TOURISM MARKET HETEROGENEITY IN ROMANIAN URBAN DESTINATIONS, THE CASE OF BRASOV

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Abstract
This paper is set on the context of tourism marketing and it investigates the concept of segmentation as an important tool in the management of urban tourism destinations. Segmentation presumes the existence of heterogeneity among customers in the market, and has received considerable support within the tourism literature while urban tourism has been the object of intensive research for several years. Based on a quantitative research, the present study, aims to provide a deeper insight into the typology of tourists visiting Romanian urban tourism destinations, with a focus on the city of Brasov. The survey reveals that the studied sample can be grouped into different clusters according to their socio-demographic and travel characteristics. As the results demonstrate that each of the identified tourists segments has different profiles, the implications for destination management are discussed. Recommendations are also highlighted in order to assist destination managers to formulate marketing strategies adapted to the different market segments, aiming to better position Brasov as an urban destination on the competitive national and international market.
Keywords Market heterogeneity, Profile, Segmentation, Urban destination, Tourists

INTRODUCTION

One of the main challenges for destination managers is to identify and target different types of tourists based on their travel behavior and characteristics. Considering this challenge the recent tourism literature reflects this increasing interest in the behavior of tourists. On the other hand, consumer decision-making literature acknowledges that understanding travel decisions require an analysis of the effects of social and psychological factors (Mayo and Jarvis 1981, cited in: Barroso Castro et al. 2007, 175–187), considering that destination choice is one of many travel-related decisions the tourist has to make.

Market segmentation is one of the most crucial long-term strategic marketing decisions a destination or organization makes, therefore it is of great importance to explore the market structure as thoroughly as possible. This process can derive the most promising market segments with regard to their attractiveness and the matching potential of each segment's needs and the destination's strengths (Dolnicar 2004, 244-250). Segmentation studies imply that tourists are heterogeneous in terms of travel motivations and, therefore, should be classified into smaller homogeneous groups providing an opportunity for tourism marketers to target different types of tourists more effectively (Kim and Ritchie 2010, in proof.).

1. LITERATURE REVIEW

Tourism literature has emphasized the importance of market segmentation if effective marketing strategies are to be employed (Decrop and Snelders 2005, 121–132). It is now widely accepted among tourism researchers that tourists are not one homogeneous group of people who seek the same benefits from a destination, have the same expectations, undertake the same vacation activities, and perceive the same vacation components as attractive; tourists are highly heterogeneous (Dolnicar and Grün 2008, 63-71). Segmentation presumes the existence of heterogeneity among customers in the market and because it is typically not possible to customize a tourism product for each tourist, market segmentation can be used to identify groups of similar tourists which can be targeted with offers satisfying their specific needs (Haley, Russell 1968, 35, cited in: Dolnicar and Grün 2008, 63-71). The concept of market segmentation has consequently been embraced both by tourism industry and tourism researchers (Wedel and Wagner 1998, cited in: Dolnicar and Grün 2008, 63-71). In today's tourism literature, a very large number of studies can be found that use different descriptors and discriminating variables to segment a market.

Clearly, every market could be segmented in several different ways and not each of these possible segmentations of the market is equally attractive (Dolnicar and Grün 2008, 63-71): ideal segments contain tourists with similar tourism needs and behaviors, similar socio-demographic profiles, who are profitable, who could easily be reached with marketing communication messages, who match the strengths of the tourism destination or business, and whose needs are not catered for by major competitors. Such ideal segments would be highly attractive from the tourism industry's point of view as they would bear the most potential for profit increase through more targeted marketing activities with a higher effect on market demand within the targeted segment (Kotler 1997, cited in: Dolnicar and Grün 2008, 63-71). From an implementation point of view, segments must further be viable (the potential revenue being higher than the costs of the segment marketing mix) and appropriate (segments have to be compatible with the overall position of the service producer), (Bieger and Laesser 2002, 68-76). Some of the studies present in the tourism literature have used a priori segmentation approaches, mainly because the segments were already known. Others have made use of a posteriori segmentation strategies, mainly identifying the sizes and number of visitor segments that were previously unknown by using factor cluster statistical analysis. While a priori segmentation is based on the discretionary selection of variables, a posteriori segmentation can be based entirely on empirically delineated segments; the outcome is therefore much more in-depth (Bieger and Laesser 2002, 68-76).

Demographic and socio-economic characteristics have long been used as the basis of segmentation. However, Chen (Chen 2003, 178–193) calls for more innovative segmentation studies, which might lead to promising and pragmatic marketing applications. When tangible, psychological, unique and common destination attributes are evaluated on the basis of visitors' socio-demographics, the identified similarities or differences in perceptions offer segmentation opportunities (Leisen 2001, 49–64), (Beerli and Martin 2004, 657–681). Beerli and Martin (Beerli and Martin 2004, 623–636) outlined the relationships between the affective and cognitive components of

image and the tourists' socio-demographic characteristics with reference to gender, age, level of education and social class. The influence of the socio-demographic characteristics on perceived images has been mostly assessed on its cognitive component; Prayag (Prayag 2011, wileyonlinelibrary.com, DOI: 10.1002/jtr.837) identified different segments of visitors based on their satisfaction with destination cognitive image attributes in the Island of Mauritius. A study conducted by Barroso, Armario and Ruiz (Barroso Castro et al. 2007, 175–187) analyzes the influence of market heterogeneity - based on a psychological characteristic of the individual - on the relationship between the destination's image and tourist's evaluations and future behavior.

Walmsley and Jenkins (Walmsley and Jenkins 1993, 1–13) studied the perceived image of different tourist resorts in Australia and found that the image of some places differed depending on the visitor's gender and age. Baloglu and McCleary (Baloglu and McCleary 1999, 868–897) have also found that an individual's age and level of education influenced the perceived image of various tourist destinations. Stern and Krakover (Stern and Krakover 1993, 130–146) analyzed the influence that the level of education had on perceived images of a city and found significant differences depending on the individuals' level of education. Visitor status as first timer or repeater is another influential factor on perceived images (Tasci and Gartner 2007, 413–425), (Stepchenkova and Morrison 2008, 548–560). Purpose of visit may also explain differences in perceptions and preferences for destination attributes (Yong and Gartner 2004, 39–45). Other travel behavior variables such as the length of stay and group traveling tend to have similar effects (Baloglu 1997, 221–233), (Boo and Busser 2005, 55–67).

Therefore, understanding such differences may enable destination marketers to identify different segments and fine-tune the tourism product through adaptation of the marketing mix elements (Prayag 2011, wileyonlinelibrary.com, DOI: 10.1002/jtr.837). This subdivision of visitors into useful groups is a critical step in building the competitive advantage of a destination (Evans et al. 2002) and is one of the most crucial long-term strategic marketing decisions a destination makes (Dolnicar 2004, 244-250). The effectiveness of such segmentation depends on the identification of segments that are measurable, accessible, substantial, actionable and differentiable (Kotler et al. 2002). In sum, segmentation techniques could be powerful tools not only for developing marketing plans but also for resolving other managerial concerns as long as they are regarded as cost-effective methods in developing lasting solutions for business operations.

2. AN OVERVIEW OF TOURISM DEVELOPMENT IN THE CITY OF BRAŞOV

Situated in the center of Romania, the city of Brasov is present in most national tourism itineraries of both Romanian and foreign tourists. Although it has a large number of tourism assets, varying from cultural-historic, sports and entertainment attractions, Brasov fails to retain tourists in the city for more than 2 days. This situation reflects a weak exploitation of tourism facilities and a low contribution to the local economy.

The analysis of the official statistics concerning Brasov tourism activities in the last years shows little information that can assist decision-makers in their attempt to propose practical actions aimed at increasing tourists' length of stay, accommodation occupancy rate and tourism's multiplier effect for other economic activities.

The number of available rooms in the city of Brasov has increased with 150% (over 1.000 rooms) between 2003 and 2010 (see Figure 1). The number of urban guesthouses has tripled during the eight analyzed years while the number of hotels in Brasov has increased with 25% in the same period, despite a considerable decrease of their weight in the total number of rooms from 82% in 2003 to 68% in 2010.

Figure 1: **The evolution of the number of rooms in Brasov accommodation units between 2003 and 2010**
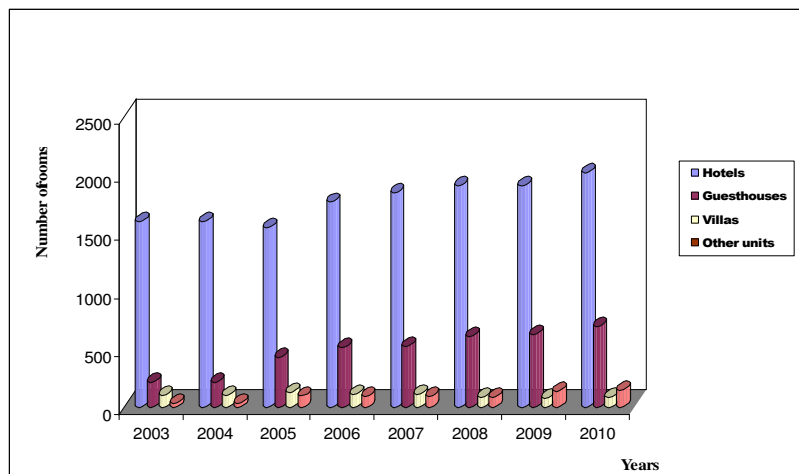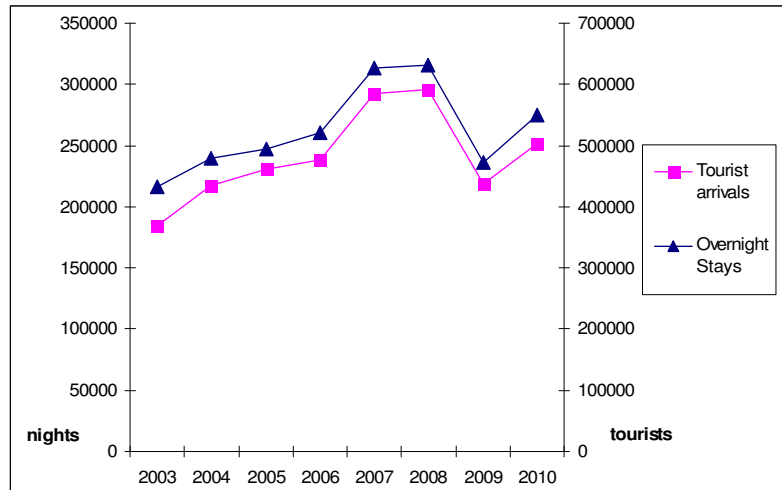

Source: Brasov County Statistics Institute, 2003-2010

Tourism activities have recorded a constant growth till the beginning of the global economic crisis in 2008, when tourism indicators have shown a decline that continued in 2009 and 2010. However, the year 2010 ended with a slight recovery of tourist arrivals and overnight stays, compared to the previous year (see Figure 2). The results published by Brasov County Statistics Institute for the first eight months of 2011 show an increase with over 50% of tourist arrivals, compared to the same period in 2010. Tourists' overnight stays have registred the same growth, larger for Romanian tourists and thus contributing to a slight increase (of 1.9 percents) of the occupancy rate.

Except few annual variations, 26% of Brasov tourists are foreigners: 75% are Europeans and 18% are asians, while the others come from other regions of the world. During the analyzed period of time (2003-2010) most foreign tourists visiting Brasov came from Germany (about 10.000 persons/year), Israel (about 8.000 persons/year), France (about 5.000 persons/year), United Kingdom and Spain (about 4.000 persons/year).

Figure 2: **The evolution of tourist arrivals and overnight stays in Brasov between 2003 and 2010**

Source: Brasov County Statistics Institute, 2003-2010

The regional Destination Management Organization (DMO) – The Association for Tourism Promotion and Development in Brasov County (APDT) has started to organize montly meetings with tourism stakeholders for strategic consultations that include a regular update concerning local and regional tourism statistics. We consider it a worthwhile initiative with long term effects on the tourism planning process in this urban destination. Although these meetings are often aimed at proposing new tourism products and initiating tourism development projects, we consider them partially effective due to the lack of information about Brasov tourist segments, their socio-demographic and travel characteristics. Brasov, as a tourism destination, has also been studied in several scientific papers but none of them focused on tourists' profiles and travel behaviour. Consequently, the present paper aims to study the hetereogeneity of Brasov tourism market in order to outline the different segments of tourists considering socio-demographic variables and their perception of the destination. This information is valuable for both the local DMO and tourist services providers as a framework for further tourism planning and marketing activities.


3.   **METHODOLOGY**

In order to accomplish our research purpose, a survey was conducted aiming to analyze the image of Brasov as a tourist destination (including its satellite mountain resort: Poiana Brasov). Tourists were approached by voluntary students in their accommodation location based on a randomly selection and asked to fill a questionnaire. We prepared questionnaires both in English and Romanian and the survey took place simultaneously in Brasov and Poiana Brasov. Data was collected between January and May 2009 and the final sample size counted 542 tourists. The

main weakness of our sample consists in the impossibility to assure a veritable sample framework, which is a common issue in tourism research. Our efforts have focused on covering a quite large period of time and different seasons in order to obtain a good representativeness of the sample in spite of the mentioned weak point. The questionnaire contained a series of questions meant to evaluate the image of Brasov tourist destination as well as tourist identification questions aiming to capture their socio-demographic characteristics. In this respect, 21 items regarding the evaluation of different attributes of the studied tourist destination have been evaluated based on a Likert scale with 5 levels, equally distanced each other. As the responses to these 21 items capture a fragmented image of the studied destination, we have added an additional question meant to evaluate the overall image of the Brasov as a tourist destination. Collected data was analyzed using various univariate, bivariate and multivariate methods available in the SPSS software. In this respect, t-Student test, one way Anova, Chi-square test, Principal Component Analysis, Cluster Analysis, Homogeneity Analysis have been used in order to identify relationships between different variables and to characterize the heterogeneity of the local tourism market.

4. RESEARCH OUTCOMES

The main purpose of our research is to demonstrate the heterogeneity of Brasov tourist market using different variables that can situate tourists in certain groups according to their socio-demographic characteristics and their attitudes regarding the image of destination. As the segmentation process could be made both on a priori and post-hoc methods, we started our analysis from the sample's distribution according to the socio-demographic characteristics of the researched population. This is an a priori segmentation that requires the researcher to choose firstly the variables of interest and then classify visitors according to their main characteristics such as (Prayag 2011, wileyonlinelibrary.com, DOI: 10.1002/jtr.837): gender, age, marital status etc. However, our main variable of interest is the overall image of the studied tourist destination. The distribution of this variable on an interval scale from 1 to 5, were 5= very positive image, is presented in figure 3.

Figure 3: **The overall image of Brasov**
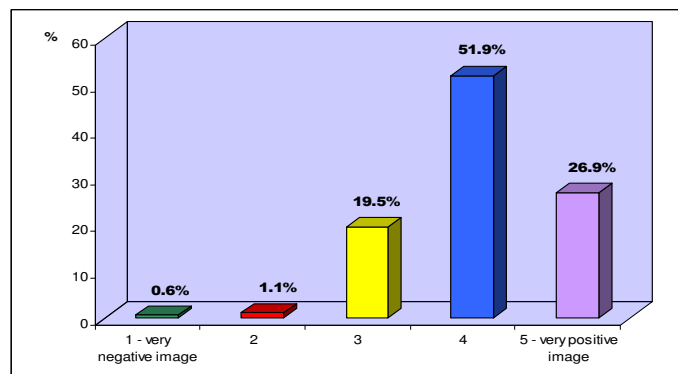
The majority of the respondents (51.9%) have a positive overall image of Brasov while 26.9% of subjects consider that Brasov has a very positive overall image. According to these results, the mean of the variable that measures Brasov's overall image is 4.034 points on a five levels scale (5 = very positive image). Starting from this main variable, we tried to do a segmentation of Brasov tourists according to the main characteristics of the studied population: gender, age, marital status, the main purpose of visit, country of residence and traveling style (with a group or individually). Table 1 shows the sample structure according to the population's characteristics resulted from the process of data collection and the influences of these variables on the overall image of Brasov tourist destination. The influences of the socio-demographic characteristics on the overall image of Brasov were tested with t-Student test for two groups and the Analysis of Variances (ANOVA) for the variables with more than two groups. In this respect, the differences between the groups' means regarding the overall image of Brasov tourist destination were tested.

The conclusion of this analysis is that a priori segmentation is not a proper method in this case as all the significance levels (Sig.) are higher than 0.05. Therefore the differences between the groups' means are not significant for a probability equal or higher than 95%. Moreover these differences are found for very low probabilities, meaning that the studied population is homogeneous if we take into consideration separately its main characteristics.

Table 1: **The socio-demographic characteristics of the studied sample and their influence on the overall image of the Brasov tourist destination**

Characteristics	Frequency	%	Test result	Significance
Gender				
Male	305	57.2%	t = 0.144	Sig = 0.88
Female	228	42.8%		
Age				
16-24 years	117	21.6%	F=0.862	Sig = 0.506
25-34 years	189	34.9%		
35-44 years	145	26.8%		
45-54 years	68	12.6%		
55-64 years	14	2.6%		
Over 64 years	8	1.5%		
Marital status				
Single	131	25.0%	F=0.192	Sig = 0.943
Married	222	42.4%		
In a partnership	142	27.1%		
Separated,/divorced	18	3.4%		
Widowed	11	2.1%		
The main purpose of visit				
Leisure	321	61.6%	F=0.131	Sig = 0.941

Characteristics	Frequency	%	Test result	Significance
Business	130	25.0%		
Visit friends or relatives	41	7.9%		
Other purpose	29	5.6%		
Country of residence				
Romania	460	85.0%	t = 1.091	Sig = 0.276
Other country	81	15.0%		
Travelling in a group				
No	135	25.1%	t = 0.508	Sig = 0.612
Yes	402	74.9%		

In order to find the main patterns of tourists' behaviors and differences between significant groups, a post-hoc segmentation was used. Post hoc segmentation requires the researcher to choose a range of interrelated variables and then cluster visitors into groups whose average within-group similarity is high and between- group similarity is low (Hoek et al. 1996, 1355–2538, in: Prayag 2011). Firstly, we have taken into consideration the 21 items that divide the image of Brasov destination in different levels of appreciation. These items were grouped into major factors using the Principal Component Analysis (PCA) as a method of multivariate data processing. We have chosen this analysis because it allowed us to identify the simultaneous correlations between more than two variables. In this context, we had the opportunity to analyze globally the interdependence between the variables (Bry 1995). Using PCA method on our data set (Ispas et al. 2010, 88-100), five relevant factors have been isolated from the 21 used variables, which can be labeled as follows: "leisure component", "security component", "infrastructure component", "environment component" and "friendly component". The results of the factor analysis show that the explained variance is more than 60%, and individually each dimension has the "eigenvalue" above one. The statistical significance of the correlations and adequacy of factors were validated using specific statistical tests such as Barlet test of sphericity and Kaiser-Meyer-Olkin measure of sampling adequacy. Among the five identified factors the fourth ("environment") and the fifth ("friendliness") had the highest mean scores (4.34 and 4.04).

In order to identify the patterns of the studied population that take into consideration both their attitudes towards the Brasov destination and the main socio-demographic characteristics, we have used a Two Step Cluster Analysis procedure. This is an exploratory tool designed to reveal natural groupings (or clusters) within a data set that would otherwise not be apparent. The algorithm employed by this procedure has several desirable features that differentiate it from traditional clustering techniques. As the SPSS package mentions, the method handles with categorical and continuous variables, by assuming variables to be independent. Finally a joint multinomial-normal distribution can be placed on categorical and continuous variables. We have introduced in the Cluster Analysis all the five factors mentioned above that characterize the image

of the studied tourist destination and tourists' characteristics: gender, age, marital status, travel purpose and traveling style (in a group or individually). The algorithm outlined two clusters with different attitudes regarding the image of the tourist destination and certain socio-demographic characteristics. The results are presented in Table 2. In order to identify the significance of the differences between clusters we have used t-Student test and Chi-square test. As it is illustrated in Table 2, even if the differences between tourists' attitudes towards the five dimensions of destination image are quite small, all of them are statistically significant. The other differences between the clusters' structure according to respondents' characteristics are also statistically significant.

Table 2. **Clusters' characteristics and the statistical significance of the differences**

Variables	Cluster 1	Cluster 2	Test result	Significance
Cluster dimensions inside the sample	**62.0%**	**38.0%**		
Mean scores of the image dimensions (5= very positive image)				
Security component	3.9	3.6	t = 5.71	Sig = 0.000
Infrastructure component	3.9	3.7	t = 3.16	Sig = 0.002
Environment component	4.4	4.2	t = 2.63	Sig = 0.009
Leisure component	3.7	3.4	t = 3.89	Sig = 0.000
Friendly component	4.1	3.9	t = 3.52	Sig = 0.000
Gender				
Male	68.3%	31.7%	$\chi^2 = 11.21$	Sig = 0.001
Female	53.6%	46.4%		
Age				
16-24 years	16.2%	83.8%		
25-34 years	47.5%	52.5%		
35-44 years	100%	0%	$\chi^2 = 234.4$	Sig = 0.000
45-54 years	94.9%	5.1%		
55-64 years	100%	0%		
Over 64 years	100%	0%		
Marital status				
Single	40.2%	59.8%		
Married	90.1%	9.9%		
In a partnership	34.3%	65.7%	$\chi^2 = 153.8$	Sig = 0.000
Separated./divorced	94.1%	5.9%		
Widowed	100%	0%		
The main purpose of visit				
Leisure	44.2%	55.8%		
Business	100%	0%		
Visit friends or relatives	92.1%	7.9%	$\chi^2 = 132.9$	Sig = 0.000
Other purpose	51.9%	48.1%		
Traveling in a group				
No	99.2%	0.8%	$\chi^2 = 95.6$	Sig = 0.000
Yes	49.9%	50.1%		

Considering the patterns of the two clusters, we can conclude that people from Cluster 2 are more demanding than Cluster 1 members as all their appreciations regarding the features of the studied destination are lower than the overall means. This cluster includes mainly females and young people under 35 years old. They are mainly single or live in partnership and travel in groups for leisure purposes. Cluster 1 contains people over 35 years that are married or separated (including widowed). They travel for business or to visit relatives & friends, some are travelling in a group but most are travelling individually. By analyzing the differences between the two clusters regarding the overall image of Brasov tourist destination we have obtained the same pattern: Cluster 2 (mean = 3.9 points) is more demanding than Cluster 1 (mean = 4.1 points), the difference being also statistically significant. In conclusion, one possible explanation of these different attitudes could be that the members of Cluster 1 travel mainly for business or to visit relatives/friends and maybe sometimes they don't cover their travel expenses. Such people tend to be less demanding in assessing the image of a tourist destination in comparison with the ones that travel for leisure and finance their travel expenses. Despite these evidences it should be mentioned that the differences are not so high and that Brasov has a positive image as a tourist destination in the perception of all the respondents.

In order to find some characteristics of the two clusters regarding the information sources and the reservation process we have used another multivariate research method: the Homogeneity Analysis or HOMALS. Also known as the Multiple Correspondence Analysis, this method makes complicated multivariate data accessible by displaying their main regularities in pictures such as scatter plots (Michailidis and de Leeuw 1998, 307–336). It provides an easily interpreted perceptual map that jointly shows the relationship between the categorical variables, which is not available through the traditional method of using Chi-Squares on a bi-variate level of analysis (Schimmel and Nicholls 2005, 23-36). The emphasis of the method is on the geometrical aspects of the problem. For this reason, homogeneity analysis is popular in economic and social research as it reveals important associations between the categories of several variables.

In Figure 4 we have mapped the proximities between the analyzed clusters and the information and reservation variables' categories. One of the conclusions of this analysis is that members of Cluster 1 use TV & Radio as the main information source as well as the Internet. They usually book tourism services with 1 up to 3 weeks before departure using the Internet but also telephone and fax. The members of Cluster 2, mainly young people under 35 years old, use as an information source mostly their friends and relatives and they are used to late-booking (less than one week before travel) by telephone or fax. Tourism information centers and travel agencies are quite isolated on the map, being rarely used as information sources and booking. Another interesting conclusion of this analysis is that few respondents have booked travel-related services with more than one month in advance but at the same time there are few persons that have not booked their travel before arriving in the tourist destination. The most common booking period ranges between several days and 3 weeks.

Figure 4: **Homogeneity analysis between tourists' information and booking procedure**
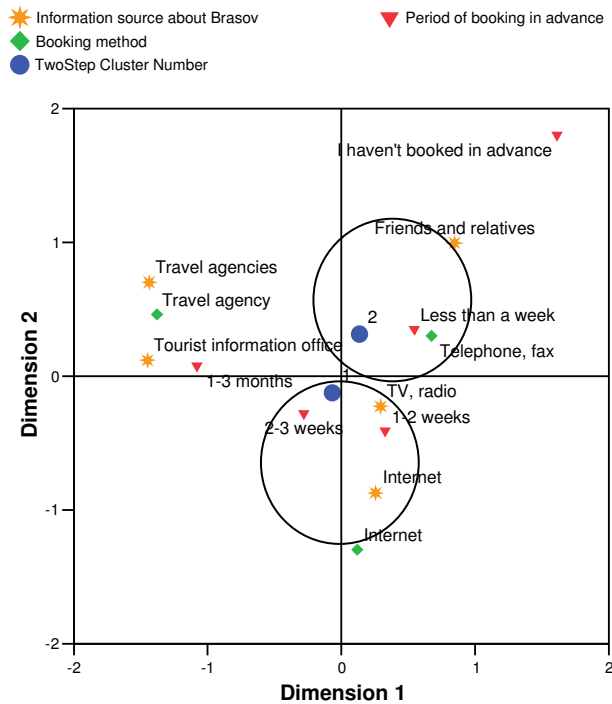
CONCLUSIONS

Destination image is a complex set of concepts that differs according to the market segments. This paper can be considered an original approach because it outlines the role of perceived destination image as a helpful construct for market segmentation. From a practical perspective the results deliver insightful findings for destination planning and management outlining the importance of developing a positive destination image. The identification of several groups of tourists, with different socio-demographic traits and perception of the destination, calls for a more focused approach on the market.

As the demographic and socio-economic characteristics have long been used as the basis of segmentation, we have additionally taken into consideration the relationships between these variables and the components of the studied destination image. Although the majority of the respondents (78.8%) have a positive overall image of Brasov we have noticed some differences in the evaluation of the 21 attributes of the destination. Using PCA method on our data set, five relevant factors have been isolated: "leisure component", "security component", "infrastructure component", "environment

component" and "friendly component". We have introduced these factors in the Cluster Analysis as well as tourists' socio-demographic characteristics and identified two clusters with different attitudes regarding the image of the tourist destination. Respondents from Cluster 2 are more demanding than Cluster 1 members as all their appreciations regarding the features of the studied destination are lower than the overall means. This cluster includes mainly females and young people under 35 years old. They are mainly single or live in partnership and travel in groups for leisure purposes. Cluster 1 contains people over 35 years that are married or separated (including widowed). They travel for business or to visit relatives & friends, some are travelling in a group but most are travelling individually. Advertising and promotion efforts should emphasize high scored attributes as the "environment" and residents' "friendliness" in the attempt to increase visitation. Leisure is the factor with the lowest score and considering the characteristics of the second cluster (young tourists, leisure-driven) destination managers should improve these attributes. Despite the fact that Brasov's overall image as a tourist destination is a very good one, this can't guarantee repeated visitation. Although satisfied tourists do not necessarily return, they can help the destination to attract new customers through a positive word-of-mouth communication. The analysis of tourists' information and booking procedures revealed the fact that demanding tourists prefer late booking (less than a week in advance) using telephone/fax while less demanding tourists book tourism services a long time before departure and prefer the same type of communication means. In order to assure their occupancy in advance, we consider that tourist providers should promote early bookings discounts. At the same time, the lack of popularity of tourist's booking through travel agencies might be explained by the fact that Brasov is not perceived as an integrated tourism destination. In order to motivate tourists to spend more time in Brasov, the local DMO could develop and promote specific tourism packages adapted to the market segments we have identified: active holidays, especially including sport activities for the demanding tourists (young, single/with partner, leisure driven, travelling in a group) and rather cultural or spa and wellness packages for less demanding tourists (over 35 years old, travelling for business purposes or to visit relatives & friends). An appropriate promotion of Brasov as a tourist destination is required and a continuous presence of Brasov tourism packages in the catalogues of both Romanian and foreign tour operators.

However, the generalization of the results is a limitation of the paper, since the area of research only permits the results to be generalized for the researched population in Brasov, making it advisable both to conduct this research in other settings and to analyze the factors that influence the perceived image in other Romanian urban destinations. Future tourist segmentation studies focused on the same destination should take into consideration other variables which haven't been included in our research such as: tourists' education, income and job or profession.

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