THE LOCAL RECREATION SECTOR: ROMANIAN BUSINESS REPRESENTATIVES' INSIGHTS

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Abstract :
The aim of the present paper is to examine the local recreation sector in Romania from the business representatives' perspective. The results presented herein are based on a case study survey conducted on a number of 35 organisations specialised in providing artistic, sports, entertainment, cultural, or gambling and betting services from 13 cities in Romania. The research shows what are the main reasons for starting a business in the local recreation sector, what difficulties entrepreneurs encounter, what strategies they adopt in their attempt to create thriving companies, and how they perceive the breadth of the competitive threats. The inquiry regarding the sector's present and prospective level of development reveals a rather optimistic outlook despite the current setbacks. The study is not intended to be exhaustive nor statistically significant, but to give a reflection of the reality through in depth exploration of the given sample of businesses operating in the local recreation sector in Romania.

Keywords : Local recreation; business representatives; case study survey; sectoral analysis; Arts, entertainment and recreation.
JEL Classification : L82, L83, M20, P23
Paper type : Research paper

Introduction

We are heading towards, or perhaps, even live in the *experience economy*. In the late 90s, Pine and Gilmore (1998) welcomed us all in this fourth stage of economic development, subsequent to the agrarian, industrial and service economies. "An *experience* occurs when a company intentionally uses services as the stage, and goods as props, to engage individual customers in a way that creates a memorable event" (Pine & Gilmore, 1998).

Nowadays, customers want more than to satisfy their needs (however lofty they may be) by consuming goods and services. They "are now looking for more than the mere product or service; and experiences fulfil this need" (Sundbo & Dramer, 2008).

In most economic sectors, transforming the consumption of a product or service in a memorable experience is usually the job of marketers. But, there are economic sectors that whose main activity is actually the creation of experiences, namely tourism and local recreation. This paper focuses on analysing the local recreation sector in a country in transition, Romania.

In 2008, when the Statistical Classification of Economic Activities in the European Community has been revised, the economic activities related to local recreation services have been categorised under *Section R – Arts, entertainment and recreation* (Eurostat, 2008). However the section's name is rather unsuitable due to the fact it places side-by-side terms with different degrees of coverage: the arts and entertainment activities are in fact included in the category of recreational activities.

Therefore, in the present paper will be used the much simpler and more intuitive expression *local recreation* as substitute for *Arts, entertainment and recreation*. The choice of this collocation is rather straightforward. First of all, the economic activities comprised in Section R either refer to recreational services or to support activities for such services, hence the term *recreation*. The juxtaposition of the word *local* is necessary in order to subtract from the wide range of recreational activities those related to tourism – a sector that also comprises in the most part recreational activities.

In 2013, the Eurofund has released a report concerning the working conditions and job quality in the *Arts, entertainment and recreation* sector throughout the European Union based on the "Fifth European Working Conditions Survey" (Eurofund, 2013). According to the source, the work processes and the working conditions in the local recreation sector are quite distinctive from other economic sectors. Nevertheless, most of the disparities could be considered positive: above average levels of job autonomy and intrinsic working time quality, prevalence of self-employment and positive health outcomes. However, irregular and atypical working hours and below average earnings could explain the little interest for employment in the local recreation sector, especially in countries experiencing financial difficulties.

Although Eurofund's quinquennial survey represents an admirable initiative and a very good resource in the study of job quality in the European Union, it addresses the topic mainly from the employees' perspective, whilst not permitting researchers to perform in-depth analysis regarding business owners' or self-employers' viewpoints.

Furthermore, neither Eurofund's report, nor the European Working Conditions Survey dataset (EFILWC, 2010) provide any information about the local recreation sector at country level. Therefore, in order to have more than an overview of the sector in Romania, new investigations ought to be carried out.

The present analysis, which takes the form of a case study survey conducted at the end of 2014 among business representatives from the local recreation sector, was aimed to examine the sector's current situation and prospects.

1. The local recreation sector in Romania: summary indicators

The local recreation sector in Romania has very little prominence compared to other European Union countries (Eurofund, 2013). In 2012, the sector's gross production counted for 0,91% of the total (INS, n.d.), while the government spending for culture, recreation and religion rose up to 1,70% of the total state budget expenditure (INS, n.d.).

In 2013, a number of 5131 enterprises were operating in the local recreation sector, that is 1,06% of the total number of enterprises in Romania (INS, n.d.). The employment share of the sector amounted to 0,84% (INS, n.d.) and the vacancies rate was 1,67% (INS, n.d.), given that the monthly average net earnings in the local recreation sector were of 1.250 lei, 23% lower than the national average (INS, n.d.).

However, regardless the size of an economic sector, more important in determining its prospective success is the supply-demand ratio within the sector.

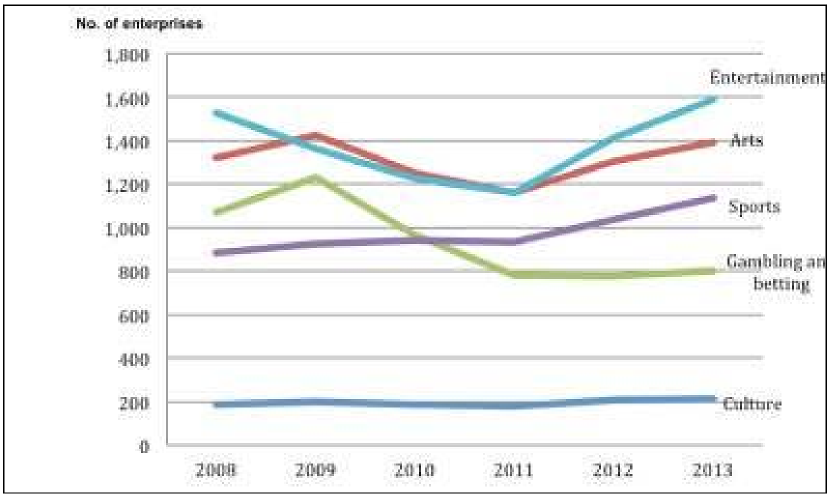
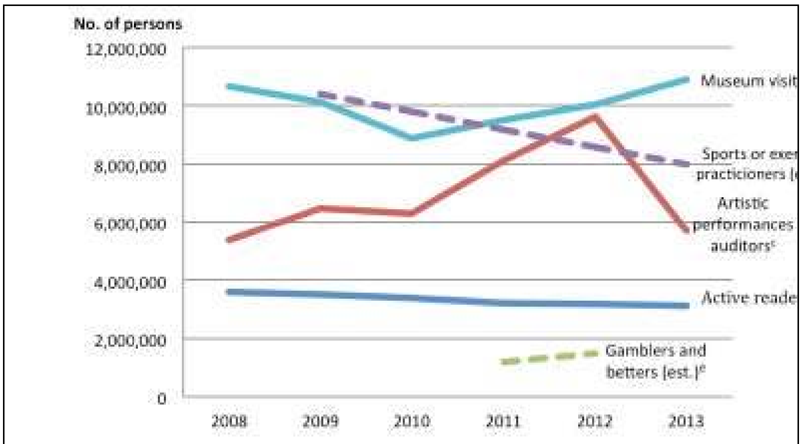


Figure 6. Evolution of local recreation services offer in Romania
Source: *Computed based on data retrieved from: INS (n.d.)*

Figure 1 illustrates the evolution of the local recreation services offer in Romania in the period 2008-2013 by employing as indicator the number of active enterprises operating in the sector provided annually by the Romanian NIS. In 2009 in the local recreation sector were operating 5142 enterprises, the highest number ever recorded in

Romania. Since then, the number has sharply decreased, diminishing with 18% over the next two years. In 2011 the overall trend has changed, so that in 2013 the offer of recreational services has approached the 2011 peak. The oscillatory dynamic of the economic activity in the local recreation sector is indicative of a cyclic fluctuation. It appears that the analysed period marks the beginning and end of a minor cycle, judging by its length and intensity (Tiganescu et. al., 2000). Also, it could be the result of the poor government policy adopted in Romania since the onset of the global economic crisis that resulted in the demise of a great number of organisations, especially PMEs (Stănculescu & Marin, 2011).

The offer of services in an economy is easily measurable and, most often, competent institutions provide detailed statistics. Contrariwise, the demand for services is quite difficult to measure. Therefore, the local recreation services offer will be compared with the actual consumption, rather than with the demand.



Note: The Romanian NIS annually provides data regarding the production and consumption of culture and sport. Therefore, the number of museum visitors, artistic performances auditors and active readers (except the number of registered readers in libraries of tertiary education institutions and school libraries) represent definitive data, whereas the number of sports or exercise practitioners and gamblers and betters were estimated based on official reports or press releases and there is no certainty regarding the interim fluctuations.

Figure 7. Evolution of local recreation services consumption in Romania

Source: *Computed based on data retrieved from: [a] INS (n.d.), [b] European Commission (2014), [c] INS (n.d.), [d] INS (n.d.), [e] Chiriac, R. (2012) & Colibășanu, A.M. (2011)*

The graphical representation in Figure 2 does not reveal any common pattern regarding the consumption of local recreation services. In 2013 the number of museum visitors and artistic performances auditors was the same as in 2008, but the trend of participation during this period was in fact opposite. The number of people who exercise regularly has decreased significantly from 2009 to 2013. A more moderate downwards trend has been recorded in the number of active readers in libraries starting with 2008, while gamblers and betters appear to have grown in number from 2011 to 2012 according to the cited sources.

Although, at the moment, one cannot calculate the overall consumption in the field of local recreation, the available statistical data seems to indicate a decrease in the participation to local recreational activities. Undoubtedly, the global economic crisis was the main factor that has led to a lowering participation to recreational activities. Approximately two years from the crisis outbreak, the number of employees in Romania has dropped with 14,4% (Stănculescu & Marin, 2011), which has led to a reorganisation of households' expenditures towards lowering the expenses on non-essential goods and services.

If the estimation were true, and the actual consumption in the local recreation sector was declining while the offer of services had increased, than it would create grim premises for the businesses currently operating in the sector as well as for the sector's future development

2. Research methodology

The purpose of the present paper is to present business representatives' outlook and insights regarding the local recreation sector in Romania. The research questions that the study tries to answer to are whether businesses in the field of local recreation are heading towards failure as the premise would indicate, and how do business representatives perceive the sector's level of development?

In order to answer to the research questions was chosen a mixed approach and a case study survey based on questionnaire as research design. While the questionnaire is the standard data collection instrument in quantitative research, its use in qualitative research is rather controversial. Wisker (2007, in Palgrave Study Skills, n.d.) suggests that questionnaires can be used in the preliminary phase of research to collect statistical data, but that such an approach should be followed-up with more in-depth investigations by using classic qualitative techniques such as interviews, focus groups or observation. Nevertheless, there are authors who argue that questionnaires could be trustworthy instruments in qualitative research, but only if they comply with certain standards, and moreover that in certain cases where such approach is even preferable.

Woods (2006) states that questionnaires in qualitative research are useful "as a means of collecting information from a wider sample than can be reached by personal interview", although reasoning that the researcher should confirm "on a sample of questionnaire replies to see if respondents were interpreting items in the way intended". McLure (2002) argues that this method could be used when interviewing every respondent is unmanageable. Alfa Dube (2010) synthetized several author's views and concluded that qualitative questionnaires can be used to gather information on beliefs, feelings or experiences, and that participants have freedom to express their opinions without being influenced by the interviewer.

The questionnaire used in the present case study includes a mixture of open- and closed-ended items that require respondents to reveal definite facts (i.e. quantitative approach), or to make assumptions, reveal their attitude, and present their outlook on certain topics (i.e. qualitative approach). In the case of the present study, all the aforementioned suggestions concerning specific circumstances where questionnaires could be used in qualitative surveys are met.

Over 900 invitations to participate in the study have been sent to Romanian business representatives from the local recreation sector via e-mail, website contact pages or Facebook. Only 40 positive responses to the invitation have been received from business representatives from 13 cities. Given the high geographical dispersion of potential survey respondents and certain reluctance for conducting telephonic interviews, I have opted for creating an online questionnaire.

The questionnaire was divided into 4 sections and inquired about: (1) business strategies, (2) business threats, (3) the prospective future of the organisation and sector and (4) some general identification questions.

The online survey was active from October 30th to December 31st, 2014 and at the end of the period 35 questionnaires have been validated. A further verification for determining whether the items have been interpreted in the way anticipated was made on three survey respondents and has revealed no problems.

The final sample consisted of 12 art business representatives, 11 sports business representatives, 10 entertainment business representatives, one representative of a cultural business and one representative of a gambling and betting business.

3. Research findings: Romanian business representatives' outlook on the local recreation sector

The business representatives' responses have been analysed twice. Firstly, quantitative-like analyses have been performed on the whole sample. To this end, open-ended and Likert-scale questions have been coded and conclusions concerning the overall sample have been drawn. Secondly, the responses by activity groups have been explored in more detail to see whether patterns are revealed.

Doubtless that the sample on which the research has been conducted is too small for the results to be statistically significant, but the study offers a reflection of the reality through in depth exploration of actual businesses operating in the local recreation sector in Romania.

3.1. Outlook on the business strategies

The 35 business representatives were asked to provide some insight on the strategies they have adopted in the start-up phase of the business, as well as further on in their current activity in order to thrive – or, in some cases, just to survive – in the local recreation market.

Figure 3 shows what were the main reasons that drove the respondents to start a business in the local recreation sector. The prior possession of specific skills seems to be the main reason behind creating an organisation specialised in performing arts, sports or artistic creation. Entertainment, cultural, and sports businesses tend to be founded as consequence of a discovering an activity for which the demand is higher than the offer or a market niche. Conversely, but not surprisingly, the gambling and betting business representative stated that the reason behind founding the organisation was the success of other similar organisations.

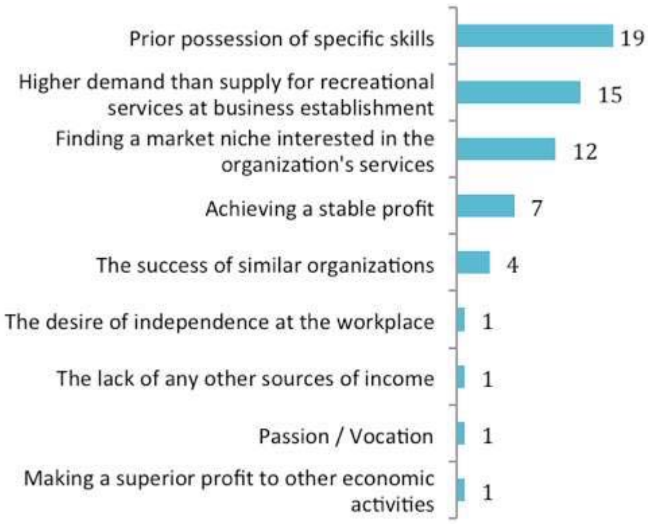


Figure 8. Reasons behind starting the business in the recreation sector

Figure 9. Difficulties encountered at business start-up

As shown in Figure 4, during the start-up phase, most business representatives experienced difficulties. Among them, most common are sustaining business financing, attracting customers, and finding a suitable location or personnel recruitment. The majority of respondents have experienced at least one inconvenience, but of course, there were cases where no problems were encountered. There were no notable differences between the answers given by representatives of different activity groups, with one exception. The only activity for which no difficulty was reported is the field of cultural services – that, however, was represented by only one business.

Figure 5 presents what are the business financing strategies adopted by the respondents. It is clear from the graphical representation that a rather small number of entrepreneurs from the local recreation sector resort to external financing sources, whether it takes the form of applying to local, national, and European funding or contracting bank loans.

In choosing a location, however, the entrepreneurs seem to adopt more varied strategies. Figure 6 indicates that most business owners shall base their choice on one of two quite opposite aspects: the cost size and the commercial venue. Other factors that influence the choice of the business location are suitable compartmentalisation, ease of access, consumers' area of interest, and lack of competition.

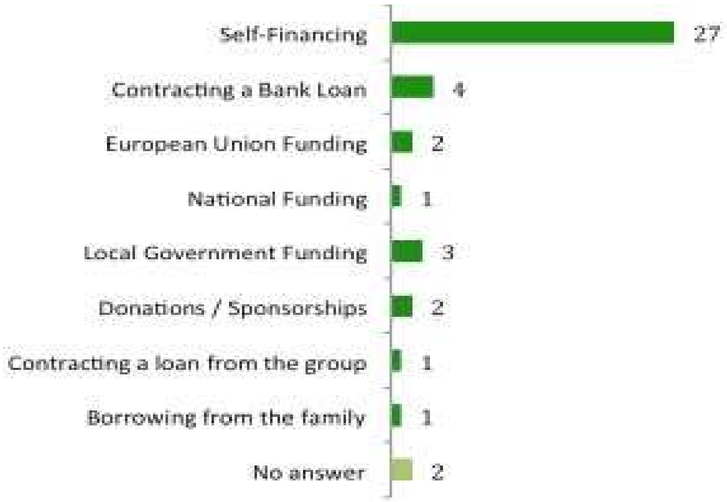


Figure 10. Business financing strategies

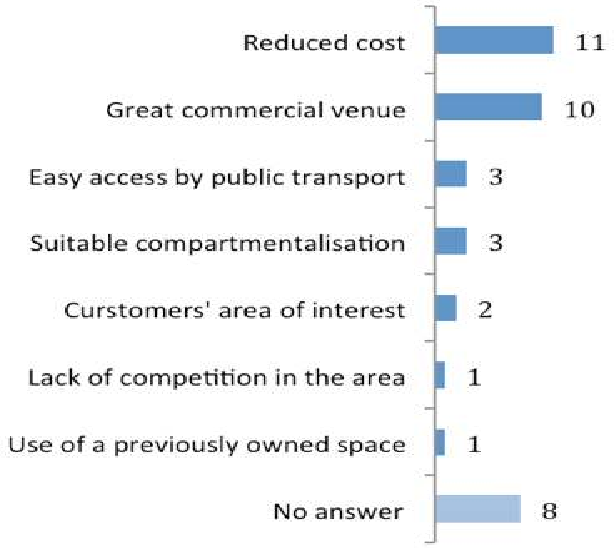


Figure 11. Location strategies

Figure 7 points out that the recruitment process in the local recreation sector does not always take the form of classical hiring based on skills or qualifications. Results show that businesses in the local recreation sector operate through volunteering, by training former and current students, or by hiring students and even friends and acquaintances.

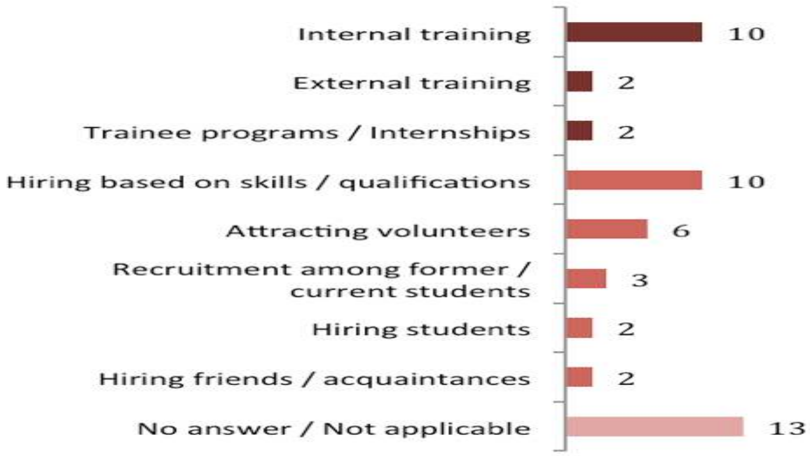


Figure 12. Personnel recruitment strategies

Figure 13. Attracting customers strategies

Internal training seems to be preferred to internships or external training, most probably due to the extra costs implied, but also because it facilitates the knowledge transfer from more experienced employees with a vocation in the field – considering the specific of the activities in the local recreation sector. Also, results show that a rather high number of the business representatives questioned did not to answer the question regarding their personnel recruitment strategies. This situation may be due to the fact that in the local recreation sector most organisations have at most one employee, therefore making the question futile. Another possible explanation could be hiding undeclared work, and consequently presenting reluctance to divulging the personnel recruitment strategies.

For attracting customers, the business representatives in the local recreation sector resort to a great variety of strategies. Figure 8 shows that most businesses opt for promoting their services indirectly through visual means such as promotional flyers, social media, or posters, rather than through more direct approaches like interacting with potential customers at special events and exhibitions or by word of mouth.

3.2. Outlook on the business threats

The second section of the questionnaire focused on the business threats in the local recreation sector. The threats have been derived from Michael Porter's five forces of competitive position analysis (Porter, 1979). Respondents were asked to quantify on a scale from 1 to 7 the magnitude of the six elements (the threat of new entrants has been divided into two separate items: barriers to entry and barriers to exit) that can be construed as threats for the business that they are representing.

Table 1 summarises the business representatives' perception regarding the business threats. It presents the average and modal value recorded within the sample.

From the perspective of business representatives in the filed of: (number of respondents)	Arts (12)	Sports (10)	Entertainment (10)	Culture (1)	Gambling & betting (1)	Whole sample (34)	
Threat of	2,8	2,9	3,8	7	4	3,3	mean

substitutes	2	2	-	7	4	2	mode
Barriers to entry (Threat of new entrants)	3 4	3,2 3	3,8 5	6 6	5 5	3,4 -	mean mode
Barriers to exit (Threat of new entrants)	3,1 -	3,2 3	4,1 6	7 7	2 2	3,4 2	mean mode
Industry rivalry	3,3 2	2,8 2	4,1 5	7 7	7 7	4,2 7	mean mode
Bargaining power of suppliers	4,3 5	4,9 -	3,7 4	5 5	4 4	4 5	mean mode
Bargaining power of buyers	4,5 3	4 5	4,7 4	5 5	1 1	4,6 4	mean mode

Table 1. Magnitude of business threats
Source: computed based on questionnaire responses

Substitutes represent a risk factor for businesses regardless of the activity sector. The main risk consists of the interest that consumers may develop for products or services of substitution, interest that will lead to accelerating the obsolescence of the existing supply and, therefore, decrease the market value of the current products and services (Porter, 1979). Overall, the majority of the business representatives have responded that substitutes merely present a threat in their field of business. As exceptions, on average, the entertainment or the gambling and betting representatives consider the threat of substitutes as being moderate, whereas for the cultural business it represents a threat of the highest level.

The threat of new entrants is manifested by the presence or absence of barriers to entry and exit. In the case of service sectors, the entry barriers are usually related to the initial investments and companies' differentiation capabilities, while exit barriers mostly arise from the difficulty of reselling assets. Thus, if the barriers to entry are high, the probability of new entrants on the market is low, therefore the risk for the existing companies being low also. For the exit barriers the situation is reversed, because the more difficult it is for a company to leave the market, the greater is the threat of the competitors who will strive to remain on the market (Porter, 1979). The survey results show that businesses from different activity groups perceive very differently these threats. For example, in the sports and arts fields, the business representatives estimate rather low entry and exit barriers, a situation that more likely involves a continuously changing competition than a high-risk situation for the business. The gambling and betting sector, on the other hand, shows the most favourable situation regarding the threat of new entrants: high barriers to entry coupled with low barriers to exit.

The industry rivalry takes the form of "jockeying for position". It can be enhanced, in addition to the number and size of competitors, by slow growth of the market, the high level of fixed costs, hence, a sharp rivalry to conquer market share, or poor offer differentiation, which can lead to lack of loyalty to the brand (Porter, 1979). Overall, most respondents reported a very high rivalry within the sector. However, from the business representatives' responses there are indications that in the sports and arts subsectors the rivalry level is rather low.

Suppliers and buyers can reduce organisations' and consequently a sector's profits by exerting their bargaining power and demanding more. Suppliers can demand more money for their services or products, whereas buyers can demand more of the organisation's services at the same price (Porter, 1979). The results in Table 1 show that respondents perceive the bargaining power of both suppliers and buyers to represent a rather high threat for their businesses.

3.3. Outlook on the future of the organisation and sector

Up until this point, the survey questions focused on revealing past actions and strategies adopted by the business representatives or on finding out their perception regarding the organisation's current threats. The third part of the questionnaire concerned the respondents' prospects on the future of the organisation and sector.

Figure 9 shows how many of the 35 respondents envision a business expansion and Figure 10 shows the planned time frame. Only one fifth of the sample declared not planning to expand their organisation in the foreseeable future, while the rest of the respondents wish to develop their business in even more than one dimension, either by increasing the services portfolio, the number of locations or employees, or by collaborating and even merging with another organisation.

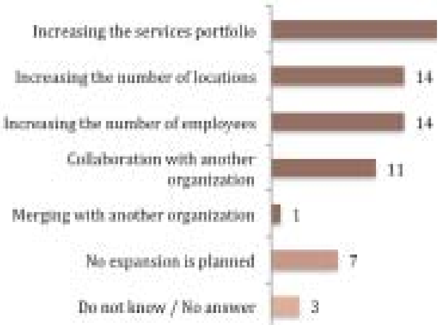


Figure 14. Prospects regarding expansion

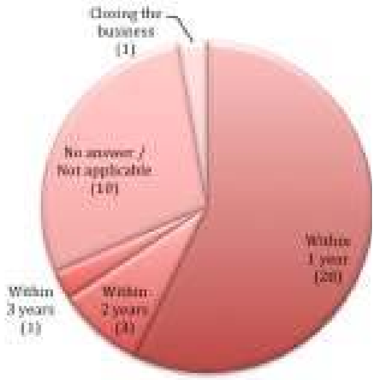


Figure 15. Time frame for expansion

The period in which the expansion is planned varies from one to three years, most entrepreneurs wanting to make the change sooner rather than later. Only one representative (in the field of entertainment) declared wanting to close the business in the near future, by claiming that the high level of state taxes and the lack of trademark protection have led him to this decision.

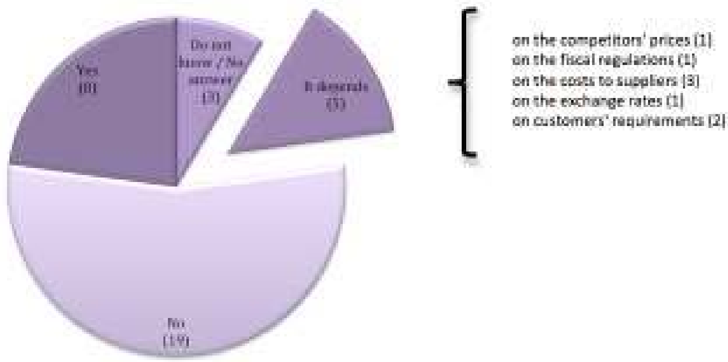


Figure 16. Prospects regarding pricing

In terms of service pricing prospects, more than half of the respondents acknowledged wanting to maintain the current level of prices, as shown in Figure 11, while another 15% of them stated that this decision depends on changing factors, such as the suppliers' costs or the customers' specific requirements for their service.

Table 2. Current and prospective level of development of the organisations and sector

From the perspective of business representatives in the filed of: (number of respondents)	Arts (12)	Sports (10)	Entertain ment (10)	Culture (1)	Gambling & betting (1)	Whole sample (34)	
Organizations' current level of development in relation to competition	3,3 2	4,3 4	2,9 4	3 3	4 4	3,7 4	mean mode
Organizations' prospects for development in relation to competition	5,1 7	5,1 5	4,1 -	6 6	4 4	4,8 5	mean mode
Sector's current level of development in relation to other sectors	4,4 5	4 3	3,8 3	3 3	7 7	4,1 3	mean mode
Organization's prospects for development in relation to other sectors	5,5 7	4,8 6	4,8 -	6 6	7 7	5,2 6	mean mode

Source: computed based on questionnaire responses

Overall, the business representatives that took part in the survey estimate an average degree of development of their organisation and a slightly lower level of development of the sector that they are operating in. Nevertheless, despite the shortcomings, most of them uphold an optimistic outlook over their organisations' prospects for development, and predict an even better forecast regarding the sector.

Conclusions

Statistical data shows that in Romania, the local recreation sector is one of the least prominent sectors both in comparison with other European Union member states and compared with other economic sectors within the country.

Also, by comparing supply with demand within the local recreation sector in Romania, we can observe a rather worrying scenario as number of enterprises operating in the sector is rising and the consumption of recreational services is slowly decreasing over the last few years.

The present study aimed to move the focus from the usual macroeconomic analyses to a more business-oriented approach by actually questioning local recreation business representatives about their perception and experience in the sector.

The results showed that the main reason for starting a business in the field of local recreation is the prior possession of specific skills by the entrepreneur, and that the business financing is generally made from personal resources.

During the start-up phase, many entrepreneurs experience difficulties. Among them, the most common ones are attracting customers, sustaining business financing, finding a suitable location and personnel recruitment.

In order to maintain or develop a competitive advantage, managers adopt varied strategies, without revealing any discernible pattern. Most entrepreneurs are planning for business expansion, while maintaining the current level of prices.

The greatest threat for businesses in the local recreation sector seems to the high bargaining power of buyers and customers, cumulated with a great pressure from the part of competitors.

The study does not offer a definitive response to the research questions. Nevertheless, it does seem to indicate that businesses in the field of local recreation are not actually heading towards failure and that, despite the shortcomings, most of the business representatives that participated in the survey estimate an average degree of development of the sector that they are operating in, and uphold an optimistic outlook over the sector's prospects for development.

The main research limitation of the study is therefore, the little generalizability of the results. Other limitations are related to the use of questionnaires in a qualitative study. Woods (2006) draws attention over the fact that such an approach restrains the respondents' natural behaviour. McLure (2002) states that even though questionnaires' items are "easy to score, the responses only provide a very limited picture of the situation to the researcher" and that questionnaires always imply the risk of respondents giving responses deemed as socially acceptable rather than honest answers. In order to deliver statistically significant results, the research should be continued. At least 323 more responses ought to be collected from local recreation business representatives (in equal proportions from all five activity groups) for the results to be accurate and generalizable with a 5% margin of error. Also, the data collection technique could be revised, by opting for conducting personal interviews rather than for online questionnaires, given the very low response rate (3,9%) registered in the present study.

Regardless of the limitations, the present survey outline was proved suitable for responding to the research objectives. In the future, it could be applied as means to perform cross-sector or cross-country analyses.

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