



Review Paper

An Overview on Romanian Tourism to the Middle East: Possibilities of Travel to and Knowledge of the Region

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Abstract

This paper aims to draw a picture of the tourist relations between Romania and the Middle East, a region which has become more prominent on the country's tourist market in the last decade. There are two facts that make this region attractive to Romanians. The first one is that it is new and new destinations, surrounded by a small amount of mystery and exoticism always appeal to the market. The second reason is that the array of destinations in this region is suitable for a large number of types of tourism: coastal tourism, religious tourism, shopping tourism and of course, cultural tourism. However, even if as already mentioned, mystery and exoticism have the potential to make a destination more attractive, too much of this, especially mystery, can have the exact opposite effect in tourism, driving customers away. Considering this, it was decided to split this paper in two main parts: the first one analyzes the current state of the tourist offer to the Middle East in Romania by means of analyzing the offers of certain tour operators and the second one is a direct research which had the purpose to determine the level of knowledge the survey's subjects had regarding the Middle East and tourism to this region.

Keywords: Middle East, Romania, Tourism, Travel, Tour operators, Perceptions, Knowledge.

Introduction

Although nowadays tourism is one of the world's most significant economic sectors, the demand for tourist products is easily influenced by various external factors, such as economic downturns and instability. Political and economic instability create difficulties to all companies from all fields and tourism is certainly no exception.

Up until 2007, global tourism showed a stable growth, significantly above the previously anticipated yearly rate of 4.1 % until 2020, as forecasted by the World Tourism Organization. Worldwide international tourist arrivals reached about 900 million in the year 2007, with Europe being the region that received the greatest number of arrivals, totaling 53% of inbound tourism in 2008¹.

On a European level, we can observe that traditional tourist destinations such as the Mediterranean or Western Europe have experienced slowdowns in international tourist arrivals, stagnations or in some cases even declines (ex.: Greece). On the other hand in other areas of the world, particularly in developing countries we can see the exact opposite: travel and tourism industries are steadily developing even in times of crisis. Such examples include South Asia, China, the Middle East and parts of Latin America². This brings new opportunities for tour operators, who encountered a high risk of financial difficulties

considering the decline of the traditional mature destinations to which they had offered travel packages. Travel companies that will capitalize on the opportunities provided by emerging destinations will be able to counteract the effects of the current economical downturn at least partially by broadening their array of travel products, thus satisfying the needs of the increasingly particular and well documented clients.

Main points in marketing destinations

The beginning of the 2008 economic crisis brought about a few changes in the behavior of international tourists in regards to the distance they are willing to cover during vacations. Long range destinations are performing lower than they used to. For example, European arrivals to the Americas significantly lowered during the crisis. Medium range destinations however have been performing better, so long as there is a convenient quality/price ratio. Consequently, countries like Turkey and Morocco are doing fairly well on the European market. Opposite to their medium and long range correspondents, short range destinations are performing well in all segments, thanks to their convenient prices and more fit shorter duration, considering the current economic circumstances.

Clearly, two important components in the popularity of a destination are price and to some extent political and economic conditions. Another equally significant component is the

destination's brand. Branding and brand perceptions strongly affect tourist's impressions regarding a destination. Destination branding can be defined as a method of promoting a destination's unique identity by differentiating it from its competitors³.

Another noteworthy aspect is that a destination's tourist and services assets must be integrated with existing elements⁴. These existing elements simply refer to the natural and cultural attractions, as well as other elements like infrastructure. The natural setting with its components (topography, rivers, fauna, vegetation, climate, natural reservations etc) represents the framework where tourism takes place. If it possesses outstanding qualities it can generate significant tourist flows. If not, it simply represents the background of other elements of attractiveness. Some examples of natural resources of great esthetic value include valleys, canyons, mountain peaks, cliffs, ski slopes, deserts, waterfalls, lakes, geysers, beaches, deltas, swamps, estuaries etc⁵.

Cultural resources or man-made attractions, built in various periods of history, greatly contribute to increasing a destination's attractiveness and to strengthening its brand. The most important characteristics of cultural attractions which leave a mark on their tourist value and attractiveness are: uniqueness, age, dimensions, level of conservation, historical significance and international recognition⁶. The highest international recognition a monument (either natural or man-made) can get is by gaining recognition as a UNESCO World Heritage Site. A destination's tourist potential grows along with factors such as the number of tourist attractions, their quality and to some extent their geographical distribution. The attractiveness of a tourist destination is also determined by the number of types of tourism available. The more varied the types

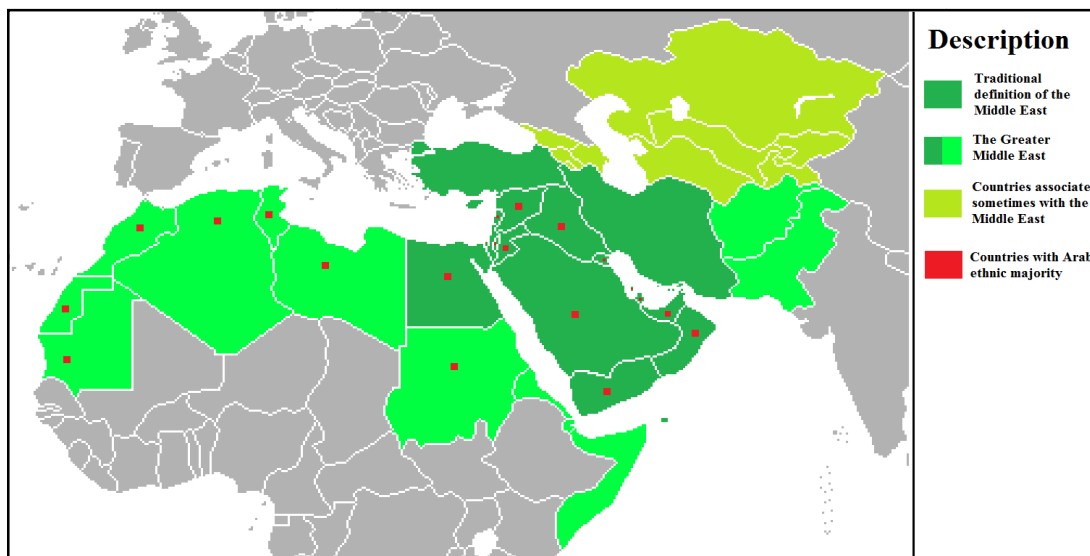
of tourism, the higher the chances a destination has of attracting more visitors⁷. Destinations that diversify their tourist portfolios are able to increase their number of visitors and increase their loyalty.

Defining the borders of the Middle East

Traditionally the geographical meaning of the Middle East has been defined as follows: a region in the western part of Asia whose borders are The Armenian Plateau to the north, The Arabian Peninsula to the south, The Nile Valley to the west and The Zagros Mountains to the east⁸. The countries included by this traditional definition are: Bahrain, Cyprus, Egypt, Iraq, Iran, Israel, Jordan, Kuwait, Lebanon, Oman, Palestine, Qatar, Saudi Arabia, Syria, Turkey, the United Arab Emirates (UAE) and Yemen.

There is another more recent definition of the *Greater Middle East*, which was initially proposed by the representatives of the US at the G8 Summit of 2009. According to them, the Middle East is the region extending from the Himalayan Plateau to the shores of West Africa from east to west and from the Armenian Plateau to Eastern Africa from north to south⁹. The countries included by the newer definition are the ones above plus Morocco, Western Sahara, Mauritania, Algeria, Tunisia, Libya, Sudan, Djibouti, Somalia, Eritrea, Afghanistan and Pakistan. Sometimes the eight countries of Central Asia and the Caucasus are also included in this extended definition because of the cultural differences between them and Europe. These additional nations are: Armenia, Azerbaijan, Georgia, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan.

The map of the Middle East according to both definitions is shown in Figure-1.



Source: Own work, based on the sources already mentioned in the paper's main body

Figure-1
Map of the Middle East according to multiple definitions

The *Middle East* should not be confused with other geopolitical terms like the *Arab World* or the *Muslim World*¹⁰. Many of the countries included in the definitions of the Middle East are also included by the definitions of the other two terms, but they are nonetheless different notions.

Romanian tour operators' travel offer for the Middle East

In this section of the paper we will make an analysis of several tour operators' offers for travel packs to the Middle East. The 22 tour operators were selected on three criteria: i. Location: all the tour operators' head offices are located in Bucharest, Romania's capital and largest city (however, the majority of these – 14/22 – have subsidiaries in other cities across the country, making their offer accessible to all Romanian nationals); ii. Age: all were founded before 2005; iii. Travel offers: all tour operators offer travel packages to at least three Middle Eastern countries – without this criterion the selection would have been much wider as almost all Romanian tour operators offer travel packages to Turkey.

The tour operators' offers were split into two main categories: tours (travel offers which include accommodation in more than one location) and holidays (offers which include accommodation in just one location – includes city breaks). The Romanian terms are *circuit* and *sejur*. This simple classification of travel offers has been widely used by Romanian tour-operators, ever since the emergence of private travel enterprises in 1990, right after the fall of communism¹¹.

The offers found by this analysis are illustrated in Table-1. This table also shows the minimum and maximum prices for each country's travel packages as well as the minimum and maximum length for these travel packages (*note: the minimum and maximum price and length shown for each country do not necessarily belong to the same package*). The validity period of these offers was April-September 2015. The Middle Eastern nations included in this analysis were selected according to the definition of the Greater Middle East. The selected Romanian tour operators offer travel packages to no less than eleven Middle Eastern nations: Israel, UAE, Egypt, Turkey, Cyprus, Jordan, Morocco, Tunisia, Iran, Oman and Armenia.

Table-1A
Overview on Romanian tour operators' offer of travel packages to the Middle East

	Israel		UAE		Egypt		Turkey		Cyprus	
	Pr.	N	Pr.	N.	Pr.	N.	Pr.	N.	Pr.	N.
Minimum	219	2	520	6	293	4	105	3	217	6
Maximum	765	9	5.555	7	1.034	15	1.609	11	1.290	7
Max.-Min.	546	7	5.035	1	741	11	1.504	8	1.073	1
Types of packages	H	T	H	T	H	T	H	T	H	T
Paralela 45	x	x			x	X	x	X	x	
TUI Travel Center	x	x	x		x		x		x	
TEZ Tour			x		x		x			
Europa Travel	x	x	x		x	X	x	X	x	
Christian Tour	x	x	x		x		x			
Kara Travel		x				X	x	X		
Prestige Tours		x	x			S	x		x	
Perfect Tour			x				x	X	x	
Eximtur	x	x	x		x	x	x	X	x	
Genius Travel	x		x		x		x	X	x	
Happy Tour		x	x				x		x	
Marshal Turism	x	x	x			x	x		x	
DAL Travel			x	c	x		x	X	x	
Premier Tour		x	x			x	x	X		
Alida Holidays		x	x			x	x	X		
Alltur	x		x				x		x	
ABC Tours		x	x				x	X		
Pegas Holiday		x	x				x	X	x	
DERTOUR	x	x	x		x		x	X	x	
J'Info Tours		x	x	c	x	x	x	X	x	
Basilica Travel		x				x	x	X		
TAROM Tours	x		x				x		x	

Description: x –package available; s –only available as a secondary destination within a multi-national tour; c - cruise; H - holiday; T. - tour; n. - nights. Prices are inEuros andthey do not include airport taxes.

Source: Own work, based on information found on the tour operators' websites.

Table-1B
Overview on Romanian tour operators' offer of travel packages to the Middle East

	Jordan		Morocco		Tunisia		Iran		Oman		Armenia	
	Pr.	N.	Pr.	N.	Pr.	N.	Pr.	N.	Pr.	N.	Pr.	N.
Minimum	294	3	434	6	300	4	850	7	1.200	5	1.100	10
Maximum	1.071	10	1.200	14	1.776	13	1.260	10	2.000	10	1.100	10
Max.-Min.	777	7	766	8	1.476	9	410	3	800	5	0	0
Types of packages	H	T	H	T	H	T	H	T	H	T	H	T
Paralela 45		s		x				x				
TUI Travel Center												
TEZ Tour												
Europa Travel		s		x								
Christian Tour												
Kara Travel				x								
Prestige Tours												
Perfect Tour	x	x	x	x	x							
Eximtur			x		x							
Genius Travel			x									
Happy Tour		s										
Marshal Turism									x			
DAL Travel				x				x		s		x
Premier Tour		s										
Alida Holidays												
Alltur												
ABC Tours				x								
Pegas Holiday												
DERTOUR					x							
J'Info Tours	x			x	x							
Basilica Travel		s										
TAROM Tours	x											

Description: x –package available; s –only available as a secondary destination within a multi-national tour; c - cruise; H - holiday; T. - tour; n. - nights. Prices are inEuros andthey do not include airport taxes.

Source: Own work, based on information found on the tour operators' websites.

While examining the travel offers of the selected tour operators, one geographical aspect immediately caught the eye. 17 of these tour operators classified their offers by continents. Nine of them classified Turkey as a European destination while only eight classified it as an Asian one. In spite of being a transcontinental country, the European part of Turkey comprises less than 5% of the total territory¹². Furthermore, all tour operators include their offers for Cyprus in the Europe category. Even though Cyprus can be considered European nation from a cultural point of view because of the fact that Greeks are the dominant ethnicity, geographically it is clearly in Asia, as the island is located less than 150 km from the Syrian and Lebanese coasts¹³. The only offer for Armenia is correctly classified in the *Asia* category¹⁴. A summary of these findings can be seen in Table-2.

The main transportation method provided by the selected tour operators from Romania to the Middle East is almost exclusively air transport either by regular flights (TAROM or Middle Eastern airlines such as Turkish Airlines, El Al, Emirates or Qatar Airways) or by charter flights, the latter being particularly popular for Antalya and Egyptian Red Sea resorts. The only exceptions are some city breaks to Istanbul and some tours in Turkey. The transportation method chosen for some of these travel packages is the bus, as the distance between Bucharest and Istanbul is less than 650 km. Up until 2011 there were a few travel packages which included land transportation to Israel. But the Syrian Arab Spring which broke out in March 2011 and eventually turned into a full scale civil war¹⁵ forced the indefinite cancellation of all these trips.

Table-2

The continental classification of Turkey according to the selected tour operators; the slogan chosen for the presentation of Dubai, UAE by the same tour operators

Tour operator	Turkey			Dubai/ UAE	Tour operator	Turkey			Dubai/ UAE
	Europe	Asia	None			Europe	Asia	None	
Paralela 45	x			-	Marshal Turism			x	Dubai
TUI Travel Center	x			Dubai	DAL Travel		x		EAU
TEZ Tour			x	EAU	Premier Tour	x			Dubai
Europa Travel	x			Dubai	Alida Holidays			x	Dubai
Christian Tour		x		Dubai	Alltur			x	Dubai
Kara Travel			x	-	ABC Tours	x			Dubai
Prestige Tours	x			EAU	Pegas Holidays		x		Dubai
Perfect Tour		x		EAU	DERTOUR		x		EAU
Eximtur	x			Dubai	J'Info Tours	x			Dubai
Genius Travel		x		EAU	Basilica Travel		x		-
Happy Tour	x			EAU	TAROM Tours		x		Dubai
TOTAL						9	8	5	Dubai: 12

Source: Own work, based on information found on the tour operator's websites.

The situation regarding the types of travel packages varies from country to country. The vast majority of travel packages for Israel are tours and they focus on cultural and religious tourism. All these tours include accommodation in Israeli cities like Jerusalem, Haifa, Tel Aviv, Nazareth or Tiberias, but most also include visits to at least one city in the Palestinian Territories: Bethlehem or Jericho. Holidays in Israel usually come in two forms: three day city breaks to Tel Aviv or one week stays in Eilat, Israel's only Red Sea resort. There is also one offer for a seven day stay in Bethlehem which includes excursions to other nearby holy cities and sites. The most noticeable major Israeli tourist attractions missing from the Romanian tourist operators' offers are Acre and Masada. Another interesting fact about travel packages to Israel is that out of all countries examined, this one has the smallest difference between the minimum and maximum price.

The travel offers for the United Arab Emirates (UAE) focus almost exclusively on one single destination: Dubai. The main form of tourism promoted is shopping tourism, with stays in luxury hotels (4* and above). Predictably, the UAE has the most pricy offers (a six nights stay at the Burj al-Arab) and the biggest difference between the lowest and highest price. There is only one tour operator in Romania which offers travel

packages other emirates, namely: Abu Dhabi, Sharjah, Fujairah and Umm al-Quwain. This is probably the reason why most tour operators (12/19) promote their travel packages to the UAE under the slogan "Travel to Dubai", not "Travel to the UAE" (see table 2). Finally, there is also an offer for a cruise in the Persian Gulf (the only such offer for the Middle East), which includes stops in Abu Dhabi, Dubai, Fujairah, Sharjah and Masqat, the capital of Oman. The only offer that focuses exclusively on Oman comes from a tour operator which offers its clients one week holidays at *Al Bustan Palace*, one of the oldest luxury hotels in the Arab Peninsula¹⁶.

One of the most popular Middle Eastern tourist destinations in Romania as well as all over the world is Egypt. Prior to January 2011, when the revolution against the regime of Hosni Mubarak took place, the vast majority of Romanian tour operators offered travel packages to Egypt. This event led to a temporary but firm slowdown in tourist flows from Romania to Egypt. But after the relative stabilization of Egyptian politics, the general situation started to return to the pre-Arab Spring level. At the time of the analysis 16 out of the 22 selected tour operators had travel offers to Egypt. Tours in Egypt focus on the ancient vestiges on the Nile Valley located in cities like Cairo, Alexandria, Luxor and Aswan, while most holidays are in Hurghada and Sharm el-

Sheikh, Egypt's main Red Sea resorts. Other destinations include Port Said and Suez, the northern and southern limits of the Suez Canal. Out of all offers analyzed, the longest are in Egypt (up to 15 days in Hurghada). The main types of tourism promoted are cultural tourism (The Nile Valley), coastal (the Red Sea resorts) and shopping (Port Said and Suez).

The most visible Middle Eastern destination on the Romanian travel market is Turkey. This country can be considered one of the least expensive luxury destinations. The hotels in the Antalya region are comparable to those in Dubai in terms of quality standards, but the travel package's prices make them accessible for a broader section of the public (maximum price: €1,300 for 11 nights, all inclusive). The tours, which are done almost exclusively by bus, cover Istanbul and cities and resorts in the western part of the country like, Izmir, Ephesus, Kuşadası, Bergama, Marmaris, Bodrum and Pamukkale, but also the Cappadocia region. The southern resorts of the Antalya region are almost exclusively promoted as destinations for long-term stays. Even though Turkey is the most popular destination in the region for Romanians, a few Turkish regions have not yet been exploited on the Romanian travel market: the Black Sea coast (Samsun, Trabzon, Rize etc), some southern resorts (Adana, Iskenderun) and Turkish Kurdistan (cities like Van, Şanlıurfa and Diyarbakır)¹⁷. Several types of tourism are being promoted: cultural tourism (in Istanbul and the Aegean coast), coastal tourism (Antalya and the Aegean coast) and shopping (Istanbul). There is only one agency which explicitly promotes religious tourism to certain Christian holy sites.

Apart from these four major Middle Eastern destinations, travel offers to other smaller countries in the region are starting to emerge. The first of these is Cyprus. The travel offer for this country is integrally made up of stays in a few seaside resorts from the south of the island: Limassol, Larnaca and Paphos. The capital Nicosia and the northern part of the island are currently not being promoted in Romania. But then again, the northern part of the island, which is controlled by the self-declared Turkish Republic of Northern Cyprus ever since July 1974¹⁸, is not nearly as active as the Greek part in international tourism. Prices for travel packages to Cyprus vary from €217 to €1,290, thus making the island accessible for all sections of the Romanian travel market.

Jordan is also present as a travel destination in the Romanian tour operators' offers, although it's usually only a secondary destination within tours that focus on Israel. The most popular destinations in Jordan are the capital Amman, The Dead Sea, Petra and religious sites such as Bethany – the place where Jesus Christ was baptized and Mount Nebo – the mountain from which Moses took a glimpse of the Promised Land before he passed away¹⁹. There are also a few offers for city-breaks in Amman and holidays in Aqaba, Jordan's only coastal city, located close to the Israel's Eilat. The main types of tourism promoted are cultural, religious and coastal tourism. Although most travel packages to Jordan include visits to The Dead Sea,

one of the world's saltiest bodies of water²⁰, spa tourism is not being explicitly promoted.

In the cases of Israel, Turkey and Jordan religious tourism and cultural tourism have been treated separately. Although sometimes religious tourism is considered to be just a sub-domain of cultural tourism²¹, when studying Romanian travel habits, it is important to distinguish between cultural tourism and religious tourism. This is mainly because of the relatively high importance held by religion in this country. According to Eurobarometer statistics, 92% of Romanians believe there is a God, the second highest such percentage in Europe, with a further 7% believing that there is some sort of spirit or life force, leaving only 1% with no sort of religious beliefs²². Even though only 10% of the respondents stated that they were fully devout believers, many people who have the financial means of traveling to these Middle Eastern destinations chose to do it with the express purpose of visiting biblical holy sites.

Before 2011, there was a consistent array of travel packages to Tunisia. But right after the start of the Arab Spring, which started in Tunisia in December 2010, this country almost vanished from the Romanian travel market. Although this geopolitical incident ended in January 2011, the Romanian tour operators' travel offer to Tunisia did not fully recover. At the time when the analysis took place only a few tour operators had offers for Tunisia, which mainly consisted of 4 to 13 day holidays in resorts like Hammamet, Sousse, Mahdia, Monastir or Gammarth.

The main reason for the slow recovery of Tunisia is that right after the cancellation of all offers caused by the Arab Spring it was quickly replaced by Morocco, another North African nation which up until that moment was a rather anonymous destination in the eyes of the Romanian public. At the moment, seven of the tour operators considered for this analysis offer travel packages to Morocco. Most of these consist of cultural tours that cover the country's major cities: Marrakech, Casablanca, Fez, Meknes and Rabat. There are also some offers for city-breaks in Marrakech and holidays in Agadir and Essaouira, seaside resorts on the Atlantic coast. Even though the price array for travel packages to Morocco is fairly broad, it restricts the access of the lower income categories to this country.

A recently appeared travel destination on the Romanian travel market is Iran. Right now there are only two tour operators that offer cultural tours that cover cities in the western part of Iran: Shiraz, Yazd, Esfahan, Hamedan, Kermanshah and Teheran. The prices for these tours of 8 and 11 days are €850 and €1,260 respectively. Despite the rich cultural heritage of Iran, there are many obstacles in the way of developing travel flows to this country: the visa regime, the instable relations with Israel and the West and certain religious restrictions instated by the Islamic regime that rose to power over 30 years ago²³.

Finally, a last recently appeared Middle Eastern destination on the Romanian travel market is Armenia. The only offer for

Armenia was a tour that covered numerous religious sites around the country but also a few natural attractions such as Mount Aragats and Lake Sevan.

What Romanians think and know about the Middle East

This final part of this paper concentrates on a research regarding the subjects' knowledge and perception of the Middle East. This research was conducted with the help of an anonymous survey of 18 questions. The first set of questions (1 to 9) concentrate on aspects regarding the general knowledge of the region with the purpose of determining the degree of knowledge of certain facts. The second set of questions (10 to 14) has the purpose of determining the subject's opinion regarding certain controversial aspects of the Middle East. Finally, questions 15 to 18 were focused on information regarding the subjects' characteristics.

The total number of respondents to this survey was 120 and the responses were gathered between 21 April 2013 and 13 May 2013. Most of the responses (98) were gathered via a *Google Drive* e-questionnaire and the rest were gathered face to face. Over 75% of the respondents graduated some form of college education. The majority of those who did not graduate college are students, most of them at the Bucharest University of Economics. The same goes for those who have already graduated college. 82 of the subjects (68%) were 18 to 25 years old, 8 of them (15%) were 26 to 35 years old and 12 (10%) were 36 to 60 years old. Most of the subjects who were not students anymore worked at a financial investment company based in Bucharest, Romania. 53 of the subjects (44%) were full-time students, while the rest had part-time or full-time jobs. The subjects' monthly income distribution was uniform: under €100 – 24%, €100 to €200 – 18%, €200 to €400 – 24%, €400 to €800 – 24%, over €800 – 13%.

To view the exact questions of the survey and a graphical analysis of the results, please check the appendix.

All of the respondents stated that they had heard the term *Middle East* at least once before (Q1). The sources where they first heard this term were: school 49%, mass media 38%, books 7% and other sources 8% (Q2). Almost all subjects associated the Middle East with the Asian continent (98%), while 31% associated with Africa (also) and 4% associated it with Europe (also) (Q3). Interestingly, 31 respondents (26%) who associated the Middle East with Asia only, also checked African countries at question 4, especially Egypt. All those who associated the Middle East with Europe and Asia checked Turkey and/or Kazakhstan on the same list, both of which have territories located within the geographical boundaries of the European continent¹⁴.

The countries most often associated with the Middle East by the subjects were Saudi Arabia (88%), Iraq (83%), Iran (81%) and

the UAE (80%) (Q4). The Jewish State was checked by only 68% of the subjects. High figures were registered by Afghanistan (52%) and Pakistan (40%), two countries included only in the definition of the Greater Middle East. Egypt, which is included in both of the region's definitions, was checked by just 42% of the subjects. Other Arab states which were checked by less than two thirds of the respondents were: Jordan (62%), Kuwait (57%), Syria (53%) and Oman (47%). Only a handful of the respondents checked Cyprus (16%) and Armenia (10%). Clearly, most people generally associate these countries with Europe, because of their culture and identity. The African states included in the modern definition of the region were each checked by less than 15% of the subjects: Morocco 14%, Tunisia 13% and Somalia 8%. Although there were very few respondents who check all of the Middle East's countries (or the majority of them), less than 6% checked countries outside both definitions which were included in the list: India 7 checks, Nigeria 4 checks, China 3, Tanzania 2 and Indonesia, Bosnia-Herzegovina and Russia one check each. Greece and the USA were checked by none.

When it comes to the knowledge of the meaning of certain geographical and cultural terms, results vary. Almost three quarters of the respondents (73%) consider that the *Middle East* is not the same as the *Arab World* or the *Muslims World* (Q5). The territorial divisions between Israel and Palestine are rather unclear to most respondents. 71% of them were aware that there are differences between the terms *Israel*, *The Palestinian Territories*, *The West Bank* and *The Gaza Strip*, but they were unable to clearly define them, while 13% stated that they are completely unfamiliar with these terms (Q6).

Just over a quarter of the respondents (26%) were aware of the fact that the dominant ethnic group in Iran was not the Arabs (Q7). 55% believed that both Iran and Iraq were Arab states and 18% believed that neither was Arab. In reality, Iraq is a predominantly Arab country, with more than three quarters of the population belonging to this ethnicity and Iran is predominantly populated by Persians, with Arabs forming a minority of around 2% of the total population²⁴.

The UAE are a federation of seven emirates, each of them absolute monarchies fully controlled by an emir²⁵. According to the answers received, the respondents were generally aware of the existence of just two of these emirates: Dubai (117 or 98%) and Abu Dhabi (106 or 88%) (Q8). The other emirates were each checked by less than 15% of the respondents. Furthermore, almost a third of the respondents were not aware of the fact that Dubai was a province of a sovereign state, not a separate country (Q9). A contribution to this certainly belongs to tour operators or to the manner in which most of them chose to promote this destination, which we discussed earlier.

In what concerns Turkey's European identity, most respondents consider that there are some debatable issues here. At question 4, barely half of the subjects (53%) identified Turkey as a

Middle Eastern nation. When asked if Turkey can be considered a European nation, 23% of the subjects said “yes” and 19% said “no” (Q10). However the vast majority (55%) thought that Turkey can be considered European “only from certain points of view”. Therefore, even though less than a fifth of the respondents to the survey completely rejected the notion of a European Turkish identity, most of them consider the issue debatable. The figures obtained in this research are somewhat consistent with a 2007 EU opinion survey, according to which 66% of Romanians are in favor of Turkey joining the EU, the largest such percentage in the EU²⁶.

On of the main concerns worldwide regarding the Middle East is safety and security. Question 11 focused on the potential security risks in Middle Eastern countries marketed by Romanian tour operators. The results, in order of the checks for each country were: Iran 71%, Israel 63%, Egypt 53%, Jordan 41%, Tunisia 26%, Oman 21%, UAE 18%, Morocco 16%, Armenia 15%, Turkey 14% and Cyprus 5% (Q11). Concerns regarding Iran and Israel are based in reality, considering their geopolitical situation. The perception of Jordan and Egypt was most probably fueled by events brought about by the Arab Spring and perhaps by their proximity to Israel. But for the moment Jordanian internal politics significantly calmed down, so such concerns currently have no solid ground²⁷. In the case of other countries in the list this perception is most likely fueled mostly by the lack of knowledge of the region. Although in the past there were significant conflicts in Armenia and Turkey, nowadays it is not the same. Throughout the last decade PKK activity in Turkey significantly diminished²⁸ and the Nagorno-Karabakh Conflict between Armenia and Azerbaijan has been almost completely frozen since 1994²⁹. 9% of the survey’s subjects considered that there are no security risks in any of these countries.

When asked which form of tourism they think is the most representative for each of the same eleven countries, most subjects generally had a correct perception of things (Q13). Israel was predominantly associated with religious tourism (83%), but also with cultural tourism (12%). The UAE were mostly associated with shopping tourism (46%) and coastal tourism (25%). Egypt was almost unanimously considered a destination suitable for cultural tourism (80%). A majority of the respondents considered Turkey to be most fit for coastal tourism (62%), but a big minority considered it better for cultural tourism (24%). Cyprus was almost unanimously considered destination adequate for seaside tourism (88%). The most common responses in the case of Jordan were split almost equally between cultural tourism (35%) and religious tourism (33%). Because of reasons discussed earlier, Iran was considered to be unfit for tourism by a large portion of the subjects (23%). Similar figures were registered for Syria (23%), Lebanon (18%), Kuwait (20%) and Iraq (43%). Based on the number of “don’t know” answers received, we can conclude that the least known countries were Oman (48%), Kuwait (45%) and Armenia (41%).

Finally, the last question, which in fact was made up of seven components, had the purpose of determining the respondent’s perception of the region and its tourist potential through some statements regarding cultural, political and tourist aspects (Q14).

The majority of the respondents do not consider the distance between Romania and the Middle East to be a major obstacle in the growth of tourist circulation towards the region. This point of view can be easily validated by taking a glance at the travel times to a few of the region’s major destinations from Bucharest: Istanbul (7h by bus, 1h by plane), Antalya (12h by bus, 2h by plane), TelAviv (2h30’ by plane), Tunis (3h by plane), Dubai (4h30’ by plane)^{30 31}. Many of the respondents (50%) however, considered that the high prices of travel packages are an obstacle in the way of travel to the Middle East. This position can be sustained by the low average income in Romania. On the other hand, as it has been demonstrated in table1, there are a number of offers accessible to consumers with lower incomes. We should note though that these countries were not often associated with the Middle East at question 4.

Opinions regarding cultural and religious differences between the West and the Middle East were shared almost equally: 46% thought they do not represent an obstacle in the way of developing tourism to the region while 43% thought oppositely. In many cases, reality seems to give credit to those in the first category. There are several countries in the Middle East (with a Muslim majority, obviously) that have developed solid tourist industries. Such examples include Egypt, UAE, and Turkey³². There have also been surveys conducted in countries in the region, such as Tunisia, which show that extremist religious views are not common among citizens³³. Opinions are divided regarding the diversity of the available travel packages to the Middle East: 39% consider that they are sufficiently diverse, while 33% think oppositely. Although at a first glance there may seem to be widespread ideas that the Middle East is a region made up of technologically underdeveloped Third World countries with inadequate infrastructures, less than a quarter of the survey’s subjects (24%) agreed with such a statement. Although the region contains several underdeveloped countries like Yemen, Iraq, Sudan or Somalia, it is also home to countries like Qatar, Kuwait, Israel or the UAE which are comparable to Western Europe and North America in terms of technological development.

As far as the attitude of Middle Eastern locals towards foreigners goes, most respondents (45%) did not consider this to be a problem. Their opinion is sustained by the past travel and tourism competitiveness reports, according to which the average of the local’s attitude towards foreigners indexes for the whole Middle East is 6.1 out of 7, putting it 0.4 points above Romania³⁴. Finally, more than half of the respondents (53%) admit to thinking that they do not have enough knowledge of the region as they should in order to correctly evaluate its tourist

potential, a result which is consistent with the answers received in the first part of the survey.

The survey's subjects' personal characteristics did not significantly influence the quality of the answers received (Q15-Q18). The same goes even for those who have already traveled to at least one country in the region, 37 respondents or 31% of the total number of people questioned (Q12).

Conclusion

A general conclusion that can be drawn from the aspects discussed in this paper is that the Middle East is already quite present on the Romanian tourist market and has a certain potential to develop further. With a number of 11 countries in the region covered by tour operators, it can be said that there is already a visible presence of the Middle East in the Romanian tourist offer. This offer already includes a great variety of types of tourism and destinations for all tourist categories. However, at the moment, the market is dominated by offers from three countries: Turkey, Israel and the UAE.

When it comes to knowledge of the region among the local population, results could be better. From the results of the survey-based research that was undertaken, we concluded that many people are somewhat confused regarding the identity and culture of some of the countries and people of the region and even by the geographic extent of the region itself. Notable confusions were made regarding the ethnic identity of the majority of the population in Iran, with the majority of the

subjects not being aware of the fact that Iran was not an Arab country. Another theme of debate is the continental designation of Turkey, with some considering it to be either European, others considering it to be Asian and others being undecided on this matter. Some people also tend to believe that the UAE and Dubai are one and the same. As far as the geographic extent of the Middle East goes, many respondents had a tendency to associate the region only with the countries that appear most often in mass-media in negative contexts, like Saudi Arabia and Iraq. Sources of confusion are also the differences between the terms *Israel*, the *Palestinian Territories*, the *West Bank* and the *Gaza Strip*. A part of the reason for some of the confusions may be the way that tour operators promote their travel packs.

However, a relatively small number of the subjects seemed to manifest concerns regarding security risks in the region and cultural differences between their country and the Middle East region. This means that detractors against travelling are mainly related to the lack of knowledge of region and not to concerns related to the actual act of travelling to that region. In other words, promoting travel to this region would have to focus mainly on raising the awareness of the public and not in changing negative perceptions, as these are not that widespread.

This appendix contains the survey's questions and graphs that describe the results. **Total number of respondents: 120**

Q1: Have you heard the term *Middle East* at least once before?
 Answer : Yes : 100%

Table-3
Answers to Q2 of the survey

Q2: Where did you first hear the term "Middle East"?		
	No. of answers	% of total answers
In school	57	48
In mass-media	45	38
In books and articles	8	7
Elsewhere	10	8

Table-4
Answers to Q3 of the survey

Q3: What continent(s) are you inclined to associate the Middle East with? (You can choose more than one)?		
	Answers	% of total answers
Asia	117	97.5
Africa	37	30.8
Europe	5	4.2

Table-5
Answers to Q4 of the survey

Q4: In the following list, check the countries that you consider to be part of the Middle East		
Country	No. of answers	% of total answers
Afghanistan	62	51.7
Armenia	13	10.8
Bosnia-Herzegovina	1	0.8
China	3	2.5
Cyprus	19	15.8
Egypt	50	41.7
Greece	0	0.0
India	7	5.8
Indonesia	1	0.8
Iran	97	80.8
Iraq	100	83.3
Israel	82	68.3
Jordan	74	61.7
Kazakhstan	33	27.5
Kuwait	68	56.7
Morocco	17	14.2
Nigeria	5	4.2
Oman	56	46.7
Pakistan	47	39.2
Russia	1	0.8
Saudi Arabia	105	87.5
Somalia	9	7.5
Syria	63	52.5
Tanzania	2	1.7
Tunisia	15	12.5
Turkey	63	52.5
UAE	96	80.0
USA	0	0.0

Table-6
Answers to Q5 of the survey

Q5: Do you think there are any differences between the term "Middle East" and other geopolitical terms like "Arab World" or "Muslim World"?		
	No. of answers	% of total answers
Yes	88	73.3
No	32	26.7

Table-7
Answers to Q6 of the survey

Q6: Do you know the differences between the terms "Israel", "Palestinian Territories", "West Bank" and "Gaza Strip"?		
	No. of answers	% of total answers
Yes, completely	19	15.8
I know there are differences, but I do not know all of them	85	70.8
No, not at all	16	13.3

Table-8
Answers to Q8 of the survey

Q7: Do you know the differences between the terms "Israel", "Palestinian Territories", "West Bank" and "Gaza Strip"?		
	No. of answers	% of total answers
Yes, both are Arab countries	66	55.0
Only Iran	1	0.8
Only Iraq	31	25.8
No, none of them is an Arab country	22	18.3

Table-9
Answers to Q8 of the survey

Q8: You are familiar with the existence of how many of the United Arab Emirates' seven emirates? Check the familiar ones in the list below.		
	No. of answers	% of total answers
Abu Dhabi	106	88.3
Dubai	117	97.5
Sharjah	22	18.3
Ras al-Khaimah	16	13.3
Ajman	15	12.5
Fujairah	12	10.0
Umm al-Quwain	14	11.7

Table-10
Answers to Q9 of the survey

Q9: Until the previous question were you aware of the fact that Dubai is a province of a sovereign nation, NOT a sovereign nation itself?		
	No. of answers	% of total answers
Yes	84	70.0
No	36	30.0

Table-11
Answers to Q11 of the survey

Q10: Do you believe that Turkey can be considered a European country?		
	No. of answers	% of total answers
Yes	27	22.5
No	23	19.2
Only from some points of view	66	55.0
I do not know	4	3.3

Table-12
Answers to Q12 of the survey

Q11: In which of the following countries present in the Romanian tour operators' tourist offers do you think there may be risks regarding safety and security?		
	No. of answers	% of total answers
Israel	75	62.5
UAE	22	18.3
Egypt	63	52.5
Turkey	17	14.2
Cyprus	6	5.0
Jordan	49	40.8
Morocco	19	15.8
Tunisia	31	25.8
Iran	85	70.8
Oman	25	20.8
Armenia	18	15.0

Table-13
Answers to Q12 of the survey

Q12: Have you travelled to any of the countries mentioned in the previous question (Q 11)? If YES, check it/them. If NO, go to question 13.		
	No. of answers	% of total answers
Israel	7	5.8
UAE	5	4.2
Egypt	4	3.3
Turkey	29	24.2
Cyprus	4	3.3
Jordan	6	5.0
Morocco	6	5.0
Tunisia	4	3.3
Iran	2	1.7
Oman	3	2.5
Armenia	0	0.0

Table-14

Answers to Q13 of the survey. The figures given the first row of each category represent the effective number of responses received and the ones in the second row represent the percentage of respondents who chose that answer.

Q13. Which type of tourism do you think is the most representative for the following countries?															
Israel	UAE	Egypt	Turkey	Cyprus	Jordan	Morocco	Tunisia	Iran	Oman	Armenia	Kuwait	Saudi Arabia	Syria	Lebanon	Iraq
Coastal tourism															
3	30	14	74	105	5	18	69	1	14	2	4	6	3	6	0
3	25	12	62	88	4	15	58	1	12	2	3	5	3	5	0
Cultural tourism															
14	8	96	29	5	42	64	25	26	12	27	12	32	35	31	15
12	7	80	24	4	35	53	21	22	10	23	10	27	29	26	13
Religious tourism															
99	5	4	1	0	40	6	1	6	6	5	3	28	7	8	5
83	4	3	1	0	33	5	1	5	5	4	3	23	6	7	4
Shopping tourism															
0	55	1	11	3	0	7	0	0	2	1	7	5	2	2	1
0	46	1	9	3	0	6	0	0	2	1	6	4	2	2	1
Mountain tourism															
0	0	0	1	0	0	1	2	4	1	11	1	2	2	0	1
0	0	0	1	0	0	1	2	3	1	9	1	2	2	0	1
Other types of tourism															
0	10	2	4	2	8	9	7	16	11	9	15	11	10	11	13
0	8	2	3	2	7	8	6	13	9	8	13	9	8	9	11
None															
2	2	0	0	0	6	1	2	28	17	16	24	11	26	22	51
2	2	0	0	0	5	1	2	23	14	13	20	9	22	18	43
I don't know															
2	10	3	0	5	19	14	14	39	57	49	54	25	35	40	34
2	8	3	0	4	16	12	12	33	48	41	45	21	29	33	28

Table-15

Answers to Q14 of the survey. The figures given the first row of each category represent the effective number of responses received and the ones in the second row represent the percentage of respondents who chose that answer

Q14. To what extent do you agree or disagree with the following statements about the Middle East?						
The geographic distance between Romania and the Middle East makes access difficult	The Middle East is NOT an accessible region to all tourist categories because of the travel package's high prices	The cultural and religious differences between the Middle East and the West are an obstacle in the way of developing tourism in the region	Romanian tour operators' travel offer for the Middle East is sufficiently diverse to satisfy all preferences	As far as technology and infrastructure go the Middle East is far behind the West	I believe that the Middle East is NOT an ideal destination in terms of the locals' attitude towards foreigners	I consider that I do NOT have sufficient knowledge about the Middle East in order to correctly evaluate its tourist potential
Totally disagree						
19	5	10	5	9	13	10
16	4	8	4	8	11	8
Disagree						
49	30	45	35	44	41	23
41	25	38	29	37	34	19
Indifferent						
31	25	13	33	38	42	23
26	21	11	28	32	35	19
Agree						
18	49	39	43	24	20	51
15	41	33	36	20	17	43
Totally agree						
3	11	13	4	5	4	13
3	9	11	3	4	3	11
Totally disagree + Disagree						
68	35	55	40	53	54	33
57	29	46	33	44	45	28
Indifferent						
31	25	13	33	38	42	23
26	21	11	28	32	35	19
Totally agree + Agree						
21	60	52	47	29	24	64
18	50	43	39	24	20	53

Table-16
Answers to Q15 of the survey

Q15: What age group do you fit in?		
	Answers	% of total answers
Under 18 y.o.	4	3.3
18-25 y.o.	82	68.3
26-35 y.o.	8	6.7
36-50 y.o.	12	10.0
51-60 y.o.	11	9.2
Above 60 y.o.	3	2.5

Table-17
Answers to Q16 of the survey

Q16: What was the last type of education you graduated?		
	Answers	% of total answers
Middle-school	5	4.2
High-school	24	20.0
Bachelor's degree	76	63.3
Master's degree	15	12.5

Table-18
Answers to Q17 of the survey

Q17: What is your status on the labor market?		
	Answers	% of total answers
Student	53	44.2
Employee	60	50.0
Unemployed	4	3.3
Retired	3	2.5

Table-19
Answers to Q18 of the survey

Q18: What is your monthly income?		
	Answers	% of total answers
Under €100	29	24.2
€100-€200	21	17.5
€200-€300	29	24.2
€300-€400	25	20.8
Over €400	16	13.3

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