Quantifying the Impact of the COVID-19 Pandemic on the Romanian Balneal Tourism. A Comparative Analysis of Băile Herculane and Băile Felix

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Abstract: The pandemic has had a substantial impact on Romanian tourism, and visitor arrivals have decreased dramatically since the beginning of 2020. The government’s national-level policies have hampered people’s mobility, and the uncertainty of a trip’s safety and security has also stifled tourism activities.

The present study focuses on the evolution of two globally known spas from Romania, Băile Herculane and Băile Felix, in recent years, as well as the influence of the COVID-19 pandemic on tourism in the two spas.

The purpose of this paper is to highlight the manner in which the pandemic has affected spa tourism in Romania. In this sense, statistical indicators are interpreted, focusing specifically on the tourist activity in Băile Felix and Băile Herculane resorts.

Keywords: balneary tourism, spa tourism, health tourism, COVID-19 pandemic, travel data, hotel industry, Romanian market

1. INTRODUCTION

After a period of decline due to lack of awareness of the value of thermal resources, balneal tourism has become a growing segment of the tourism market in Romania, with one third of Europe’s balneal resources being found on Romanian territory [1]. More specifically, according to an official report published by The World Tourism Council, Romania hosts more than 2,500 hydro-mineral water resources – springs and boreholes, which have been proven to have physical, geochemical, physicochemical, and microbiological and pharmacodynamics properties. [1] The country already is renowned internationally for its natural potential - with appropriate investment in development, as well as intensive marketing for foreign tourists, Romania has the potential to become one of the most sought-after balneal destinations in Europe.

The country also hosts some of the oldest geothermal springs in Europe. Explored and exploited since ancient times [2], hot springs are an important factor in tourism motivation, being a source of health and well-being [3], [4]. Recognized since Greco-Roman times, the thermal waters on the territory of ancient Dacia were attractions for the peoples of antiquity. There is no doubt that the most flourishing spa resort in Dacia was the one in Băile Herculane. Due to its healing waters under the protection of the god Hercules, the settlement was named “Thermae Herculi” or “Ad aquas Herculi sacras ad Mediam” (the holy waters of Hercules of Mediam, i.e. Mehadia) [5].

Another resort famous for its treatment with geothermal waters is Baile Felix. From a tourist perspective, the exploitation of the natural resources specific to this area dates back to the XV-XVII centuries, when people started extracting mineral waters and vegetable mud from the local lake [6].

Spas are important tourist destinations, especially for consumers who are looking for both health and leisure. If in Romania, initially, the tourist product presented only basic, traditional elements, being strictly based on aspects of balneology, regarding cures or treatments in the presence of a doctor, today the product offer has been improved with other spa services, becoming a combination of traditional services (specific procedures and treatments) and rejuvenation services [3]. The tourists’
appetite for these products has increased exponentially in recent decades, primarily due to the understanding of the beneficial role that thermal waters have on health. The concept of “Sante par aqua” (health with the help of water), has become more and more popular among Romanian consumers.

The concept of normality has been completely challenged since the outburst of the COVID-19 pandemic in Hubei, China, in December 2019, pushing global economies on the verge of collapse in a very short period of time [7] (p.2). Although the “new normal” and the challenges raised by the pandemic on the hospitality and tourism industries have been extensively covered in published research, both from an industry perspective and a consumer perspective, to the best of our knowledge, no empirical research to date has considered a comparative analysis of two popular balneal tourist destinations from Romania. As a result, the aim of this article is to fill this research gap by using a comparative analysis of how two internationally renowned spas, Băile Herculane, the most prestigious destination for balneal tourism from the Western Region, and Băile Felix, the most renowned destination for health and spa tourism from the North-Western Region, have evolved in recent years and the impact of the COVID-19 global pandemic on tourism in the two spas.

2. LITERATURE REVIEW

Throughout the centuries, Romanian spas have gone through a series of development eras: the Roman era, the Austrian era, in the 18th and 19th century, the royal era in the beginning of the 20th century, the communist (1944-1989) and the post-communist era (after the fall of the communist regime in December 1989) [8] (p.16). Today, the National Health Insurance House covers 70% of the spa treatments related to health recovery [9].

Currently, spa and wellness tourism is an important contributor to Romania’s economic development, being one of the oldest and most popular forms of tourism practiced on Romanian territory [10]. The country has a number of natural resources, including mineral, thermal and salt waters, all used in a variety of health-boosting procedures such as preventative spa treatments, wave-therapy – known for having curative properties, as well as hydrotherapy [11].

According to statistics, balneal tourism became an important element of the Romanian tourism sector between 1980 and 1989 [12] (pp90-91). Before the 1980s, in the early phase of balneal tourism in Romania, “simplicity” was the key word to describe the accommodation facilities and the catering options of the spas [12] (p.90). Seasonality was a serious element affecting the flow of tourists in the spa resorts. However, due to an increase in demand, during the 1980s large accommodation facilities were constructed, decreasing the seasonality of balneal tourism and turning it into a type of tourism that could be practiced twelve months a year [12] (p.90).

In spite of having enormous potential from a natural resources point of view, Romania lacks international exposure, meaning that almost 90% of those using Romanian spas are senior Romanian citizens, using treatment tickets [13]. Ungureanu et. al (2014) argue that this is precisely the main issue that affects the flow of international tourists - the fact that Romania uses the concept of medical tourism as closely related to the social system and social tourism, which does “not help the sector develop as it is not based on excellence or high-quality services” [14]. Moreover, Tudor et. al (2012) also argue that, unlike other resorts in Western Europe, Romania focuses mainly on medical purposes, rather than tourism, which has been an impediment in attracting different segments of customers, both local and inbound tourists [15].

By comparison, the situation is completely different in other European countries that provide medical spa tourism. Germany, for example, another European country that is renowned for medical spas, has managed to successfully attract a variety of segments of tourists by creating clear profiles for each of the resorts on the country’s territory [16]. Naturresort Schindelbruch, located in the middle of the forest in the Harz mountains, is one of Germany’s most renowned spa and wellness resorts, promoting themselves under the motto of “A good life” (“Das Gute leben”) [1]. The resort is not advertised as a medical facility, but as an exquisite, luxury experience, offering tourists a large variety of facilities and activities: three swimming pools, each serving a different health-purpose; a sun-deck, where customers can enjoy a variety of healthy drinks; a bistro-spa that offers a wide choice of healthy dishes; a sauna-village; a variety of relaxation rooms with panoramic views; massage rooms; a
The resort also offers a variety of other activities and special packages aimed at couples, with or without children, seniors and even companies, this way ensuring that their product offer caters to a varied customer base. Some of the activities include day trips (entertaining or cultural); sports events; weddings or corporate events, and the special packages include wellness holidays for pregnant women; hunting holidays; holidays for pet owners; winter holidays; and holidays for people passionate about hiking and other sports [1] (pp. 124-125).

Thermes de Spa, located in Belgium is another example of health and spa resort that manages to successfully promote its product offer in a way that attracts different segments of international tourists [1] (p.123). The resort offers a variety of services, mixing health benefits with leisure and beauty purposes: thermal activities, such as aqua gym, bebebulles (initiating infants in different aquatic activities), hammam and sauna; relaxation activities in two rooms that are equipped for different relaxation techniques – the Wood light room, with blue light produced by ultraviolet lamps, helping with detox and the health of the respiratory system; and the infrared room, recommended to be used after the hammam sessions in order to reduce body temperature [1] (p.123) The resort also offers balneal therapy, “Zen” nights - evenings that are aimed to encourage individuals to escape daily routine through a series of activities, a variety of beauty procedures and massage techniques. [1] (p.123)

Up to this point, the present research has created an overview of the Romanian balneal tourism sector, focusing on the lack of visibility and popularity among international tourists, when compared to popular health and spa facilities from other European countries. By referring to statistical data, the following chapters of this study are going to analyze the extent to which the global COVID-19 pandemic has impacted the demand for balneal tourism.

3. MATERIALS AND METHODS

The following analysis aims to briefly create an overview of two of the most relevant balneal (spa) resorts from Romania: Băile Herculane and Băile Felix. In other words, the main objective of the research is to investigate and illustrate, through statistical data, whether the two resorts were negatively impacted by the COVID-19 pandemic, mainly because of the measures that specialists from the hospitality industry had to implement in order the protect their clients, but also prevent the potential appearance of an unfavorable economic situation for their business.

Băile Herculane is regarded to be one of the most renowned areas for balneal tourism from the Western Region, not only due to the health and spa facilities, but also due to the natural setting and its unique cultural heritage [1] (p.20). As a result, health and beauty activities are the main socio-economic drivers for the area.

Băile Felix is the most prestigious tourist destination in the North-Western region, mainly due to its large accommodation capacity, as well as its natural resources, bringing a significant share to the regional spa share [1] (p.27). Whilst the seasonality of the area is similar to most balneal regions, recording the highest demand during the holiday season, and the lowest demand during winter, late autumn and early spring, Băile Felix has the advantage of having thermal waters of high temperatures, which provide the area with a great potential of developing spa facilities that will attract tourists all year round [1] (pp.32-33). Most of the accommodation units in the area have been built before 1989 [17].

Generally speaking, hygiene and various safety protocols have always been factors that were considered as fundamental by both hotel businesses and customers, especially in the case of spa tourism [18] [19].

The crisis generated by the pandemic only increased the importance of the aforementioned requirements, which were illustrated in Romania by two major changes: the reduction of a hotel’s accommodation capacity, including the treatment base and the expansion of safety measures. As a result, hotels from all over the country, with a special focus on the balneal area were hit by a surge in operational expenses and a plunge in generated profits.

The sample of the current research consists of Romanian establishments that provide data to the National Institute of Statistics (NIS) and have as their main activity spa tourism in various locations,
officially classified in Romania as balneal resorts. The data is analyzed from both a yearly and monthly perspective. Although the INS data is utilized for a period of five years 2017–2021 in order to create a comprehensive analysis, the primary focus of the study is the data available for the period between March 2020 and December 2021, which represents the period where certain limitations have been implemented at a national level.

The main variables of the present research are: occupancy rate, existing room supply with focus on hotels (total number of rooms available), the average length of stay, tourist overnight stays and tourist arrivals. Considering the current crisis (i.e., COVID-19), the empirical approach of the study will consist mainly in the exploratory analysis based mostly on INS data and indexes calculated by the body of authors.

Firstly, the authors have measured the preceding variables at a national scale in regards to balneal resort. Secondly, the focus will shift towards the analysis of Băile Herculane and Băile Felix. The past two years are going to be the main focal point of the analysis in order to emphasize the effects of the COVID-19 measures on spa tourism. Moreover, a comparison of the changes in key performance measures across hotel balneal tourism will also be provided, because most of the accommodation facilities that are providing spa, wellness and treatment facilities are hotels.

While these preliminary analyses are essential for further examining the impact of the COVID-19 pandemic on the Romanian balneal tourism industry, they are limited and must represent a start for further analysis and correlations. Therefore, for future research, the authors of this study highly recommend, an analysis of direct correlations between indices like the average length of stay in relation to revenue loss, profit or even costs.

4. RESULTS AND DISCUSSIONS

The end of 2019 marked the beginning of the global COVID-19 pandemic, giving birth to a new era “characterized by fear of illness and uncertainty regarding the foreseeable future” [7] (p.2). Given the highly contagious nature of the virus, governments worldwide have promptly reacted and installed social distancing regulations and lockdown as the only mean to reduce the spread of the disease [7]. This has deeply affected all industries, particularly those that rely on human interaction, including the tourism industry. The Romanian tourism industry was no exception, being significantly affected. At the beginning of 2020, the arrivals of tourists experienced a drastic decrease. The measures taken by the government at national level have restricted the movement of people, and the uncertainty of the safety and security of a trip has also limited tourism activity.

With the easing of restrictions, tourists have expressed a desire to travel, gradually practicing different forms of tourism, depending on the level of safety they offer.

In order to best emphasize the disruptions created in the last two years in Băile Herculane and Băile Felix resorts, the study presents Romania’s balneal tourism situation from the last four years, between 2017 and 2020. Even though the monthly analysis of the two balneal resorts will be illustrated on a five-year scale, from a national perspective the study refers to the existing data up to the end of 2020.

Spa tourism has been one of the favorite forms of tourism among Romanian citizens for many decades. Most packages purchased by tourists interested in getting treatment involved an average length of stay of 12 days. All the spa and wellness procedures were usually performed in hotels’ treatment bases built during the communist period. Since the ‘90s, many balneal resorts have suffered a sharp decline in customer demand, which lead to a lack of investments in the technical-material base. Moreover, as previously argued in the literature review, spa packages have not been so strongly sought after, especially by the younger generations and the main pool of customers consisted mostly of retirees and adults over the age of 50. The young generations have avoided Romania’s resorts mainly due to the poor quality of services compared to balneal resorts from other European countries, as evidenced through the literature, earlier in this study. However, after 2002 there has been a revival of the accommodation capacity of many resorts, through the emergence and development of various new types of accommodation (many built using European structural funds) and through the rehabilitation of existing hotels equipped with adequate treatment bases.
Despite the fact one might have expected the last two years marked by the COVID-19 pandemic to lead to several business closures (the hospitality industry included), the statistical data shows that, on a national scale (in balneal resorts) the number of accommodation structures has been constantly growing and the number of hotels have remained approximately constant, ranging between 132 hotels in 2017 and 134, respectively 133 hotels in 2019 and 2020 (Fig. no.1).

Moreover, all individuals, regardless of their country of residence, have been affected by this health and economic crisis that has led to our incapacity of travelling, as well as the closure of accommodation establishments for different time spans (like March – April 2020) or to the limitation of operating an accommodation unit (e.g. reduced capacity). The influx of tourists from 2017 to 2019 has constantly been increasing and the arrivals in national balneal spas were mostly quantified by Romanian visitors in a proportion of approximately 95%. Only 5% of the total arrivals was represented by foreign visitors. The year of 2020 has seen a sudden drop of almost 50% in arrivals compared to 2019 and the number of foreign visitors dropped from an average of 5% of total arrivals to 0.93% in 2020 (Fig. no.2).
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![Fig 3. Tourist overnight stays accommodated in Romania’s balneal resorts by tourist type](image)

**Source:** INS, illustrated by authors

Regarding the tourist overnight stays in Romania’s balneal resorts, from a ratio stance, the situation is similar to arrivals, foreign visitors’ stays accounting for an average of 3% of the total. Undoubtedly, 2020 has led to a decrease of total overnight stays with almost 53% compared to 2019 and a drop from the average foreign visitors stays from 3% to 0.97% (Fig. no.3).

**Table 1. Average stay in Romania’s balneal resorts**

<table>
<thead>
<tr>
<th>Type of tourists</th>
<th>Year</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>4.45</td>
<td>4.32</td>
<td>4.24</td>
<td>3.67</td>
</tr>
<tr>
<td><strong>Romanian</strong></td>
<td></td>
<td>4.50</td>
<td>4.36</td>
<td>4.27</td>
<td>3.67</td>
</tr>
<tr>
<td><strong>Foreign</strong></td>
<td></td>
<td>3.54</td>
<td>3.53</td>
<td>3.38</td>
<td>3.81</td>
</tr>
</tbody>
</table>

**Source:** Authors, based on research

Considering the crisis situation, the authors were interested to find out what was the average stay in Romania’s balneal resorts. Table no.1 presents the situation for the last four years, where the average stay was around 4.34 days and has suffered a sudden drop to 3.67 days in 2020. Moreover, it is interesting to note that the average stay of foreign touristshas recorded an increase to 3.81 days from 3.38 days in 2019. In addition to mathematical considerations that led to this result, there is a possibility that this increase might be determined by different travelling limitations.

As stated in the beginning of the current research, this analysis will focus on the impact of the COVID-19 crisis on the balneal tourism in two of the most famous resorts in Romania, Băile Herculane and Băile Felix. The analysis will focus on the main variables that can illustrate the last 5 years situation, on a monthly basis, with an additional focus on years 2020 and 2021.

Before analyzing the evolution of the two balneal resorts, it is necessary to make some clarifications in regard to the measures implemented to combat the COVID-19 pandemic. Thus, contrary to existing trends in European countries, in the period of 2020-2021 Romania faced 4 waves, which automatically led to restrictions on population movement in order to diminish the spreadof the highly contagious virus. Thus, the first period that marked the state of emergency and full closure of units from the hospitality industry (restaurants and hotels) was between March and April 2020. Looking back, this was the period that has most affected the hospitality industry. The crisis continued with the second wave, between October and December 2020. During this period of time many units operated at a low capacity, in direct correlation to the evolution of the infection rate on a local level. The year 2021 was also marked by two complicated periods, one that took place between January and April,
with certain periods of relaxation and the other, which produced the most casualties nationwide around October - November 2021. As previously mentioned, the measures varied depending on the local infection rate. For example, while some tourist destinations could operate at a 30% of the total capacity, others could do so at 50% or even more because their infection rate was lower.

Looking at monthly tourist arrivals in the aforementioned resorts, in April 2020 one can observe a sudden drop to zero of monthly arrivals, because of the implementation of a state of emergency. Also, it is important to note that, usually during the Easter Holidays many people are interested in spa packages of around 4 to 5 days in Băile Herculane and Băile Felix. However, this year’s Easter was celebrated at home due to lockdown. Figure no. 4 below illustrates the situation of the two resorts: whilst Băile Felix had usually a double amount of tourists compared to Herculane, 2020 was the year when they reached an even position. The year 2021 was better considering the fact that arrivals from May to September have almost reached 2019 levels, thanks to clearer legislation and a positive attitude towards resolving any unforeseen situation.

![Figure 4. Monthly tourist arrivals in Băile Herculane and Băile Felix](image)

**Source:** INS and authors’ research

Considering the tourist overnight stays indicator, no matter the type of accommodation unit, it would be interesting to note that, in a normal global context, both resorts have recorded their busiest period starting from May until November with peaks in the months of July, August and even September (Fig. no.5). The situation has changed abruptly in 2020 when for a period of almost 4 months (March – June) tourists have stopped coming or were hesitant to stay for more nights. For example, in the case of Băile Herculane while June 2019 has recorded a total of 58611 tourist arrivals, the same month of 2020 recorded only a total of 8231 arrivals.

Furthermore, it is important to emphasize a comparative analysis between Figure no. 5 and Figure no. 6 of the current research. Besides the similar trends presented in the last five years, one must also notice that over 85% of the total overnight stays account for 100% of hotel units, where tourists usually have access to various types of spa and wellness treatments, while the 15% difference accounts for other types of units that, in many cases, do not offer access to mineral water treatments. Therefore, tourists prefer hotels in order to have access to both basic tourist services and additional services that, in the case of spa packages are essential. Of course, Băile Felix continues to be the top choice for tourists even during the years of 2020 and 2021.
Another relevant indicator that the authors were interested, presented in figure no. 7 below, was the average length of stay in these two balneal resorts. In comparison to Băile Felix, 2017 was the best year for Herculane, where the highest average stay was registered in October: 6.42 days, compared to Felix with an average of 4.77 days. Since 2018, Băile Felix has taken the lead regarding the average length of stay indicator, and after the sudden drop to 0 days in April 2020, it has managed to maintain itself at levels similar to 2018. In both cases, the period of October – November 2020, as well as year 2021 were critical ones because the infection rate has increased and had a negative impact on the average length of stay. For example, in Băile Felix October 2019 had an average stay of 5.26 days, which dropped to 4.41 days in 2021.

In regard to the accommodation capacity in function (figure no. 8), measured in beds-days, besides the constant evolution of both resorts, 2021 has come with a positive outcome because the period May-November has been the best in the past five years for both Herculane and Felix. Moreover, it is important to highlight that this was the most relaxed period in the last two years with eased restrictions. Also, after the calm period, followed the worse COVID-19 wave, which created the most
casualties among the population. For a future analysis, it would be interesting to find out if there is a highly positive correlation between the less harsh measures and the increased infection and death rate. Likewise, it would be compelling to investigate whether the balneal tourism had a negative impact, considering the fact that tourists spend much of their time in the treatment, spa or wellness base, surrounded by many other people.

**Fig 7.** The average length of stay in Băile Herculane and Băile Felix

*Source: Authors’ research*

**Fig 8.** Accommodation capacity in function (beds-days) in Băile Herculane and Băile Felix

*Source: INS and authors’ research*

According to figure no. 9, the total number of existing beds in Băile Herculane and Băile Felix has slightly fluctuated during the past five years. Nevertheless, the total number of beds in Băile Felix has kept its significantly higher position compared to Băile Herculane. It also experienced significant increases in Herculane both in 2018 and 2020. The number of beds in hotels have been approximately constant during the years 2017, 2018, 2019, 2020 and 2021.
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The final part of our brief analysis follows the evolution of hotels’ occupancy rate from Herculane and Felix balneal resorts. As we have seen from previous graphs we can now understand why Băile Felix is considered to be the most famous balneal resort in Romania. Between the years 2018 and 2019 the occupancy rate in hotels has reached in full season almost 75% and months like October and November ranged between 46% and 55%. Even though Herculane is not that popular, during extra-season (March – April and October – November) it had a higher occupancy rate than Băile Felix. Without a doubt, the situation has changed throughout 2020 and 2021 and Herculane managed to keep its five year position as a leader both in full and extra season. In terms of hotel occupancy rate, data found for the year of 2021 was comparable to 2017. For further analysis, it would be interesting to find out what were the main factors that kept a higher occupancy rate before and during the COVID-19 crisis in Băile Herculane.

5. CONCLUSIONS

As discussed throughout this paper, Romanian tourism has been severely impacted by the global COVID-19 crisis. Tourist arrivals have dropped dramatically since the beginning of 2020. The
government's national-level policies have hampered people's mobility, and the ambiguity of a trip's safety and security has also discouraged tourism activities. Tourists have shown a willingness to travel as limitations have been eased, gradually practicing various types of tourism based on the amount of safety they provide.

In Romania, even during the alert and emergency states, hotels and restaurants were opened, but the swimming pools and spa facilities were not. Authorities found it difficult to maintain the physical distance needed to contain the spreading of the virus in indoor pools, saunas, spa rooms, as well as other bathing procedures involving water pools. Therefore, the health and spa resorts in Romania, whose tourists are usually the elderly, have experienced a real decline in demand.

In the case of both Băile Felix and Băile Herculane, the evolution of arrivals in the beginning of the pandemic was negative. With the relaxation of restrictions, tourism has begun to recover, one of the reasons being that visits to these destinations involve treatments that improve the health of travelers. Also, an aspect analyzed in this research is the seasonality of Băile Felix and Băile Herculane resorts.

Therefore, we can say that their seasonality was high even before the pandemic, the latter being just another factor that increased the seasonality and implicitly the decrease in the number of tourists during certain periods.

Isolation, limited physical activity, as well as the rise in sedentary lifestyle caused by the COVID-19 pandemic caused tourists to choose spas not only to relax, but also to boost their immune system and improve their overall health. Therefore, destination managers and local operators may still see the pandemic as an opportunity in the future, as tourists will use their services for both post-COVID recovery and relaxation. In conclusion, the relaunch of the activity in spas can be a method of recovery for both tourists and the local economy.

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