

Agro-Tourist Boarding Houses in Romania: Is their Online Positioning Designed to Be Effective?

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Abstract

Do the Romanian agro-tourist boarding houses design online positioning able to have an effective impact on the target customers? The answer to this question may have critical consequences for the competitiveness, profitability and sustainability of these businesses. Systematic studies on this topic are rather few in Romania. The paper presents the findings of one of the first studies aiming to explore this research question. The main objectives of the research were the following: (i) to discern the types of customers targeted by these agro-tourist boarding houses; (ii) to search the main pillars on which positioning relies in this sector; (iii) to identify the points of parity; (iv) to find the types of points of differentiation communicated online; (v) to investigate the core brand promise of the agro-tourist boarding houses. The study was based on the analysis of secondary sources of information available in an online touchpoint such as a portal dedicated to the boarding houses. The online information analyzed focuses on the positioning strategies designed by the agro-tourist boarding houses, not on actual image forged among Romanian and foreign tourists. Based on the research findings, specific recommendations are formulated for the benefit of both the agro-tourist boarding houses and their customers.

Keywords: marketing, positioning strategy, points of parity, points of differentiation, agro-tourist boarding houses.

JEL classification : M30, M31, Z33.

1. Introduction

Academia and practitioners specialized in the field of tourism use several different translations as English equivalent for the concept “pensiuine agro-turistica” from the Romanian language. In this article, the term “agro-tourist boarding house” was preferred against others, due to its official use by the National Institute of Statistics from Romania.

This article focuses on the online positioning of the agro-tourist boarding houses. The major question addressed is whether their online positioning is designed to be effective in this field, respectively to successfully attract customers and to contribute to the sustainable development of these establishments of tourist reception.

2. Agro-tourism and positioning

This article makes a step forward in the research on marketing topics in the agro-tourism sector in Romania. At present, no study on the subject of positioning is available. The research findings that were published on agro-tourism in Romania were more focused on the marketing mix than on targeting and positioning strategies. The question addressed by this article has both managerial and research relevance.

2.1. Agro-tourism

In Romania, from the 1990s, agro-tourism captured the increased attention of academia, researchers and practitioners. Gradually, several conceptual and research trends emerged.

A first trend consisted in conceptual clarifications. Specialists contributed to the definition of concepts such as rural tourism, sustainable tourism, ecotourism and agro-tourism (Mitrache, 1996; Glavan, 2003; Nistoreanu, ed., 2010). The importance of agro-tourism and its relevance to the Romanian economy were also approached. A second but weaker trend materialized in agro-tourism research on specific geographical areas and zones. Lately, exploratory studies approached areas such as the locality Arieseni from Apuseni (Goje, Pascuta, 2009), the Caras-

Severin county (Sava, 2012) and Bihor county (Botezat, 2015) etc.

Conclusive research on agro-tourism topics is still in a preliminary stage in Romania. Opportunities for both fundamental and applied research are still not turned into value.

The adoption of the “Agenda for a sustainable and competitive European tourism” led to the increase in the importance of natural resources and ecosystems and of the soft forms of tourism activity such as nature, ecotourism and adventurous tourism (Leslie, 2011, p. 57). Research and practice in this field will very likely evolve within the context of new priorities set by the European Union in the tourism domain.

Agro-tourism requires multidisciplinary approaches. Joint research in social and economic sciences may benefit both agro-tourism stakeholders and research advancement.

2.2. Positioning: core marketing concept

Positioning is a core concept in marketing management and an important tool for each company in accomplishing functional and corporate objectives. In addition, the positioning strategy guides the development of the marketing mix of the company. The essence of positioning a product/service brand or a corporate brand consists in designing the brand and its image so that it occupies a special and relevant place in the minds and hearts of the customers from the target segments (Ries and Trout, 2000). Brand positioning is a multi-stage process. The main stages of this process are the following: (i) selection of the target market segments; (ii) identification of competitors that will represent the basis of comparison; (iii) setting the points of parity in relation to the other competitors; (iv) definition of the points of difference; (v) crafting the brand mantra (Kotler and Keller, 2016).

As regards the selection of the target market, the strategic options are undifferentiated, differentiated and concentrated strategies. Many companies, even in the tourism sector, apply the undifferentiated strategy in order to maintain low levels of costs (Stancioiu, 2004, p. 91).

The points of parity are the attributes and benefits which are common to several brands. The essence of brand positioning is the association with a “place” in the minds of customers that is distinctive in comparison to those of relevant competitors. Consequently, differentiation may seem to be the key of positioning while points of parity may be considered drawbacks. In reality, companies may have at least two good reasons to develop points of parity within their positioning strategy. The former is the need to demonstrate that brand belongs to a specific category, respectively that it has the features and benefits required and expected by the target customers. The latter is related to the aim of eroding the points of difference of competitors’ brands by communicating attributes and benefits similar to those associated with the points of difference of the competitors. In contrast, points of differentiation are corner-stones of the value proposition and brand positioning. They consist in attributes and benefits that are strongly, uniquely and positively associated with a specific brand. Many successful brands rely on multiple points of difference for their positioning.

3. The agro-tourist boarding houses in Romania

During the present decade, in Romania, the agro-tourist boarding houses registered an ascending trend in terms of number of establishment. In addition, the tourist boarding houses and the agro-tourist boarding houses gained an important place in the tourism sector.

3.1. Tourist boarding houses and agro-tourist boarding houses

In Romania, the order no. 65/2013 and order no. 221/2015 of the president of the National Tourism Authority set the requirements that must be met by the tourist boarding houses and the agro-tourist boarding houses. The evolution during the present decade shows that such boarding houses gained an important place within the tourism sector in Romania.

Essentially, both establishments of tourist reception must provide accommodation, as well as conditions for preparing and serving meals. They function either in a dwelling or in an independent building. In addition, the tourist boarding houses from the rural area and the agro-tourist boarding houses should be located on a minimal area of 1,000 sq.m. representing the built area plus the land area around the building (including the land for agricultural and crafting activities in the case of the agro-tourist boarding houses).

The differences between the two types of touristic establishments are multifold (National Tourism Authority, 2013). Firstly, they differ in terms of accommodation capacity. A tourist boarding house may reach up to 15 rooms, respectively 40 places/beds, while the agro-tourist boarding house does not surpass 8 rooms. Secondly, another differentiator consists in the additional value provided. In the agro-tourist boarding houses, tourists have the possibility to participate in activities within the household. Thirdly, the agro-tourist boarding houses prepare the meals from natural produce grown by them or obtained from authorized producers existing locally. Finally, the hosts from the agro-tourist boarding houses are in charge for tourist reception and for the program of tourists all along their stay at the establishment. According to the order no. 221/2015, the host has also to accompany tourists during their participation in household or crafting activities.

3.2. Evolution of tourist boarding houses and agro-tourist boarding houses in Romania

The tourist accommodation capacity evolved progressively in Romania. The types of establishments which provide permanent or seasonal accommodation to tourists are diverse and include: hotels, motels, tourist inns, hostels, tourist villas, holiday villages, camping sites, school and pre-school camps, tourist halting places, tourist boarding houses, agro-tourist boarding houses, houselet-type units and ship accommodation places.

In 2015, the number of establishments of tourist reception reached 6821 units (National Institute of Statistics, 2016). This number is the result of an ascending trend over the period 2011-2015. Data on this evolution are presented in table 1.

Indicators	Measuring unit	Year				
		2011	2012	2013	2014	2015
Number of establishments of tourist reception	Establishments					
Total in Romania		5003	5821	6009	6130	6821
out of which:						
• TBH		1050	1247	1335	1323	1527
• ATBH		1210	1569	1598	1665	1918
Existing accommodation capacity	Beds					
Total in Romania		278503	301109	305707	311288	328313
out of which:						
• TBH		20499	25019	27325	27295	32051
• ATBH		20683	27453	28775	30480	35188
Accommodation capacity in use	Beds-days					
Total in Romania		68417259	74135614	77028488	77676817	81872539
out of which:						
• TBH		5999542	7343529	8179000	8279529	9416908
• ATBH		5378364	6864934	7932634	8219979	9079901

Note: Data on July 31 of each year. TBH = tourist boarding houses. ATBH = agro-tourist boarding houses.

Table 1. Tourist establishments, tourist boarding houses and agro-tourist boarding houses in Romania, during the period 2011-2015

Source: Based on National Institute of Statistics, 2014, p. 22; National Institute of Statistics, 2016, p. 22.

The data from table 1 highlights several major features and trends:

- a) **high share of boarding houses in the number of establishments of tourist reception.** In 2015, 50.51% of the establishments of tourist reception existing in Romania were boarding houses. The year 2015 is a “turning point” because the boarding houses reached for the first time half of the number of establishments of tourist reception in Romania. Between 2011 and 2014, this type of establishments represented approximately 45-48% of the total number of establishments of tourist reception. In 2015, the agro-tourist boarding houses (1918 establishments) were more numerous than hotels (1545 establishments) (National Institute of Statistics, 2014).
- b) **predominant share of agro-tourist boarding houses.** The statistics focus on two distinct types of boarding houses, respectively “tourist boarding houses” and agro-tourist boarding houses”. Data show that agro-tourist boarding houses surpass the number of tourist boarding houses. In 2015, the share held by each of the two types of boarding houses in the total number of establishments of tourist reception was 28.12% and respectively 22.39%.
- c) **relevant share of boarding houses in the accommodation capacity.** A boarding house provides accommodation services for a relatively small number of tourists. This is the reason of the lower share held by boarding houses in the tourist accommodation capacity, compared to the share held in the number of establishments of tourist reception. In 2015, the share of boarding houses in the tourist accommodation capacity was 20.48% compared to 14.79% in 2011.
- d) **higher degree of use of the accommodation capacity of boarding houses.** On average, the number of accommodation days per bed was 249.37 for all the establishments of tourist reception in 2015. In the case of boarding houses, the degree of use of the accommodation capacity was comparatively higher, respectively 293.81 days/bed in the case of tourist boarding houses and 258.04 days/bed in the case of agro-tourist boarding houses. At the same time, a significant difference is visible between the two types of boarding houses. More precisely, the agro-tourist boarding houses display a lower degree of accommodation use in comparison to the tourist boarding houses. Thus, even if the number of establishments and the accommodation capacity is higher in the case of agro-tourist boarding houses, the use of the available capacity is lower compared to the tourist boarding houses.
- e) **increase in the number of tourist establishments, including boarding houses.** The number of establishments increased by 36.34% over the five-year period. The positive trend was more intense for the tourist boarding houses and the agro-tourist boarding houses. The number of tourist boarding houses augmented by 45.43% in 2015 compared to 2011. The agro-tourist boarding houses had the most prominent increase, their number being 58.51% higher by the end of the five-year interval.
- f) **slightly larger size of the new boarding houses.** On average, an establishment of tourist reception in Romania had a number of 55.67 beds in 2015, with 15.67% more than in 2011. In the case of tourist boarding houses, the average accommodation capacity slightly increased by 7.5% from 19.52 beds in 2011 to 20.99 beds in 2015. The agro-tourist boarding houses have a rather similar evolution in terms of capacity, increasing by 7.33% from 17.09 beds to 18.35 beds during the same interval.
- g) **growth in the tourist accommodation capacity, boarding houses included.** Countrywise, the increase in the accommodation capacity was +17.88%, fact that reveals that new establishments were of rather medium and small capacity. The boarding houses are in stark contrast with this evolution at national level. The

accommodation capacity of the agro-tourist boarding houses grew by 70.13%. Compared to the increase of 58.51% of these establishments, the growth in the extant accommodation capacity of the agro-tourist boarding houses reveals that on average, every new establishment created between 2011 and 2015 had a larger number of beds than the existing boarding houses of the same type.

- h) increase in the accommodation capacity in use, boarding houses included.** The accommodation capacity in use had also a favorable evolution. The growth in the number of bed-days during the five-year period was +19.67% for all the types of establishments at national level, +56.96% for the tourist boarding houses and +68.82% in the case of agro-tourist boarding houses.

In essence, the tourism sector in Romania registered positive trends in terms of number of establishments of tourist reception, accommodation capacity and capacity in use over the five-year period. This situation was also witnessed by the boarding houses. The favorable dynamics could be the result of both stronger entrepreneurial initiatives and of higher tourist interest in boarding houses.

Almost all boarding houses are privately owned. In 2015, 99.7% of the tourist boarding houses and 98.7% of the agro-tourist boarding houses were mainly privately owned (National Institute of Statistics, 2016, p. 23). This state of facts is in line with the situation registered in the Romanian tourism, 96.3% of the tourist establishments being mainly privately owned.

The National Institute of Statistics (2016, pp. 24-25) provides data on the categories of comfort of these tourist establishments. Several aspects are worth noticing:

- a) 3-star comfort category is dominant.** In 2015, this comfort category included most of the establishments of tourist reception at national level (50.86%). A similar situation characterizes the tourist boarding houses and the agro-tourist boarding houses, with shares of 58.48% and respectively 53.23%.
- b) low comfort levels hold a significant share.** More than one third (34.6%) of the establishments of tourist reception rank in the categories of 2-star (27.86% of the establishments) and 1-star (6.74% of the establishments) comfort levels. The low comfort levels hold 29.87% of the tourist boarding houses and 34.62% of the agro-tourist boarding houses.
- c) high comfort categories reach low shares.** Only 1.5% of the establishments of tourist reception are 5-star units and only 11.32% are 4-star units. Similarly, the 5-star and 4-star comfort categories cumulate 11.53% of the tourist boarding houses and 12.15% of the agro-tourist boarding houses.
- d) accommodation capacity.** The distribution of the accommodation capacity and accommodation capacity in use by comfort categories reflects the same feature as the distribution of the establishments of tourist reception, not only overall, but also as regards the tourist boarding houses and the agro-tourist boarding houses.

One aspect that draws the attention consists in the similarities existing in terms of the distribution of the types of establishments (including boarding houses) by comfort categories. In conclusion, as regards accommodation and service quality, tourists may select from a similar array of comfort categories in terms of the various types of establishments of tourist reception, including boarding houses (either tourist boarding houses or agro-tourist boarding houses). No visible imbalance exists between the different types of establishments of tourist reception relative to the comfort categories. Thus, the choice of a specific type of establishment seems not to be affected by disparities in comfort categories.

Besides the favorable evolution of boarding houses as type of establishments of tourist reception, the use of accommodation capacity in use requires further consideration. The “net use index of the tourist accommodation capacity in use” is calculated as ratio between the

number of overnight stays and the capacity of tourist accommodation in use in the respective period. In 2015, the index level was 17.7% for tourist boarding houses and 15.1% for agro-tourist boarding houses (National Institute of Statistics, 2016, p. 35). These values are rather low. They do not surpass half of the index value for hotels (36.3% in hotels). The indices are below those specific to tourist villas (21.7%), hostels (20.4%) and houselet-type units (20%). Two key aspects relative to the present state of the agro-tourist boarding houses are worth noticing. The former consists in the fact that agro-tourist boarding houses are in the growth stage of their evolution on the Romanian market. The latter is the contrast between the potential accommodation capacity and the degree of use of that capacity.

The statistical data reveal that boarding houses represent half of the number of establishments for tourist reception and a significant accommodation capacity in Romania. However, there is “the other side of the coin” consisting in a low net use index of the tourist accommodation in use. This paradoxical situation leads to the hypothesis that boarding houses in general, and agro-tourist boarding houses in particular, design and apply ineffective positioning strategies. Within this context, the term “ineffective” refers to the inability to generate the desired results, respectively a higher value of the net use index.

4. Research on the online positioning of the agro-tourist boarding houses

After the assessment of the present state of development, an exploratory research was designed and implemented starting from the hypothesis founded on statistical data.

4.1. Research methodology

The goal of the research was to study whether online positioning strategies of the agro-tourist boarding houses are designed to be effective, specifically to generate the desired impact on tourists. The objectives of the research were: (i) to discern the types of customers targeted by these agro-tourist boarding houses; (ii) to search the main pillars on which positioning relies in this sector; (iii) to identify the points of parity; (iv) to find the types of points of differentiation communicated online; (v) to investigate the core brand promise of the agro-tourist boarding houses.

The research was exploratory and based on the analysis of secondary sources of information available in online touchpoints such as Web portals presenting the offering of these operators. Sources of data about the agro-tourist boarding houses are not only the own sites of these establishments, but also the portals that facilitate the access of tourists to information on the offering of a relatively large number of boarding houses. The portals accomplish a promotion function. Boarding houses provide information under the format required by the portal.

Romanian and foreign tourists may access various portals dedicated to boarding houses or agro-tourist boarding houses. Some portals integrate information on a wide range of boarding houses (including agro-tourist boarding houses) which are located in almost every region and county of Romania. An example of such portal is *lapensiuni.ro*. Other portals are limited to one or a small number of regions/areas of the country. Examples of this type of portals are the following: *cazareinsecuime.ro* (that focuses on a specific part of Transylvania) and *agrotour.ro* (which highlights the agro-tourist boarding houses located in Apuseni, Bran-Moeciu, Bucovina, Harghita, Maramures and Marginimea Sibiului).

One can find numerous portals which present the boarding houses extant in Romania. For this research, many portals with relatively large numbers of registered boarding houses or with relatively high traffic were not considered due to several reasons:

a) absence of a distinct search category “agro-tourist boarding houses” on the portal.

This situation could lead to confusion between tourist boarding houses and agro-tourist boarding houses. Such an example is the site *turistinfo.ro* that is the first in terms of

popularity in the category “Tourism” of the traffic ranking site *trafic.ro* (trafic.ro, 2016), providing the opportunity to make reservations directly with the tourist establishments. However, the search focuses on locality, county and geographical area (turistinfo.ro, 2016).

- b) **low number of registered agro-tourist boarding houses.** This is the case of *cazarelapensiune.ro* that registered more than 3000 boarding houses but displays four examples only for the search “pensiune agroturistica” / ”agro-tourist boarding house” (cazarelapensiune.ro, 2016).
- c) **unstructured manner of presentation.** Such an example is the portal *infopensiuni.ro*. For the search “pensiuni agroturistice”, the site disorderly lists many boarding houses and does not provide a structured perspective of these establishments. Boarding houses and other types of offerings (such as apartments) are presented in the alphabetic order of the localities (infopensiuni.ro, 2016).
- d) **inaccessibility of information about the agro-tourist boarding houses from Romania.** This situation is specific to high awareness sites which present boarding houses existing in Europe and worldwide. For instance, Booking.com provides information in Romanian language about “pensiuni agroturistice”, but the search options displayed refer to other countries or regions that do not include Romania (Booking.com, 2016).

Finally, the portal *lapensiuni.ro* was chosen as source of information about the agro-tourist boarding houses. This portal was launched by the company Vitrina Web Ltd. in 2011 and its objective is to become the number one portal in Romania for information on agro-tourist boarding houses and holidays in the nature (Vitrina Web, 2016a). On July 25, 2016, there were 154 agro-tourist boarding houses registered on the portal *lapensiuni.ro* (Vitrina Web, 2016b). This list comprises 8% of the total number of agro-tourist boarding houses existing in Romania. A database was created to facilitate data collection and analysis. The information entered in the database was collected according to the objectives of the research.

This research has two limitations. The former is the fact that online information reflects the potential effectiveness of the positioning designed by these establishments, not the actual image forged among Romanian and foreign tourists. The latter is the fact that online information is an indirect evidence of the positioning strategies, while the direct access to the positioning statements of the companies is rather unavailable.

4.2. Research findings

The first objective of the research was to identify the market targeted by the agro-tourist boarding houses. The search of the information available on the portal *lapensiuni.ro* reveals that most of the registered establishments have an undifferentiated targeting strategy. Their offering is addressed to all tourists irrespective of demographical and life-style characteristics. They do not focus on only one or several segments of customers.

Their approach is “inclusive” rather than “exclusive”. This targeting approach is proven by the list of provided services that includes items such as “playground for children”, “pets accepted”, “team building activities”, “bicycles for rent”, “camping / caravan area” and “horses” among others. The targeting philosophy seems to be “nobody is left aside”. Everybody is invited and welcomed, from active people that want an oasis of tranquility to families with small children, from tourists looking for leisure activities to business customers that organize team-building programs for their staff.

The second research objective was to identify the main pillars on which positioning relies in this sector. In this context, *positioning pillars* refer to the attributes of the offering which contribute to the positioning of the agro-tourist boarding houses. The analysis of the

information available on the portal for each of the 154 registered establishments led to the identification of five major pillars of positioning: (a) geographical location; (b) architectural, furnishing and decoration styles; (c) natural environment; (d) range of services/facilities; (e) prices. The information about the official comfort category assigned by specialized authorities is generally not available on the portal or on the page that presents each agro-tourist boarding house. Thus, the formal comfort category plays no role in the positioning of agro-tourist boarding houses. Only indirectly, tourists may get an idea about the comfort category by reading the information and looking at the photos available on the portal.

The third and fourth objectives of the research consisted in identifying the points of parity and points of difference. In this respect, the entire offering of all the 154 registered establishments was studied. The analysis was based on the five positioning pillars:

- a) **geographical location.** The portal invites tourists to search for agro-tourist boarding houses within specific localities, counties or region. Consequently, the positioning of each agro-tourist boarding house is either enhanced or “eroded” by the image developed among Romanian and foreign tourists relative to a locality, county or region. Maramures, Sibiu, Cluj, Alba, Brasov and Suceava are examples of counties with strong brand equity in the minds and hearts of tourists. For the agro-tourist boarding houses from these areas, the geographical location is a relevant point of differentiation compared to the tourist establishments from other counties/regions of Romania. However, within the competitive frame represented by all the 154 establishment registered on the portal, the geographical location may be considered a point of parity for all those boarding houses that are located in the same county. This is the case for at least 51.3% of the 154 establishments, respectively 21 establishments from the Maramures county, 19 from the Alba county, 14 from the Brasov county, 13 from the Cluj county and 12 from the Suceava county.
- b) **architectural, furnishing and decoration styles.** This visual positioning pillar is very important due to its strong impact upon the tourist’ decision process. The portal provides the owners of the boarding houses the possibility to display several tens of images presenting the house and its surroundings. The exploration of the images available on the portal *lapensiuni.ro* led to the identification of several distinct types of architectural, furnishing and decoration styles. They could be labeled as follows: (i) *archaic style* – specific to the traditional boarding houses that belong to an ancient period (even if they have been refurbished); (ii) *authentic style* – that reflects traditional architecture, furnishing and decoration which are specific to the region, but the houses were relatively recently built by knowledgeable craftsmen; (iii) *mixed style* – which combines in almost equal shares traditional and modern architectural, furnishing and decoration solutions; (iv) *too much non-traditional and non-authentic style* – specific to the houses that provide modern comfort levels and do not differ fundamentally from a high quality hotel in terms of furnishing and decoration; (v) *non-traditional and minimalist modern style* – which characterizes the houses that disregard the traditional architectural design of the region and replace it with an “impersonal” and unattractive style; (vi) *kitschy style* – that is not only non-traditional and not specific to the region, but also ugly, the house being painted in “aggressive” colors, furnishing and decorations being non-specific to an agro-tourist house etc. Consequently, the architectural, furnishing and decoration styles are a strong and favorable differentiation point for extremely few agro-tourist boarding houses registered on the portal, such as: Casa de Oaspeti Miclosoara (Miclosoara, Covasna), Pensiunea Aranyos (Coltesti, Alba), Cabana Motilor (Marisel, Cluj) and Pensiunea In Deal la Ancuta (Vadu Izei, Maramures). In many cases, there is a contradiction between the exterior and the

interior styles of the agro-tourist boarding house. From the perspective of tourists that like authentic and archaic styles, such “mis-matched” houses deserve neither the name of agro-tourist boarding houses nor a high ranking in terms of clear, relevant and attractive positioning. In the case of many agro-tourist boarding houses, the positioning based on the pillar “architectural, furnishing and decoration styles” is ineffective and may even lead to the exclusion of those boarding houses from the consideration set of tourists searching for authentic and engaging experiences.

- c) **natural environment.** Most of the visual representations on the portal show beautiful and peaceful landscapes and the “greatness of wild nature”. This is an important positioning pillar, but often leads to points of parity rather than to points of differentiation in comparison to the competitive frame of reference. Nevertheless, nature attractiveness facilitates differentiation in the case of entrepreneurial owners who decide to offer tourists the opportunity to participate in guided trips and hikes.
- d) **range of services/facilities.** Most of the 154 agro-tourist boarding houses registered on the portal *lapensiuni.ro* provide a diversified range of services/facilities. An overview of these services/facilities is presented in the following table:

Services/facilities	Number of agro-tourism boarding houses providing that service/facility	Share in the total number of agro-tourism boarding houses registered on the portal <i>lapensiuni.ro</i> (%)
Terrace or turret	144	93.5
Grill in the courtyard	142	92.2
Playground for children	111	72.1
Internet access	109	70.8
Restaurant	75	48.7
Selling local products	64	41.6
Pets accepted	57	37.0
Camping/caravan area	33	21.4
Teambuilding activities	33	21.4
Swimming pool	23	14.9
Horse riding	21	13.6
Bicycles for rent	20	13.0
Credit card payment	16	10.4
Didactic farm	14	9.1
Spa/wellness center	10	6.5
Services for persons with disabilities	3	1.9
Fish pond	1	0.6
Total (agro-tourist boarding houses registered on <i>lapensiuni.ro</i>)	154	100,0

Table 2. Services/facilities provided by the agro-tourist boarding houses

Source: Based on data available on the portal *lapensiuni.ro* (Vitrina Web, 2016b).

Several services/facilities are common attributes for more than 70% of the agro-tourist boarding house. This is the case of the following services/facilities: terrace or turret, grill in the courtyard, playground for children and Internet access. Restaurants are points of parity for almost half of the agro-tourist boarding houses.

The data from table 2 shows that differentiation became reality in this sector. There are boarding houses that provide value-added services to more demanding tourists. One fifth of the agro-tourist boarding houses provide facilities for team building activities. These facilities are not just points of differentiation from competitors, but ways to

attract business customers and expand the target market. Didactic farms represent points of difference for 9.1% of the agro-tourist boarding houses. They allow those establishments to target families with children and very likely schools that organize summer camps. The camping/caravan areas and the bicycles for rent may be points of difference in the eyes of a more dynamic and eventually younger target.

Swimming pools and spa/wellness centers may raise questions relative to the classification of the establishments of tourist reception as agro-tourist boarding houses. In addition, authenticity may be questioned.

- e) **prices.** The range of prices is very wide. For instance, for accommodation and breakfast, prices start from 30 lei/person/night or 60 lei/double room/night and reach levels of 420 lei/double room/night. Tourists may choose to pay for accommodation and 2-3 daily meals. In contrast, several boarding houses have a more sophisticated marketing strategy. They provide a variety of value-added services and each of them brings cash flow to the agro-tourist boarding house. Examples are diverse, from an additional bed in the room to trips organized for groups of tourists and selling produce from own farm. However, price comparisons are irrelevant when they are not backed by comparisons of the comfort categories and of the free/paid services provided. Price comparisons are also difficult because some owners quote the price per person and others the price per room. Two aspects must be underlined. Firstly, price is a powerful differentiator between the agro-tourist boarding houses and the other types of establishments of tourist reception, especially hotels. These boarding houses represent a very affordable solution for staying in the middle of the nature and enjoying traditional food recipes. Secondly, most of the 154 agro-tourist boarding houses focus on lower price levels. For them, price is a point of parity, not of differentiation. The houses that tend to charge higher prices are fewer and usually they provide more authentic environment and distinctive tourist experience.

The fifth objective of the research was to investigate the core brand promise of the agro-tourist boarding houses. On the page dedicated to each boarding house, the first sentences played the role of value proposition or core brand promise (even if the paragraph did not have this title). The analysis of the value propositions presented on the portal by the 154 establishments revealed that a very small number of agro-tourist boarding houses paid attention to the online communication of their positioning to the target customers. Many core brand promises are just enumerations of the attributes of the offering, respectively of the services/facilities. References to the natural environment are also part of the core brand promises or value propositions. Benefits for tourists are often overlooked.

The agro-tourist boarding houses which designed an impactful communication of their value proposition or core brand promise selected carefully the words, idioms, metaphors and sentences for the “introductory paragraph”, in order to build an emotional connection with the potential customers. Some relevant examples are the following: “an archaic place like from a fairytale and from immemorial times”, “unforgettable holidays”, “the house of grandparents”, “the beauty [of nature] that our ancestors appreciated”, “We created for you, with love, a special place where you’ll be pampered [...]”, “It is located away from civilization, a place where to meet yourself again is easier. All told, [a place] to recharge your batteries that you consume along the year, when you are «connected».”. Many introductory paragraphs have functional character. They plainly describe the components of the offering and mention the locality or region where the house is located. They do not contribute to the formulation of the value proposition / core brand promise. Nevertheless, such presentations indirectly contribute to positioning by providing reasons to believe in the offering of the boarding house.

5. Conclusions and recommendations

In Romania, this research is the first that explored whether the online positioning of agro-tourist boarding houses is designed to be effective. Findings reveal that examples of establishments that master professionally the online positioning are few. Most entrepreneurs in this field overlook the crucial role of the online positioning. The stages of the positioning process are often disregarded with direct and negative consequences upon the demand of the target market. This is also signaled by the low level of use of the extant accommodation capacity while the number of agro-tourist boarding houses increased substantially.

The research revealed that agro-tourist boarding houses apply an undifferentiated targeting strategy and have an “inclusive” rather than “exclusive” approach. This strategic choice is double-edged. On one side, the owners of the agro-tourist boarding houses may benefit from a diversified pool of potential customers. On the other side, the lack of specificity and dedication to a particular tourist profile may have an adverse impact. Customers may doubt that a specific agro-tourist boarding house is the right choice for them when the offering is addressed to the entire universe of tourists that might be interested.

Considering the competitive frame consisting in the 154 agro-tourist boarding houses registered on the portal, the major pillars of positioning are: geographical location; architectural, furnishing and decoration styles; natural environment; range of services/facilities; prices. The thorough analysis of their online positioning revealed that it is far from being designed to be effective. Firstly, most of the agro-tourist boarding houses share numerous points of parity with other similar establishments in terms of the main positioning pillars. Secondly, a very small number of agro-tourist boarding houses developed points of difference centered on value-added services such as: didactic farms, bicycles for rent, teambuilding training facilities and camping/caravan areas. Thirdly, the customer value propositions or core brand promises are rather functional and usually overlook the benefits expected by tourists. Enumerations of offering attributes and references to the natural environment are the basic framework of the value propositions.

These findings are relevant to the research and managerial fields. The initial hypothesis based on statistical data (according to which the online positioning of the agro-tourist boarding houses is not designed to be effective) is also sustained by the findings of the exploratory research. Further descriptive studies may confirm or not this hypothesis by investigating the actual image of the agro-tourist boarding houses among tourists. The relevance for the management of the agro-tourist boarding houses is obvious. Firstly, many of these establishments of tourist reception must reconsider their positioning strategies in the online environment. Secondly, the entrepreneurs that intend to start such a business are recommended to learn the right lessons from the marketing practice of the extant agro-tourist boarding houses, especially to develop a more inspiring and creative positioning, conveying a five-sense tourist experience. Thirdly, all stakeholders may participate in this shift, not only the owners of the boarding houses. Customers may provide honest feedback. Communities may be more demanding relative to the development of agro-tourism and provide advice and support to entrepreneurs. The associations in the tourism sector may also contribute to the promotion of a new way of thinking. Finally, decision-makers at the macro-level may initiate and enhance a change process that could benefit the brand image of the Romanian agro-tourism and have positive impact upon the brand image of the country.

In a very competitive European tourist market, Romanian agro-tourism has a significant untapped potential of traditions, as well as of natural and human resources. Only attractive value propositions multiplied by innovation and authenticity in positioning may transform agro-tourist boarding houses from just a numerous presence into successful business models.

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