

TOURISM POTENTIAL AND MARKETING STRATEGIES IN ROMANIAN HOSPITALITY INDUSTRY

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ABSTRACT

Romania is considered the country which possesses a rich and varied natural touristic resources created by man and this gives a great disposability for tourism. The general secretary of the World Tourism Organization states that: "Such a country which owns the Danube Delta, the Black Sea, The Bukovina monasteries could live and prosper from tourism only." Romania has all the natural conditions to become one of the most important European tourism destinations. One of the possible ways of tourism relaunching constitutes the elaboration of some efficient marketing strategies and politics starting from a marketing environment analysis.

Key words: Romanian tourism, marketing strategies, SWOT analysis

1. INTRODUCTION

Ever since the fall of the Ceausescu regime, numerous commentators as well as visitors to Romania have drawn attention to the significant tourist potential which this country ought to have. With mountains, forests, a sea coast, and historic towns, together with a climate which should attract visitors in both summer and winter, Romania ought to be as inspiring for visitors as Austria or Switzerland.

Yet the numbers of foreign tourists continues to be pitifully low, compared with last. Romania's tourist industry performed better under Ceausescu, with charter flights to serve the mountains and Black Sea coast from Western European countries, most of which ceased in the mid 1990s. While a fall in the number of visitors immediately after 1989 was to be expected as many citizens of former Eastern Bloc countries inevitably chose to exercise their new-found freedom to travel to Western Europe, this should have been a short term development, and with an imaginative tourism strategy, Romania could have re-established its position in traditional markets as well as expanding into new ones.

The effort for developing a strategy for using Romania's tourism potential has as a preliminary stage an inventory of the determinants that condition in terms of quantity, quality and circumstance the viability and feasibility of its various components. Establishing the determinants in a realistic fashion ensures a high degree of accuracy in promoting a modern, environmentally-friendly and long-term sustainable tourism. Thus, the Romanian tourism potential can be connected to the European heritage of material, spiritual and aesthetic values.

Like any strategy, the analysis of the activity domain taken into consideration and the final objectives of the estimated changes for a certain period of time are two essential moments of the strategy in the tourism domain.

Without any notable exceptions the Romanian specialists and the foreign ones agree upon the fact that the Romanian tourism potential could compete with the touristic supply of any other country in the world thus significantly contributing to the income growth. Let's remember that in the 60s Romania was a successful touristic destination especially due to the Black Sea. The regress started with the comunist national isolation. Its fall has not brought the supposed good changes and today the tourism Romanian industry is measured by a series of parametres which explain its peripheral position in international context.

The economic, social and political context of the period after 1990 has not been one that contributed to the Romanian tourism development. Today, the Romanian hospitality industry confronts itself with problems such as: the decline of the internal and external touristic demand, an old touristic product, the low standard in the services which do not satisfy the tourists` expectations, the payment and too high prices compared to the quality of the services, an insufficient promotion. Moreover after 1989 because of the population low income level a restructuration of the consumption priorities took place and this did not favour tourism.

The foreigners` perception upon accommodation, upon prices, is for Romania lower than in the case of Turkey and Greece. They consider that our country is deficitary because of the too high taxes for a reduced range of services.

One of the reasons of the touristic demand decrease is the Romanian hotel keepers` tendency to increase the price of the services when the number of clients become less. Generally the Romanian tourism managers not often proceed to cost analyses or market research.

Moreover, the visa elimination for the Romanians who travel in the European Union countries – starting with January the 1st 2007 – implies the destination modifications preferred by the Romanians.

2. TOURISM POTENTIAL AND MARKET IN ROMANIA

Romania is located at the Eastern border of the European Union and offers a tourism potential that is especially attractive, considering at least the following arguments:

- the Romanian tourism potential represents – for the majority of Western tourists – a great unknown, something that is less talked about, due mainly to, on the one hand, the names in sports, art, music and literature that have brought us fame, and, on the other hand, to the less desirable „fame” brought to us by beggars, prostitutes and the gangs that rob banks and cause trouble abroad. Can this perception change? There is only one answer: YES! Change can be brought about through an effort of thinking and through will to act, through establishing feasible objectives and persevering in the actual realisation of the actions initiated. We can offer originality through the tourism products we are so accustomed with as not to appreciate them to their full potential, but which foreigners discover and value greatly, by which they are pleasantly surprised and on the subject which they drew our attention to the fact that we have treasures we don't know about

and we don't know how to make them known to the rest of the world. In order to move out of the strictly theoretical, I would like to point to a few of the jewels Romanian tourism has, but is not promoting properly:

- the most densely inhabited mountains in Europe, which can be visited year-round, with a less polluted environment, but in danger of being degraded by the unchecked and irrational exploitation of sub-alpine forests;
- the country with the most mineral water sources with exceptional therapeutic properties;
- an area with endemic natural environment, century-old forests, caves and salt mines, areas with naturally ionised air – very rare in Europe – hills with potential for turning into ski slopes, renowned vineyards, original folklore and diversity in ethnography etc.

The international touristic demand registered a diminution tendency due to some causes such as the relatively low level of the touristic services, the touristic program nondiversification, the reduced amusement possibilities. The official satisfactions regarding the *external touristic circulation* offer data whose relevance is relative as they register also the persons who practice frontier traffic .

In the future it is believed the number of the foreign tourists will rise due to adhesion to OTAN but also because Romania is considered an attractive country. This is very important if we take into account the general situation on the tourism international market, in the case of Middle East for example the situation is different.

We consider that as far as the Romanian hospitality industry is concerned is the elaboration of some marketing strategies to contribute to the internal market flourishing.

As far as the internal market is concerned we can notice a *migration tendency of the touristic demand towards the touristic products import* which reflects the spectacular growth of the number of voyages made by the Romanian tourists abroad. Here we must draw the attention towards the “pseudotourists” proliferation, that is of those persons who travel abroad with purposes which are connected to their jobs and who actually cannot be considered tourists at all!

Balneary tourism

The movements and evolution trends of the balneary tourism, which appeared on international level show the directions of development for this type of tourism in Romania. The splendour and diversity of natural therapeutic factors that can be transformed according to the requests of the European Community Standards are the main favourable elements for the Romanian watering places development. The penetration on new markets, the extension of the touristic treatment offer for the people with low income and the perpetuation of the „Tourism for Health” programme are the main strategic actions which aims at the revival of the balneary tourism.

In what concerns the balneary potential, Romania possesses certain particularities of great touristic interest:

- The presence of all types of resources comprised in the category of the therapeutic minerals: non-thermal and thermal waters, therapeutic oozes and gases, the water of salty lakes and the sea, the saline climate of the subterraneous voids (see the attached map);
- The existence of the therapeutic minerals considered exceptions of nature. There stand out the choke damp gases whose high therapeutic value determined by large specialty research render them specific items of great interest to the Romanian balneology. In the case of the choke damp gases it has been specified that there are few resorts in the world where the natural factors (choke damp associated with mineral waters) meet the qualities required for the treatment of such a diversified range of diseases, especially of the cardiovascular ones. One may also include in this group the water of the therapeutic lakes and peloids that are present in few places in Europe, yet whose curative value has been internationally acknowledged since the 19th century, along with the use, for the first time in our country, of such substances in balneary purpose (at Balta Alba). One may also add to this group the therapeutic salt mines, less spread over Europe, but highly efficient in treating some respiratory diseases.
- The existence of the geological reserves of therapeutic minerals, which allows a large capitalization of the same;
- The high curative value of the balneary minerals.

The investment process started pursuant to the re-arrangement system of the new patronage, noticing a general tendency of growth of the annual investments

amount, an amount showing the effort put up by the companies in order to modernize the balneary tourism structures, especially at the beginning of the new millennia.

The installation over the last years of a large revamping process of the treatment bases and their endowment with specific devices for balneary treatments ensures the transgression of the names of the resorts beyond the national borders. The attraction some balneary resorts started enjoying reflects the capacity of changing the view of the tourists, the adhesion to the idea of prophylaxis by balneoclimatology and not calling for it after the disease has already installed.

The situation at the level of the resorts concerning the built fund indicates the cohabitation of two hotel models, the old one having large dimensions and the new one with reduced dimensions regarding room number (below 40 rooms – like apartments, double or single rooms), appearing as a conglomerate of services in the context of the new orientations

(treatment and maintenance structures – kineto-therapy, electrotherapy, massage, sauna, fitness room; public food structures, leisure structures – tennis, basketball fields, open swimming pool). By the space-organizing manner, by the variety and quality of services, sojourn tourism, which is addressed to family, is also encouraged. Hotels must become attractive and viable both for the population of Romania as well as for foreigners, always seeking solutions and formulae in the tendency to reintegrate Romanian balneoclimatic resorts in the international tourism circuits.

It would be desirable for us too that in the countries with tradition, to maintain the atmosphere of the balneary cities having specific architecture, and the new constructions to be accepted to the extent they are really necessary and if they match the existing architectural style. It seems that resorts such as Vatra Dornei, Olănești and Băile Herculane lost of the old charm, appearing as a sort of kitsch.

The creation of the development regions in the territorial structures has offered the possibility to some programmes and strategies through which tourists hold an increased role in highlighting national valences.

The application of the measures on short and medium term issued by the authorized entities targeting the revival of the balneary tourism shall ensure a significant increase of the demand for this type of tourism both internally and internationally. We mention some of them: arrangement and equipping to European

touristic standards of some pilot resorts representative for the Romanian offer - Băile Herculane, Băile Felix, Covasna, Slănic Moldova, Olănești, Sovata, Mangalia et al.; reintroduction in the domestic touristic circuit of some local interest resorts, along with their revamping and development; technological renewal of the treatment bases, revamping and increase of the degree of comfort of the reception structures; extension of the arrangements and specific and general leisure endowments; diversification of the prophylactic cures and treatment procedures based on the natural factors in the main balneo-touristic resorts and the extension of the maintenance treatments (antistress, fitness, coming back to shape, embellishment, banting etc.).

Balneary tourism may become the trump card of Romanian economy by ensuring the stagnation premise of the decline from the beginning of the late decade of the 20th century and by the evolving revival under new concepts and orientations, on the basis of the richness and diversity of natural therapeutic factors. The natural, rich and various balneary potential, complemented by the improvement of the political and economic context optimum and necessary, may maintain Romania's prestige as to this aspect.

3. MARKETING STRATEGIES IN ROMANIAN HOSPITALITY INDUSTRY

The adopted marketing strategies must presuppose regaining the touristic market which has been lost in 1980-1989: Germany, France, Belgium, Holland, USA, Canada etc. Nowadays the major touristic reasons which attract the foreign tourists in Romania are The Black Sea, The Carpathians, business activities, cultural-historical circuits (such as the monasteries from Bukovina).

Without any fiscal facilities, without an aggressive provocation, without quality services, without a modern infrastructure, the Romanian tourism remains a perpetual chance. It is certain that for Romania tourism represents a great opportunity which must be exploited at the beginning of the third millennium.

One of the possible ways of tourism relaunching constitutes the elaboration of some efficient marketing strategies and politics starting from a marketing environment analysis. This must presuppose:

- the rise of the services quality level offered to tourists especially for the services where it is required their diversification;

- the enlargement of the Romanian tourism agencies supplies in order to succeed in drawing the attention of a greater number of tourists; this is how the focus will be on the introduction or the conception of some touristic products to correspond to the motivational tourist profile;
- redimensioning the connection between the service quality and their price such as to be justified all the taxes;
- the intensification of the touristic products and actions of service promotion choosing modern ways to promote like the Internet; this is how the possibility of tourists information on the touristic services is created.

Unfortunately, as a Horwath British firm specialized in consultancy has pointed out, Romania is for the foreign tourists “an expired touristic product, an inadequate offer for time spending, which reflects the lack of investment.”(Nedelea, 2003)Thus Romania has reached an expensive touristic destination.

The National Authority of Tourism has established a series of *strategical objectives at the national level*:

- the improvement and the touristic product consolidation in those areas, stations, localities, which are the most familiar for the Romanian and foreign tourists and where there is already a certain structure;
- the development and modernization of the touristic product in such a way that Romania would distinguish itself from another countries;
- the rise of the standard level of services in accordance to the touristic category and the used payment.

Therefore we can adopt four main types strategies of the Romanian touristic product:

I. As far as the *differentiation strategy* is concerned we believe that it is recommended to have as a starting point the originality through which the Romanian tourism must be characterized without being able to compete with the experienced countries. In order to confer originality to the touristic products we recommend the combination of the circuits and sejours in the mountain area with those from the Danube Delta, Bukovina, Maramureş, the Black Sea, the balneoclimatelic stations, the center of Transylvania, the monasteries area in the north of Oltenia etc.

II. Adopting a *diversification strategy* in the hospitality industry in Romania presupposes the demand satisfaction of more tourist segments by conceiving some varied touristic activities and forms. If we take into consideration the varied and complex character of the native touristic potential we consider that the following could be particular touristic products: the seaside sejour, the mountain and cultural circuits the rural tourism, ecotourism(the green tourism), the bussiness tourism, the sports practising tourism, and other sports and activities, the scientific tourism etc.

III. As far as *the quality growth strategy* we could mention the existence of *the Q Mark Application National Program* which has criteria allowing the full quality measure and of all factors which can assure a high degree of client satisfaction.

The recommended system has in view the valorification of some associations from the hospitality industry to promote quality marks. In order to become members of such an association the operator should respect a certain quality standard. The association will have to respect a certain quality standard. Its members will own a quality mark which will certify the existence of a certain standard. That association will also have the role to promote this mark and the touristic structures.

Table- 1: Tourism in Romania

Type of tourism	Short presentation
Black Sea Coast	Accommodation structures represent 40% of the entire accommodation offer in Romania, and this type of tourism represents 25% of the total request. Most of the buildings here are built in the early '70s.
Tourism for treatment and wellness	Romania has over 70 watering areas, 20 destined to international tourism. The international request decreased in the past few years and the standards are also insufficient for international markets (except for some new spa and wellness centers as Bazna)
Winter sports tourism	The most well known tourism areas for winter sports are Poiana Brasov (Brasov),

Type of tourism	Short presentation
	Sinaia/Platoul Bucegi (Prahova, Dimbovita), Busteni/Babele (Prahova, Dimbovita) and Pestera/Padina (Dimbovita). As second important areas, mostly visited by Romanian tourists, we mention: Stina de Vale (Bihor), Borsa (Maramures), Semenic and Muntele Mic (Caras Severin), Păltinis and Bilea Nord (Sibiu), Predeal (Brasov) and Lacu Rosu (Harghita).
Mass tourism / road trips to main cultural attractions (organized through tour operators from Romania or abroad)	The main themes promoted for foreign tourists are: cultural tourism, pilgrimage (monasteries from Neamt and Suceava counties). These destinations are included in itinerant trips that depart from Bucharest, the Black Sea Coast or Transylvania (to the cities and to the fortified churches).
Business tourism	Bucharest has the best infrastructure for this kind of programs that combine the business activity (events, seminars, conferences) with tourism.
Active tourism (off road, hunting and fishing, trekking, mountain biking etc.)	Most of active tourism programs are organized in the mountains and the Danube Delta.

Romania has all the natural conditions to become one of the most important European tourism destinations. The most visited regions are: the Black Sea Coast, Bucharest, Prahova Valley (Sinaia, Busteni, Azuga, Predeal), Poiana Brasov, Moldavia and Bucovina Monasteries from Neamt and Suceava counties, wooden churches - Maramures, Danube Delta, Bran (Dracula Castle), medieval cities (Brasov, Sighisoara, Sibiu, Medias, Deva, Cluj, Alba-Iulia), watering resorts (Baile Felix, Baile Herculane, Baile Tusnad, Calimanesti-Caciulata, Olanesti, Sovata, Vatra-Dornei, Eforie Nord etc.), a lot of caves.

The main destinations for the foreign tourists are the Black Sea Coast, the Carpathian Mountains, the wellness resorts and the destinations for business tourism.

4. SWOT ANALYSIS ON ROMANIAN TOURISM

To be able to use tourism activities at the development of Romania it is necessary to make a serious analyze regarding strong and weak points of the actual level of Romanian tourism. This study is presented below:

STRONG POINTS

Generals:

- the Romanian image has been improved in time; some efforts should be made in order to sustain this image.
- the number of foreign tourists follows a positive trend

The natural potential:

- Unspoiled nature – proper for the development of ecological tourism and natural tourism
- great, dreamful nature
- strong cultural potential

Accommodation:

- acceptable accommodation services
- nice and friendly service, very hospitable people

Beach, Bathing, Swimming:

- Black Sea beach is good
- good tourism (3 points on a scale from 1 to 5)

Cultural tourism:

- very large tourism offer
- culture also has a great touristic potential, but should be known better
- absolutely great in Bucovina and and Transilvania

- very diverse offer, but for individual holiday makers not always easy to reach

Tourism personnel:

- most of the time they are very friendly and polite

Gastronomy:

- very good, mostly far better than expected
- good taste and typical for the country
- good original cuisine
- regarded as opulent and good - meals in restaurants are far better than in hotels

Tours operators activity:

- have been appreciated as good and very good
- tour operators are actively involved in connection with external partners
- clients are mostly satisfied with organization
- their activity gets better and better

Public Service, Customs:

- considered to be good
- fast, quick procedure at the border
- much better than before, no comparison with the Nineties (in a positive way)

Low Cost Airlines:

- 2 new companies have been founded: Blue Air and Blue Line

WEAK POINTS

Generals:

- infrastructure
- the season is too short
- the foreign tourists consider that some components of the tourism offer may not always be fulfilled
- price-quality-ratio not always in balance

The natural potential:

- should be improved as far as the environment is concerned – littering problem
- some areas are not very clean
- the pollution of the water in some tourism areas should be controlled

Accommodation:

- accommodation not always tidy, bad service, breakfast not always good
- rather simple standard, often with “Eastern-charm”
- partly without proper care, although simple standard is not a problem
- partly rather expensive, sometimes bad service, everything takes a very long time, music too loud, food too cold
- staff not always friendly, helpful
- variable hotel standard during round trips
- not sufficient Three Star hotels

Beach, Bathing, Swimming:

- Black Sea beach good, but dirty, not cleaned, too expensive
- the water is not so clean
- seaside is loud, noisy and bad service
- lack of swimming pools in the country

Cultural tourism:

- better protection of historical monuments (fortified churches and deserted villages)
- the cultural monuments sometimes are not properly indicated or illuminated
- better promotion of the monuments

Tourism personnel:

- the quality of the services is not always at high standards
- the personnel is not well qualified
- the Four Star Hotels do not always have the best qualified personnel
- the quality of the environment where the services are offered is not so good

Gastronomy:

- rather too much meat and lack of fresh products
- beware of fast food, convenience food, international food
- more local products like juice, beer, wine instead of Fanta, Cola, etc
- not enough choice of typical Romanian dishes
- varying food standard during round trips
- partly rather expensive, sometimes bad service, everything takes a very long time, music too loud, food too cold
- food in hotels could be better
- service is not yet used with handling groups: problems when taking the orders and non-transparent accounting

Tours operators activity:

- working methods are not very dynamic and creative
- communication could be improved

Public Service, Customs:

- very slow and bureaucratic
- problems when crossing with the identity card only
- sometimes rather "harassing"
- rather bad, except for local service partners
- bike transport should be improved considerably

sometimes not transparent situations in the activity of the customs officials

Low Cost Airlines:

- compared with the international level, airline prices to Romania are by far too high, low cost carriers are important
- very important because air fares of the scheduled airlines are very expensive

- unfortunately there is no real alternative on the market compared with other destinations of utmost importance, because the long and expensive journey to get there is one of the greatest obstacles

OPORTUNITIES

- Romania is considered to be a safe destination
- there is a minimal legislation
- there are specific organizations and funds for protected areas, biodiversity
- the govern begun to pay attention to the protected areas
- tour operators plan some new theme for Romania: cultural programs, trips, active tourism, mountain biking
- most of the tour-operators are interested in info-tours especially in Bucovina, Maramures, Portile de Fier and Banat, Delta Dunarii, cultural tourism and active tourism
- the tourists' opinion about Romania is much better than the image that Romanians have created in time. The most appreciated things are: hospitality, nature, landscape, mountain routes
- credible tourism stakeholders
- the development of a network with funds for biking tourism
- better promotion of Romania outside the borders
- better information activities

THREATS

- threats from other touristic destination which offer similar products (Bulgaria)
- an intensive and extensive development of the tourism in the Danube Delta – that may be destructive for the beauty of the area
- the Romanian people should not necessarily copy the western standards, but should preserve the authenticity and the specific of the area
- tourists skepticism about Romania

From this SWOT analysis of Romanian tourism it is obvious that being tourist in this country is a pleasure, but also a real challenge.

5. CONCLUSIONS

An effective tourism strategy would recognise that Romania has no hope of attracting foreign visitors in significant numbers if tourist facilities continue to charge at least Western European prices for services which in many cases have barely improved since communism. At present, the resorts seem to survive on Romanian tourists who prefer to stay in their own country or have become used to doing so. But this market too is diminishing as more and more Romanians are refusing to put up with such poor quality in relation to price and are heading for Greece, Turkey and other countries. The easing of departure restrictions for Romanian citizens leaving the country to visit the Schengen area has given a further incentive to holiday abroad. With EU accession, the bureaucratic impediments to foreign travel for Romanians will further diminish.

As in many areas of the Romanian economy, foreign investment is critical if a revival of the country's tourism is to take place. This should lead to a radical improvement in quality, as infrastructure is upgraded to Western standards, staff are trained in basic service skills and prices are set to match comparable facilities in other countries. Experienced investors will also realise that a significant increase in the number of visitors will not happen overnight and that it will take some years before Romania's poor reputation as a tourist destination begins to change. Yet so far, many potential developers have been driven away by the standard problems which have affected investors in all sectors, such as lack of clarity or stability of legislation and a tax system which remains Byzantine in spite of the introduction of the flat tax in 2005. Corruption inevitably leads many to abandon plans for investment in Romania, because those without the right connections are so frequently at a disadvantage. The poor quality of the infrastructure is a severe impediment to investors, such as the continued lack of a proper motorway network, while lack of sustainable planning on a local level has made Romania's tourist facilities unattractive to many, as the state authorities fail to provide effective services. One tour operator which considered offering holidays on the Romanian Black Sea coast in the last couple of years is rumoured to have been deterred by the presence of wild dogs on the country's beaches.

The years after 1989 ought to have seen a substantial influx of tourists keen to enjoy the country's numerous attractions. Instead, the sector fell into decline. Areas which should have seen economic regeneration have fallen victim to rising unemployment. A responsible government strategy ought to concentrate on attracting the necessary

expertise to develop the tourist industry, offering investors a low tax economy with a minimum of red tape, as well as providing the infrastructure which developers would like to see.

The Romanian tourism potential could compete with the touristic supply of any other country in the world thus significantly contributing to the income growth.

As far as the internal market is concerned we can notice a migration tendency of the touristic demand towards the touristic products import which reflects the spectacular growth of the number of voyages made by the Romanian tourists abroad.

Some of the possible ways of tourism relaunching constitutes the elaboration of some efficient marketing strategies and politics starting from a marketing environment analysis. In order to conceive and promote a competitive Romanian touristic product the adoption of a quality rise strategy is essential.

It is certain that for Romania tourism represents a great opportunity which must be exploited at the beginning of the third millenium.

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