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Creativity and innovation – Sources of competitive advantage in the value chain of tourism enterprises

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Abstract. *As the highly standardized mass tourism demonstrated its incapacity to satisfy the increasingly complex needs of tourists, the necessity to develop a new approach for the production, selling and promotion of tourism products became obvious. In the current economic environment, the competitiveness of tourism operators is significantly dependent on their capacity to transform service provision into a creative process of satisfying consumers' individual needs. Affirming creativity as an important source of competitive advantage in the tourism industry has actually led to the emergence of a new type of tourism – creative tourism – a type of tourism which suggests new products and services, new collaboration and partnership structures, new forms of organization and particularly new experiences for tourism consumers.*
The economic impact of creativity and innovation in tourism is significant: by integrating creativity in the various production, selling and promotion activities, an operator may influence a tourism product's added value as well as the satisfaction that this product brings to the final consumer. With the aim of determining valid instruments to maximize the value of the tourism product, the authors conducted a qualitative research on the intensity of creativity and innovation on various levels in the value chain of cultural and balneotherapy tourism in Romania. The purpose is to study the influence and perspectives for generating and integrating creativity in the activities which build the complex process of developing tourism products.

Keywords: creativity, innovation, value chain, tourism product, cultural tourism, balneotherapy tourism.

JEL Classification: L83, M31, O31.

1. Introduction. Creativity and innovation in the tourism industry

Tourism is an industry which has been subject to many changes and transformations over the course of the past decades. As the demand for tourism services became more segmented, specialized and sophisticated (Novelli et al., 2006: p. 1141), companies in the tourism industry face the challenge of constantly changing their offer of services, rethinking their daily operations and procedures, improving their current organizational structure and business model, and finding new ways to communicate and interact with customers and other stakeholders in the market.

Tourism companies need creativity in order to be competitive as satisfying the ever increasingly demanding consumers has become even more difficult than before **(Pikkemaat and Peters, 2006: p. 90).** Even in the case of more specific types of tourism, such as cultural tourism, the demand has become saturated by “conventional” mass services and by what Richards and Wilson (2006: p. 1209) call “the serial reproduction of culture”. What the “new tourists” defined by Aliana Poon (1994: pp. 91-92) desire and expect is creativity and added travelling experience. What results is “creative tourism” (Richards, 2010: pp. 9-15), a type of tourism which counteracts the commodification and serial reproduction of tourism experiences (Richards and Wilson, 2006: p. 1209).

According to Richards (2012), creativity impacts tourism in a number of ways, being used to develop new tourism products and experiences, to revitalize existing products, to provide higher value to cultural and creative assets, to enhance the tourism experience through creative techniques and to provide tourist destinations with a unique atmosphere.

Implementing creative ideas ultimately leads to innovation (Amabile, 1996: pp. 396). According to André-Jean Guerin (2004), innovation in tourism is foremost a cultural development, expanding at its own pace. Furthermore, innovation in tourism is generally incremental (Decelle, 2004) and stems from everyday practice and interaction (Monteiro and Sousa, 2011: p. 170), and rarely from internal research and development (Hjalager, 2002: pp. 469-470). Even though radical innovations do occur in tourism, they are often developed externally, particularly when they involve new technologies (Orfila-Santes et al., 2004: p. 854). This is the case of property management systems used in the hospitality industry, global distribution systems such as Amadeus or Worldspan, and online reservation networks such as booking.com.

Research on the innovative behaviour of tourism companies remains however limited and insufficient (Sundbo et al., 2006: p. 88). Overall, the tourism industry is viewed as moderately innovative, though some authors indicate that the innovation potential of tourism enterprises might be higher (Sundbo et al., 2006, p. 88). The degree to which this potential is exploited depends on tourism companies’ capacity to form larger structures and connect through head offices, franchising organizations and network service centres (Hjalager, 2002: p. 469). As tourism is currently dominated by SMEs, few organizations achieve the economies of scale necessary to support R&D and particularly technological development (Hjalager, 2002: pp. 469).

Recent research (Meneses and Teixeira, 2011: p. 28) has shown that innovation intensity in the tourism industry differs according to the type of services provided by companies.

This is not surprising however, as the tourism industry comprises a wide range of heterogeneous activities (INE, 2007 in Meneses and Teixeira, 2011: pp. 26). Thus, the tourism product may include multiple services provided by different segments of suppliers: accommodation, travel agencies, transportation operators, entertainment facilities and restaurants (Hjalager, 2002: pp. 470). These are added to several numerous other complementary industries, such as health services, meetings and conferences, sports and culture (Meneses and Teixeira, 2011: p. 26). Several organizations may contribute to the provision of a single tourism product, making the tourism value chain one of the most complex in the tertiary sector.

The view that innovation intensity varies among different sectors of the tourism industry is also supported by a recent pilot study conducted recently on Romanian tourism consumers (Ravar and Iorgulescu, 2013: pp. 820-822). The results indicate that tourists consider accommodation facilities as the most innovative enterprises in the tourism industry (3.89 points on a scale from 1 to 5), followed by restaurants (3.6) and entertainment facilities (3.17). The least innovative are transport operators (2.9) and travel agencies/tour-operators (2.28), despite using technology in their daily operations.

These scores show, however, that no particular segment of suppliers in the tourism value chain is viewed as highly innovative. Some authors consider that innovation in tourism may be enhanced through facilities which generate “indirect infusion of knowledge into the destinations” (Hjalager, 2002: p. 470), such as nature parks, cultural institutions, events. These segments of suppliers – which provide services which are complementary to the basic tourism product consisting of accommodation and transportation - are generally more likely to adopt and adapt innovations generated in the academic environment (Hjalager, 2002: p. 470).

The role of complementary services in enhancing creativity and innovation in the tourism industry is, indeed, significant. In fact, in the tourism value chain, the prevalence of one complementary service or the other leads to the emergence of new types of tourism, such as nature tourism, cultural tourism, sports tourism, adventure tourism, wellness and balneotherapy tourism. Thus, these services, due to their diversity and quality, create the premises for creative thinking and enhanced innovation in the tourism value chain. This supports the shift from tangible to intangible competitive advantage (Richards, 2012), from mass tourism to a tourism based on personal experience.

2. Value chain analysis – strategic instrument for creativity development

Since each of the agents providing the interdependent services that make up a complex tourism product (e.g. accommodation, food, transport, leisure – and, in the case of balneotherapy tourism, treatment and specific procedures) adds a certain value to the final product and, implicitly, creates different levels in the product’s conception and provision, it is the more necessary to ensure a clear delimitation of the processes, activities and resources undertaken by tourism organisations, so that the value of the tourism product is defined, controlled and permanently adapted to consumers’ needs and especially to their desires.

Thus, in order to gain profound knowledge of the Romanian tourism product so as to improve and develop it, it is necessary to conduct an analysis of the industry's value chain, in which every level is represented by a provider with significant direct or indirect impact on the development of the tourism product. This analysis is rather difficult, both from the management perspective, which implies mapping activities, conducting feasibility studies and analysing the economic flows of every agent involved in the tourism value chain, as well as from the marketing perspective, the latter being highly dependent on the consumers' overall perception of the tourism product, but also of the individual services that compose the product. Following an analysis of the tourism value chain (regarded as a comprehensive system), through the deconstruction of activities in "their tangible form by assigning the ones which contribute to the development of a product" and in "their intangible form by assigning cost elements to these activities" (Băcanu, 2006: p. 99), one can identify the success factors that allow the members of the "tourism system" to function at standard parameters (Presenza and Cipollina, 2010: p. 18).

This fact is further enhanced by the tendency of tourism experiences to become more even since the global image of the services which compose the value chain functions according to the communicating vessels principle; thus, if the performance indicators are not achieved or if consumers' perception of a certain service is inadequate, the image of all other services under the umbrella of the tourism product shall be significantly affected. In this context, the analysis of the tourism value chain proves to be valuable, since it allows operators to identify, correct or even outsource activities which are unprofitable, inadequately provided or insufficiently optimised. The performance should be assessed from multiple perspectives: the financial perspective, the consumers' perspective, the business perspective, the innovation and learning perspective (West et al., 2010: p. 91).

In the academic literature, the key concepts referring to service marketing include: relationships, interaction, network creation and quality (Gummesson, 2000 in Grängsjö, 2003: p. 429). The buying decision strongly depends on the destination marketing strategies, the activities involved and the facilities provided by the actors who contribute to the product's creation, regardless of whether these actors act together or individually (Grängsjö, 2003: p. 431). Also taking into consideration the characteristics of tourism services (more specifically, the interdependence of service providers in the creation of a unique product), applying relationship marketing is essential in creating a coherent tourism product, strongly positioned and capable to satisfy consumers' needs and desires in an effective and sustainable manner.

It is thus recommended that destination stakeholders become involved in networks that facilitate interaction, by creating a "tourism stakeholders system" (Weaver and Oppermann, 2000 in Grängsjö, 2003: p. 430). These partnership-based networks should be created among all service providers, public and private, starting from the product level, since coordinating the efforts of all agents and optimising their activity is essential for the destination's development, for maximizing profits, for creating a product that offers a unique experience, and for achieving customer satisfaction. The international literature on tourism destinations planning highlights the urgent need for private and public sectors to reach a consensus by aligning the aims of their activities (Pforr, 2006 in Presenza and Cipollina, 2010: p. 19).

A detailed analysis, based on maps of the activities encompassed in the tourism product, should be conducted both from the marketing perspective, by introducing relevant elements which bring added value to the tourism experience, as well as from the management perspective, taking into consideration the resources, processes and activities which stand at the basis of these elements (Johnson et al., 2008: p. 114). Thus, a bidirectional approach of the tourism value chain is highly needed.

Since the diversification of consumers' needs and desires is proportional with the product's value (an essential coordinate of tourist satisfaction), creating partnerships and networks represents a means to create and improve the knowledge, capacity and resources that are necessary for the development, exploitation and ultimately the sale of new ideas (Wilkinson, 2008: p. 25). By coordinating the inputs represented by the entire physical, human, informational, social and financial capital, one can achieve a better collection and allocation of resources, process optimization and redesigning of activities, while respecting characteristics, moral and ethical norms and values, management roles, interdependence, but also inter- and intra-organisational limitations (Grängsjö, 2003: pp. 442-443).

3. Research methodology

In order to analyse creativity as a mean to develop cultural and/or balneotherapy tourism products - products created by Romanian travel agencies and tour operators, a qualitative research was conducted, with the aim of identifying the coordinates and value chain segments in which creativity and innovation are generated and enhanced. The instrument used in the research is the in-depth interview, applied among representatives of nine tourism agencies and tour operators, four of which offer cultural tourism products and five both cultural as well as balneotherapy tourism products. The authors opted for a qualitative research since it allows an in-depth analysis of the subject without resorting to quantitative measurements (Zikmund and Babin, 2010).

The interview guide comprises 22 items, grouped in five themes: the tourism market and tourism product, creativity, innovation, relations, results. Practically, the aim of the research instrument is to provide the means to accomplish the following objectives:

- Reveal the main characteristics of the cultural and balneotherapy tourism markets (types of products, competitive advantages, target segments);
- Investigate how creativity manifests itself in the value chain of enterprises that develop and/or sale cultural and balneotherapy tourism products;
- Describe innovation processes in the value chain of enterprises that develop and/or sale cultural and balneotherapy tourism products;
- Analyse how creativity and innovation are disseminated along the value chain through communication processes;
- Identify the results of creativity and innovation in tourism enterprises that develop and/or sell cultural and balneotherapy tourism products.

The cultural tourism products sold by the agencies that are subject to our analysis target both internal as well as foreign destinations, while the balneotherapy tourism products focus exclusively on Romanian tourist destinations. The content analysis revealed several discussion and, ultimately, research themes relevant for defining the role of creativity and its forms in the various tourism structures, by "deconstructing" the cultural and balneotherapy tourism markets and products.

After transcribing the interviews' content and defining analysis units, the collected information was structured based on a general grid, that facilitates the identification of themes and sub-themes, in order to obtain both a perspective image (by using vertical analysis) as well as a detailed image of each respondent (by using horizontal analysis); the interview is structured from general to particular and aims to determine the coordinates of the cultural and balneotherapy tourism markets, with their adjoining market segments, as well as the position of each respondent on the market, the generation of new ideas and respondents' view on creativity and innovation.

4. Research results

The first category of information analysed refers to identifying the main components and characteristics of the cultural and balneotherapy tourism markets; the elements revealed by respondents show the current market situation, as it is perceived by respondents, offering a comprehensive image of the framework necessary for the creation of novel products and indicating the degree to which creative products have been developed so far. Responses show a clear difference between the two markets, both in terms of the markets' current situation as well as of their dynamics. While the cultural tourism market (which includes several components: stays, circuits and city-breaks in the main European capitals) is univocally perceived as complex and diverse (or diversifying), characterized by high-quality services, the Romanian balneotherapy tourism market is regarded as standardized, with reduced opportunities for differentiation and offering products that fail to meet clients' expectations in terms of quality. As far as products' positioning is concerned, the two main directions pursued in the development of tourism products, both cultural and balneotherapy include enhancing novelty (in what regards tourism products and destinations) and improving service quality.

Perceived as significantly different by travel agencies and tour operators, the two types of tourism products (cultural and balneotherapy) also target distinct consumer segments. Cultural tourists place more emphasis on quality than on price, are young adults or middle-aged, generally dispose of higher incomes and request new tourism experiences focused on adventure and active learning. On the other hand, balneotherapy tourists are generally older and dispose of lower incomes. The fact that the balneotherapy consumer segments have not been described in great detail as far as their behaviour and psychological experiences are concerned - the need for treatment being the only segmentation criteria - explains tourism providers' view on this form of tourism, which is regarded as stagnant but also insufficiently explored from the marketing perspective.

The fact that cultural tourists' needs seem to grow in complexity, in the context of an increasingly growing demand for new and novel products, supports the development tendency of cultural tourism and especially of its themed component, which became significant in the conception of cultural tourism products. The fact that travel agencies and tour operators are less motivated in building and selling new balneotherapy products is explained by upstream suppliers' lack of interest for improvement and innovation, which indicates that travel agencies and tour operators that sell balneotherapy products are indeed dependent on the measures and tendencies imposed by upstream providers (hotels, facility treatments). Furthermore, in the case of balneotherapy tourism products, respondents view agencies' and tour-operators' contribution to the final product as relatively small, since providers of accommodation and balneotherapy procedures are responsible for the entire product creation process! Due to this, the lack of differentiation opportunities in balneotherapy tourism may be interpreted as a "creativity blockage" since the small contribution of travel agencies and tour operators in the creation of the final product is translated into small commissions, which leads to reduced incentives for travel agencies to include balneotherapy products in their offer; hence the number of tour operators involved in the development of balneotherapy products is relatively small.

In the case of the both types of products (cultural and balneotherapy tourism products), the most significant category of information collected through the interviews is that referring to creativity; since the majority of the interviewees associated creativity with novelty, it became necessary to clarify the ***"new product"*** concept. The most frequent terms used by respondents to define "new products" were "novel destinations", "products that other travel agencies do not yet provide" (e.g., circuits in Ecuador, Galapagos, Costa Rica), which indicates the tourism market's extensive growth tendency. Since on the tourism market a new tourism product (and even a new tourist destination) cannot be legally protected due to its heterogeneous nature, obtaining and sustaining a long term competitive advantage is also impossible. This may lead to a permanent and increasingly alert quest for new destinations which, in the absence of sustained product development efforts and support to local providers of services, can in time lead to a „destination war". Novelty was also defined as consisting in "new experiences" which are closely linked to "new combinations of services", "new forms to organize tourist products", the use of „complementary services" and the fusion of services and types of tourism which in turn leads to the creation of „tourism products with novel content" that are often adapted according to the needs of each client. New products are often based on "less known tourist attractions which tell a story" (e.g. Dracula's Secret Love Story) and "offer the opportunity to do something different".

Furthermore, respondents' view of what constitutes a "new product" tends to differ according to the size and market orientation of the operator they represent. Thus, wholesalers view product novelty as consisting of "new destinations" or "new combinations of services", while travel agencies and tour-operators that sell their products to individual consumers feel that new products should focus on creating experience. Regardless of the degree to which travel agencies foster and use creativity, it is necessary to study upstream providers' capacity to satisfy the standards imposed by travel agencies, taking into account consumers' needs and demands. This highlights the importance of an effective value chain, characterised by communication, negotiation and persuasion activities and aimed at profitably achieving tourist satisfaction.

Following the description of how new products are created and developed, the next step of the content analysis was to explore the differentiation elements for cultural and balneotherapy tourism products addressed to young people. Although this segment is serviced by few travel agencies (most young people planning their vacation on their own), it is interesting that respondents' perception on differentiation elements was largely univocal, being characterised by "flexibility", "reduced staying period", "online distribution and promotion, through the use of new channels", "reduced personnel importance" and "low price". All these elements are typical of city-breaks in European capitals, destinations relatively close to Romania (e.g. Vienna, Prague); additional services comprise concerts and festivals tickets and sports and entertainment activities and do not include services in the field of balneotherapy. The fact that almost all interviewees defined a similar vacation model addressed to young people - which encompasses differentiation elements typical to this market segment - diminishes through enhanced similarity travel agencies' capacity to differentiate themselves from other operators. Due to this, differentiation is often achieved by applying a similar model in different destinations, thus confirming respondents' view that a new tourism product is often translated into a new destination.

In what regards the middle-aged (adult) segment, the differentiation elements mentioned by respondents include "a special itinerary", "themed cultural circuits", visits to "less known tourist attractions", "a higher emphasis on tourist counselling and assistance". These coordinates do not lead to a clear unitary identity, but rather position the product as "a higher-quality vacation, at a higher price". The only elements that generate differentiation (reflecting a product differentiation) are the optional programmes (mentioned by the large majority of respondents) and, implicitly, the vacation's complexity. Also, differentiation does not translate into a particular vacation model but rather into the means through which the model is implemented. It is interesting that respondents did not mention differentiation elements in the field of balneotherapy tourism, thus excluding specific optional services (treatment, spa and wellness services) that might complement a cultural vacation.

Vacations addressed to the aged segment of the market are viewed by respondents as being characterised by the following differentiation elements: "longer stay", "relatively low price", "travelling in extra season", while also including "social programmes" and ensuring the presence of "group attendants and medical personnel"; these elements are typical to both cultural and balneotherapy tourism, the latter including "relaxation activities" associated to treatment procedures. The majority of these elements are already comprised in a product specifically adapted to this age segment and currently developed and sold by several travel agencies. Thus, the differentiation elements that were once considered creative have gradually become compulsory conditions imposed by market standards and that lead to the emergence of standardised products; some particular elements still exist, such as “wine and traditional dishes tasting”, and “rides with the Mocănița train”, that may be included both in both cultural as well as in balneotherapy tourism products.

As far as competitors’ position is concerned, two contrary views (but balanced in what regards their force of expression) have been put forward by interviewees. The first one, according to which most competitors resolve to offering basic services as part of standardised products, without much emphasis on counselling and tourist assistance opposes the second one, that most competitors adopt the differentiation elements previously defined for the three age segments, while performing some changes in what regards the itinerary, the dimension of the group and the role of local guides. Both alternatives indicate that some market segments have remained “unoccupied” on the cultural tourism market and especially on the balneotherapy tourism market. Thus, although the latter includes three main components (treatment, prophylaxis and relaxation), the majority of the products sold through travel agencies in Romania focus on treatment. In fact, the spa and wellness (prophylaxis and relaxation) segments are almost absent, respondents indicating that this is due to upstream suppliers’ (accommodation units and treatment facilities) lack of creativity and reluctance to innovate.

The process of generating new ideas invariably follows the same steps, corresponding to the first phase of the new products development process (analysing customers’ needs, generating new ideas, selecting and assessing ideas), all the steps focusing on achieving customer satisfaction and implementing novelty. The process implies “discussions with customers” and collecting “customers’ requests to adapt the offer or introduce new destinations”, followed by an analysis of these requests, conducted by the travel agent; the travel agents’ main tasks are to “sense the customers’ needs and wants”; “communicate”, “persuade”, and “gain knowledge of tourist destinations”. The ideas collected by travel agents are later transmitted to the management, which is responsible for “developing new service packages”, and “identifying relevant service providers”. Other steps such as “collaborating with other departments”, “establishing the product concept” and “presenting the concept to service providers” are viewed as less important in the process of generating new ideas (being indicated by fewer interviewees).

The elements that support communication in the value chain and stand at the basis of product development are also mentioned by fewer respondents. According to the vast majority of the interviewees, new ideas are generated at the level of travel agencies and are disseminated to tour-operators, suppliers and local partners. Some interviewees also mentioned the role of local tour operators, thus acknowledging that ideas flow in both ways inside the value chain. For example, local tour operators and partners provide services at the request of outgoing travel agencies that come with new ideas for products, while travel agencies and tour-operators integrate new services developed by local cultural operators (concerts, festivals, exhibitions) and ideas generated by accommodation providers and local partners into their own products. Thus, it is necessary to differentiate between the concepts of creating, implementing and exploiting new ideas, each of these interdependent and correlated functions being associated to various actors in the value chain, since all suppliers are part of a larger system that generates and applies new ideas.

Establishing standards for creativity was another objective of the research. The most frequent criteria indicated by respondents include "additional tourism experience" – most often, customised. Furthermore, a creative organization is viewed as adopting an anticipation strategy and developing products before the demand for a particular type of products is very high, placing creativity on equal footing with pioneering. Such organizations generate the image of an "ideally creative company", which develops tourist programmes with the help of local partners, based on its own initiative, creates authentic themed "products" that "tell a story", and introduces new destinations as a market pioneer; all these indicate diverse directions for product development, both extensive - through the introduction of new destinations as well as intensive - through the augmentation and enrichment of customized tourist products. These elements create a market position difficult to achieve and support in terms of competitive advantage. On the other hand, lack of creativity leads to the absence of a strategic direction, and a non-differentiated market approach, that implies the adoption and sale of products that have already been developed by other agents.

Another important subject targeted by the research is innovation in tourism products; innovation has different meanings for each of the respondents, varying from new services (e.g. travelling by coach to a destination that could previously be reached only by plane) to additional services (specific to the destination's culture and history), new products (e.g. circuits in Kenya), new destinations, adapting products or tourism forms already tested on external market (circuits which combine ecotourism, adventure tourism, safari etc.), serving new market segments with new approaches and structures (e.g. small groups).

In the case of balneotherapy tourism, unlike cultural tourism, innovation is dependent on the providers of accommodation services (which largely coincide with the providers of treatment procedures), which are expected to invest in new treatment and wellness facilities. This is an area in which travel agencies' contribution to innovation is minimal, since, according to the view of the respondents, innovation in balneotherapy tourism means satisfying a segment that demands wellness services (which implies investments in infrastructure and human capital that can be undertaken only by accommodation and treatment facilities), whereas innovation in cultural tourism is translated in new destinations and new itineraries. The most common examples of innovative products include themed cultural circuits (e.g., "Dracula's Secret Love Story", "The hidden treasures of Romania", "Medieval Art in Transylvania", "Circuit in Scotland with the Royal Scotsman train" etc.), tourism products that focus on a specific theme associated to a well-targeted interest (e.g. beach and safari at the Indian Ocean, fitness and wellness camps, survival camps, vacations for aged people in mountain and balneary destinations) or combining different types of tourism (e.g. nature tourism, adventure tourism and cultural tourism) in exotic destinations such as Ecuador, Costa Rica, Galapagos.

The most important resources involved in the innovation process are human resources, who are responsible for documenting, prospecting and contracting new products and destinations (e.g. visiting new destinations, participating at tourism fair, creating and testing new itineraries, maintaining business relations with suppliers), recommending tourism as a human-intensive industry par excellence. The key word used by respondents is "creativity", seen as a generator of added-value, followed by informational resources (e.g. access to data bases).

In what regards the contribution of various upstream operators in the tourism value chain to the products' degree of innovation, each of the two types of tourism (cultural and balneotherapy tourism) is characterised by a different approach. Cultural services (e.g. events, concerts, tastings, electronic guides and applications for a better understanding of local culture, tickets to theatre and opera performances, optional tours, cultural visits) may bring added value and even uniqueness to a tourism product, thus supporting an opposite flow of creativity, from cultural operators towards travel agencies. In the case of balneotherapy tourism (an area in which respondents highlighted innovation at upstream supplier level as the only means to create an innovative balneotherapy product), respondents view suppliers' (providers of accommodation services, treatment procedures, spa and wellness services) contribution to innovation as relatively low, taking into account the infrastructure's degree of obsolescence.

The innovation standard described by interviewees is represented by companies which follow "a different road than the one followed by competitors", thus excluding agencies which address the entire market in an undifferentiated manner. The research indicates that the perception on what constitutes an innovative company differs according to the size of the travel agency. Thus, small tour-operators that focus on individual end consumers tend to promote a "knowledge and discovery experience" – a new and different experience, which "tells a story" (e.g. Danube cruises, travels combining circuits and longer stays). Large tour-operators and wholesalers on the other hand view innovative companies as focused on anticipating market trends and introducing new products and destinations before they are adopted by competitors.

Communication among actors in the value chain is essential for ensuring the coherence and unitary character of tourism products. In order to ensure optimal communication conditions for each operator in the value chain, specific communication channels are used for contacting different partners. Foreign tour operators (essential partners for travel agencies which view products tested on external markets as sources of innovation) are generally contacted at international fairs, conferences and reunions and later on by e-mail and through information and study tours. Communication with other suppliers such as accommodation or transport facilities is characterised by less formal meetings.

Although most respondents feel that each member of the value chain has its own role in the generation of creativity elements (especially in the case of premium products), they consider that travel agencies and tour operators must exert a higher impact than other operators since they are involved in creating the vacation concept, organising and actually implementing tourism products. The travel agency establishes, in fact, the levels at which sensations are created – the "tourist experience level", the "tourist activities level" and the "optional programmes" level. The interdependence of value chain members is acknowledged by respondents and explained through creativity's capacity to stimulate the innovative behaviour of other agents in the value chain, in both directions of the value chain: on one hand, service suppliers must positively react to the new market segments endorsed by the travel agencies, while on the other hand travel agencies and tour operators must develop new products by integrating creative services provided by upstream suppliers in their own offer and adapting them to the targeted market segments.

The aim of the innovation process is to improve the agency's image and to achieve customer loyalty, although it is generally accepted that most innovations in tourism are easy to copy and adapt (e.g. new destinations, programmes for mass tourism). This is one of the main causes for which the offer of products and destinations is changing at an increasingly alert pace, rapidly eroding organizations competitive advantage. Difficult to copy innovations, according to the interviewees, include relations with local and foreign partners, personnel training, niche products such as wellness and premium services (due to high production costs), most of these belonging to the field of relational marketing.

5. Limits and further directions for research

Given the dynamic character of the tourism market, it is highly necessary that studies reflecting the manner in which creativity is understood and applied are conducted on a permanent basis. Although the current study is exploratory rather than comprehensive, it represents a relevant starting point for further research into the impact of creativity on the competitiveness of tourist products, since it encompasses the views and opinions of tourism operators that are ultimately responsible for the market's development and growth. Furthermore, we recommend that further interviews are applied on a larger number of managers in the tourism industry, thus offering a better image of travel agencies' and tour operators' strategic decisions in what regards creativity and innovation.

Conclusions

The tourism market, including the market for cultural and balneotherapy tourism products, is characterised by a rapid growth; due to this, the creativity of travel agencies, tour operators and tourism service suppliers represents a sine-qua-non condition for maintaining and improving the organization's market position. Creativity generally manifests itself in an extensive manner and implies that tourism operators anticipate customers' needs and wants and identify new destinations. Introducing new destinations also represents a standard for creativity and novelty, the most appreciated companies in the field being those which renew their offer at increasingly shorter periods of time. By creating an "incomplete spiral", collaboration with some service suppliers (which depend on the flows of tourists generated by the travel agency/tour operator in order to develop their operations and ultimately to improve their services) is significantly affected.

In what regards the types of tourism subject to the current analysis, cultural tourism is seen as a development opportunity for most travel agencies and tour operators, allowing the implementation of a new approach which associates themed circuits and cultural destinations with a "story, the latter representing the framework for creating a unique and lasting tourism experience, in which the operator can bring a significant input. In the view of respondents, balneotherapy tourism does not keep step with the current growth rhythm, since the latter implies an extensive growth, in which the contribution of all the actors in the value chain supports services at destination level. These services, together with the destination's resources and through destination marketing and management processes, may secure a competitive advantage and transform the manner in which tourism products are developed from a creative value-added process in powerful innovation clusters, with novelty elements which are difficult to copy.

In this context and from marketers' perspective, the need for travel agencies and tour operators (which must have a profound knowledge of their clients' motivations, expectations and particularly of their needs) to intervene on every segment of the tourism market and with any „new product" is prominent.

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