MODERN TECHNOLOGIES AND INNOVATION – SOURCE OF COMPETITIVE ADVANTAGE FOR TOURISM SMES

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ABSTRACT

Tourism represents a fundamental drive for economic growth, having the potential to aid in poverty reduction through its capacity of generating jobs and incomes based on both tourism and related services industry. Tourism, the fastest growing industry in Europe, mainly represents a private sector industry, based on small and medium enterprises, especially within the destination areas.
Inside Europe, and not only, SMEs are considered as an important factor for economic and competitiveness growth, innovation, creating jobs and social integration. The effects of the latest economic crisis have definitely marked the evolution of the modern SMEs. Despite these negative aspects, the analysis of the indicators related to the tourism field entrepreneurial activity indicates a net growth in Romania during the last years. The fact is due to the innovative potential, flexibility and adaptability, all essential traits of the SMEs field, traits that proved extremely useful in overcoming the latest economic crises.
The fast and continuous development of the information technologies brings profound implications for the entire hospitality industry. The present day tourists are well informed and responsible, becoming more and more demanding and generating a whole new level of pressure on the tourism enterprises in order for them to adapt to this new situation. The IT & C infrastructure and services are now a key element which can rapidly propel a tourism SME, or in other cases can cause irreparable damage to a business in this field. A good software for location management, a nice website and a good reservations and support online system can make all the difference now.

KEYWORDS: *Tourism, Competitiveness, Information Technology, SMEs, Innovation*

1. INTRODUCTION

The hospitality industry followed an ascendant trajectory during 2014, at world level, even though there were geopolitical issues and the general economic growth was actually halted. This trend for hospitality was maintained during 2015 too, being a great catalyzer for economic development and creation of jobs. Increased population living conditions, demographic changes, added time for vacations, modernization of transportation and infrastructure, as well as the continuous development of information technology are

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elements that stimulate the continuous development of tourism. At global level, the tourism and travel industry provides around 266 million jobs and contributes with around 9.5% at the global GDP. Revenues from tourism, at world level, increased constantly, so as at 2015 level they amounted to 1230 billion dollars. The hospitality sector represents an important part of the European economy too. Regarding to the labour market, no less than 10.2 million people are directly employed in this industry and thus bringing an important plus for the general development and fiscal contributions. International competitiveness of an economy depends decisively on the competitiveness of its enterprises, and this is based on their strategy, structure, management and objectives [1].

At European level, and not only, tourism occupies an important place especially among the small and medium enterprises (SMEs), those being considered an important factor for growth and economic competitiveness, innovation, workforce occupation and social integration. SMEs are the most important part of the economy, they represent the base of economic growth and employment. During 2013, the values of the main SMEs indicators show the major role they have within the economy, representing a real driving force for economic growth and sustained development. Inside the EU 99% of the active enterprises are SMEs, 60-70% represent the percentage of people employed in SMEs and 58% of the added value generated by the economy comes from SMEs. [2]

The effects of the financial crises were felt at SME level too, affecting the performance indicators. Nevertheless, in 2014, compared to 2013, we saw a rejuvenation of the SMEs, the added value brought by them in the EU economy increasing with 3.3% and the employment level with 1.2% [3]. According the European Commission previsions, the positive evolution of the SMEs performance indicators will follow the same trend in 2016, as it did during 2015. The current estimations are a 3.7% increase related to the added value, 0.9% for employment level and a 0.7% increase in number of SMEs for 2016. The Small Business Act (SBA) represent a strategic initiative of the EU, the first policy framework for SMEs within EU, adopted in 2008. Promotion of entrepreneurship and support for SMEs must be considered government priorities for all EU members. The SBA aims to improve the entrepreneurship skills in Europe, as well as to eliminate the obstacles on their development path. The main argument is that these companies are characterized by flexibility and fast adaptation capacities to the changing economic conditions, to the political environment and other perturbation factors, thus managing to capitalize on existing opportunities on a faster pace. The SMEs create their competitiveness edge based on the price-quality ratio, quality of their products/services, company reputation, professionalism of the employees, post-sell relations with their clients, distribution channels, management quality and, last but not least, innovation capacity. The SME Performance Review represents the main instruments that the EC uses in order to monitor and evaluate the progress of its member states regarding the application of the SBA, offering information related to SMEs performance in the EU countries and other 9 partner countries.

At EU level, the SMEs are mainly involved in five different sectors: commerce, manufacturing industry, constructions, professional/scientific/technical activities and HoReCa[1]. Within these sectors, according to a Post-Privatization Foundation study, we

[1] HoReCa – comes from hotels, restaurants and café. Term widely used, especially in Europe.

can find more than 78% of the SMEs, more than 80% of the active workforce and more than 71% of the total added value in the economy. At EU level, Romania occupies the 17th place regarding total added value and the last position on the active SMEs ranking. Looking the percentage of the employees within SMEs, Romania occupies a better 8th place in the EU.

2. LEVEL AND DYNAMICS OF THE SMES PERFORMANCE IN THE FIELD OF TOURISM, AT EU LEVEL AND IN ROMANIA

Despite the slow economic growth inside the advanced economies and the geopolitical tensions in several regions, tourism still represents a large part of the world economy (estimated at around 9% of the global GDP) and of the occupied workforce, while the number of international travels continue to increase [4]. Europe represents the region with most international arrivals, due to its rich cultural resources, world class touristic infrastructure and great health and hygiene conditions. International touristic arrivals in Europe increased by 3% in 2014, amounted to 582 million euro, while the tourism sector revenues, in real terms, increased by 4%, amounting to 383 billion euro [5]. At world level, Europe holds 51% of the total international arrivals and 41% of the international revenues, representing the region with the most touristic destinations. Within this context, the Central and Eastern Europe area was the only sub-region in Europe, and in the world as a matter of fact, that saw a 5% decrease or arrivals, after three years of consecutive growth. This situation is mainly due to the sharp decrease of arrivals to Ukraine (-48%), thanks to the Russian aggression in the Crimean peninsula. Romania had a 12% healthy growth of international arrivals in 2014. In our country, tourism is considered a priority development sector, focusing on natural landscapes and rich history, with a more recent focus on entertainment destinations on the Black Sea coast line. This sector is regarded as having a huge potential, even on short term period, and being able to bring an important contribution at the economic development of the country. In 2013, Romanian tourism contributed 5.1% of the GDP, placing us on the 154 position at world level, according the WTTC[1] report.

Table 1. Distribution of number of active SMEs in tourism sector, number of employees and added value, 2012 (UE28)

Enterprises	Number of enterprises (thousands)	Number of persons employed (thousands)	Value added (million**)**
	1825	10425	213425
Micro (0-9 employees)	1651	4352	72472
Small (10-49 employees)	159	2954	58200
Medium (50-249 employees)	14	1235	32182
Share in non-financial business economy total (%)	8,2%	7,2%	3,5%

Source: Adaptation after the European Commission, Key indicators, accommodation and food service activities, EU-28, 2012

[1] WTTC - World Travel & Tourism Council

The values of the main SMEs indicators, cumulated at EU level, expressed in percentages, give us a good picture of the SMEs value in the European economy: 99% of the total enterprises in EU are SMEs, two out of three employees work within an SME, 58% of the added value in the economy comes from the SMEs [6]. The contribution of the tourism sector at the non-financial enterprises economy can be summarized as follows: the workforce was far larger (7.8% of the total) that the generated added value (3.5%), while the weight of the number of enterprises was 8.2%. The most employees are found in micro-enterprises (approx. 4351400 persons), their weight in the total SME workforce being 41.75% in 2012. The small enterprises provide around 29% of the total work places in SMEs and 12% of the tourism SMEs workforce is employed in medium enterprises.

Micro-enterprises contribute with over 33% at the added value provided by the tourism SMEs in EU28. The small enterprises brought, during 2012, around 28% of the added value of the SMEs sector, while the medium enterprises contributed with only 15.1% at the added value total.

Around 91% of the tourism SMEs in EU28 are micro-enterprises, the small enterprises cover around 8.7% of the total European SMEs and only around 1% are medium enterprises.

Table 2. Number of persons employed by enterprise size class, accommodation and food service activities, 2012 (UE 28)

	Total (thousands)	**SMEs** (% of total)	**Micro** (% of total)	**Small** (% of total)	**Medium-sized** (% of total)
UE28	10425	83	41,7	29	12
Germany	1990	90,3	30,0	42,3	18,0
Italy	1321,7	90,1	63,2	22,2	4,8
Spain	1219,1	86,1	54,2	21,7	10,2
France	991,8	81,4	47,5	27,4	6,5
Greece	262,3	98,2	72,9	17,9	7,4
Romania	154,1	89,8	34,7	39,2	15,9
Bulgaria	140	92,2	41,3	33,4	17,4

Source: European Commission, Key indicators, accommodation and food service activities, EU-28, 2012.

As we can see in Table 2, the leaders of the workforce employment rank in EU28 are France, Germany, Italy and Spain. Around 90% of the employees of this sector are to be found in SMEs. Regarding the employment percentages in the tourism sector in micro-enterprises, Greece holds the 1st place with 72.9%. In Italy, the workforce is concentrated in micro-enterprises at 63.2%, in small enterprises at 22.2% and only 4.8% in medium enterprises. Romania has a structure somewhat similar to our neighbor Bulgaria, regarding the repartition of the workforce in the tourism sector: 34.7% in micro-enterprises in Romania and 41.3% in Bulgaria; 39.2% in small enterprises in Romania and 33.4% in Bulgaria and around 16% in medium enterprises, in both Romania and Bulgaria.

Table 3. Value added by enterprise size class, accommodation and food service activities, 2012 (UE 28)

	Total euro(million)	**SMEs** (% of total)	**Micro** (% of total)	**Small** (% of total)	**Medium-sized** (% of total)
UE28	213425	76,3	34,0	27,3	15,1
France	34252	79,1	47,8	24,4	6,9
Germany	33298	85,4	24,4	38,9	22,2
Italy	26922	85,5	47,5	29,7	8,3
Spain	24410	81,2	39,3	25,9	16
Austria	7797	93,3	36,5	37,0	19,7
Romania	729	79,0	19,8	34,7	24,5
Bulgaria	614	85,7	19,6	30,4	35,7

Source: European Commission, Key indicators, accommodation and food service activities, EU-28, 2012.

The total added value of the EU28 SMEs sector amounts to 3557 billion euro, in 2012, representing around 58% of the total volume of the EU28 economy. The relative importance of the medium enterprises (defined as employing 50 to 249 people) was quite low in the tourism sector, at EU28 level, contributing only around 38.5% of the added value. More than half of the added value provided by the SMEs active in the tourism field is brought by the first four EU economies, led by France (16%) and Germany (15.6%), Italy (12.6%) and Spain (11.4%).

Table 4. Enterprises active in accommodation and food services activities, 2012-2014 (UE 28)

	2012	**2013**	**2014**
EU 28	1825191	1825323	1827427
Italy	16,88	17,16	17,07
Spain	15,24	15,09	14,77
France	13,84	14,32	14,94
Germany	11,90	11,18	12,38
Greece	5,02	4,90	4,96
Hungary	1,72	1,62	1,60
Bulgaria	1,45	1,43	1,44
Romania	1,29	1,33	1,37

Source: Adaptation after the European Commission, Key indicators, accommodation and food service activities, EU-28

At EU28 level, the number of enterprises active in the sub-sector of accommodation and food services is on an increase trend since 2012. In 2014, next to 2013, their number grew with 2104. More than half the active enterprises of the sector come from Italy, Spain, France and Germany. In Romania the number of enterprises active in this sector is also on the same ascendant path, in 2014 the Romanian enterprises of this kind amounting to 1.37% of the total at EU28 level.

Romania occupies the 17th place in the EU after the added value of the SMEs sector, with a 0.7% of the total added value of the sector at EU level. Our country contributes with 0.34% at the added value of the SMEs from the accommodation and food services sub-sector, ranked after Hungary but before Bulgaria.

The weight of the micro-enterprises in this sub-sector was especially high at EU28 level, generating 34% of the added value and employing around 41% of the total workforce in 2012. The small enterprises were especially important for this sub-sector, with a weight of 27.38% of the added value and concentrating 29% of the workforce at EU28 level.

At global level, tourism is one of the best developing sectors of the economy, and Romania bets on tourism for further international opening and economic development, especially due to the fact that tourism also generates a significant amount of jobs in other related sectors, such as transportation, entertainment and other services [7].

Innovation is a key for economic growth and the entrepreneurial spirit is very important for innovation [1]. It is a recognized fact that entrepreneurship and entrepreneurial culture play a vital role in increasing the competitiveness of any economy. Also, the lack of entrepreneurial culture, lack of cooperation and of a strategic vision at least on medium term if not long term, are factors that bring a negative impact on the development of entrepreneurship in our country. Tourism entrepreneurship can be developed if the economic, politic and social environment is favorable and if this activity is supported by the community and government [8]. Countries that actively support innovation, taking chances with own businesses and communication of success models by businessmen, tend to inspire more people to become entrepreneurs [9].

Towards this end, authorities can play an important role in changing the attitude towards entrepreneurs, taking into account our interruption of entrepreneurial culture development during the dark ages of the communist regime that plagued Romania for almost 50 years. The improvement of the entrepreneur image can be done by sharing success stories, by explaining their role in creating new jobs in the economy. One of the most important barriers in entrepreneurship development in Romania is the fear of failure, according to an EY study.

Table 5. Dynamic of SME activity, October 2011 - march 2016, according to activity sector

Sector	**Industry**	**Constructions**	**Commerce**	**Transportation**	**Tourism**	**Services**
SMEs that decreased activity	17,01%	16,48%	24,20%	18,60%	10,00%	17,46%
SMSs functioning in the same parameters	67,22%	70,33%	62,23%	72,09%	63,33%	70,48%
SMEs that increased activity	15,77%	13,19%	13,56%	9,30%	26,67%	12,06%

Source: Carta IMM-urilor, 2016, CNIPMMR

Examining the enterprises based on their sector of activity has shown the following elements: the services providers have the largest share of enterprises that do business at the same level during this time (70.48%), followed by the SMEs in industry (67.22%) and those in tourism (63.33%). Regarding the SMEs that decreased business levels, commerce has the largest percentage (24.20%) and the lowest percentage appears in the tourism sector (10.00%). The tourism SMEs hold the largest share of the enterprises that increased business during the time of the analysis (26.67%).

Table 6. Evolution and trends for SMEs active in tourism, Romania, 2010-2014

Indicator	**2010**	**2011**	**2012**	**2013**	**2014**
No. of enterprises	24402	22210	23499	24297	25013
No. of SMEs	24379	22186	23473	24272	-
Number of persons employed	140564	169000	172000	175000	181000
Gross value added (RON million current prices)	5162,5	6095,7	8587,2	10947,9	-

Source: România în cifre – breviar statistic, INS, Bucureşti, 2014, 2015; Anuarul Statistic al României 2014, 2015

Demographically speaking, during 2010-2014, the number of SMEs had a different evolution. In 2011 their number fell with approximately 9%, compared to 2010, while during 2012-2014 their numbers increased constantly. The SMEs sector has been largely affected by the global crises, with its peaks in 2009 and 2010. After that moment, the sector saw a slight recovery but seems to have lost the 2012 favorable moment, the trend of the Romanian SMEs being different from those found in the majority of EU countries, according to the Post-Privatization Foundation studies. The data show an increase in employment numbers in tourism SMEs starting with 2010. The total number of employees in SMEs increased by 28% in 2014 related to 2010.

The gross added value shows the contribution of the enterprises, fields and sectors to the national economy, being considered a relevant indicator of economic performance of enterprises, because it eliminates from calculation the intermediate costs which are part of the business turnover [10]. The data shows that this type of added value brought by the SMEs from the sub-sector of accommodation and food services is continuously increasing, starting from 2010.

In Romania, the large companies recover much more rapidly from the crises than the SMEs, because the latter are less competitive and less innovative. According to the White Book of SMEs, the innovation efforts of the SMEs have focused towards: new products (33.30%), new management and marketing strategies (24.73%), new technologies (23.18%), informatics systems modernization (7.85%) and training employees (7.03%). In 2016, related to the precedent year, we have a positive evolution in the decrease of weight for SMEs that indicate absence of preoccupation towards innovation. The research also shows that the main obstacles for research and development activities of SMEs were: high costs (32.76%), not enough funding (31.75%), incertitude about the demand of innovative products (27.01%), difficult access to relevant information regarding new technologies (19.89%), difficult access to relevant information regarding markets (market researches, statistics etc.) (19.62%), lack of public financing/co-financing instruments for research and development and/or rigidity of eligibility criteria (13.05%), difficulties to find partners for research and development (10.68%), lack of skilled human resources (10.58%) and lack of medium and long term estimates about the evolution of their sectors of activity (4.56%) (11). According to the same study above mentioned, the main elements of the informatics technology used by Romania SMEs are: PCs (76,55%), internet (74,36%), e-mail applications (68,70%), company website (28,10%), online transactions (14,69%) and using an intranet (3,92%). From the previous year, we can see a negative evolution related to the increase by 4.5% of the weight of SMEs that do use basic information technology tools in their business. The tourism enterprises are characterized by the largest share of responders that mentioned the use of internet, computers, e-mail applications, company website and online transactions. The aim of using the internet and intranet was mainly communication with suppliers and clients, obtaining information about the business environment, promotion of products/services, electronic transactions and payments, intra-organization communications.

3. INFORMATION TECHNOLOGY IN TOURISM, AN INNOVATION TRAIN THAT WE CANNOT MISS

Romania is quite well known for the prowess of it programmers and IT workforce, generally. While we have managed to become an important contender in several fields of the information technology environment at world level, Romanian tourism does not seem to have adapted to this 21st century realities very well.

Today, the internet access is something that is almost taken for granted in any civilized country, with several countries even considering it a right in its own. Finland was the first country to legalize mandatory access to internet to all its citizens, making access to the global network a right that is upheld by the law [12].

Romania seems to have focused its tourism SMEs activity towards several niches: rural tourism, agro-tourism and entertainment tourism (in incipient phases, at the Black Sea Mamaia Resort especially). While these areas are all very good, they usually to not provide a high margin of added value, mainly due to the numbers involved – being a niche market, they do not attract vast numbers of international clients. The main distribution channel for information about the agro-tourism, for example, remains the word-of-mouth, with former clients spreading the information to other potential clients. Even though the idea has its merits, this low-level business cannot bring a real step increase in revenues, at country level. Romania should find a way to invest not only in “boutique” tourism, but also in large scale business ventures in tourism, through both public and private funding.

It may seem strange at first, but these potential increase in mass-tourism we consider would bring a definite advantage to the SMEs too. With a large number of visitors, brought by the large enterprises in tourism, the potential customer-base for SMEs increases exponentially. The vast majority of the visitors that would travel to these large enterprises will go out of their hotels/resorts and look for entertainment, food and other services – things that can be provided at very high quality level and with flexibility regarding the prices, by the SMEs. Also, the prices of the small “boutiques” accommodation SMEs can be increased and thus, increasing the added value brought by these businesses.

Usually, innovation in tourism means:

- product innovation
- process innovation
- logistic innovation
- market innovation

Generally speaking, everybody considers that the involvement of IT field in tourism is limited to e-tourism. This term, already an established one now, means an aggregation of several aspects: information, reservations, payments, communications. All these can now be done with the help of a computer or smartphone, over the internet. But, let alone the possible misunderstandings and inaccurate information that can be an issues with this approach, this entire paradigm is not something modern anymore! Actually, any sound tourism business, SME or large level, has to have an online presence now – at least a website and a reservation system is mandatory for anyone in this field. And if everybody has it, where is the new technology? Where is the wow factor that can differentiate an offer from another?

We think that Romanian SMEs can really make a move and transform their environment into a digital one. This policy is very well applicable for agro-tourism too, everything could be done, presented and set up digitally, with the clients switching to an “old style” vacation when they arrive – but with every detail already established and clear, setup by using the most modern IT apps. Also, Romanian SMEs in the field of tourism can rely on different innovations not for directly attracting customers, but also for improving logistics and other support areas of their business – for example, they can group together, build a small wind farm and use the electric power generated by them for their own business [13].

One of the things that can be done, and in quite a short period of time too, is the integration of augmented reality into the electronic presence of tourism SMEs in Romania. While this approach requires a lot more effort on the side of a large enterprise, at SME level is perfectly doable. Imagine an SME with a small hotel, somewhere in the mountains of Romania, that has the entire hotel, with all rooms, public spaces and facilities mapped inside an AR application. One of the first things people consider when going to a vacation is accommodation – it would be great to have the possibility the see the exact reality of each room, to see the view from every room, to see the bowling area, the spa, the bar, the terraces etc. Going a step beyond, the same thing can be done for the main attractions and points of interest in the immediate area (restaurants, museums, skiing slopes, mountain biking, climbing etc). The public transportation in the area should also benefit from a dedicated AR app that can reliably show you on your laptop or mobile phone when the train or the bus is arriving, the schedule for the next days or the meteorological alerts that would prevent driving for example.

One of the best practices in this area was established by Holiday Inn when they announced their first Augmented Reality Hotel, in 2012. Their guests could see the 2012 London Olympics athletes going through the hallways and they could even take a picture with their favorite sport stars in their own hotel room

Figure 1. AR app of Holiday Inn showing 2012 Olympics athletes in the lobby of the hotel [1]

All small accommodation enterprises could build their own AE mobile apps that can vastly improve the experience of their guests, from directions to different locations to information and holographic-like guides for using different services within the hotel.

Another area where an AR approach could bring something hype, is the food services field. By using AR the clients can go through different themes and choose one for their reserved table, the app could help translate the menu, the plates can be seen realistically before ordering and maybe even during the cooking process with a life video stream from the kitchen area.

Figure 2. AR app of Inamo restaurant, London, UK [2]

Another AR implementation that would really appeal to the tourism SMEs clients is related to the re-enactment of historical places.

[1] Source: https://thinkdigital.travel
[2] Source: https://thinkdigital.travel

Figure 3. AR app reconstructing Rome historical places[1]

Instead of seeing the ruins of the Tomis fortress, on the Black Sea coast, the tourists could see the ancient buildings, the walls and markets, maybe with in-app purchase possibility to order a juice from the ancient Greek vendor you see on the tablet or smartphone, delivered by a Romanian employee directly to the customer, based on the GPS readings of his device. The possibilities of introducing AR are actually limitless, only time and money required for different projects making the difference – something is feasible, something it is not yet worth the money invested in it.

Of course, all these innovative IT applications would require funding but we think that the benefit from these innovative approaches would definitely out weight the costs. By using this approach on a large scale we could also re-interpret the Romanian tourism SMEs as being at the fore-front of technological advances, thus providing an image that can help increase the prestige of the industry, bringing more and more customers.

We consider that instead of focusing on a relatively small numbers of low expenses incomers for agro-tourism (mainly, but the discussion can be up scaled to all areas), our domestic SMEs active in the tourism field could also prepare and launch an “offensive” for the also relatively small but statistically high expenses customers that could be attracted by the top edge of technology being used in the tourism services. The added value, on medium and long term, would definitely be higher than now and this development path would also be based on the IT software industry that is available here, in Romania. At a future step, we could also start developing, building and selling specialized hardware/software packages for the tourism businesses, both domestic and abroad.

4. CONCLUSIONS

Romania has a huge potential, insufficiently exploited yet. Romania is ranked 76 in the World Top of Competitiveness in Tourism, between Azerbaijan and El Salvador, according to a World Economic Forum study. The low competitiveness of the Romanian economy can be, at least partially, explained through the lack of maturity for our entrepreneurship culture.

[1] Source: http://www.soloroma.com

Thus, we consider that our country should focus on innovation, because it is a demonstrated fact that innovative products and services, developed by skilled entrepreneurs, represent the key of success for improving the entrepreneurs public image and the added value amounts. The inconclusive correlation between weight of added value and demographic potential of Romania reflects the large drawback in developments, productivity and competitiveness of Romanian SMEs, according the the Post-Privatization Foundation reports. The global world crises generated negative effects in Romania also, the dynamics of SMEs activity being strongly affected by factors such as: major financing difficulties, financial blockings due to late payments, reduced demand at domestic and international levels, low level of absorption of EU funding. Nevertheless, the main obstacles for development of SMEs in Romania, according to a study by National Council of Private Small and Medium Enterprises in Romania, are the legislation framework, corruption, excessive bureaucracy, banking policies and insufficient professionalism of the Government and Parliament to counter the effects of the crises [11].

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