

CHANGES IN THE ROMANIAN CARPATHIAN TOURISM AFTER THE COMMUNISM COLLAPSE AND THE DOMESTIC TOURISTS' SATISFACTION

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Emerging Râncea-a resort in the Parâng Mountains.

Changes in the Romanian Carpathian tourism after the communism collapse and the domestic tourists' satisfaction

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ABSTRACT: In the context of Romania's transition to the market economy after the communism collapse, and the accession in EU, the study aims to analyse characteristics of tourism changes in the Carpathian destinations by correlation with the domestic visitors' satisfaction for tourist services and new forms of tourism by empirical field observations, and statistical analysis used to test the level of satisfaction for Carpathian tourism. The results show an increase of tourist demand for the Carpathian destinations in the framework of tourist establishments' structure changes, the spreading of agri-tourism, a need for improvement of accommodation services quality according to the visitors' profile. Tourism development, revealed by visitors' flows, has some similarities with the perception of tourists. The tourists' views can, with several limits, be considered as a barometer in tourism research and a useful instrument in building tourism offers.

KEY WORDS: geography, tourism, domestic tourists' satisfaction, survey, Romanian Carpathians

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1 Introduction

As a destination recently promoted as the national tourist brand sustained by the natural and human environment diversity, Carpathian area attracted in the last twenty years more than half of the Romania's visitors. Gathering an area of 27.8% of the country (Velcea 1987), being almost 54% of the total length of the entire chain (Mihăilescu 1963); the Romanian Carpathian Mountains have those qualities suitable for tourism. Otherwise, »the remarkable growth and economic significance, the tourism has long been considered an effective means of achieving economic and social development in destinations' areas« (Tefler and Sharpely 2008).

The suitability for tourism of the Romanian Carpathians dates back since Roman times due to the mineral and geothermal springs, which were widely used after the 18th century. In the 19th century, mountain tourism developed (Ielenicz and Comănescu 2006), while in the 20th century, winter sports resorts were established (Ciangă 1997). During the communist regime, uncontrolled and social tourism have prevailed. Since 1990, the tourism has entered in a new period regulated by the market economy and new legislation.

The Tourism Master Plan 2007–2026 has established several objectives for mountainous areas: the development of mountain areas and mountain resorts, introduction of thematic tourism routes, the development of ecotourism in protected or rural areas, sustainable development of winter sports and elimination of informal businesses.

The demand for this destination is expected to play an important role in the national tourism industry. In fact, the demand shows the attractiveness both for tourism heritage and services. Furthermore, the tourists' satisfaction correlates with loyalty (Kandampully and Suhartanto 2000, Yoon and Uysal 2005, Moliner Velázquez et al 2011), and profitability like the management studies of Storbacka et al. (1994), Schneider and Bowen (1995; quoted by Hallowell 1996), underline. Marketing papers sustain that the satisfaction creates favorable attitudes resulting in repeated purchasing behavior over time (Yi 1990; Olivier 1997). The satisfaction depends on many factors either internal: tourist motivation (Jang and Feng 2007), the tourists' feelings, or external, such as tourist activities in a destination (Uysal and Jurovski 1994), and the balance between price and quality. The theory of dissatisfaction-satisfaction set up by Pizam and Milman, (1993; quoted by Yüksel, 2001), Kozak and Rimmington, (2000), Petrick, (2003), Prebensen, (2006) and Jang and Feng (2007) shows that the two variables differ as intensity and may generate loyalty for a destination.

In this sense, it is useful that individual policies and practices provide opportunities to link the market preferences with supply development (Gunn 2002), to study the »market-plant match«, a concept introduced by Taylor (1980) and developed by Cachon and Terwiesch (2005), who stressed that matching between demand and supply on the market is always dynamic. In Romania an analysis of tourist services' quality was made by Băbăiță, Ispas and Părjol (2010).

The present study aims to analyze the main changes in the Carpathian tourism mirrored by visitors' satisfaction for tourism services, agri-tourism and ecotourism's development as new forms of tourism.

2 Research Design and Data

The study is based, firstly, on the analysis of several indicators for the Carpathian tourism. In the second part, we debate the results of a structured questionnaire, applied in 2011, on 150 Romanian visitors in the Carpathians, aimed in collecting and analyzing the tourists' satisfaction, using a rating scale to appreciate the new tourism types, the tourist facilities' development and favorite destinations. In order to assess the tourist's satisfaction we performed a five-level Lickert type scale. The answers were processed using Xcel 2007© and analyzed in SPSS© v. 17. We have also asked the visitors to rank (from 1 to 3 points) the most attractive destinations of the Carpathians.

For accuracy, the Carpathians' tourism potential was modeled in GIS using the SRTM3-derived terrain of Romania and the main rivers network, processed in ARCGIS™. The Carpathians are outlined by the differently colored resorts and tourism potential. The green-red palette signifies the tourism potential of these mountains, calculated as the sum of points for technical achievements (30%), tourism facilities (10%), natural touristic resources (30%), human resources for tourism (30%) made by PATN (2008) for each settlement.

Statistical data were collected from NIS (National Institute of Statistics) for the period between 1990 and 2011.

3 Results and Discussions

3.1 An Overview of the Romanian Carpathians Tourism after 1990

The opening of Romanian tourism towards the market economy in the Carpathians, as well as the whole country, can be divided into three stages: before privatization (1990–1997), the great wave of privatization (1997–2007) and after EU admittance.

The first stage was marked by a long transition, when major changes had not occurred. The tourism infrastructure capacity remained unchanged while the change was observed in tourist flow patterns following the opening of the country's borders. An exceptional development was registered by rural tourism and agri-tourism which have previously entered into the market by creating »tourist villages« in 1973. Agri-tourism was recognized as the most attractive types of tourism in several mountain areas (Turnock 1999; 2006).

The second stage which started in 1997 was marked by privatization and building of new hotels, pensions, tourist villas by international hotel chains. In 1999, 46% tourist establishments belonged to the private sector while the share increased to 85% in 2002 (AM News 2006).

The health tourism, as the oldest tourism type in Romania (Pricăjan 1999) entered in a process of certification.

The winter sports' facilities have been developed through »Super ski in the Carpathians«, ecotourism in national parks (Smaranda 2008) and also geotourism emerged on the market (Hose et al. 2011).

The third stage can be considered starting with 2007, when Romania adhered to the EU, with the last wave of privatization which has been performed only in 2010.

3.2 Tourism key indicators

Starting from the assumption »equally important in functioning tourism system is the driving force of supply side – all the objects and services that are provided to meet demands« (Gunn 2002), Carpathian area gathers all types of tourist establishments.

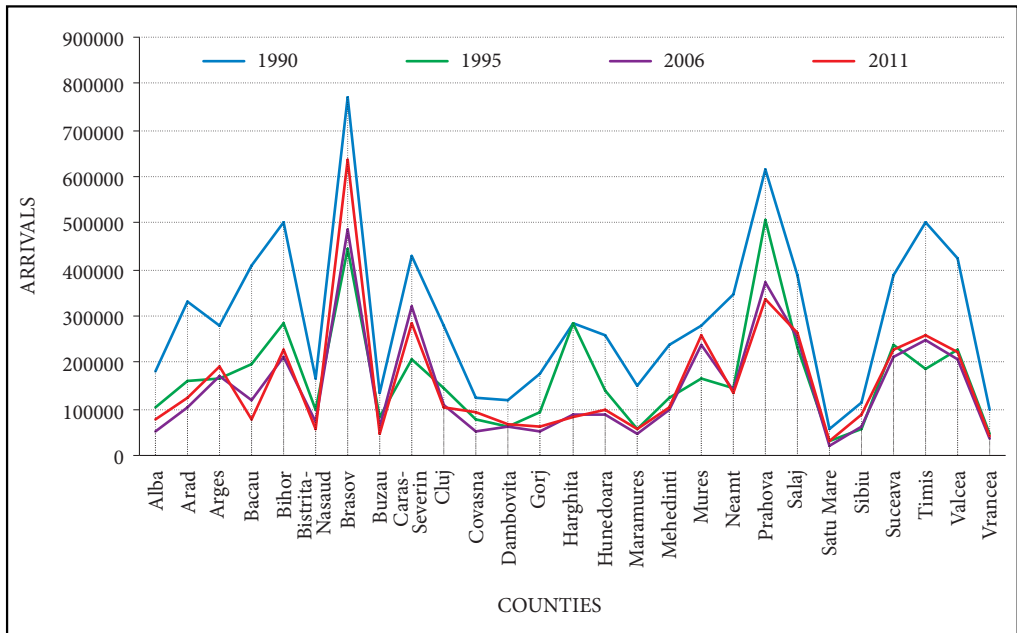


Figure 1. The dynamic of tourists' arrivals (1990–2011). Processed after NIS Data.

Despite the fact that the total Romania's tourist capacity decreased from 77 million places-days (1990) to 67,7 million in 2011, the Carpathian area has increased its share from 50.8% in 1990 to 63.8% in 2011 (NIS, 1990–2011). While former accommodation structures used in social/mass tourism were decommissioned, some preserved (Băile Herculane, Geoagiu-Băi, Covasna, Sângeorz-Băi) or turned into superior accommodation standards, new private tourist establishments were appeared (Braşov, Prahova Valley, Bran, Danube Gorge).

Hotel establishments are still widely spread in urban settlements or resorts in the Carpathians. Compared to the communism era, dominated by 2 or 3 star hotels, a shift to higher-ranking hotels of 3, 4 and 5 stars was observed lately. The share of hotels decreased steadily from the beginning of the analyzed period till now (e.g. in 2011, it was 54.4% in comparison with 1990, 59.2%), but have risen in the quality standards.

Rural, urban and agri-tourist boarding houses have developed after 1995, when the National Association for Rural-Ecological and Cultural Tourism set up the guesthouses' network. In 1996, Romania had 72,716 places-days in agri-pensions, 247,542 in 1998 (NIS 1996; NIS 1998), and almost 4,9 million in 2011 (NIS 2012), from which 4,6 million (94.6%) were in the Carpathians. Carpathians seem to be suitable businesses for the Carpathians' communities or entrepreneurs. These can be correlated with the accessing of Special Accession Programme for Agriculture and Rural Development and Structural Funds.

The chalets, special tourist establishments fitting with mountain tracks are spread in remote areas, have been diminished in number, due to the difficulty in their maintenance or/and access and the competition with boarding houses (Matei 2010) and also the tourist villas. Global touristic demand of the Carpathians has registered fluctuations (Figure 1).

Domestic tourism demand had the same overall trend. The Carpathian area attracted over 60% all Romania visitors, but as number it decreased from 7,2 million in 1990 to 4,4 million, in 1993 and 3,0 million in 2011 (NIS 1990; 2011).

Distribution of tourists' arrivals is focused on hotels (47%), then, the boarding houses. In the analyzed period, the tourists' demand for hotel services fluctuated, in chalets have dropped, while boarding houses have gained the market (Table 1). These figures show that the Carpathian areas need to stimulate much more the rural tourism, mountain tourism, ecotourism and hotels of four and five star.

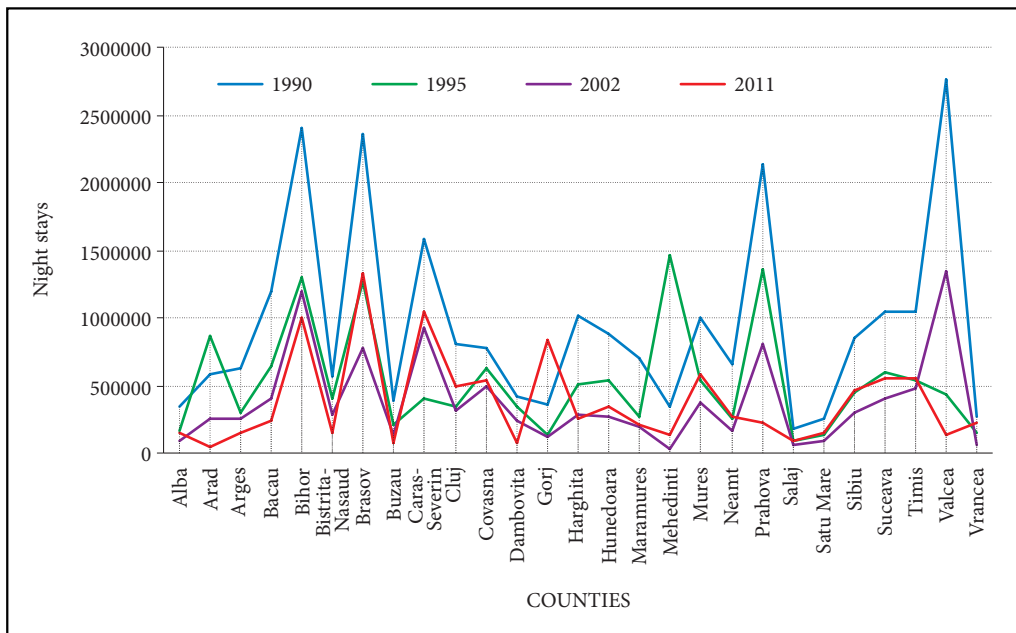


Figure 2. The dynamic of the tourists' overnight stays (1990–2011). Processed after NIS Data.

Table 1. Distribution of tourists' arrivals (1990–2011).

Years	1990	1995	2002	2006	2009	2011
Total Romania (mil.)	12,3	7,0	4,8	6,2	6,1	7,0
Total Romania (%)	100	100	100	100	100	100
Hotels (%)	75.5	73.3	79.1	75.0	74.0	76.1
Boarding houses (%)	0.0	0.3	3.9	9.3	12.0	11.9
Chalets (%)	4.0	2.7	1.7	1.1	1.4	1.1
Carpathians (%)	65.6	67.2	64.0	63.8	60.8	69.8
Hotels (%)	47.0	52.7	47.9	43.8	39.3	47.9
Boarding houses (%)	0.0	0.2	3.5	7.7	10.7	10.9
Chalets (%)	3.9	2.6	1.6	1.0	1.1	1.0

Processed after NIS Data.

Overnights have continuously dropped (Figure 2) from over 44 million in 1990 to less than half in following years. While Bulgaria concentrated the tourists to the Black Sea (over 50%) and only 10% in mountains (Dabeva 2010), in Romania, Carpathians have held 63% (2011).

The length stay in all Romanian establishments has diminished in this period, from 3.6 days to 2.5 days.

The occupancy rate of accommodation reflects the profitability of the businesses. In Romania, all tourist accommodation structures became gradually unprofitable because in 1995 the occupancy rate was 45% and in 2011, 26.3% (NIS 1995; NIS 2011). The hotels attract the highest shares of tourists, having an average of overnight stays about 49.2% in 1995 and 31.6% in 2011. Most requested are hotels of 5 stars (over 36% in 2011) and 2 stars (35.6%, 2011). Simple guesthouses or agri-guesthouses have registered values around 15%, being higher in luxury units, explained by attractive pricing policy and comfort.

We can conclude that tourist infrastructure, the visitors and agri-tourism in the Carpathians are in a continuous growing.

3.3 Domestic tourists' satisfaction

The satisfaction of the domestic tourists concerning the quality of the Carpathian tourist infrastructure offer reveals the dimensions of the demand–supply matching (Taylor 1980) by proving the expectancy-disconfirmation theory (Pizam and Milman 1993).

The tourist satisfaction influences the choice of a destination, the consumption of products and services, and the decision to return (Kozak and Rimmington 2000). The dimension of satisfaction effectively becomes a measure of performance in tourism by assessing the domestic tourists perception (Turner 2001).

The study reveals that the global average of tourist satisfaction in the Carpathians is 0.2 on a scale between –2 (correspondent to strongly disagree) and +2 (strongly agree) (Figure 3).

The greater satisfaction does not always correspond with the mountain with high potential values (Figure 4).

Table 2. Synthesis of the statistical significance of tested variables (Chi-Square).

Variable		Value	df	Asymp. Sig. (2-sided)
Accommodation-income	Pearson Chi Square	33,741 ^a	12	,001
Accommodation-education	Pearson Chi Square	24,389 ^a	8	,002
Food-income	Pearson Chi Square	32,231 ^a	12	,001
Food-education	Pearson Chi Square	28,546 ^a	0	,001
Agritourism-income	Pearson Chi Square	44,320 ^a	12	,001
Agritourism-education	Pearson Chi Square	27,151 ^a	8	,001
Leisure-income	Pearson Chi Square	28,542 ^a	12	,005
Leisure-age	Pearson Chi Square	31,325 ^a	12	,002
Ecotourism-income	Pearson Chi Square	31,120 ^a	12	,002
Ecotourism-age	Pearson Chi Square	31,502 ^a	12	,002
Ecotourism-education	Pearson Chi Square	26,206 ^a	8	,001

Source: the authors' calculations using SPSS v. 17 ©, data collected from the questionnaires applied on domestic visitors in 2011.

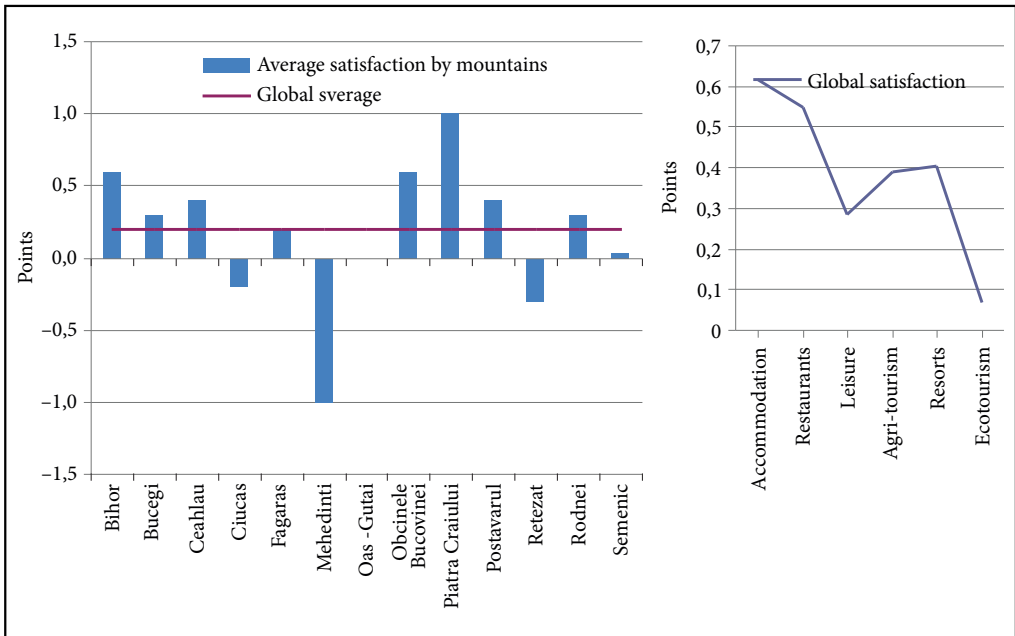


Figure 3. Global tourists' satisfaction for the Carpathians tourism offers. Source: the authors' calculations using the data collected from the questionnaires applied on domestic visitors in 2011.

Accommodation is the best tourism service, followed by the restaurants, the resorts' offers or agri-tourism. The ecotourism is still in infancy and needs more attention from the stakeholders.

The empirical calculations show that the structure of domestic tourists' satisfaction is lower as the revenues are higher, and consequently with the educational level. Female travellers are more exigent than males concerning the tourism offer evaluation and also the middle aged people more than young or elderly tourists.

The significance of the Chi-square test lower than 0,005 between age and leisure, age and ecotourism's satisfaction, indicate that for these items, stakeholders in tourism should carefully developed their offers, taking into account the age of consumers. Moreover, the test confirmed that higher education level and income lower is the satisfaction. Test results do not support significant differences in tourists' satisfaction by genders and in some cases by age.

4 Conclusions

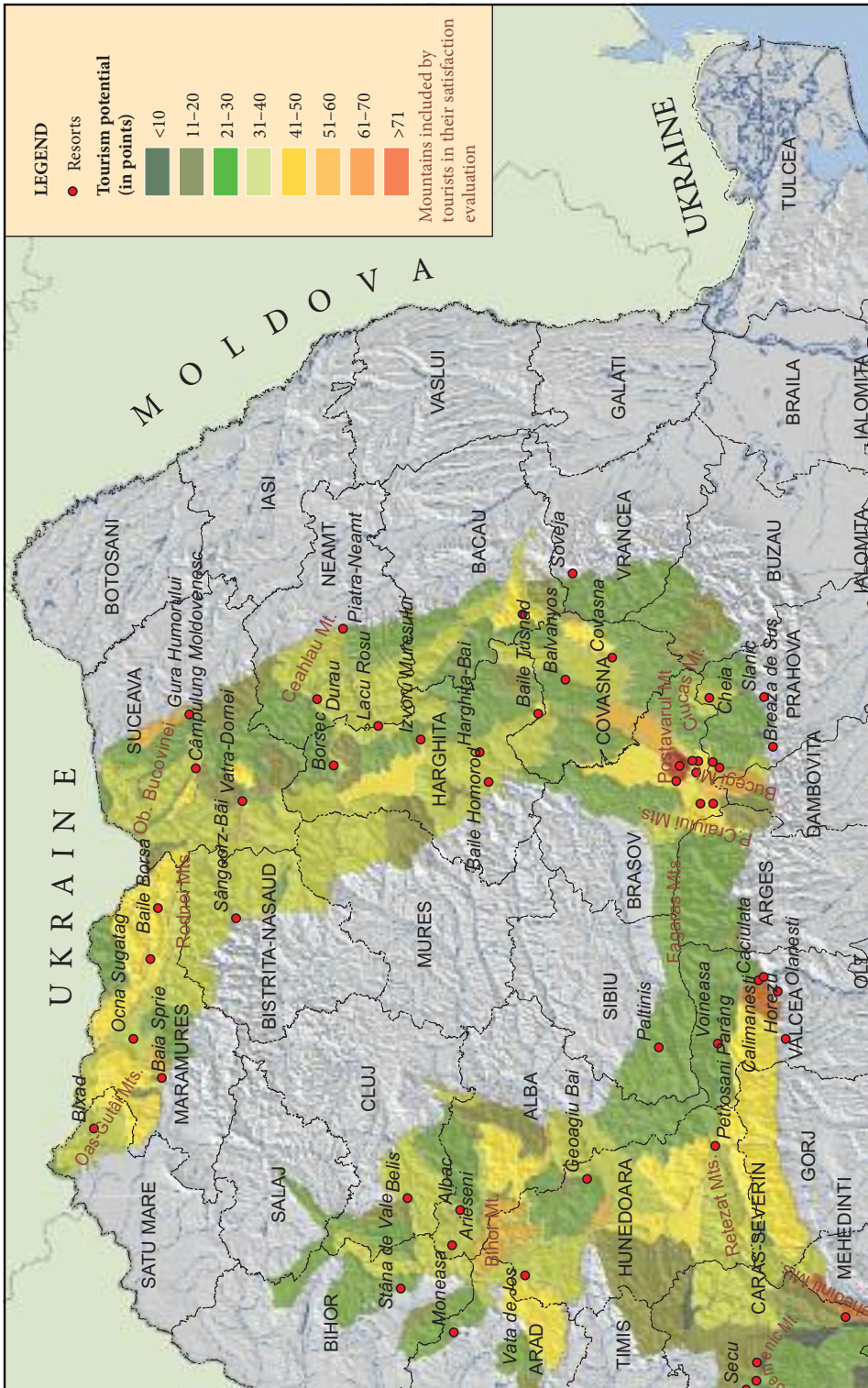
The Romanian Carpathian Mountains gather an explosion of tourism infrastructure including winter sports, favored by local or abroad investments, an increase of interest for agri-tourism offers. After the communism's collapse and implementation of the market economy mechanisms and governmental or EU programs, the occurrence of various tourism businesses have been generated.

Accommodation statistics demonstrate that even at the country level the number of places has decreased, the Carpathians play a more important role than in 90's. It can be also seen a reorientation of businesses to the boarding houses and hotels.

The resorts remain focused on social tourism, while the winter sports facilitate mass or weekend tourism.

The ecotourism, favored by environment protection in natural or national parks stimulated by laws and programs is far to the tourist's demands.

Figure 4. Carpathians tourism potential by geomorphological units. Processed after the National Territorial Planning Assessment (section VI), 2008. Resorts list: www.tourism.gov.ro ►



The arrivals, length-stays were diminished in the last decade due to the financial crises and the holidays' fragmentation, throughout the year.

Domestic tourists remain the main pool of the Carpathians' visitors, but their profile corresponds to the class with low and middle income, youth and elderly people with less experience on abroad destinations.

The development and functioning of tourist establishments should take into consideration the surveys upon the tourists' satisfaction, which could be a reliable way of testing their performance in tourism offers.

The method presented supports the conclusion that this assessment of the tourists' satisfaction is a reliable instrument, and can be used for research purposes.

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