



Comparative study between Romanian inland spa tourism and seaside tourism

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COMPARATIVE STUDY BETWEEN ROMANIAN INLAND SPA TOURISM AND SEASIDE TOURISM

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Abstract. Tourism has become a worldwide phenomenon and extremely important for Romanian economy, especially after 1990. Its fast evolution is related to a strong economic development and wage's growth. Tourism has brought important benefits, both for tourists (in terms of personal experience) as for destination's economy and society (in terms of wealth, employment and reputation). Thus, tourism is now a necessity for mental health (either for recreation and knowledge) and physical health (motion, relaxation, treatments). In Romania, tourism has also achieved notable share in the national economy, especially regarding urban tourism, followed by mountain-resort tourism, seaside and spa tourism. The last two types of tourism (by type of natural resource) chosen to be analysed and compared – Inland spa tourism ("Turismul balnear") and Seaside Tourism ("Turismul litoral") show very close behaviour in terms of demand (tourist arrivals or overnight stays) but are treated unequally by the central government along with its investments. Our study pointed out that Romanian spa tourism has more unique features, less regional competitors than seaside tourism, a better occupancy for a similar capacity in use, a better territorial distribution of the destinations and their resources (along with a higher diversity of connected activities – such as natural attractions, leisure activities, local traditions, cultural features, more connection with local societies etc.) as well as a wider range of beneficiaries. Thus, our study is meant to be an alarm signal and starting point for future analysis that emphasize this imbalance between the potential of spa tourism and the general interest in investing and developing it.

Keywords: tourism, accommodation, Romania, inland spa tourism, seaside tourism, resorts

1. Premises

Since the accession of Romania in the EU in 2007, Romanian seaside tourism is slowly losing ground to competition, especially with neighbour competitors like Bulgaria, Greece, Turkey, Croatia or Cyprus. In the same time, the spa tourism encounters a gap between a good quality of the resource and a poor condition of infrastructure elements (obsolete structures, inadequate technical infrastructure).

Romania has more than 1/3 of the mineral waters in all Europe, with few competitors in Eastern Europe (like Hungary, for example) but there are very few public or governmental funds invested for the development of spa resources. Instead, seaside tourism is competing

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with similar areas, but with more advantages on location, climate, quality of beaches, service standards and nature management.

Among the differences between the two types of tourism, the geographical location is the most obvious. Seaside tourism has the disadvantage of a strictly (de)limited territory, as a “strip” (only 245 kilometres among which only 82 are available for leisure activities and development as the other 183 are part of the Danube’s Delta UNESCO Biosphere Reserve). Plus, comparing with other European coasts, the Romanian seaside is less attractive in terms of width of beach, general management, more eutrophic features (algae, for example) etc.

The cities with spa (therapeutic) factors in Romania are in a higher number (29 “local” and “national” resorts – as labelled by the National Tourism Authority – and even over 100 with minimal therapeutic factors!) than the seaside resorts (grouped into only 6 administrative units – communes/cities) which can be a quantitative advantage in terms of actors and beneficiaries of eventual investments and benefits. Regarding the diversity of activities, spa tourism has much more various places to visit, in terms of nature and society.

Regarding the tourists and their motivations in choosing one or the other, opinions are often in favour of seaside tourism. In the same time, the cliché that only the elder people visit the spa resorts (compared to a low average age of tourists in seaside resorts) begins lose significance as newer spa facilities (in junction with fitness, wellness and aesthetic features) are implemented.

However, the short life of governments (and the respective Tourism Ministry or Authority) in the past 15-20 years has brought a general instability. Central investments have been directed to already developed areas, namely at the seaside, where the effects are seen quickly - a large flow of tourists every year.

Starting with these premises, this paper wants emphasize that by increasing investments in spa tourism - infrastructure planning, transportation development and efficient information for tourists - the benefits would be higher in spa tourism.

2. Theoretical aspects

The term “tourism” has acquired many definitions over the time, each adding more specific concepts. Etymologically, the word comes from English Tourism “tour” and it means a trip to the destination (and return).

Tourism “expresses a complex activity, involving movement and staying of an individual for a few hours to several days and achieving - in a place, region or on a circuit - a goal such as recreation, leisure, spa treatments, scientific or business meeting. Thus tourism excludes provision of services and activities performed daily by the tourist in his profession, qualification etc.”

Health and spa tourism “is actually the movement of people at different ages, genders and professions in spas for health care, leisure and spa cures with natural substances (mineral water, mud, etc.)” as defined by the International Union of Tourist Organizations (IUTO)

On the other hand, seaside tourism represents “all tourism activities that are in the space or vicinity of a surface of water. This includes the development of tourism (resorts, hotels, restaurants, catering, etc.) and the infrastructure that supports its expansion.” (Drăgan, 2003)

3. Methodology – Objectives

We compared the national resorts (labelled as “national” by the Romanian Government and Tourism Authority) grouped at the level of the administrative unit, as follows:

- Seaside, (Mamaia, Eforie, Costinești, Techirghiol, Mangalia)

- Inland spa resorts (main resorts: Amara, Băile Felix, Băile Govora, Băile Herculane, Băile Olănești, Tușnad, Buziaș, Călimănești-Căciulata, Covasna, Geoagiu Bai, Moneasa, Ocna Sibiu, Pucioasa, Sângeorz Băi, Slănic Moldova, Tg. Ocna, Sovata, Vatra Dornei, Voineasa).

Further we analysed statistical data of INSSE on the following indicators (used to compare the actual potential of the two destinations) regarding

A. Offer:

- *number of accommodation units* - an indicator of tourism actors and possible investment initiatives

- *number of beds (capacity)* – indicator of hosting capacity of the destination

- *number of beds (capacity) in use* – indicator of potential sales

B. Demand:

- *arrivals* – indicator of image of destination, of pressure on destination

- *number of overnight stays* - indicator and real (net) benefits

- *(degree of) occupancy* – indicator of performance of the accommodation unit but also of the general performance of the destination. It may be gross (considered of 365 days/year) or net (considered only by season – no of actual working days).

4. Analysis

Spa tourism is one of the strengths of the country, with hypothetical and statistical power to lift the Romanian tourism close to other developed states. But for this to be happen, a good strategy is required. Seaside tourism seems artificially maintained by the multitude of investments, a place that has lost ground to the seaside from Bulgaria, Turkey, Greece etc.

The difference between the two forms of tourism are linked to the level of institutionalization of activities - specialized medical care, overqualified personnel and to the natural resources or specialized treatment equipment and accommodation facilities.

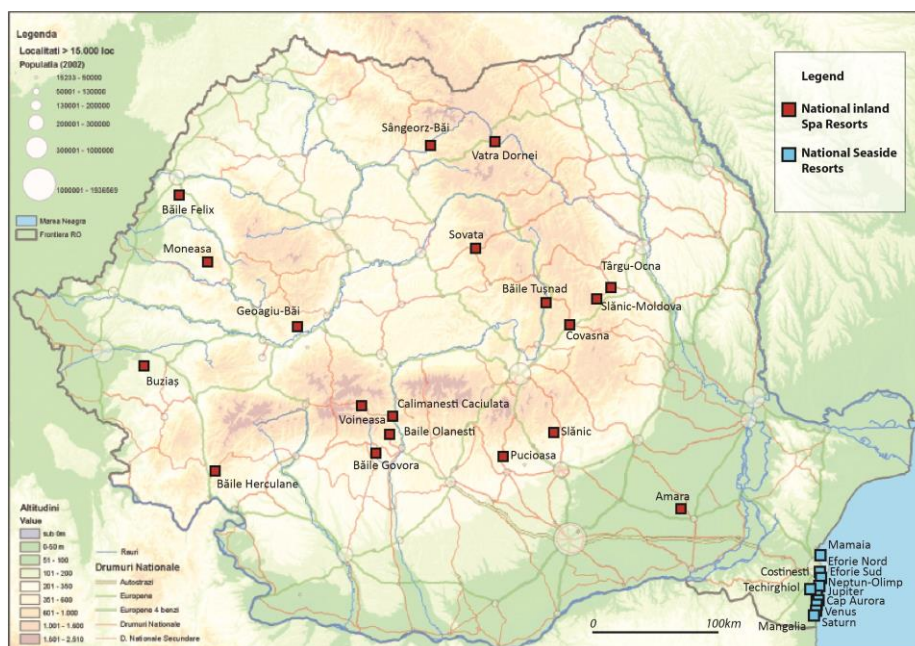


Figure 1. Territorial distribution of national spa & seaside resorts in Romania

Data source: Government figures

Spread in many regions of Romania, inland spa resorts have an extended manifestation in territory unlike the seaside resorts which are confined to a thin strip of land (as of Fig. 1). The majority of the spa resorts also benefit from the proximity of Carpathian Mountains which is another asset in combining health tourism and leisure tourism in one single trip. Seaside resorts offer a limited range of leisure activities and the proximity of Danube's Delta (a UNESCO nature reserve) is not playing a role in diversifying the activities during travel, as the Delta addresses to different kind of potential tourists than those who come to the seaside.

Seaside tourism in Romania is relying on the tourism demand exerted by the capital Bucharest. But when analysing accessibility, the time-distance between Bucharest and the seaside resorts is about 220 km (2-3h) which is too close, allowing tourists to perform day-time travel, with no spending for the accommodation, with rare advance bookings as the tourists rely on the close weather forecast. As for the Bulgarian case, the distance between Sofia and the seaside is 400 km 6-7h which require advance booking and longer stay at the seaside with a minimum of 2-3 days). This requires better organization of the stay for Bulgarian tourists, with a longer stay in seaside, less influenced by the climate vicissitudes.

However, in an international comparison, other European countries holding mineral resources such as Hungary, Czech Republic, Bulgaria, Russia, the resorts have very good accessibility, close to main roads, TGV stations. In our country a small part of the resorts are at this level.

According to the National Statistics Institute: "Once a favourite summer tourist area, for both Romanian and foreign tourists, the Romanian seaside has lost much of the interest of tourists from Western Europe and failed to relaunch with other seaside destinations in the region. Also the frequency of Romanian tourists fell as foreign destinations have become more accessible and attractive."

Among all segments of tourism, health & spa tourism is the only form of tourism that relies on a permanent potential, with a high complexity, independent and inexhaustible of atmospheric conditions. Spa tourism is not affected by seasonality as the seaside tourism, which is open for four months in a year.

An important feature of spa tourism is the motivation of travel. The area of spa tourism is highly expanded, which concerns: prophylactic treatments addressed both to healthy people and not healthy persons; therapeutic treatments used, using natural factors, and a variety of illness conditions; healing treatments used in some forms and stages of disease that generates disability, functional impairment.

Spa tourism uses completely natural resources environmental factors that a country or area has. Another important feature of this kind of tourism is the wide spreading character of natural factors, which makes health tourism can be practiced anywhere.

The following table (Fig. 3) offered by the National Institute of Statistics gives us, at a glance, a comparative image in terms of offer of spa versus seaside resorts. Together, they hold a quarter of the accommodation facilities with comparable number of units (625 in seaside vs. 413 in inland spa). But when comparing total accommodation capacity the gap extends to the double of beds for the seaside resorts which makes it the biggest accommodation provider in the country. But the real situation (the net / clean accommodation capacity, called "beds per days" which is calculated as the number of beds multiplied by the number of working days over the year) shows that both sectors have the same national share. It is about 10 million beds per days which show the total annual offer of cumulated overnights that each sector can sell over the year. When drawing national policies, these are the numbers that need to be looked at and not the raw (brute) numbers.

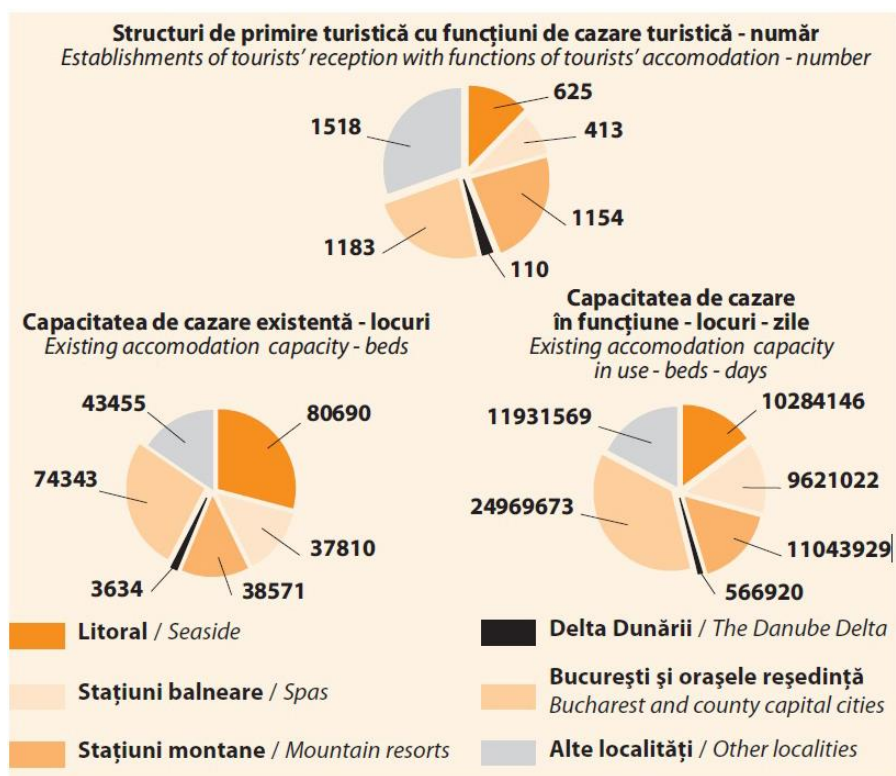


Figure 2 Statistical comparison between main types of tourism in Romania, by theme in 2012
 (Source: National Statistical Institute, 2013)

In 2012, 18.5% of the hotels were registered on the seaside, with a number of beds representing 33.4% of total accommodation capacity in hotel structures (national). However, these hotels are generally open for less than 4 months, with an average of 117 days recorded in 2012, up from the previous period, although the number of accommodation structures on the seaside has diminished (due to a large closing of accommodation structures after 2011, following enormous costs for maintenance during the years after the crisis).

"In the Romanian spa resorts come annually between 800,000 and one million people to restore their health. Among them are the elderly that receive treatment tickets from the National Institute Pension. Annually about 250,000 such tickets go to retirees, but not all of them arrive in the resorts." (Evenimentul Zilei, 2012).

The evolution of arrivals in the two types of tourism is similar between them. Among the years 2005-2006, because of the floods from 2005, both had fallen. In years 2007-2008 the rise of economy and of people's wages determined a growth of the arrivals, but the effect of the economic crises in late 2008 had reduced the arrivals of tourists in 2009-2010. We may notice that both have overcome the crisis, (spa resorts have faster overcome the crisis apparently). Unlike seaside resorts, spa resorts tend to limit their growth, which is explained by the fall of national programmes of grants for the treatment towards the spa resorts in 2012 (due to government change) and massive investments in advertising the seaside and organising public events.

It is noted that investments in health tourism in terms of accommodation are much lower, although the resorts are much more than the seaside resorts. "The spa sector has tremendous potential, but we have a number of shortcomings that prevents us from being very

good. We don't have the infrastructure developed, or tour operators specialized in attracting tourists for spa, nor sufficient advertisement. Such troughs are reflected in the one million tourists registered, only 65 % come through the National Institute of Pensions" said Nicu Radulescu, President of Organization of Spa Tourism in Romania. Meanwhile, accommodation units had diversified and opened wellness hotels - characterized by 'high quality facilities being assigned at 3-5 stars category, units that bring together all services "under one roof" and have a large number of spaces for wellness services.

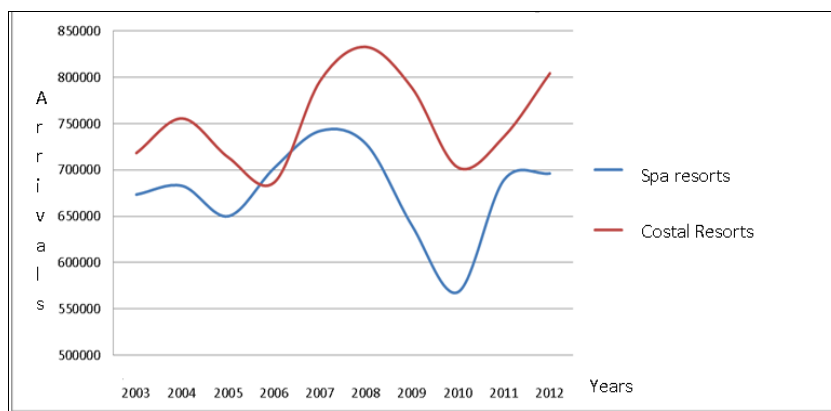


Figure 3: Evolution of tourist arrivals in Romanian spa and seaside/coastal resorts

Data source: INSSE.ro

There are much more places with spa specific than seaside resorts in Romania, and some of the beach resorts also have a spa specific. Thus, the benefits from investments in spa resorts would be much higher at a national and international level.

Regarding local benefits, for the inhabitants from spa resorts, investments would diversify and multiply jobs, unemployment being a major issue of these localities. As for the seaside resorts, the jobs created last only up to 6 months, which bring a lot of social problems with it.

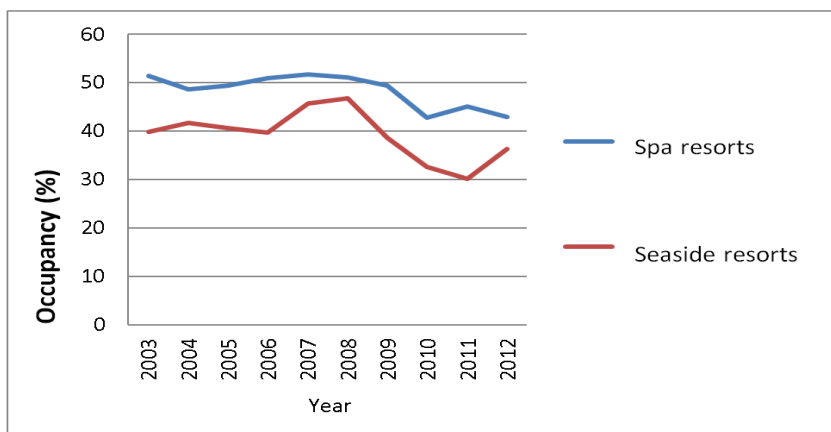


Figure 2: Compared evolution of net occupancy in tourism structures in spa and seaside resort Data source: INSSE.ro

The above graph (Fig. 4) is clearly showing us a much more performing spa resort sector as opposed to the seaside sector. The gap in net occupancy is around 10% and the

economic crisis after 2008 has somehow augmented this gap. When considering gross occupancy (calculated over the total number of days over a year, including the 8 months when most of seaside resorts close (with less occurrence in Mamaia-Constanta), this performance indicator is definitely in the favour of spa tourism.

As for the distributions of the tourist arrivals in the national resorts, we notice a size gap between the high number of arrivals concentrated in only 5 administrative units (and over 3-4 months) at the seaside and the lower-span found in the spa resorts (over 10-12 months during the year). Some spa resorts form regional ensembles and can trigger a common development strategy which might increase their offer and performance like, for example the "Olt Valley" region (Voineasa, Olanesti, Govora, Calimanești-Căciulata) or "The Eastern Mophet" area (Tușnad – Covasna – Slănic Moldova – Tg Ocna), while size of these localities is comparable (from 3000 up to 10.000 inhabitants).

The size gap between the administrative units at the Black Sea (300.000 in Constanta versus 3000 in Costinesti) makes collaboration very difficult and by now, very few national strategies have targeted large areas of the Black Sea shore.

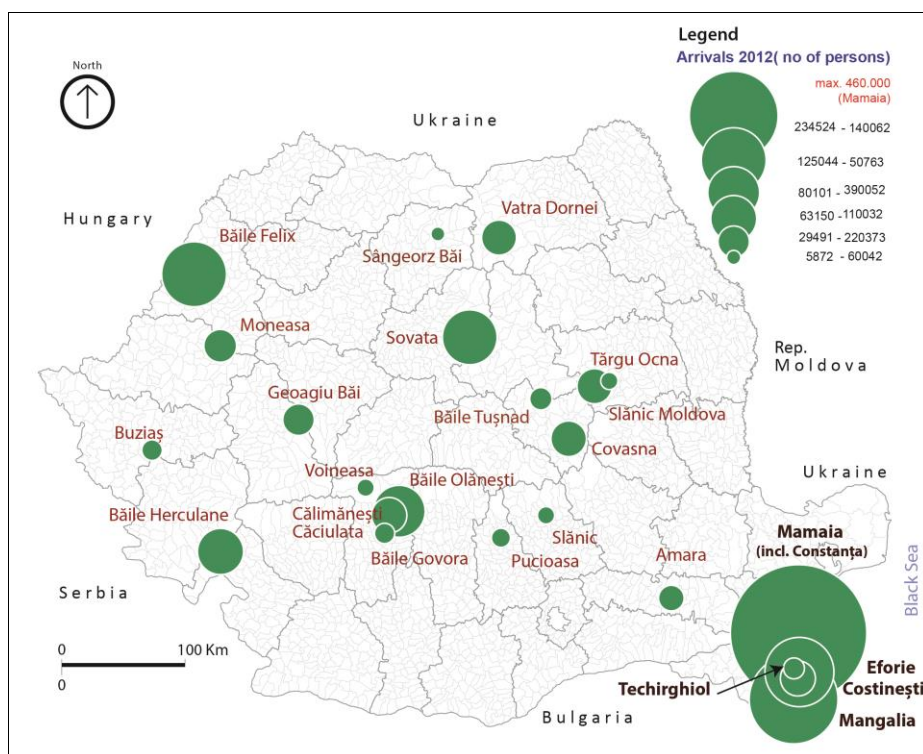


Figure 3: Tourist arrivals in national inland spa & seaside resorts in 2012

Data source: INSSE.ro. Made with Philcarto & Adobe Illustrator

Until 2007 tourists visiting spa resorts were mostly elder, choosing to treat certain health conditions, with less financial possibilities. Nowadays the mentality of tourists has changed, "One cannot stay in pyjamas in the hotel courtyard or in recovery centre [...]. One's no longer considered a sick person. but wants the opportunity to feel good, to spend time with his family and enjoy after his recovery" said the official *porte-parole* from the Ministry of Tourism, Emilian Imbri. The change in demand has triggered changes in the offer of spa destinations, with a new mentality to diversify the range of activities during stay.

Spa tourism is also highly dependent on prices. Specialists consider that a 20% increase of price can lead to a 40% reduction in demand. This is largely due to a longer stay in resorts where prices are comparable to those on the seaside.

Conclusion

Romanian spa tourism is the only form of tourism that has a permanent potential, adapted to modern life, with people constantly stressed, and in search for knowledge and seeing more places, satisfying the eye and mind. Although in seaside tourism there have been much more investment at national level, especially in advertisement and use of seaside as national asset, it still fails to bring large benefits.

On the other part, the potential of spa tourism of our country is extremely high, but the strategies will be successful when it will fit into an organized and stable curriculum, to make health centres diversified, with a high quality profile, including "analysis for determining natural healing factors, determining the profits, useful mineral reserves and how use of them" etc. With more attention towards the development of inland spa resorts from the national development programmes, the performance indicators will show immediate and sustainable growth, with benefits for a larger population spread over a large part of the national territory.

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