

What do international tourists seek for when playing in the casinos? A Bucharest gambling market study

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Abstract

The current study focuses on the gambling market, an area often considered part of the hospitality industry. We studied the casino market in Bucharest, Romania, aiming at profiling its customers. Initially, the proportion of foreigners among the players was analyzed. Furthermore, we determined the critical success and failure factors for those players by pursuing a content analysis approach. We found that locals constitute the majority of players, although in 2 out of 5 casinos studied, the foreigners were majoritarily. There were also important differences across cultures in terms of desired experience in terms of gambling.

Keywords: gambling, casinos, hospitality

Introduction

When it comes to the gambling market, not all casinos are alike. There is a significant difference in terms of customer base between casinos catering mostly for tourists and casinos catering mostly for local players (Eadington, 2007). In line with previous research focused on finding the proportion of foreign customers of various tourist destinations casinos (Back and Bowen, 2009; Nickerson, 2005), we firstly aimed at determining this proportion for Bucharest as the leading casino market of Romania. The presence of foreign tourist as customers of local casinos seems to significantly impact the local communities through its economic leverage (Metaxas and Folinias, 2021). Secondly, there is also a body of research dedicated to success factors in the casino industry but mostly at a general level such as finances, marketing, management, ethics, or CSR (Bulatovic *et al.*, 2017; Wu and Chen, 2015; Kim, 2018; Assaf *et al.*, 2013). However, we did not find in literature a clear focus on micro success factors, such as the tangible and intangible elements of casinos themselves as physical spaces.

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We, therefore, pursued a research strategy to identify the key elements that can turn a casino into a successful business and those that risk doing the reverse. We aimed at listing the concrete critical and success factors for casinos based on the case of Bucharest casinos and the content analysis of relevant number of reviews by both local and foreign players.

1. The worldwide economic impact of casino industry

One of the main reasons for the rapid expansion of casinos is the economic benefit (Marinaci *et al.*, 2021). Casino tourism has spread rapidly in many regions around the world, despite various financial crises in recent years. Due to the rapid growth of this form of tourism, new hotel properties have been built and decorated in various casino tourist destinations. Casino revenues increased by an average of 18.3% between 2010-2015 in the Asia-Pacific region (Gu *et al.*, 2017). Casino games are increasingly being developed as an effective way to stimulate tourism development and growth (Walker, 2013). The fact that Las Vegas was a huge success in this industry, inspired other territories to focus on legalizing gambling. However, Las Vegas remains the most famous destination on earth for tourists and players. Unlike Macau, whose tourist structure is oriented only to casino games, Las Vegas also attaches importance to other services, such as entertainment (Deng *et al.*, 2020). For example, 90% of the revenue generated by tourism in Macau comes from casino activities, while in Las Vegas 63% of revenue comes from other activities, hence the profitability rate in Las Vegas casinos is much lower than in Macau (Deng. *et al.*, 2020).

Casinos also have the freedom to increase tax revenues, but there is not much research on gambling taxation, which is a recent phenomenon (Gu *et al.*, 2020). In analyzing why governments choose to legalize and promote casinos, Calgano and Walker (2010) note that “the main goal of policy is to maximize government revenue”. Governments consider legalizing and expanding casinos as a way to finance spending and balance state budgets through a “voluntary” tax (Marinaci *et al.*, 2021). Tax rates for gambling activities vary by country. For example, in the United States, gambling revenues range from 7-9% in Nevada, New Jersey, and Mississippi to more than half in Illinois (50%), Maryland (67%), Pennsylvania (55%) and New York (60-69%) (Walker and Sobel, 2016). However, in addition to direct benefits, casinos should also increase opportunities associated with recreational, leisure and entertainment activities, such as restaurants, bars, pubs, and clubs (Wu and Chen, 2015).

Unlike the fiscal policy gains that accumulate primarily at the state level, casinos have a positive impact on revenue at both the state and county levels. The casino industry has a positive effect on the economy of the host state, as revenues from casinos lead to an increase in personal income per capita at the state level (Walker and Sobel, 2016).

Taking the case of Macao again, we can say that the fiscal policy worked quite well, where the government collects huge revenues from the imposed taxes, while the casino business expands dramatically by the fact that the casino business invests a lot in advertising to attract all tourists, mainly VIPs (Gu *et al.*, 2016). The most important reason for the greater business success in Macao than in Las Vegas is the higher demand for casino gambling due to the lower price (Gu *et al.*, 2020).

The rapid development of this form of tourism can be significantly attributed to favorable external conditions (influx of high-income visitors and pathological gambling in VIP rooms), but such a development also involves income inequality and the bursting of the housing bubble (Gu *et al.*, 2017). The authors of the research concluded that Macao's economy is neither efficient nor fair because Macao continues to widen income inequality, does not support the prosperity of tourism through responsible gambling, and does not oversee the real estate market, which is currently in crisis. However, they have obtained three political implications that can lead to sustainable tourism and the growth of the local economy. The first refers to the balanced development strategy that must be sought in responsible games, diversified industries and close integration with the regional economy. China's domestic economies and huge markets can also be used to organize events / conferences / exhibitions / meetings (Zuo, 2015). The second political involvement is based on the revenues generated by tourism as a source of domestic investment in profitable sectors. To reduce income inequality, the authors believe that the Macao government should impose higher taxes on casino operators, while increasing the well-being of citizens and providing tax credits to local and foreign companies for their industrial diversification. The third involvement is to break the real estate bubble in Macao. An effective way is to treat this inequality as the main driver of the crisis and to adapt the political levers to suit the task.

On the other hand, there are authors who contradict the fact that the economy in Macau would not be efficient and fair. Zheng and Hung (2011) claim that the gambling industry has made Macau flourish by bringing significant economic progress. Being the only city in China where casino gambling is allowed, Macau is the top gambling center where there is an extremely favorable investment environment, and here not only GDP per capita has grown rapidly, but and tourism and related industries have also thrived (Zheng and Hung, 2011). It is worth noting that this gaming activity in Macau but also in general, has not only an economic motivation, but is also a pleasant and compensatory diversion and an interesting chance for people to get together, socialize and share special moments (Bussu and Detotto, 2013).

In terms of tax revenue, Gu *et al.* (2016) consider that the tax on Macao casinos should be maintained at the current level of 39% on the mass market, but substantially increased on the VIP

tourist market. In this way, a slower but healthier growth of the mass market can be registered, where the local well-being will be improved by diversifying the tourism offer and consolidating the marketing strategy. Consequently, economic growth may become less unbalanced and more sustainable (Gu *et al.*, 2016).

The expansion of the casino industry has had a substantial impact on local tourism and hospitality development, as well as on other areas, including employment, real estate and transportation (Wu and Chen, 2015). Such an expansion exposes individuals to gambling, causing negative social impacts and addiction problems. Some individuals may develop gambling-addictive behavior (Bonny-Noach and Sagiv-Alayoff, 2021). In 2013, the Statistical Manual for the Diagnosis of Mental Disorders introduced the diagnosis “gambling disorder” (GD). The severity of GD is based on a number of criteria, and it can be: mild 4-5; moderate 6-7; severe 8-9.6 (Diagnostic and Statistical Manual of Mental Disorders, 2013).

The tourist destinations based on casinos attract besides the leisure players, social and responsible, travelers with this GD condition of different degrees of severity (Bonny-Noach and Sagiv-Alayoff, 2021). Obviously, not all individuals are sensitive to such an influence. They can easily and gradually adapt to the game environment and may become less prone to the risks already mentioned (Prentice and Zeng, 2018). As soon as they start playing and betting in a casino, they make active choices about what they want to bet on and how much money they want to deposit for that bet. Subsequently, if they notice more losses than gains, they become aware of the risks that may follow and choose to leave the casino, and not bet more until they reach substantial losses (Abbot *et al.*, 2017).

2. Towards a customer’s profile for the gambling industry

Gambling tourism is a research area that focuses on the tourist desire to visit casinos as attractions (Prentice and Zeng, 2018). They no longer aim only at attracting avid players, but also at recreational tourists. They are specially designed to fascinate and relieve pressure on tourists, as gambling causes adrenaline, emotions and enthusiasm. Wong and Rosenbaum (2012) were the first to propose casino tourism in Macau, China and identified 5 motivational factors for visitors to Macau: novelty and entertainment, leisure activity, escape from pressure, visiting casino attractions and socializing (Wong and Rosenbaum, 2012). They also believe that casino destinations bring countless benefits to tourists, including restoring mental fatigue, improving mood and increasing serotonin.

Tourists seek a variety of experiences in different tourism activities and as a result may present different emotional responses (Man-U Io, 2016). In the case of casino activities, tourists and players

may experience a "thrill" when betting, and therefore, gamblers may experience more intense emotional responses that other tourists do not know (Wai Lai *et al.*, 2020). Despite the risk of experiencing a negative feeling, most tourists will not stop betting in casino resorts, and one explanation would be that experiences associated with negative emotions would not necessarily lead to customer dissatisfaction with the casino industry. They still stay for entertainment, to socialize or even with the hope of winning in the end, although tourists with the last-mentioned reason, tend to fall into the risk of bankruptcy and lead to personal and financial problems.

Emotion can be stimulated by the external environment or other stimuli, including interaction with people, place and events. And entertainment is just as important as recreational and leisure activities, as it could lead to a positive emotional experience (Man-U Io, 2016). Understanding the emotional experience of tourists not only helps to assess the tourist experience and satisfaction, but also contributes to the analysis of tourist behavior related to their hedonic experience (Pearce, 2009). For psychological well-being, the most beneficial emotions are those of joy, interest, and love. The hedonic experience refers to all the positive emotional experiences of tourists. This experience can be evaluated in three main phases, namely: the anticipatory phase, on the spot and the reflective phase (Filep and Deery, 2010). The most appropriate evaluation phase would be on the spot, because then the emotional experience is much more intense, while at departure its intensity will gradually decrease.

Following the findings of the scientific article entitled "Exploring the impact of hedonic activities on casino-hotel visitors' positive emotions and satisfaction", there are two dimensions of positive emotions that influence the satisfaction of tourists at different levels. Emotions of "light pleasure" tended to influence visitor satisfaction more effectively than emotions of "intensive fun" (Man-U Io, 2016). With this phenomenon in mind, the author believes that more attention should be paid to effectively stimulating the relaxing and pleasant feelings of visitors. The author's findings also showed that not all activities could influence the positive emotions of other tourists, because those activities that are not part of casinos could only influence the emotions of "easy pleasure", while gambling can stimulate in an effective way the emotions of "intensive fun" of visitors.

Understanding the role that emotions play in consumer decision-making, casinos can aim to develop emotional attachment by promoting the emotional experience associated with their specific activities (Malone *et al.*, 2014). For example, games are not negative in themselves, as they reflect some relevant aspects of our social life, such as courage, competition and risk-taking. Therefore, promotion, prevention and psychological campaigns are needed not only in the presence of gambling addiction, but also in the case of recreational games, to stimulate interest in responsible gaming (Bussu and Detotto, 2013).

When analyzing the reasons why people bet on gambling, it is also important to understand the development of behaviors during the game. Although not long ago, customer behavior and the global gambling industry were treated as homogeneous, the researchers concluded that in the end there is substantial diversity among players (L. Choong-Ke *et al.*, 2014). The purpose of this section is to analyze the differences between casino players and what are their reasons for betting in both physical and online casinos. The reasons why people practice gambling activities are diverse and depend on each type of player: escape, challenge, socializing, intense emotion, visiting and other tourist attractions, or winning. From this we can deduce that players with addictions (hardcore) are more focused on winning, while "relaxed" (leisure) players are more looking to socialize, have fun or visit other goals. In addition, gambling addicts are more likely to be alone when betting, while leisure gamblers usually come with family, friends or relatives (Choong-Ki *et al.*, 2014). Hardcore gamblers also spend more money on gambling because they are more focused on winning, being the most wanted customers of casinos (Wong, 2010). Leisure players practice these activities more for entertainment and socializing and there are fewer.

Many years ago, gambling was a predominantly male pastime, with research usually focusing on vulnerabilities and the negative consequences of men. With the expansion of casinos, women, especially those who were engaged, began to have direct contact with this world and be more exposed to gambling (Tang *et al.*, 2007). In this environment, women and men are not very different in behavior. The authors Tang *et al.* (2007) argue that the most obvious gender differences were observed in terms of employment status, the duration of a game of chance and the type of game played. However, they found that, compared to male players, female players began to play at an older age, were troubled by a similar number of financial and interpersonal problems, and reported more suicidal thoughts due to losses.

Another important classification is that of young people and older people. Despite the environment in casinos (noise, tension, congestion), many older people stay for a long time and spend considerable amounts of money, but what causes them to visit casinos so often (Phillips and Jang, 2012)? Older adults are an important source of income for casinos as their number of attendees is higher than other generations. In addition, the casino industry is considered to apply a marketing strategy that specifically targets seniors, such as bus-sponsored travel or cheap meals (Piscitelli *et al.*, 2016). Pleasure is a major reason why seniors visit casinos, the following being reasons for fun and entertainment (Phillips and Jang, 2012). Pleasure for them means filling free time, overcoming worries about poor health, overcoming worries caused by a close loved one who has died, increasing social relationships and increasing self-confidence (Jang *et al.*, 2009).

Young people, on the other hand, focus on the fun and intensity of short-term emotions, but also on banishing boredom or social reasons (Phillips and Jang, 2012). However, younger people practice online gambling more on casino platforms. Obviously, a valid explanation would be the fact that young people do much better with technology than seniors. One of the advantages of online casino platforms is that players can bet with virtual money to hone their skills before betting with real money. Being so exposed to a lot of casino sites, both real demands and simulation ones (gambling with or without virtual money), can lead them to excessive involvement in gambling (Kim *et al.*, 2017). Kim *et al.* (2017) formed a focus group with 21 young people, and the participants noticed several factors that influenced them to enter the casino sites: suggestions from friends, ease of accessing online gambling (compared to the locations on the field) and incentives offered by gambling operators (free spins, increased profit on sports betting, deposit bonus, etc.).

To avoid addiction for young people that can drag them into a pit full of financial and personal problems, online casino platforms should provide adequate and true information about the odds of winning, warnings about the negative consequences of excessive gambling and the ability to exclude themselves. Besides, the advertisements for both online and physical gambling should be subject to similar regulations. Prizes, promotional materials and / or incentives should be limited to adults only (Derevensky and Gainsbury, 2016).

3. Research Methodology

We chose to focus on 2 main research questions. The first one was whether there is an international dimension for the casinos' customers on the Bucharest market. According to the Romanian Tourism Statistical Abstract (2020), Bucharest attracts close to 50% of all incoming travel of the country. Apart from that, we selected Bucharest since it is the most relevant gambling market in Romania, but also one of the largest gambling markets in Central and Eastern Europe. The second research question lied in establishing the critical success factors for the customers when it comes to gambling in Bucharest and notice differences across cultures. Therefore, we advanced the following 2 hypothesis corresponding to our 2 research questions:

H1: *Most casinos' customers in Bucharest are foreigners*

H2: *Which are the critical factors which explain the success/insuccess of the casinos in Bucharest?*

For H1, we have compiled a list of the 83 casinos that are still open today, and we have selected with a randomization software (Scientific Randomizer) 5 of them, 2 of which we find inside the Marriott and Radisson Blu hotels. We first checked where we can find the most reviews (Google Maps, Facebook, Trip Advisor, etc.), As most reviews were found on Google Maps we decided to analyze the existing reviews on Google Maps. To identify the origin of customers who left feedback, we entered the profile of each, where we found the language, they used in other reviews posted, the origin of the name and surname and the places they visited most often. After that, we created a table with all the countries identified and the number of people originating from each one. In another table we separated the Romanians from the foreigners, and we calculated the weight of both the total and the one for each casino.

The method applied to H2 hypothesis, also called content analysis, is related to the strategy applied for H1, which implied to the assessment of the 5 casinos extracted with the help of Scientific Randomizer.

We analyzed all the reviews available on Google Maps for each casino (between 187-501 per casino), extracted them and coded them in Excel: a column where we find the reviews and another column that represents the attributes of these reviews and how many reviews refer to that attribute. For example, the most frequently mentioned attribute by customers is related to the professionalism of the staff: Grand Casino Marriott 42.85%, Palace Casino 32.22%, Platinum Casino 34.48%, Game World Mall 32.69% and Fortuna Palace 33, 33%. After that, the 2nd most common is related to the services offered, where, for example, at Platinum Casino we find a frequency of 29.31%.

Also, many reviews do not include a justification for the stars offered, but most were positive. We classified them as irrelevant, as we do not know what customers appreciated or did not, and we only considered those that provide information on all aspects of casinos. For example, for Palace Casino, out of 501 reviews, only 121 (24.15%) were relevant, either positive or negative, and 380 (75.84%) had no justification and we did not take them into account. A more detailed overview of the reviews processed as part of our analysis can be seen in Table 1.

In order to better understand what customers appreciate and what negative aspects are identified in casinos, we chose to analyze, for each casino, all the features found in the reviews in order to design the critical success / failure factors of casinos in Bucharest

Table 1. Reviews of Bucharest casinos synopsis

Casinos	Reviews	Relevant (containing text)	Positive no/freq.	Negative no/freq.	5 most frq. countries of origin
Grand Casino Marriott	152	35	19 / 10.6%	16 / 8.55%	Romania, Israel, Italy Greece, Germany
Game World Mall	237	52	29 / 12.2%	23 / 9.7%	Romania, Italy Israel UK, Hungary
Palace Casino	380	121	100 / 19.9%	21 / 4.19%	Romania, Israel, Italy, Greece, Turkey
Fortuna Palace	191	81	66 / 24.2 %	15 / 5.5%	Romania, Israel, Italy, Turkey, Greece
Platinum Casino	218	116	53 / 15.8%	63 / 18.8%	Israel, Romania, Turkey, Italy, Greece

Source: authors' representation

4. Research results

The **H1 hypothesis is refuted**, since out of the 5 casinos, most customers are foreign only to Platinum Casino (60.77%), and in the case of Grand Casino Marriott and Palace Casino casinos the share between foreign and Romanian tourists is almost equal (with a difference between 0.47-9.78%). The lowest share of foreign tourists is found at Game World Mall (only 7.30%) and Fortuna Palace (20.22%). In total, the share of foreign customers is 38.10%, which is quite high if we consider the fact that Romania is not so promoted internationally in this industry.

Following the analysis of the reviews for all 5 casinos, we found a fairly large number of foreign tourists, especially those from Israel (308). Of the 1567 reviews, 597 are posted by foreigners, the share being 38.10%. The casino with the highest share of tourists is Platinum Casino, where the share of foreigners is 60.77% and that of Romanians only 39.22%. We also found that many of the negative reviews were posted by Israeli tourists, who often complained about the low variety of games and the fact that they meet other Israelis who bother them for unknown reasons. Another disadvantage that they consider is related to the services offered by the casino staff, categorizing it as one below the level of those in Israel, and here they referred mostly to the time of service and the conditions that are require to benefit from free drinks and buffet: the stakes must be higher (to spend a larger amount of money).

The Italians come second place. They visited these casinos also for the appreciation of the staff and for the lower stake for which you can bet. I noticed that Italians appreciate casinos in Bucharest more than those in Israel, most reviews being from 4 onwards. Many appreciated the kindness and respect with which they were treated and the fact that the chances of winning were much higher than

in their own country. Of the 71 Italian reviews, we found only 2 that also specify what casinos should improve: selecting customers and adding more poker or blackjack tables.

In the third place we find the Greeks, with a number of 40 reviews, all of which are positive. They mostly appreciated the atmosphere in the casinos, especially the one at Platinum Casino and Grand Casino Marriott. He considers that the atmosphere is very pleasant, where the adrenaline reaches maximum levels when approaching a potential gain, and the staff always has a very friendly communication with customers. They especially appreciate the spirit of Romanians, being some of the most fun people to spend time within a casino.

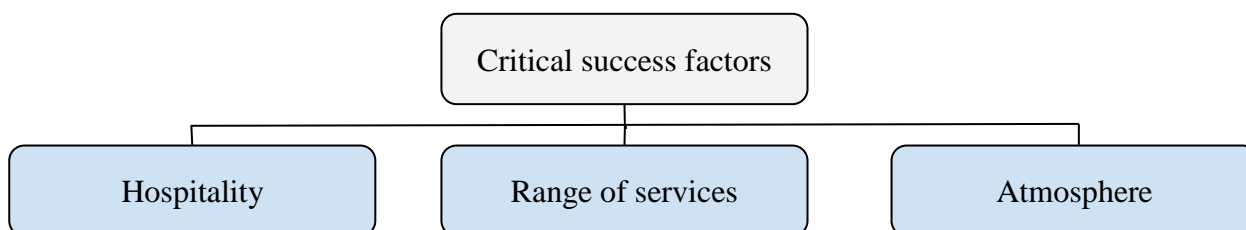
The rest of the foreign tourists who left at least one review come from: Germany (14), France (11), Canada (3), Portugal (3), Turkey (39), Saudi Arabia (5), Morocco (4), China (2), Ireland (2), Russia (11), Syria (2), Slovenia (2), Sweden (2), India (5), USA (8), England (11), Spain (7), Netherlands (4), Denmark (3), Ukraine (2), Switzerland (5), Latvia (2), Poland (3), Cyprus (2), Bulgaria (1), Japan (1), Thailand (1), Lebanon (1), Egypt (1), Serbia (1), Georgia (2), Kazakhstan (1), Indonesia (1), Belgium (2), Macedonia (1), Norway (2), Australia (1), Ghana (1), Croatia (3), Hungary (5), Pakistan (1).

To sum up, we can say that Romania has a great potential for the gambling industry, because it already attracts many tourists from abroad who came to play in casinos. Furthermore, there are very few who left with a negative attitude towards the casinos in Bucharest, which mainly refer to the entrance fees, the low win rate, and the behavior of other customers, especially Romanians and Israelis.

It is also interesting to note that, unlike Romanians, foreigners did not express dissatisfaction with the services (except for the Israelis), staff, conditions and facilities, anti-COVID-19 protection measures and the atmosphere in the casinos.

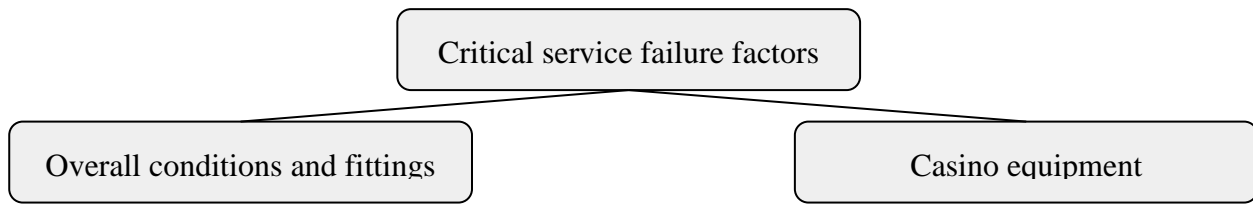
As far as H2 is concerned, after analyzing the number of reviews offered for each feature of the casino, we came to the conclusion that many customers appreciate primarily the hospitality (34%), the atmosphere of the casino (18%) and the services offered (21%). The most negative reviews were about the casino equipment (12.3%), its facilities and conditions (13.8%). Therefore, the critical success / failure factors are the following:

Figure 1. Critical success factors



Source: authors' representation

Figure 2. Critical insuccess/service failure factors



Source: authors' representation

For a deeper understanding of the matter, we summarized and included in the annexes the general results on the studied casinos, with comments on each casino separately, as a result of the content analysis.

Conclusions

Although the hypothesis regarding the largest share of casino clients in Bucharest being international clients was refuted, we noticed a large proportion of those foreigners, namely 39%. This means the foreigners are a relevant share of the gambling market in Bucharest. An interesting finding which might benefit managers is that except for Israelis, the rest of the foreigners leave mostly positive reviews. In this respect, we can recommend to casino managers to pay a closer attention to the needs and expectations of Israeli clients. It could be that a cultural focused approach would pay back in terms of this group's satisfaction.

The second research question aimed at determining the critical success factors as well as the counterparts, the critical failure factors was clarified through its specific hypothesis. We learned that three main success factors are crucial when analyzing the randomly selected casinos: hospitality, range of services and atmosphere. We could also lists other success factors such as the state of equipment or the specific pandemic sanitary measures. As far as criticism brought by guests, we noticed it was all related to the equipment, fittings, and physical environment. There is obviously a need to reinvest in more modern machinery and to pursue a serious refurbishment of premises for a number of casinos.

The current study only focused on the casino market in Bucharest, Romania. It analyzed data from 5 casinos randomly selected, but the research could be further extended For a higher representativity more regions might be included, since the qualitative analysis tools, such as atlas.ti, allow for large chunks of data to be processed.

Due to the period of restrictions caused by the 2020-2021 pandemic, we were restricted to data analysis based on reviews. It would have been useful to be able to collect and compare ground data

by carrying out surveys in casinos, while comparing the results with the data extracted from coding the reviews.

It would also be interesting to analyze differences in critical success/failure factors across cultures. Whilst we only did this to a limited extent, the analysis can be further expanded. One other valuable future research could aim at understanding the role of human and intellectual capital in developing the casinos and their regional markets as it was shown in literature it was the case for other sectors (Nestian, 2007).

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