comparing with Cluj-Napoca business environment  
- Purpose: to be in the first 3 options on the foreign investors list |
| Cultural tourists (come for the medieval town, cultural attractions, festivals, events offered by Cluj-Napoca’s market) | Sibiu Sighisoara Brasov | - Cluj-Napoca is an interesting cultural destination but it can not compete with the competitors from the cultural attractions point of view  
- Purpose: to develop cultural events and festivals (like TIFF) and to multicultural stake on the strap line: “Cluj-Napoca –heart of Europe” |

The correlation between the demand and supply is not very appropriate. Even if the evaluation of Cluj-Napoca’s tourist services is good, the accommodation offer can be developed for the main segment – academic tourism. This segment is ignored in the present. To avoid the competition, cultural tourism can be seen as a supporting product (extra product offered to add value to the core product - the reason of buying - and help to differentiate it from the competitors) of academic tourism. Cluj-Napoca market is focused now on the business tourism and the local authorities try to offer an attractive environment for the investors. In plus, the accommodation offer is orientated in this direction. For now, the 3, 4 and 5* accommodation establishments offer is complex and in the last few years there is no change in 1 and 2* supply.

Conclusions
At international level since 1990s the trend in hotel development was to differentiate any new hotel from the existing others. Even big integrated hotel chains capitalize this differentiation strategy playing with local architecture and design elements when they open hotels abroad. The strategy to be different is more important for small hotels, if they want to compete in a crowded market. If we add
to this the trend which suggest that any hotel must be – in its own way – the ambassador of its town or region through architectural and/or design elements, interior decorations, the use of lobby and other public spaces as art galleries and through its atmosphere, we have an almost complete picture of what a modern hotel must be.

In our study we included localisation, number of services, architecture and design elements in our trial to identify distinctive features for Cluj hotels, as part of a differentiating strategy. As we already revealed at the end of our discussions, we were able to identify few hotels in Cluj with some distinctive features, which can make them different from their competitors. It became gradually clear for us that the management teams of Cluj hotels do not have in mind a differentiating strategies, otherwise those hotels with some distinctive features would have capitalized on those through thematic design and would have include these elements in their presentations.

We must add that the hotel chain penetration at Cluj-Napoca’s level is very low – only one hotel (Topaz) is affiliated to Best Western. Before its closing, Hotel Continental appeared – on various websites – to be affiliated with Minotel (the Swiss voluntary chain). When we tried to double check the information, in December 2005, using Minotel official site – www.minotel.ch – we could not found any information regarding Minotel presence in Romania. Due to this situation, we consider that only one hotel – out of 28 (representing 3.57%) is affiliated to a hotel chain, compared with the hotel chain penetration rate at Romania’s level of 2.19%\(^4\), using the number of hotels.

Cluj is an important tourist destination, but it competes with other tourist destination all over Europe. In this context, the quality and unique features of Cluj lodging capacities are important. If the lodging capacities available for Cluj would not develop distinctive features, Cluj as tourist destination would loose momentum and its lodging capacities would have to face a gloomy future.

A draft of strategy is in place for tourism development at regional level. But the public authorities of city of Cluj and county of Cluj, too, must take into account the strategy formulated at regional level and must try to implement it. This way of action could give to hotel owners a hint about where the tourism market is heading and – probably – they would start to act less chaotic and more in harmony with their clients need, becoming ‘ambassadors’ of city of Cluj.

We must wait and see if some Cluj hotels would really dare to be different or they would play the same ‘copy the competitor’ attitude and what this would bring for Cluj hospitality market. With more than 60 lodging capacities on the market, to be different is a must.

\(^4\) Data were calculated using the information available by the end of November 2005.
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