

THE IMPACT OF COVID-19 ON TOURIST ACTIVITIES IN THE NORTH-WEST DEVELOPMENT REGION, ROMANIA

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L'impact de COVID-19 sur les activités touristiques dans la Région de Développement Nord-Ouest de Roumanie. La région de Nord-Ouest a été l'une des plus affectée de Roumanie par le déclin de l'activité touristique à la suite de la pandémie de COVID-19. Dans cet article nous avons analysé l'évolution de l'activité touristique et de la capacité d'hébergement touristique dans cette région pendant la période 2018–2021 à l'aide des plusieurs indicateurs: les nuitées, la durée de séjour, la capacité d'hébergement touristique totale et celle utilisée. Tous ces indicateurs montrent la même évolution générale – un déclin abrupt au cours de 2020 (surtout dans les périodes de confinement et des restrictions des déplacements et des activités considérées comme non-essentiels, y compris le tourisme) suivi d'un faible repris dans 2021 – à l'échelle régionale on ne peut pas constater le retour aux niveaux d'activité touristique d'avant la pandémie. Dans ce cadre général, au niveau des principales destinations touristiques de la région (stations touristiques et grandes villes) on peut identifier la même trajectoire ou des trajectoires différentes pour les unes ou les autres des indicateurs. Des analyses supplémentaires nous ont permis de découvrir des explications fortement dépendent des contextes locaux pour la situation meilleure ou pire de ces cas particulières.

1. INTRODUCTION

The COVID-19 pandemic and the measures that governments implemented in order to prevent the spread of the virus (lockdowns, quarantined areas, temporary border closings, travel restrictions, testing etc.) impacted the tourism activities, as well as their volumes and patterns, all over the world. International travel dropped by 72% in 2020 compared to 2019, while the recovery of 2021 was modest, the numbers of international tourist arrivals in 2021 still being lower than those of 2019 by 71% (WTO, 2022). The impact varied across counties and global regions, depending on the share of the tourism sector in the states' economy (WTO, 2021), and on other aspects such as a country's overall health system performance, the severity of the shock and the uncertainty concerning the evolution of the pandemic (Aronica *et al.*, 2022). However, even in the first stages of the COVID-19 pandemic, this crisis was also seen as a context for building better future tourism and increasing the sector's resilience to upcoming uncertainties and crises (one of them being the looming climate change crisis). In the early stages of the pandemic, OECD (2020) had already highlighted the need for promoting digital transition in tourism and for a greener tourism alongside the preparation of plans and implementing measures for any short-term recovery. Two years into the health crisis, valuable lessons have been learned in terms of destination crisis management, tourist behaviour and tourism industry trends (Aldao *et al.*, 2022). However, Gössling and Schweiggart (2022) conclude that most evidence show that the positive changes in tourism appear to be mostly at the micro-scale, while global tourism has become more vulnerable.

As a major global tourist destination, Europe was also hit by the decreasing number of international travellers. Eurostat data (2022) shows how the widespread lockdowns set the European Union's tourism at very low levels in the spring of 2020 (almost zero inbound international arrivals in tourist accommodations), followed by a small increase during the summer, driven mostly by domestic tourism (however, in July and August 2020 domestic arrivals were 9% lower than in the same period of the previous year, while international arrivals dropped by 65%). The tourism activity increased in the summer of 2021 (55% more international arrivals and 15% more domestic arrivals in July–August

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2021 than in 2020), but the total number of arrivals was still lower than in 2019 (there were 27% more nights spent at tourist accommodation in 2021, but still 37% less than in 2019).

Romania was not an exception to these evolutions (Găitan, 2020), registering a 52% reduction in tourist arrivals in 2020 compared to the year 2019 (Bănică *et al.*, 2021), and lower levels than the pre-pandemic values of 2021.

The first measures the Romanian government took to prevent the spread of the SARS-CoV-2 virus started with the announcement of a state of emergency period and a national-wide lockdown between mid-March and mid-May 2020, when travel was severely restricted and restaurants, bars, hotels, spas, and other leisure facilities were closed. After that, the state of emergency continued with the state of alert that was prolonged on a monthly basis until March 2022. During this period, the mobility limitations were eased and then eliminated, but the activities in the HoReCa industry were still restricted, e.g., tourism and wellness facilities opened at limited capacity, physical distancing rules and the screening of customers based on testing and vaccination status had to be applied, their level of activity was linked to the number of COVID cases at local level etc. (<https://www2.deloitte.com>). Moreover, since May 2021 the implementation of the EU digital COVID certificate has facilitated international travel and tourism, leading to a further strain on domestic tourism in Romania.

However, during this period, the government also took several measures to help the tourism sector mitigate the effects of the reduced activity during the pandemic, such as granting financial aid and reducing specific taxes for HoReCa businesses (in order to compensate for the loss of their revenues in 2020 compared to 2019 – www.economie.gov.ro), supporting the employees that were at risk of losing their jobs, extending the term of use for vouchers granted to state employees to be used for domestic tourism etc.. However, in spite of all that, recovery has been low, and the tourism activity has not yet reached its pre-pandemic levels (Popescu *et al.*, 2022).

The North-West Region had a promising evolution and a rather obvious upward trend, in what tourism is concerned, in the years before the COVID-19 pandemic. However, with the manifestation of the first waves of the pandemic, in early 2020, several economic and social impacts of the new situation became, in turn, more and more imposing on the tourism sector; among such impacts were the decline of activities in all economic sectors (including transport, with a decisive role on tourism), the significant decrease of incomes for several social categories (Eurostat, 2020), the associated decrease in expenditures, and the overall aspects regarding the perception of travel safety. Cretu *et al.* (2021) found that, at the beginning of the pandemic, the ten most frequently used words in answering open questions related to the perception of travel for tourism were: restrictions, rules, protection, vaccine/vaccinate, hygiene, crowded, virus, distancing, risk/risky, and pandemic. They also found that the surveyed Romanian tourists showed an increased preference for open-air, natural destinations in comparison to cities, and for travelling in small groups. Similarly, Kinczel and Müller (2022) showed how the pandemic temporarily changed the travelling behaviour and tourist activity of surveyed people in two adjoined regions in Hungary and Romania (the Northern Great Plain Region and, respectively, the North-West Region) – during the 2020–2021 period the majority of the respondents mostly visited domestic destinations (in 2018–2019 only 18.5% of respondents did not go on an outbound trip, compared to 60,1% in the 2020–2021 period) and chose shorter stays (on multiple occasions) over longer stays (57,2% declared the statement was entirely or partially true in their cases). Additionally, Aivaz and Micu (2021) concluded that “2020 was the year of Romania being rediscovered by Romanians” (p. 334) showing that internal tourism grew in importance for a significant part of national citizens. But this did not compensate for the lower touristic activity in general or for the strong decline in foreign tourists (Popescu, 2021).

The impact of the pandemic on the tourism sector has been strongly felt in all the development regions of Romania and can be well observed by analysing the evolution of the *Tourist arrivals in the establishments of tourists' reception functioning as tourists' accommodation* indicator (data from the National Institute of Statistics) in the eight development regions, in the period prior to COVID-19, in 2020, and in 2021. The North-West Region has been among those regions most impacted by the pandemic,

thus making it the one to register some of the most abrupt decreases of 2020 (a more worrisome situation being recorded only in the Bucharest-Ilfov and Centre regions). However, one can note that for the year 2021, the North-West Region had a notably more sustained recovery in comparison to the other regions, the difference between the incoming tourists' values of 2021 and 2019 being of approximately 28% as opposed to the 55.2% difference registered in 2020 (for comparison, in the West Region there was a decrease of 55.2% in 2020, at the same time, the decrease of 2021, although lower than the one of the previous year, was still rather high, i.e., 36.71%, while the most significant declines were recorded in the Bucharest-Ilfov Region, reaching 72.4% in 2020 and 54.94% in 2021).

The present paper aims at analysing more in depth the situation in the North-West Development Region and providing an insight as to the impact of the COVID-19 pandemic on tourism in the main destinations within this area. To this end, we have analysed the main statistic indicators regarding tourism in the main cities and in the tourist resorts of national and local importance in the region. For it is there that 75% of the region's tourist accommodation capacity is located, and where 85% of the tourist arrivals in 2019 were registered.

We have analysed each of the main destinations in the Nord-West Region in order to avoid the implicit generalization of a regional level analysis, and to highlight the local evolutions and the various resulted trajectories based on local contexts and factors.

2. STUDY AREA

The North-West Development Region comprises the counties Bihor, Bistrița-Năsăud, Cluj, Maramureș, Satu Mare and Sălaj, while covering an area of 34,160 km² (<https://www.nord-vest.ro/regiunea/>) and a population of 2,826,756 inhabitants (the legally resident population in 2021, according to data provided by the National Institute of Statistics). The urban-rural share of the resident population is fairly balanced, with a slightly higher percentage of the population living in the urban areas (53.78%) in comparison to the rural areas of the region (46.21%). The main cities of the region, encompassing the highest numbers of inhabitants are Cluj-Napoca (328,103), Oradea (220,131), Baia Mare (143,425), Satu Mare (117,526), Bistrița (94,740) and Zalău (68,738), which are also the main development poles of the region.

From a touristic point of view, the regional potential is constituted by important natural and anthropic tourist resources. The main natural parks (Rodnei and Apuseni) and natural reserves of the region, and together with the ecotourist destinations of Mara-Cosău and Pădurea Craiului are all areas of great potential for the development of ecotourism and geotourism. The high mountain peaks and glacial landscape of Rodnei Mountains, the Karst landscape of Apuseni Mountains, including some of the best-known caves in Romania (Cetățile Ponorului, Vântului, Valea Firei Cave etc.) and some of the most representative gorges (Galbenei, Turzii, Someșului Cald etc.), and other important geomorphosites are valuable resources for the development of outdoor tourism and speleotourism. The mineral and thermal waters of the region have been important assets for the development of the main tourist resorts of the area (Felix, 1 Mai, Ocna Șugatag, Tășnad etc.) while being able to sustain the development of a competitive spa and wellness type of tourism. The potential for cultural and religious tourism is significant both in the main cities of the region (Oradea Fortress, the Cluj-Napoca historic centre and museums etc.), as well as in the rural areas containing many heritage sites such as the wooden churches of Maramureș (eight of them being UNESCO sites) and historic landmarks such as castles, manors, or archaeological sites. Other novel types of tourism have been developed around particular or unique resources, like the Turda salt mine or the Merry Cemetery of Săpânța, or even specific events, such as music or film festivals organized in the main cities of the region. The tourist potential of the region has been extensively analysed in several studies, among which Cocean and Pop (2020) or Ilieș *et al.* (2014).

The region has two main cities that can be considered actual tourist poles for the analysed territory: Cluj-Napoca and Oradea, with the city of Baia Mare trying to rise up to the level of the first

two. There are also seven tourist resorts of national importance in the region: the six mentioned in the document *Annex No. 5 of 20.08.2021 to HG 852/2008* – Băile Felix, Zona turistică Centrul istoric Coridorul Crișului Repede–Oradea, Sângeorz Băi, Borșa, Ocna Șugatag and Tășnad, and the most recently declared one, Vișeu de Sus (<http://turism.gov.ro/web/>). The regional tourist network is rounded off by 34 tourist resorts of local importance, including the very new resorts of Marghita and Vadu Crișului from Bihor County, and Săpânța from Maramureș County, that received this status in 2022 (Fig. 1).

In recent decades, the tourism infrastructures in the region have developed, their numbers have substantially increased, their types have become more diverse, and they have been offering more qualitative services. In fact, the numbers of *establishments of tourists' reception functioning as tourists' accommodation* (data provided by the National Institute of Statistics) have continually grown in past years, from 292 units in 2000, to 480 units in 2005, 658 units in 2010, 771 units in 2015 and 1,124 units in 2019. The counties with the highest existing tourist accommodation capacity are Bihor and Cluj (13,552 and 11,911 places in 2019, respectively) followed by Maramureș (7,213 places). The other three counties have visibly lower capacities: 3,449 places in Bistrița-Năsăud, 2,232 places in Satu Mare and 1,797 places in Sălaj, for the same reference year. As expected, the main cities of the region (Cluj-Napoca, Oradea, Baia Mare and Bistrița) and Sânmartin Commune (which includes Felix and 1 Mai spa resorts) have the highest number of accommodation options. More than half of the existing accommodation capacity of the region is located in hotels (20,469 places, that is, 50.97%) while more than 34% are located in agro-touristic and touristic boarding houses; the rest can be found in hostels, motels, touristic villas, camping sites etc. (each of the other types encompassing under 4% of the accommodation capacity).

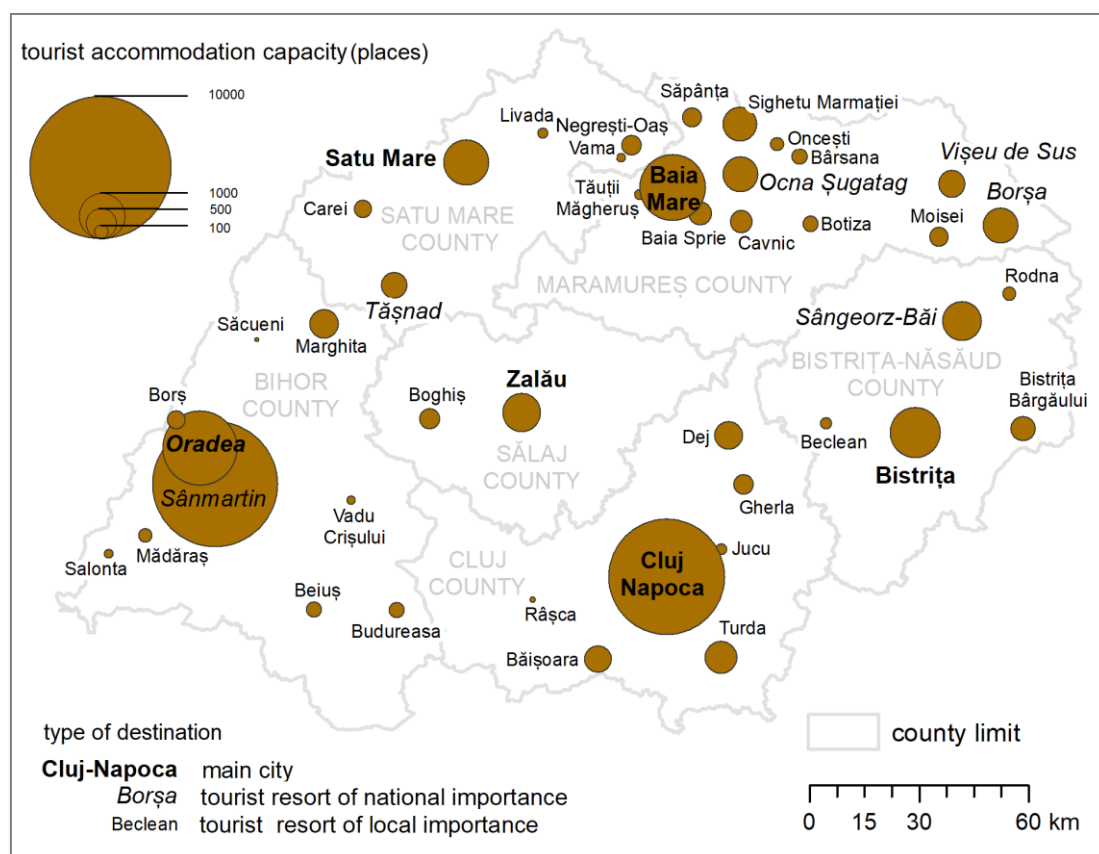


Fig. 1 – The main destinations in the Nord-West Region and their accommodation capacity in 2019 (Data source: National Institute of Statistics).

The tourism demand has also proportionally increased, *the tourist arrivals in the establishments of tourists' reception functioning as tourists' accommodation* (data provided by the National Institute of Statistics) clearly demonstrating this growth. The total number of tourists' arrival has grown from 702,838 persons in 2010, to 1,140,667 in 2015, and 1,766,289 in 2019. Moreover, the numbers of foreign tourists have also notably increased, from 124,683 persons in 2010 to 208,767 in 2015 and 271,491 in 2019.

3. DATA AND METHODOLOGICAL ASPECTS

We have analysed data made available by the National Institute of Statistics regarding the tourism sector in the North-West Development Region. These data were retrieved for the following indicators:

- *The tourist arrivals in the establishments of tourists' reception functioning as tourists' accommodation, by main tourist destinations, type of establishments and category of comfort* – the number of persons spending at least one night in a touristic accommodation outside their area of residence;
- *The overnight stays in the establishments of tourists' reception functioning as tourists' accommodation* – the number of nights that are spent in accommodation units;
- *The duration of stay* – resulting from the ratio between the overnight stays and the arrivals;
- *The establishments of tourists' reception functioning as tourists' accommodation* – accommodation units with more than five places;
- *The tourists' accommodation capacity in use* – the functioning capacity, considering the periods in which the units are open;
- *Index of net using the working tourist accommodation capacity* – resulted from the ratio between the overnight stays and the functioning accommodation capacity.

Data was retrieved for the analysed types of administrative units: the region, the six counties, the main cities, and those administrative units that included tourist resorts. This fact constitutes one limitation of the study, because when we analysed the resorts in the region we had to work with data regarding the city or commune in which the resort is located. This had an impact on some cases in particular, the most notable one being the case of Sânmartin commune, which includes both Băile Felix and 1 Mai resorts. We could not get distinct data for the two resorts, so we have used the available data for Sânmartin commune.

4. RESULTS AND DISCUSSIONS

We can note a rather homogenous trend for all the analysed indicators: a strong decrease registered in 2020, concurrent with the first waves of the pandemic, the lockdown, and the subsequent attenuation measures, as well as a mostly mild recovery in 2021. Although we use the term *recovery* throughout the paper, we ought to mention that in most cases, there still was a decrease in comparison to 2019, albeit at a slower rate (more so than the decrease of 2020). However, in some very particular cases, which we have indicated where needed, the 2021 numbers (and sometimes, even the 2020 numbers) were close to those of 2019, or even surpassed them.

4.1. The tourist arrivals in the establishments of tourists' reception functioning as tourists' accommodation

The impact of the pandemic is incontestable for all the counties in the North-West Region, all of the units registering an evident decrease between 2019 and 2020 in terms of *Tourist arrivals in the establishments of tourists' reception functioning as tourists' accommodation*, with rates oscillating

between 43% and 61%. The steepest descending curves can be observed for Cluj and Bihor, the counties with the highest touristic circulation.

The situation is somewhat different in terms of Romanian tourist arrivals, with the sharpest declines registered in Sălaj (a decrease by 59.7%) and Cluj (a decrease by 55.9%), the only counties in the region that registered a downturn in excess of 50%. In terms of foreign tourists, all the counties have registered pronounced cutbacks in arrival figures, of over 70%.

The relative recovery of 2021 can be noted in all the counties of the North-West Region. However, the six counties experienced this recovery at different rates. Thus, for Cluj County, for instance, this recovery has been much slower than for the others. This could be due to the fact that the county had also lost the highest numbers of tourists. We must also mention that this recovery follows a different pace for foreign, as opposed to Romanian tourists, with a more sustained recovery in the case of the latter, due to the fact that in the first months of the pandemic and the period that followed, tourists were generally hesitant to engage in international travel (as Kinczel and Muller, 2022, showed for Hungarian tourists).

The main trends identified at county level are valid for the major cities of the six counties, as well. Cluj-Napoca has recorded the most significant impact (Fig. 2A), the number of tourist arrivals in tourist establishments decreasing by 63.8% in 2020 (the year with the strictest restrictions imposed in order to mitigate the pandemic, and when two major festivals that usually attracted around 500,000 participants were postponed for 2021) in relation to the previous year, and by approximately 43% in 2021 in relation to the same year of reference. The recovery of 2021 is therefore rather slow, the total number of tourist arrivals remaining much lower than its previous, 2019 level.

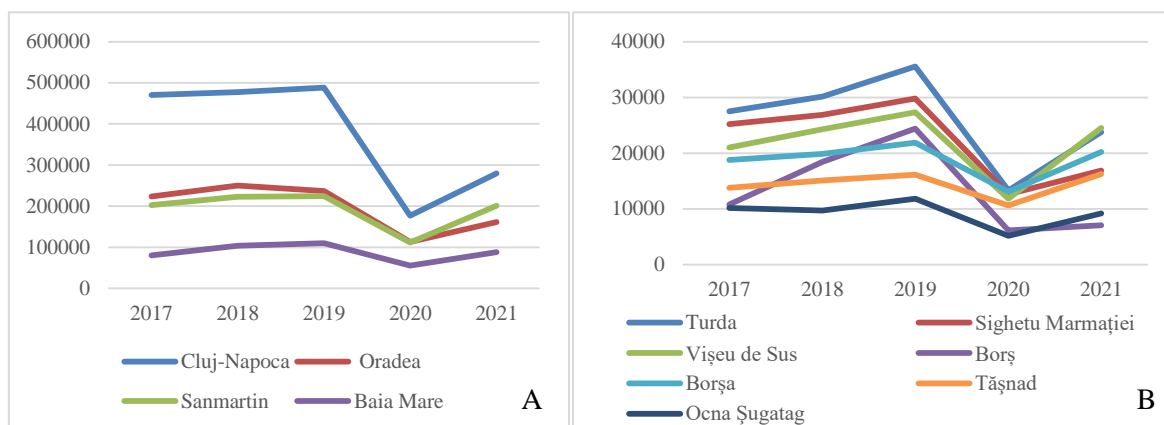


Fig. 2 – Tourist arrivals in the establishments of tourists' reception functioning as tourists' accommodation in the main destinations of the North-West Region (A) and in other resorts that registered more than 10,000 arrivals in 2019 (B). Data source: National Institute of Statistics.

In the cities with a more limited touristic circulation, this recovery is more articulated in terms of percentages. In Satu Mare, for instance, the decrease registered in 2021 in relation to 2019 did not exceed 11.1%. However, one must take into account the fact that in cases like this one, there are virtually fewer tourists registered as a reference point, so it is easier to return to the reference value (considering that we are talking about cities with a medium-high tourism potential). Still, the hypothesis of having a smaller but more loyal demand cannot be ruled out.

The tourist resorts of national importance from the North-West Region have also registered decreases of 40% to 60% in terms of tourist arrivals in accommodation units. However, an interesting case is that of Sângerz-Băi, the resort with the most prominent decrease in incoming tourists in the region, of 69.9%. The resort's decline has been ongoing since the '90s, a quantitative decline,

expressed by the decrease in accommodation capacity, as well as a qualitative decline that left incoming tourists feeling disappointed (Cocean, 2016). The main reasons quoted by the author were the two main hotels focusing on the same types of tourists as they did in previous decades, and the insufficient local means necessary for the upgrade of the resort. Another observation refers to the ever-decaying infrastructure and services of Sângeorz-Băi in comparison to other resorts; in Erdeli *et al.*'s 2011 study, we may find a comparative analysis of the different leisure infrastructures from the main spa resorts of the country, Sângeorz-Băi among them, and we can observe the rather modest diversity of such facilities in the resort in question. And its situation has worsened in recent years.

Still, when compared to the other resorts of national importance from the region, the first striking observation is that *the existing capacity of tourists' accommodation establishments* in Sângeorz-Băi is higher than that of other resorts in the same category (in spite of its highly seasonal character – National Authority for Tourism). We must mention at this point that we are not, however, trying to establish a comparison between Sângeorz-Băi, or any other resort in the region, and Felix resort, because of the great differences in size and complexity of the tourist phenomenon, and the fact that we only have the data regarding Sânmartin commune, which also includes 1 Mai resort.

In establishing a comparison between Sângeorz-Băi and Ocna Şugatag, Borşa or Tăşnad, we note that the latter resorts, despite their lower accommodation capacity, were still registering many more incoming tourists than Sângeorz-Băi. In 2019, Tăşnad, for example, did not even possess half of the available beds that Sângeorz-Băi had (339 places in Tăşnad vs. 758 places in Sângeorz-Băi) but was registering over 4 times more incoming tourists that year. In 2020, when the existing capacity of Tăşnad increased, the resort welcomed ten times more tourists than Sângeorz-Băi. In the same year, Borşa welcomed 12 times more tourists, and Ocna Şugatag almost 5 times more tourists than Sângeorz-Băi, in spite of their lower existing capacities. In 2021, we could see some changes in terms of existing capacity, with the existing capacity of Borşa and Ocna Şugatag surpassing that of Sângeorz-Băi. Needless to say, these resorts continued to register higher numbers of incoming tourists (8 times more in Borşa and 4 times more in Ocna Şugatag) than Sângeorz-Băi.

One might assume that Sângeorz-Băi registers a longer overall stay and has a slightly different touristic profile than the other resorts, hence a lower value of incoming tourists' indicator. Indeed, in 2019 the duration of stay in Sângeorz-Băi had the highest value registered among the resorts of the North-West Region (of approximately 9.5 days). However, the 2020 drop in the numbers of tourists was also proportionally represented by the dramatic decrease in the stay duration in this resort, to under 2 days.

Moreover, when referring to the *tourist accommodation capacity in use*, among the four compared resorts, Sângeorz-Băi had, yet again, the lowest degree of used capacity, 84,000 places-days in 2019, while in Tăşnad there were 119,000 places-days, in Ocna Şugatag – 180,000 places-days, and in Borşa – 265,000 places-days.

In trying to explain the differences noted between the four resorts, we also assumed that the distribution of beds on different categories of accommodation units might be a determining factor, including the hypothesis that due to the new pandemic context and for their own safety, tourists preferred smaller accommodation units, with fewer beds. However, our assumption was not fully validated, since we could later note that both in the case of Sângeorz-Băi, as well as the Tăşnad resort, the available beds are located in large accommodation units (hotels, motels, school and pre-school camps): 91% of available beds in Sângeorz-Băi and 82% in Tăşnad. On the other hand, most beds in Borşa and Ocna Şugatag are located in smaller accommodation units (boarding houses, chalets, villas): 54% and 79%, respectively.

However, Borşa and Tăşnad were the least impacted among the resorts of national importance in the region, with a decrease in tourist arrivals of 34% and 40.2%, respectively for the year 2020 in comparison to 2019 (Fig. 2B). Furthermore, Tăşnad resort has been on a rising trend in these past years, with an increase in tourist arrivals in 2021 when compared to 2019 (which was already registering higher values than the previous years, 2018 and 2017).

One observation to be made is that it appears that the pandemic has amplified pre-existing trends, making the situation worse for resorts that already found themselves in a difficult situation, such as Sângeorz-Băi, while highlighting the higher resilience of the more dynamic resorts that were registering rising evolutions before the pandemic started.

Among the 26 resorts of local importance we analysed (due to incomplete data concerning all the resorts in the region), the vast majority registered a significant decline in the numbers of tourist arrivals. 10 resorts have registered decreases of 17% to 48% and 14 resorts have registered decreases by over 50% in terms of tourist arrivals in 2020 in comparison to 2019. Among these latter, five resorts registered decreases by 72% to 80% (Borș in Bihor County, Jucu and Ocna Dej in Cluj County, and Bârsana and Cavnic in Maramureș County).

However, there are two resorts of local importance that have registered an increased number of tourist arrivals: Salonta (Bihor) and Colibița (in Bistrița Bârgăului commune, part of Bistrița-Năsăud County). While the increase in the number of tourist arrivals in Salonta was rather low, 3.7%, and registered a generally downward trend (in 2019 the number of arrivals was already lower than in 2018), Colibița has seen a gradual, continuous increase in past years, with the surprising evolution of 2020, when 10% more tourists arrived in Bistrița Bârgăului commune, as opposed to 2019. One explanation may also be that, in the COVID and post-COVID context, tourists may have chosen accommodation units with a smaller number of rooms (that would better comply with the safety and social distancing norms) located in remote places.

The 2021 recovery is generally present in the regional resorts of local importance, with only six resorts continuing to register declines of over 50%, again, in comparison to 2019 (Borș and Beiuș in Bihor County, Băile Băița (Gherla), Jucu and Ocna Dej in Cluj County and Cavnic in Maramureș County). One may easily note the presence on the list, yet again, of Borș and Ocna Dej, while the situation is most worrisome in the case of Jucu and Băile Băița, in which the number of incoming tourists in 2021 was even lower than in 2020, despite the relative relaxation of travel restrictions.

On the other hand, six resorts had higher numbers of incoming tourists in 2021 than in 2019: Salonta and Colibița had increases of over 100% (+169% and +102%, respectively), Vama (an increase of 27%), Rodna, Boghiș and Carei (with more moderate increases – under 10%).

As to the three new resorts of local importance, we note that Marghita and Săpânța registered similar percentual decreases in 2020, of 59%–63%, whereas Vadu Crișului registered values comparable to those of the previous year. In 2021, however, Vadu Crișului stands out with a substantial increase in the number of incoming tourists, an increase of 81.2% in relation to 2019, while Săpânța registered a number of tourists similar to that of 2019, and Marghita actually welcomed fewer tourists (by 30.4%).

4.2. The overnight stay and duration of overall stay

The analysis of the *overnight stay* in the North-West Region outlines some interesting observations. Circling back to the case of Sângeorz-Băi, where the value of the overnight stay dropped in 2020 to only 5% of the previous year's value. This is quite a unique case, since all the other resorts stayed above the 15% threshold of the previously recorded value, while most resorts ranged between 30% and 50%. Only six resorts maintained an overnight stay value above those figures: Tășnad (61.12%), Borșa (61.45%), Carei (64.66%), Mădăraș (68.77%), Băile Figa-Beclean (81.66%) and Colibița (110.75%), the one exception among the resorts in the region where there were even more overnight stays recorded in 2020 rather than in 2019. A similar variation in the pandemic's impact on tourism was described by Bănică *et al.* (2021) in a study done at the national level, including all tourist destinations. Aside from the widespread decline, they also found an upward trend in terms of the number of overnight stays in 14% of the Romanian destinations.

Concerning the *duration of the overall stay*, the regional and county fluctuations are not entirely telling, not even for the 2019-2020 period. We may notice a general decline in the number of overall

stays, although this trend is not shared by all the analysed counties. In fact, Maramureş and Sălaj counties are the exception, registering slight increases in 2020, in comparison to 2019. However, almost all counties registered even lower values in the number of overall stays in 2021, with the exception of Bistriţa-Năsăud (Table 1).

Table 1

The duration of the overall stay in the six counties of the North-West Region

County	2018	2019	2020	2021
Bihor	2.77	2.86	2.76	2.73
Bistriţa-Năsăud	1.68	1.86	1.80	1.88
Cluj	1.86	1.87	1.78	1.77
Maramureş	1.83	1.88	1.89	1.81
Satu Mare	1.30	1.30	1.28	1.27
Sălaj	2.23	2.20	2.21	2.08

There are, however, some situations worth mentioning. The first would be the case of Sângeorz-Băi, where a record decline in the overall duration of stay stands out, from 9.48 days in 2019 to 1.66 days in 2020; later, in 2021, the numbers increase back up to 9.35, a surprisingly fast recovery. Secondly, there are some cases where the duration of stay actually increased in 2020 in comparison to 2019: Oradea, Borş, Colibiţa, Sighetu Marmăţiei, Vişeu de Sus and Carei.

At the other end of the spectrum, there are some other resorts where the steep decline of 2020 was followed by a continuous decrease in 2021: Sânmartin (Băile Felix and 1 Mai), Mădăraş, Rodna, Turda (Băile Turda), Cavnic and Ocna Şugatag.

4.3. The tourists' accommodation capacity in use

Although the numbers of *establishments of tourists' reception functioning as tourists' accommodation* in the analysed region have continued to grow in the recent years, from 1,124 in 2019 to 1,225 in 2020 and 1,405 in 2021, and the *existing capacity* has also grown from 40,154 beds in 2019 to 42,451 beds in 2020 and 44,007 beds in 2021, *the tourists' accommodation capacity in use* in the region has followed the same decreasing trend of the previously analysed indicators: from 11,766,476 beds-days in 2019 to 8,350,780 beds-days in 2020 and 11,135,200 in 2021.

For the detailed analysis of the regional *tourists' accommodation capacity in use*, we have only analysed the major cities of the region, the resorts of national importance and some of the resorts of local importance; we have excluded those local resorts that have not reached over 1000 tourist arrivals in the past three years (in total, Romanian tourists and foreigners) or do not have an *existing accommodation capacity* of over 100 beds. By applying this criterion, we have excluded the following resorts: Beiuş, Fântânele Beliş (Râşca commune), Jucu, Livada, Salonta, Săcueni, Ştei, Tăuţii Măgheruş and Vama.

The general trend of the tourism sector can also be observed in the case of this indicator, the majority of analysed resorts registering decreases of up to 40% in 2020, in relation to 2019. There were only four resorts that registered steeper drops: Sângeorz-Băi (-77%), Băișoara (-59%), Cavnic and Băile Ocna Dej (approx. -55%).

Conversely, the least steep decrease was registered in Colibiţa, Onceşti, Oradea and Băile Figa-Beclean. The latter is a most surprising example, given the fact that the *tourist arrivals in the establishments of tourists' reception* indicator has been on a decreasing trend, as well as the overall duration of stay, which has recorded a severe drop in recent years, from 5 days in 2017 to 1.8 days in 2021.

Vadu Crişului is also a very interesting example, since its functioning accommodation capacity grew considerably in the analysed timeframe, from 6,656 beds-days in 2019 to 8,916 beds-days in 2020 and 14,119 beds-days in 2021 (more than double, in two years' time and in spite of the overall

complicated context). Vadu Crișului has a tourist offer mostly based on its natural potential for outdoor activities, such as rafting, hiking, climbing (including via ferrata trails), or for ecotourism (given also its location at the perimeter of the Pădurea Craiului ecotourist destination). All this could have made up its comparative advantage in the pandemic context. Besides, the numerous caves in the commune (the best-known being Vadu Crișului) and its historic heritage were additional factors that supported the naming of Vadu Crișului a resort of local importance in 2022 (sgg.gov.ro).

In 2021, most resorts registered a somewhat contracted decrease (yet again, in comparison to 2019) than the one from 2020. There is an exception, however, in the form of Botiza Resort in Maramureș, where the decline seems to still be ongoing. Moreover, there are some cases where the accommodation capacity in use in 2021 was higher than in 2019, Moisei, Vișeu de Sus, Oncești, Rodna and Colibița resorts being stand-out cases. While Moisei and Vișeu de Sus resorts registered an increase of over 40% in reference to 2019, Colibița registered the highest increase, of 58%, also in reference to 2019.

An interesting observation refers to the types of units that are prevalent in these locations: in the case of Moisei and Oncești, the total accommodation capacity in use is located in agro-tourist boarding houses, and in Rodna – in agro-tourist boarding houses, as well as tourist chalets. Moreover, an interesting trend could be observed in Vișeu de Sus: while the capacity in use was on a downward trend in local hotels, it rose in tourist and agro-tourist boarding houses (a rather notable increase from 7,000 to 57,000 beds-days).

Colibița is a somewhat particular case, where sustained development has been an ongoing process since 2017, a growing trend that was maintained during the pandemic period for all kinds of establishments (agro-tourist boarding houses, House Let-type units and hotels).

However, one may note that in those resorts with a much stronger decline, most available beds are located in larger units, mainly hotels. In the town of Dej (including the Ocna Dej resort), 85% of the available beds are located in hotels, in Băișoara – 63%, and in Cavnic – 60%.

Thus, we definitely cannot rule out the idea that those resorts with a more complex accommodation offer, that included several types of establishments, and those resorts with a strong share of establishments represented by agro-tourism boarding houses have had a comparative advantage in dealing with the pandemic impact, in this region at least.

In order to validate this idea, we have directed our attention towards the working accommodation capacity for each type of accommodation unit. However, the situations of different types of establishments in the region cannot lead to any decisive conclusion, that would be valid on a regional level. For example, in what hotels are concerned, in five of the six counties, the working capacity was lower in 2021 than in 2019, but for Sălaj County it was the highest recorded in the past five years. Likewise, in the case of tourist chalets, the general decreasing trend of the functioning accommodation capacity is valid for almost all the counties, with the exception, however, of Cluj County, where the values were 4 times higher than in 2019. Still, for agro-tourist boarding houses, the increase of the capacity of tourists' accommodation in use in 2021 in relation to 2020 is obvious for all six counties. For Bihor, Bistrița-Năsăud, Cluj and Maramureș the increase was notable (as much as +22% in Maramureș), above the levels of 2019, while for Sălaj and Satu Mare, the figures came close to the values of 2019. This represents the most homogeneous and positive situation among the types of accommodation units in the region. A somewhat similar situation can be observed for tourist boarding houses, even though one may note that the 2021 recovery is slower than for agro-tourist units (the values were only getting close to the 2019 ones, in all the counties) and for tourist villas, five counties registering higher values in 2021 than in 2019, and Maramureș coming very close to that value.

Consequently, from this point of view, boarding houses and villas were the accommodation establishments that maintained their offer to the pre-pandemic standards or even managed to surpass them.

Moreover, regarding *tourist arrivals in the establishments of tourists' reception functioning as tourists' accommodation*, according to the main type of establishments, one may observe a discrete growth tendency for agro-tourist boarding houses and a slight decrease in the case of hotels and hostels (Fig. 3 A, B).

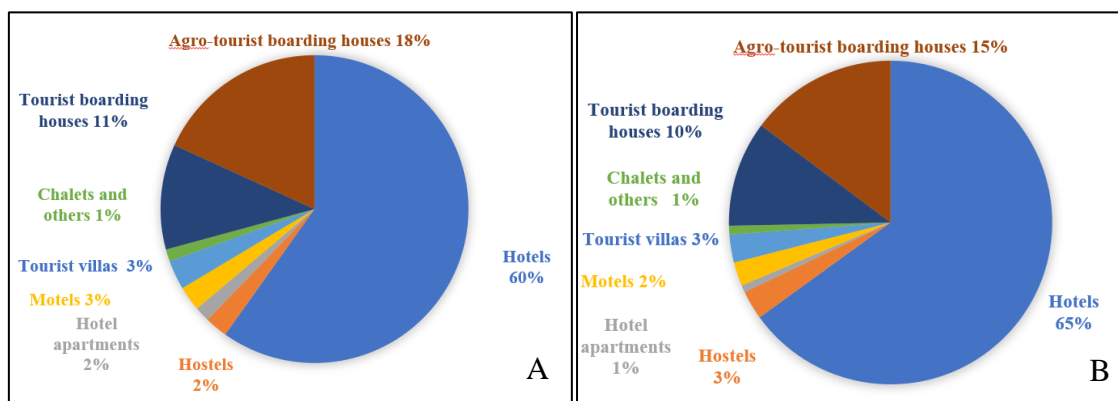


Fig. 3 – Tourist arrivals in different accommodation establishments in the North-West Region, in 2019 (A) and 2020 (B). Data source: National Institute of Statistics.

The *use index of the working touristic accommodation capacity* clearly reveals the difficult periods associated to the pandemic; on a regional level, in April-June 2020, the values were between 6 and 9.5%, in a time frame when regional values reached between 23 and 37% the previous year (Fig. 4).

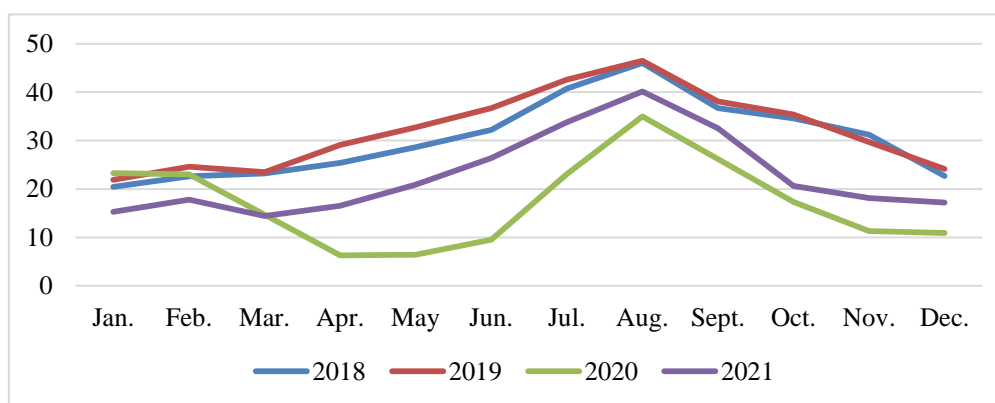


Fig. 4 – The use indices of the working tourist accommodation for the North-West Region between 2018 and 2021 (data source: National Institute of Statistics).

The situation was diverse among the analysed counties: the minimum value was recorded in Sălaj, in May 2020 – 1.5%, followed by Cluj with 3.9% in April 2020 (a dramatic decrease, in comparison to the 34% recorded the previous year) and 5.5% in May 2020, and Maramureş with 5.7% in May 2020. These lowest values overlap the lockdown period. However, in the other counties the decline was not as steep as in these cases. For example, Bistrița-Năsăud registered 14% in May 2020, in comparison to 24% in May 2019, and Satu Mare registered 10% in comparison to 18% the previous year. However, the impact of the pandemic and its successive waves was still being felt in the summer of 2020, when the indices of the tourist accommodation capacity in use were still very much below the values of previous years.

As to the *seasonality* of the tourist phenomenon in the region, one may note that in 2020 there was a higher seasonality, but that year was also marked by the lockdown and other restrictions that were mostly imposed in the colder months, and not in the summer, which is peak season in the North-West Region. In 2021 the seasonality very much follows the trends of previous, pre-pandemic years, especially in Bihor, Maramureş, Satu Mare and Sălaj. However, for Cluj and Bistrița-Năsăud we may note that seasonality remained rather pronounced in 2021 in comparison to pre-pandemic years (Fig. 5 A, B).

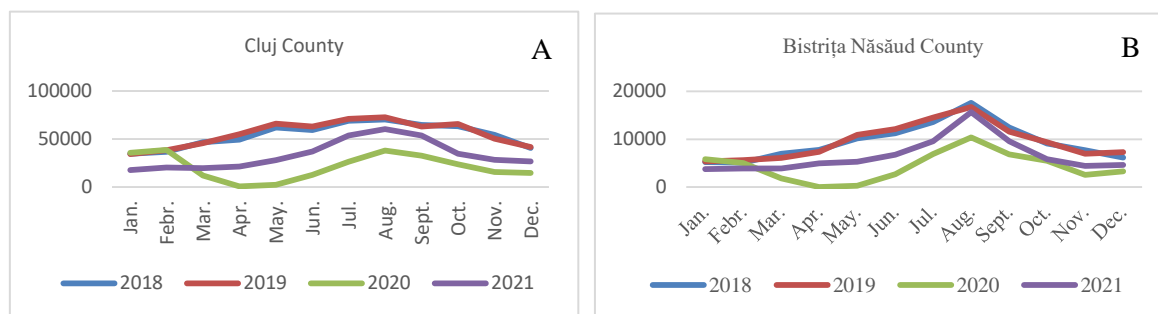


Fig. 5 – Cases of pronounced seasonality as a result of the pandemic (A. Cluj County, B. Bistrița-Năsăud County).

While in Cluj County we were able to see a rather compact season between May–October, in the pre-pandemic years, the season was shortened to July–September in 2021. In Bistrița-Năsăud the months leading to the peak season in August registered much lower increases, and September and October much steeper decreases, thus accentuating the seasonality in the county.

5. CONCLUSIONS

We may note that the impact of the COVID-19 pandemic on the tourist activities is well represented in the statistical data. We were able to identify some regionally valid trends. However, there are so many exceptions, meaning that the extraction of general conclusions regarding the resilience of different tourist destinations or tourist units cannot be accurately outlined. However, in some cases, our findings are similar to parts of those of Bănică *et al.* (2021). They expanded on the idea that the profile of a resilient tourist destination was a small destination, with smaller accommodation units, low seasonality and located far from densely populated urban centres. This profile applies to several of the investigated destinations in the North-West Region, such as Tășnad, Colibița, Vadu Crișului etc.

Nonetheless, we also signal the presence of very mixed results, impacts and reactions. We noted many cases where similar destinations, resorts with a very similar status and tourist profile, were impacted in very different ways by the pandemic and the alterations in the tourist demand (the most striking differences appear between Sângeorz-Băi and Tășnad resorts with a similar balneological profile – while the first one experienced a dramatic loss in the number of tourists and accommodation capacity, the second managed to maintain its appeal). Consequently, we underline the need for further and more detailed studies regarding some resorts in the region, especially Sângeorz-Băi, as a most worrisome example, as well as Colibița resort, a possible new example of successful tourism development in the region.

Additionally, it appears that the context resulting from mitigating the pandemic highlighted the already present trends in the overall evolution of the older tourist resorts – it accentuated the decline of the ones already on a downward trend (like Sângeorz-Băi), while being an opportunity for newer and more dynamic ones (Tășnad, Colibița, Vadu Crișului, etc.)

Moreover, future plans for tourism development in the North-West Region must take into account the impact that the pandemic has had on the different destinations in the area. By showing the different scales of the impact felt by the analysed cities and resorts, our study can serve as a basis for the identification of the most resilient and dynamic destinations, and more importantly, of the vulnerable touristic areas that need interventions and guidance for increasing their resilience.

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