TOURISM MONITORING USING EXISTING STATISTICAL DATA: COMPARISON BETWEEN CĂLIMĂNEŞTI-CĂCIULATA RESORT AND THE MAIN SPA RESORTS IN ROMANIA

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Abstract   *Spa tourism can trigger Romania's economic development, given the remarkable potential it features, but it still needs subsequent modern and competitive tourism products, along with the already established ones. This paper outlines a model for monitoring and setting up a comparative analysis in the field of tourism, at the level of resorts, using the existing statistical data provided by the National Institute of Statistics. Călimăneşti-Căciulata resort was applied within this model, and certain indicators were used for the purpose of comparison with other main spa resorts in Romania: Băile Felix-1 Mai, Băile Herculane, Sovata, Covasna, and Băile Olăneşti. This approach might be considered an illustrative example that can be applied to any spa resort in Romania.*

1. INTRODUCTION

The Romanian spa tourism is based on a permanent potential, with rich resources (mineral waters, sediments, natural gas, and therapeutic salt mines), a rich spa tradition, and a network of resorts. Unfortunately, several Romanian resorts have failed to invest in renovating the infrastructure that they possess or in creating new spa products, which is why they now need a revival. The main reasons behind this pitiful situation lie in the lack of money for development and in the exodus of the labour force. Even if funding programs from the European Union were available, the funds were insufficient for a broad programme of modernization or development.

Călimăneşti-Căciulata is one of the most famous spa resorts in Romania, its notoriety being due to the therapeutic effects of its mineral waters, to its bio climate, and to the various tourist attractions in the area.

In order to monitor the development of tourism in Călimăneşti-Căciulata resort, the statistical data available at the official level can be used.

2. METHODOLOGY

Statistical data was provided by the National Institute of Statistics and come from the "Tempo" database. The analysis covers a period of three years (2015-2017) for which data are

available at the locality level. The following statistical indicators have been taken into account:

- Number of arrivals (number of tourists);
- Number of overnight stays;
- Average length of stay (<u>derived indicator</u> calculated as the ratio between the number of overnight stays and the number of arrivals);
- Number of beds;
- Occupancy rate (<u>derived indicator</u> calculated as the ratio between the number of overnight stays and the available accommodation capacity).

The form of presentation of statistical indicators is standardized and it falls into two directions:

- A table presentation with data for the latest three years in terms of absolute values and in percent increase / decrease, as compared to the previous year;
- A standardized chart featuring the weight of the main spa resorts out of the total spa resorts area for each of the above statistical indicators, excluding the occupancy rate.

An appendix was also included where all the spa resorts in Romania were illustrated on a map chart

in terms of number of overnight stays and accommodation capacity.

3. ANALYSIS OF STATISTICAL INDICATORS

3.1. Number of Registered Tourist Arrivals at the Accommodation Units

Overall, in the latest three years, all six analyzed resorts recorded increases in the number of arrivals of tourists. The highest increase was observed in the case of Băile Olăneşti, in 2017 (+23.4%), followed in the same year by the category of "Other spa resorts" (+ 17.7%), and Băile Felix – 1 Mai (+14.2%). The lowest percentage of tourist arrivals was recorded in Băile Herculane (+ 1.5%) in 2017. Călimăneşti-Căciulata resort had a moderate growth rate (+ 6.3%) in 2017 but a higher one (+11.8%) in 2016. In 2016 was registered the sole decrease (-5%) in terms the number of arrivals, respectively for the category of "Other spa resorts". In terms of growth rates, Călimăneşti-Căciulata ranks third behind Băile Felix – 1 Mai, Băile Olăneşti and Covasna.
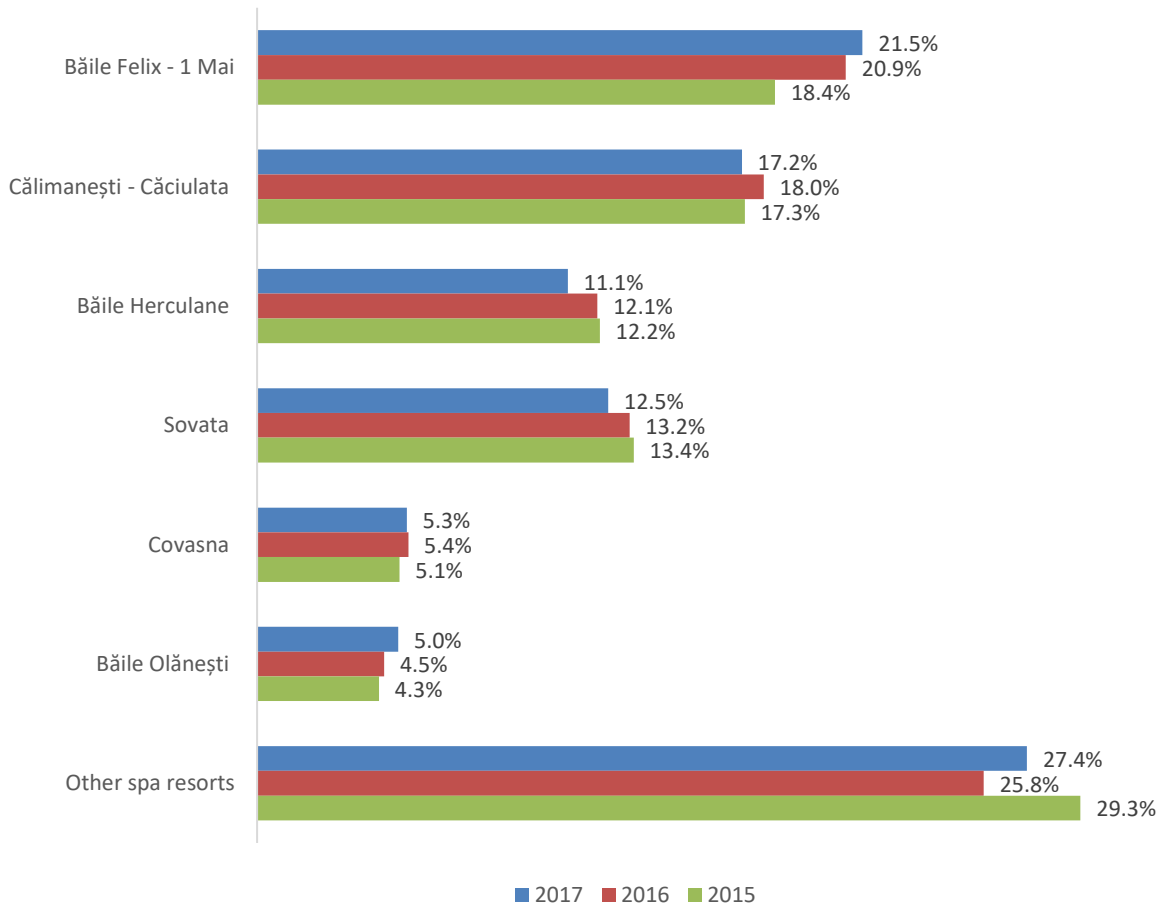
Table 1. Number of Tourist Arrivals at the Main Spa resorts between 2015 and 2017

No.	Spa Resorts	2017	2016	2015	Evolution compared with the previous year	
					2017	2016
1.	Băile Felix-1 Mai	202,438	177,204	144,862	14.2%	22.3%
2.	**Călimăneşti-Căciulata**	**162,111**	**152,527**	**136,400**	**6.3%**	**11.8%**
3.	Băile Herculane	103,948	102,412	95,905	1.5%	6.8%
4.	Sovata	117,375	112,101	105,359	4.7%	6.4%
5.	Covasna	50,105	45,525	39,844	10.1%	14.3%
6.	Băile Olăneşti	47,183	38,231	34,102	23.4%	12.1%
7.	Other Spa Resorts	257,411	218,700	230,302	17.7%	-5.0%
8.	**TOTAL**	**940,571**	**846,700**	**786,774**	**11.1%**	**7.6%**

Source: National Institute of Statistics, "Tempo" Database

Regarding the weights of the main spa resorts in the total number of arrivals in the period 2015-2017, the chart below shows that the Covasna and Băile Olăneşti resorts hold less than 5.5%, and, respectively, below 5% in this respect. The highest shares are recorded by the category of "Other spa resorts" (almost 30%), followed by Băile Felix-1 Mai (about 21%), Călimăneşti-Căciulata (little below 18%), Băile Herculane, and Sovata (around 12% each).

Source: National Institute of Statistics, *processed data*

Chart 1. The share of the main spa resorts in the total number of arrivals at spa resorts area between 2015 and 2017

3.2. Overnight Stays

In contrast with the indicator of tourist arrivals (that registered mainly increases), the number of overnight stays in some of the main six spa resorts analyzed also decreased, namely in Băile Felix-1 Mai (-9.5% in 2017), Sovata (-1.0% in 2016), and Covasna (-2.6% in 2017). It was Băile Felix -1 Mai resort that had also the highest growth rate (+ 23.5% in 2016). The growth rates of the other resorts (including Călimăneşti-Căciulata resort) were relatively modest. For instance, in Călimănesti - Căciulata the growth rate was only 0.7% in 2017 and 3.6% in 2016.
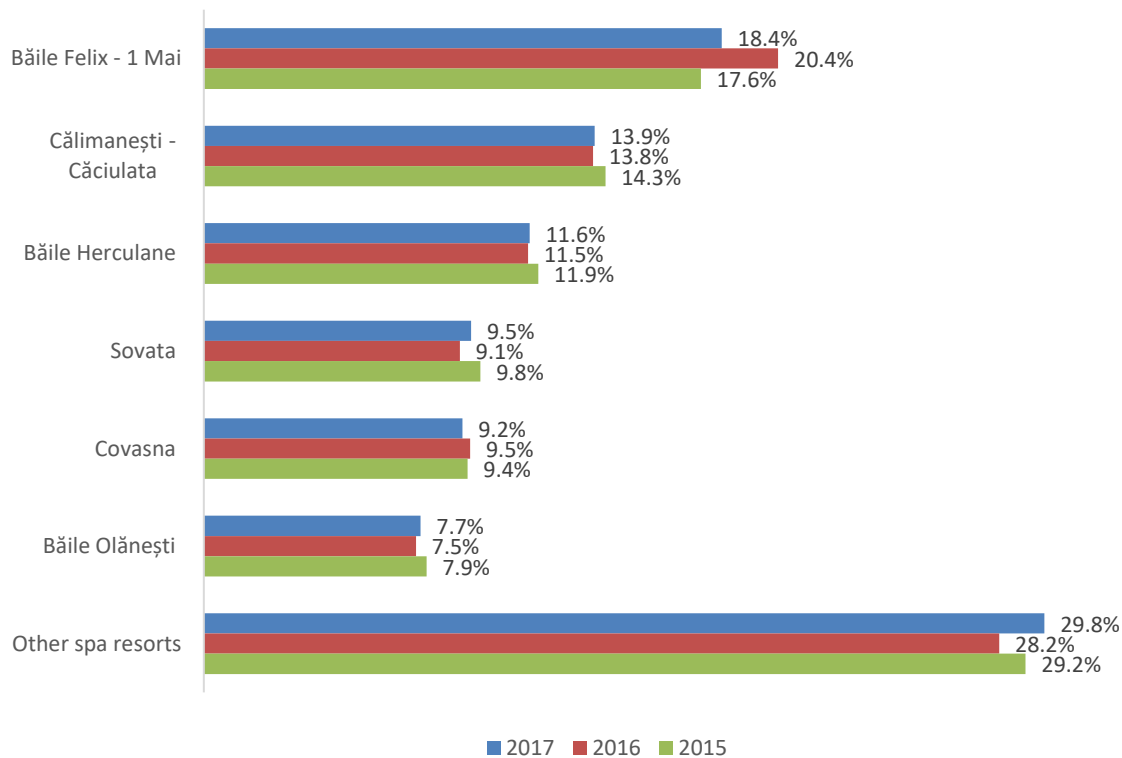
Table 2. Overnight Stays in the Main Spa resorts between 2015 and 2017

No.	Spa resorts	2017	2016	2015	Evolution compared with the previous year	
					2017	**2016**
1.	Băile Felix-1 Mai	771,355	852,753	690,570	-9.5%	23.5%
2.	**Călimăneşti-Căciulata**	**582,047**	**578,089**	**557,943**	**0.7%**	**3.6%**
3.	Băile Herculane	485,426	481,397	464,700	0.8%	3.6%
4.	Sovata	397,888	380,250	384,193	4.6%	-1.0%
5.	Covasna	385,132	395,371	366,330	-2.6%	7.9%
6.	Băile Olăneşti	322,739	314,873	309,338	2.5%	1.8%
7.	Other spa resorts	1,251,634	1,180,845	1,141,340	6.0%	3.5%
8.	**TOTAL**	**4,196,221**	**4,183,578**	**3,914,414**	**0.3%**	**6.9%**

Source: National Institute of Statistics, "Tempo" Database

Similarly to the arrivals, the highest shares in the total number of overnight stays between 2015 and 2017 were also held by the category of "Other spa resorts" (almost 30%), followed by Băile Felix-1 Mai (approximately 20%), Călimăneşti-Căciulata (13-14%), and Băile Herculane (almost 12%). Sovata, Covasna, and Băile Olăneşti recorded smaller weights (each below 10%).

Source: National Institute of Statistics, *processed data*
Chart 2. The share of the main spa resorts in the total number of overnight stays in spa resorts area between 2015 and 2017

3.3. Average Length of Stay

In 2017, the average length of stay recorded in Călimăneşti-Căciulata was of 3.6 days, decreasing compared to the other two previous years taken into account. Besides, the analyzed interval (2015-2017) was marked by many decreases in the length of stay in almost all other spa resorts, the most pronounced being in 2017, in Băile Felix-1 Mai (-20.8%), Băile Olăneşti (-16.9%),

and Covasna (-16.9%). Only for the category of "Other spa resorts" there was an increase (+ 8.9% in 2016), as well as for Băile Felix-1 Mai (+ 0.9% in 2016). Of all the analyzed spa resorts, tourists stayed the most in Covasna (7.7-9.2 days), and in Băile Olăneşti (6.8-9 days), and the least in Sovata (3.4-3.6 days).

Table 3. Average Length of Stay in the Main Spa resorts between 2015 and 2017

No.	Spa resorts	2017	2016	2015	Evolution compared with the previous year	
					2017	2016
1.	Băile Felix-1 Mai	3.8	4.8	4.8	-20.8%	0.9%
2.	**Călimăneşti-Căciulata**	**3.6**	**3.8**	**4.1**	**-5.3%**	**-7.3%**
3.	Băile Herculane	4.7	4.7	4.8	-0.7%	-3.0%
4.	Sovata	3.4	3.4	3.6	-0.1%	-7.0%
5.	Covasna	7.7	8.7	9.2	-11.5%	-5.5%
6.	Băile Olăneşti	6.8	8.2	9.1	-16.9%	-9.2%
7.	Other spa resorts	4.9	5.4	5.0	-9.9%	8.9%
8.	**TOTAL**	**4.5**	**4.9**	**5.0**	**-9.7%**	**-0.7%**

Source: National Institute of Statistics, "Tempo" Database

3.4. Accommodation Capacity and its Usage

Călimăneşti-Căciulata (alongside Băile Felix-1 Mai) is among the resorts that only registered increases from one year to another

between 2015 and 2017, in terms of accommodation capacity. On the opposite side, in Covasna resort the number of beds decreased.
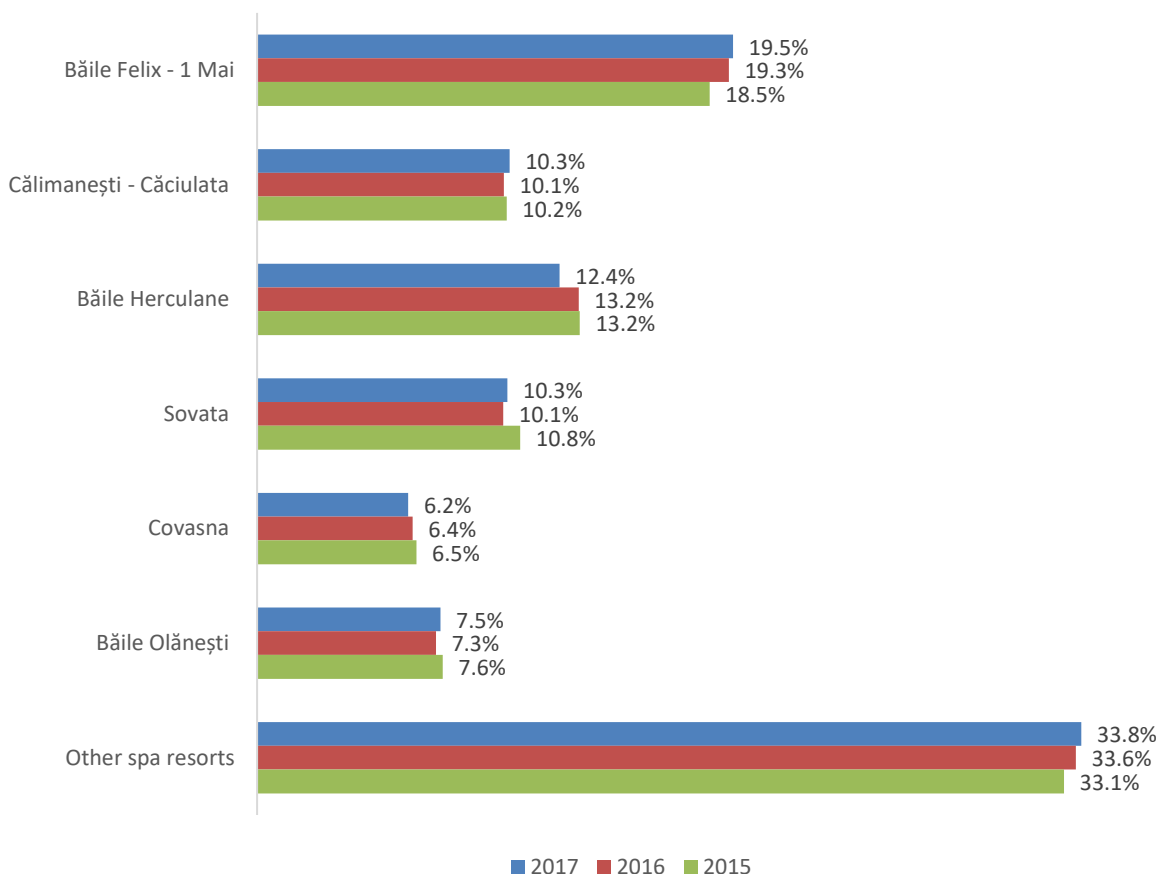
Table 4. Current Accommodation Capacity (no. of beds) in the Main Spa Resorts between 2015 and 2017

No.	Spa resorts	2017	2016	2015	Evolution compared with the previous year	
					2017	2016
1.	Băile Felix-1 Mai	7,145	6,920	6,555	3.3%	5.6%
2.	**Călimăneşti-Căciulata**	**3,790**	**3,621**	**3,615**	**4.7%**	**0.2%**
3.	Băile Herculane	4,542	4,717	4,675	-3.7%	0.9%
4.	Sovata	3,758	3,612	3,813	4.0%	-5.3%
5.	Covasna	2,268	2,283	2,308	-0.7%	-1.1%
6.	Băile Olăneşti	2,752	2,622	2,688	5.0%	-2.5%
7.	Other spa resorts	12,376	12,011	11,688	3.0%	2.8%
8.	**TOTAL**	**36,631**	**35,786**	**35,342**	**2.4%**	**1.3%**

Source: National Institute of Statistics, "Tempo" Database

Out of the main six analyzed resorts, the highest accommodation capacity was concentrated in Băile Felix -1 Mai (about 20%), followed by Băile Herculane (about 12-13%), and by Călimăneşti-

Căciulata, and Sovata (with approximately equal percentages, slightly above 10%). The smallest accommodation capacity was in Băile Olăneşti (below 8%), and in Covasna (below 6.5%).

Source: National Institute of Statistics, *processed data*
Chart 3. The share of the main spa resorts in terms of the accommodation capacity of spa resorts area between 2015 and 2017

3.5. Occupancy rate

In 2017, Călimăneşti-Căciulata had an occupancy rate of 44.8%, decreasing by 2.6% as compared to 2016. By comparison, higher occupancy rates of the beds in 2017 were registered in Covasna (57.4%), Sovata (46.5%), and Băile Felix -1 Mai (45.7%). It also stands out the fact that Băile Olăneşti was characterized by a

falling occupancy rate from one year to another between 2015 and 2017.

Table 5. Occupancy Rate (%) in the Main Spa Resorts between 2015 and 2017

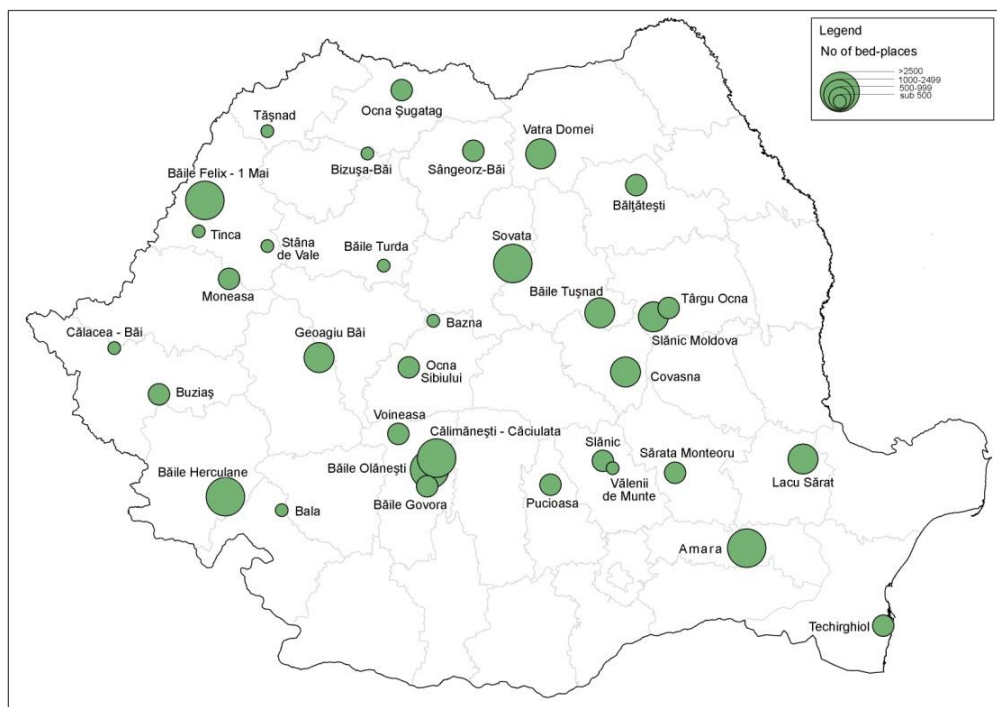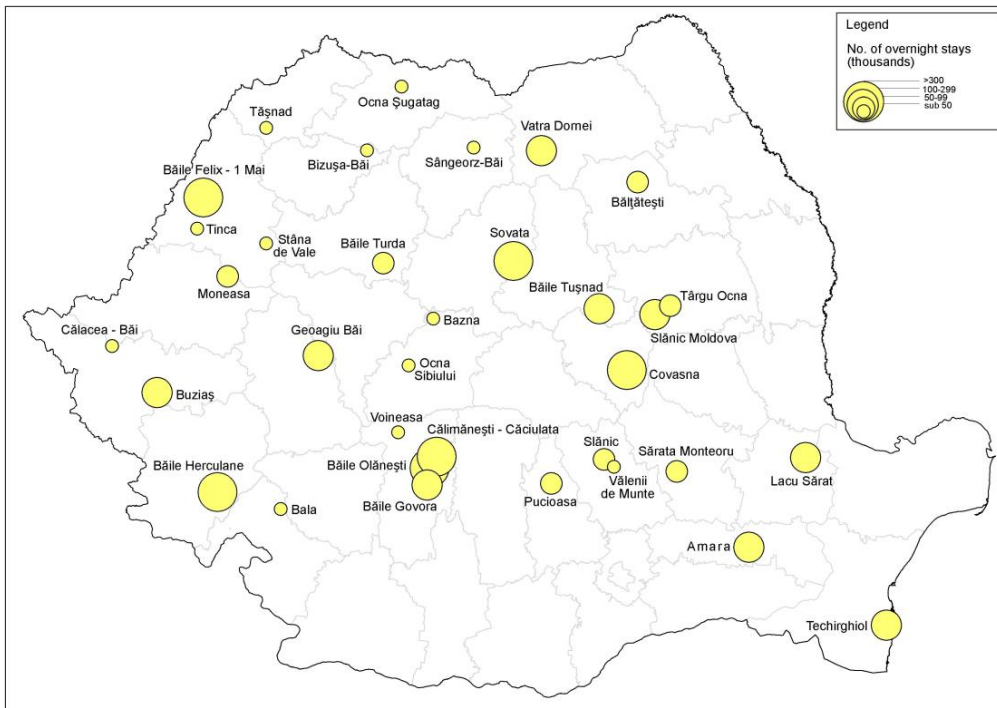| No.	Spa resorts	2017	2016	2015	Evolution compared with the previous year	
					2017	**2016**
1.	Băile Felix-1 Mai	45.7%	52.9%	47.6%	-13.7%	11.1%
2.	**Călimăneşti-Căciulata**	**44.8%**	**45.9%**	**45.2%**	**-2.6%**	**1.6%**
3.	Băile Herculane	43.6%	41.7%	42.1%	4.6%	-1.0%
4.	Sovata	46.5%	44.3%	45.3%	5.0%	-2.1%
5.	Covasna	57.4%	55.2%	55.0%	4.1%	0.2%
6.	Băile Olăneşti	35.9%	40.7%	41.3%	-11.7%	-1.4%
7.	Other spa resorts	37.7%	40.1%	37.0%	-6.0%	8.3%
8.	**TOTAL**	**42.6%**	**44.9%**	**42.8%**	**-5.1%**	**4.8%**

Source: National Institute of Statistics, "Tempo" Database

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The current comparative analysis shows that Călimăneşti-Căciulata resort was situated in the top of spa resorts in Romania, as in 2017 it ranked as the second spa resort in the country in terms of recorded tourist traffic (after Băile Felix -1 Mai) and the third in terms of the available accommodation capacity, expressed in the number of beds (after Băile Felix -1 Mai and Băile Herculane).

ACKNOWLEDGEMENTS

Appendix – Number of Overnight Stays and Accommodation Capacity of Spa Resorts in Romania

Note: This review does not include resorts located at the seaside