

A GEOGRAPHICAL PERSPECTIVE ON THE IMPACT OF COVID-19 ON TOURISM DEMAND IN ROMANIA

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Abstract: Although the tourism sector has witnessed a gradual recovery during the last years from the devastating impact of the COVID-19 pandemic, it is still too soon to discuss about a full recovery, as territories have responded and adapted in diverse manners to the shock. As such, it is important to investigate the impact of the pandemic in different moments and at different geographical scales, in order to identify and understand the contrasts between territories of same countries. In light of these facts, the purpose of the current paper is to assess the evolution and the spatial patterns of tourism demand in Romania under the impact of the COVID-19 pandemic for the period of time 2020-2023. The focus is on identifying the differences between regions and destinations in terms of initial impact of the pandemic and of their path to recovery to pre-pandemic levels of tourist arrivals.

Key words: COVID-19 pandemic, tourism demand, domestic tourism, regional disparities

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INTRODUCTION

The outbreak of COVID-19 pandemic in 2020 has been perceived as an unprecedented event (Gössling et al., 2021; Gretzel et al., 2020) with huge negative impacts on a global scale (Duarte Alonso et al., 2020; Ntounis et al., 2022; Sigala, 2020). The tourism sector proved to be one of the most vulnerable economic sectors during this pandemic (Alvarez et al., 2022; Gössling et al., 2021), unsurprisingly since it is generally considered to be extremely prone to being negatively impacted by diverse types of shocks and crises (Rosselló et al., 2020; Williams and Baláz, 2015). However, while the beginning of the pandemic came along with a widespread devastating impact, which even meant that tourism activities were completely on pause in many areas (Baum and Hai, 2020), the negative effects of the pandemic were not homogenous across regions, as the resilience of the tourism sector varies across countries, as well as across areas of the same country (Duro et al., 2022).

Contrasts across territories became even more visible as they gradually entered the path of recovery. The adopted travel restrictions and other safety measures (Gössling and Schweiggart, 2022), the availability of vaccines (Okafor and Yan, 2022) or the policies and strategies implemented by governments regarding specifically the tourism activities (Cehan and Iațu, 2023; Wong and Lai, 2022) are all considered to have a role in influencing the efficiency of the recovery process of the tourism sector. Naturally, these factors varied from one country to another which implied diverse trajectories of tourist destinations during and after the pandemic. Therefore, although during the last years the numbers of tourists gradually started to grow when compared to 2020 and although there is an overall recovery of the tourism sector at 87% of the pre-pandemic levels for the period January-September 2023 (World Tourism Organization, 2023b), it is inaccurate to assume that such levels of recovery are specific all around the world. The financial resources and governments' interest and predilection to direct these resources towards tourism, as well as smart strategies and efficient policies are all responsible for the positive trends where these have happened, but as previously emphasised, such resources, strategies and policies are not specific to all countries.

Starting right from the first year of the pandemic, a large number of studies on COVID-19 pandemic's impact on the tourism sector has been conducted for various territorial contexts and from diverse perspectives (Aburumman, 2020; Allan et al., 2022; Alshiqi and Sahiti, 2022; Cardenete et al., 2022; Foo et al., 2020; Gorina et al., 2022; Imeri and Gil-Alana, 2022; Škare et al., 2021). However, despite the literature in the field of tourism being rather abundant in studies on this topic, at present more insights into how tourist destinations evolved and recovered during the last years are necessary. Such new insights could be useful for understanding the current state of the tourism sector and for identifying the different evolution patterns of destinations as a result of the pandemic. In light of these facts, the purpose of the current paper is to assess the evolution and the spatial patterns of tourism demand in Romania under the impact of the COVID-19 pandemic for the period of time 2020-2023. In order to achieve this purpose, three objectives have been formulated: (1) to analyse the state of tourism demand in Romania as a result of the COVID-19 pandemic at different geographic levels; (2) to identify and analyse the regional disparities in Romania in terms of tourism demand in different stages of the pandemic and (3) to initiate a discussion regarding the characteristics of the destinations which might have influenced their evolution during the pandemic.

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LITERATURE REVIEW

The tourism sector during the COVID-19 pandemic

The dramatic changes that the COVID-19 pandemic brought to the tourism and hospitality sector determined a growing interest for matters related to tourism vulnerability and resilience (Boto-García and Mayor, 2022; Duro et al., 2022; Duro et al., 2021), to the economic effects that such an event can cause on tourist destinations (Allan et al., 2022; Cardenete et al., 2022) or to the most efficient and sustainable policies and strategies for recovering after the pandemic (Aldao et al., 2021; Khalid et al., 2021; Salari and Murphy, 2023; Wu et al., 2021). However, before investigating and discussing complex matters concerning the recovery of the sector and the implemented policies and strategies, a natural first step has been to assess the impact that the pandemic had on the tourism sector and, in particular, on the tourism demand. Evaluating the degree to which tourism flows have been affected at different geographical scales has been essential in order to provide a clear image of the intensity and nature of the pandemic's impact on tourism activities for different territories and at different moments.

Consequently, acknowledging the necessity of an in-depth understanding of the pandemic's impact determined during the last four years an abundance of studies that investigated the effects that COVID-19 pandemic had on tourism, which led to a significant development of the literature on crises and tourism. This development of the literature involved empirical research conducted both at a global or larger scale (Gorina et al., 2022; Gössling et al., 2021; Khalid et al., 2021; Plzáková and Smeral, 2022; Škare et al., 2021) and, even more frequent, at a national or local level (Alshiqi and Sahiti, 2022; Cardenete et al., 2022; Duro et al., 2022; Foo et al., 2020; Hyasat, 2022; Imeri and Gil-Alana, 2022; Kinzel and Müller, 2022; King et al., 2021; Payne et al., 2021; Wang et al., 2022). The perspectives and approaches regarding the impact of the pandemic are very diverse among these studies, and while inevitably most studies emphasize the severe negative impact that the pandemic had on tourism flows, on tourists' behaviours and their travel choices or on businesses and employees, their attention was also oriented towards understanding how the tourism sector started to recover after the initial shock of the COVID-19 pandemic.

Perspectives on the effects of COVID-19 pandemic on tourism activities in Romania

Matters related to the effects that COVID-19 pandemic had on tourism sector have naturally been of interest for the Romanian territory as well. While some studies aimed at an analysis of the entire country (Aivaz and Micu, 2021; Cehan and Iațu, 2023; Iftimoaei et al., 2023; Mazilu et al., 2023; Nancu et al., 2023; Popescu, 2021; Popescu et al., 2022), others focused on particular territories, through case studies on diverse issues related to the changes induced by the pandemic (Boiciuc, 2022; Coroș et al., 2021; Crismariu et al., 2022; Dragomir et al., 2021; Matei et al., 2021; Mitrică et al., 2022; Munteanu et al., 2022; Volkmann et al., 2021).

The research conducted at a larger scale, for the entire country, is diverse, varying from the more frequent approach of general assessments of the pandemic's impact on tourism demand or/and supply to concerns regarding tourism stakeholders' actions and perceptions related to the impact of the pandemic. A first direction is the one which provides a rather general overview on the impact of the pandemic on the tourism sector in Romania, concluding on the diverse negative impacts on tourist flows (Popescu, 2021) and underlining the important differences between Romanian and foreign tourists in hotels during the pandemic (Popescu et al., 2022). Another direction of research offers a more detailed perspective on the effects of the pandemic, especially from a geographical perspective.

These studies analyse the evolution of tourism indicators at NUTS2 administrative level (Aivaz and Micu, 2021) or for different types of territories, and respectively destinations, such as coastal areas, mountain areas, spa resorts (Nancu et al., 2023), both studies emphasizing how the impact of the pandemic has varied considerably across Romania's territories. Iftimoaei et al. (2023) go even further into detail, analysing various tourism indicators (tourist arrivals, overnights, accommodation capacity etc.) at LAU2 administrative level, pointing out the notable differences between destinations concerning their evolution during the crisis. A different perspective on the pandemic's effect in Romania is provided by a study of tourism stakeholders' perceptions regarding the government's policies aimed at supporting the sector through the crisis, emphasising the opposite attitudes of those stakeholders completely satisfied by the government's support and those claiming that there was a complete absence of actions and strategies for their support (Cehan and Iațu, 2023).

The case studies are also divided between assessments of the pandemic's impact on tourism demand or offer (Boiciuc, 2022; Crismariu et al., 2022; Munteanu et al., 2022) and analyses of perceptions and actions of various stakeholders (Coroș et al., 2021; Matei et al., 2021; Mitrică et al., 2022; Volkmann et al., 2021), but this time for certain areas (regions or destinations) or types of tourism. Particular attention has been offered to the region of Bukovina, both through statistical analyses of tourism offer and demand (Boiciuc, 2022) and through investigations regarding the role of public administration in the recovery of the tourism sector in the area (Matei et al., 2021). A more complex approach is based on assessing the challenges that cultural tourism has faced in rural areas in Buzău County (Mitrică et al., 2022), implying data gathered from tourists, businesses and residents.

Despite the topic of COVID-19 impact on the tourism sector in Romania having been approached from various perspectives, there are still gaps in the literature and questions to be answered. First of all, very few of the studies conducted for the entire territory of Romania present the topic from a geographical approach (Aivaz and Micu, 2021; Iftimoaei et al., 2023; Nancu et al., 2023), which can underline regional disparities and differences in terms of pandemic's impact between types of territories and destinations. Secondly, more recent assessments of destinations' evolution following the COVID-19 pandemic are needed, considering the fact that the recovery of the tourism sector is still incomplete, and little is known about which (types of) destinations have been successful in their recovery and which are still struggling. Consequently, the current study aims to add to the current stream of research regarding COVID-19 pandemic's impact on the tourism sector, with an analysis conducted at different geographical scales for the territory of Romania, for the period 2020-2023.

METHODOLOGY

Study area

The tourism sector in Romania has undergone significant changes during the last decades, its current state being a result of many important events and influences, such as the communist period which ended in 1989, the accession to the European Union in 2007, the 2008/2009 Global Economic Crisis and, more recently, the COVID-19 pandemic. Also, tourism's evolution in Romania has been characterised by the rather recent emergence of two forms of tourism which were unknown here before 2000, respectively rural tourism and business tourism (Ilieş et al., 2017), which in time got to represent an important share of the country's tourism offer. All these events and tendencies, along with other international or national trends, led to the evolution of tourist arrivals in Romania from 4.920.129 in 2000 to 13.374.943 in 2019. While the growth is considerable, Romania is far from being among the important European tourist destinations, but the almost continuous growth of tourism demand until the pandemic does reflect an obvious increase of the importance of this sector for the economy of the country, as well as a growing interest of tourists for visiting Romania.

However, despite this positive evolution, which also translated into an obvious spatial diffusion of tourism activities reflected in the growing number of administrative units which register some levels of tourism activity, it has been concluded that in many cases these new tourism areas have a reduced importance, while the already well-developed tourist destinations continue to grow significantly, which determines a rather concentrated spatial pattern of tourism in Romania (Cehan et al., 2019). Therefore, as it can also be noticed from Figure 1, Romania has a high number of tourist destinations, if all administrative units that register tourist arrivals are taken into consideration regardless of the number of arrivals, but some particular areas stand out due to much higher values. Among these areas are the seaside destinations, located at the Black Sea, which have been long known to represent one of the hot spots of tourism activities in Romania (Dumbrăveanu, 2001), Valea Prahovei area, which encompasses several tourist resorts very diverse in terms of resources, or important urban centres (Bucharest, Braşov, Oradea, Timişoara, Cluj Napoca, Iaşi), mostly attractive for their cultural heritage, but also capable to attract high numbers of arrivals for business tourism. Besides these representative tourist destinations, Romania also stands out through a considerable range of spa resorts, as the country is known to host some of the oldest geothermal springs in Europe and is considered to have a significant potential for spa tourism (Crismariu et al., 2022).

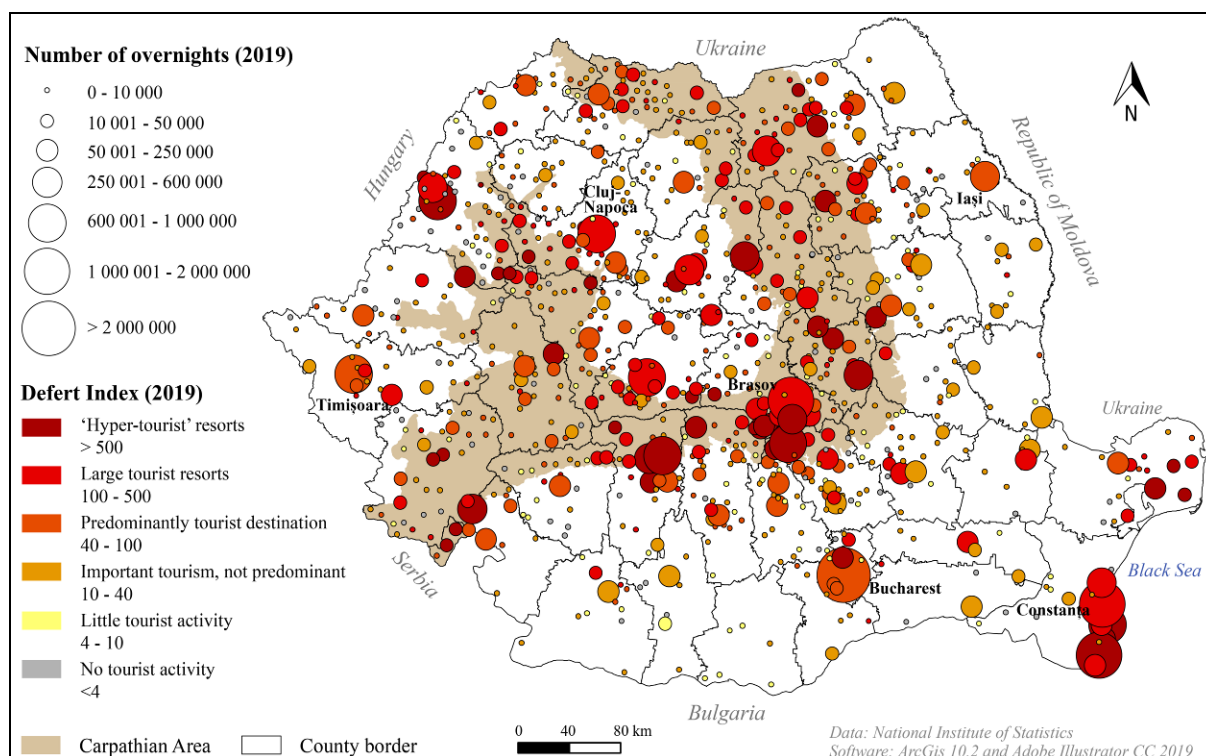


Figure 1. Tourist destinations in Romania (Source: the authors based on data from the National Institute of Statistics)

Data and methods

This study has been based on data provided by the National Institute of Statistics. As such, in order to analyse the evolution of tourism demand during the pandemic, the main indicator was the number of tourist arrivals at national, regional (NUTS 2 and NUTS3) and local (LAU2) levels. Depending on the aim that was pursued, the analysis was conducted either on monthly or annual basis. Also, for the analysis at NUTS2 regional level, data for both Romanian and foreign tourists was employed. The period of analysis was 2019-2023, since the purpose was to analyse both the evolution of tourism demand during the pandemic, as well as the recovery tendencies to pre-pandemic levels, respectively to the levels from 2019. Besides tourist arrivals, the number of overnights in 2019 was employed for the description of the study area at its state before the pandemic. Moreover, population data was employed for the calculation of Defert Index (here calculated as the ratio between the number of tourist arrivals and the number of

inhabitants at LAU2 level). This index has been considered relevant for illustrating the intensity of tourism activities across Romania prior to the pandemic, but also for analysing how destinations with different levels of intensity of tourist activity (as defined by the Defert Index) evolved during the pandemic. A number of 900 destinations has been included in the analysis. As such, local administrative units (LAU2) which registered tourist arrivals in the year before the pandemic (2019) or in any year during the pandemic have been included, regardless of the number of tourist arrivals.

While it can be argued that some of these local administrative units cannot really qualify as tourist destinations, because of extremely low numbers of arrivals, this research aims to identify all changes induced by the pandemic on different types of territories, respectively both on the highly developed tourist destinations and on the less known destinations or even completely underdeveloped areas from a tourism point of view. Descriptive statistics and cartography (through ArcMap 10.6.1) were the methods employed in order to achieve the research purpose, respectively the assessment of the impact of the pandemic on tourism demand in Romania at different geographical scales.

RESULTS AND DISCUSSIONS

From widespread decline of tourism demand to regional disparities

All around the world, as well as all around Romanian destinations, during the first year of the COVID-19 pandemic a severe decrease in the number of tourist arrivals was the norm, especially during the first months. However, not all areas were impacted in the same way and at the same levels, and most importantly, the road to recovery varied significantly among destinations, since naturally the vulnerability in contexts of shocks and crises varies from one territory to another (Duro et al., 2022; Škare et al., 2021). Regional and local factors related to the environment, society, economy, culture or governments are determinants of the differentiated impact felt across destinations (Mitică et al., 2022).

These differences between territories are illustrated and discussed as it follows for the case of tourism demand in Romania, starting from an overview of the tourism demand evolution before and during the pandemic and continuing with a detailed analysis of the differences between the Romanian regions in terms of COVID-19 impact on tourism demand and in terms of these regions' tendencies to recover.

In 2019, Romania reached its highest value of tourist arrivals, respectively 13.374.943, after an almost continuous growth during the last two decades, disrupted only by the 2009 economic crisis. Therefore, the start of the pandemic in 2020 interrupted the positive trend and caused a decline of 52.2% of the tourist arrivals when compared to 2019, bringing Romania to the values from ten years ago, with a total of 6.398.642 tourist arrivals in 2020. Analysing the monthly values of tourist arrivals for the period 2019-2023, it is easily noticed that what the pandemic did not change is the overall monthly distribution of tourists (Figure 2). As such, August has been the peak season each year, although with different values from one year to the other, followed closely by the months of July and September.

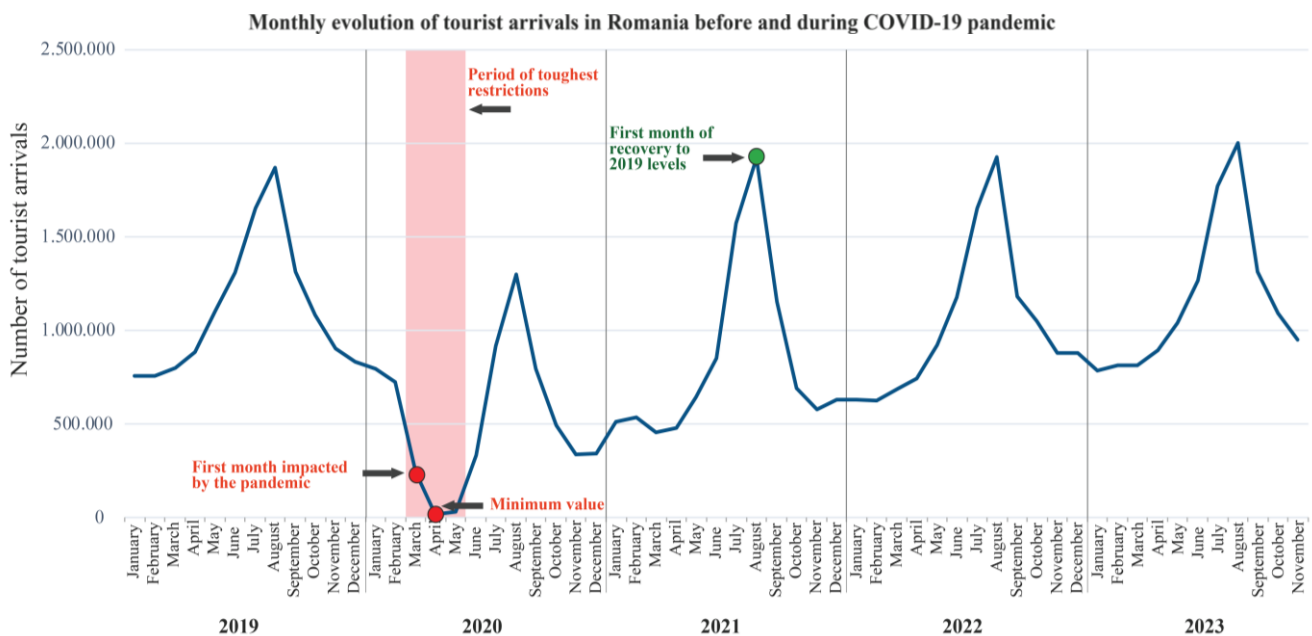


Figure 2. Evolution of tourism demand in Romania (2019-2023)
(Source: the authors based on data from the National Institute of Statistics)

It is notable that while the peak season, respectively the summer months, already turned back to normal starting with 2021 in terms of tourist arrivals, the following years do not appear to have registered significant growth compared to 2021, indicating that the effects of the pandemic were still felt. Also, an explanation can reside in the Romanian tourists' eager to travel abroad again after a period when this was impossible, which inevitably might have determined a decrease of the domestic tourism. Moreover, for the case of other moments in the year, the tourism demand reached the pre-pandemic levels only in 2023, such as it is the case with the spring season, but here including only the months of March and April, as May is in 2023 still below the 2019 levels. For the case of this month, it has to be mentioned that generally May

represents for many people the beginning of the summer season and along with the 1st of May "mini-holiday" this month usually registers rather high numbers of tourist arrivals. Therefore, the fact that in May 2023 Romania did not yet manage to reach the levels of tourism demand specific before the pandemic is surely to raise important issues to tourism stakeholders, especially since again these low values might be explained through a growing attractiveness of external destinations for Romanians during the last years, such as Turkey, Greece or the neighbouring Bulgaria.

As previously stated, the impact induced by the COVID-19 pandemic, as well as the recovery trends are clearly different from one region to another. When considering the NUTS2 regional level, the decline of tourist arrivals in 2020 (compared to 2019) varies across the 8 regions from -33% (South-East) to -72.44% (Bucharest-Ilfov) (Figure 3). However, these two extremes are quite distinct from all other 6 regions, with South-East region registering the least severe decline due to its seaside tourism, which has always been one of Romania's most developed tourism sectors (Cehan et al., 2019; Popescu et al., 2020) and which appears to remain so even in the context of a pandemic, and with Bucharest-Ilfov facing the strongest negative impact because of its demographic size (over 2.3 million inhabitants in 2020) and because of the administrative role of Bucharest (as capital city of Romania), which make this region the typical area to have been avoided by tourists during the pandemic. For the case of the other 6 NUTS2 regions, the decrease of tourist arrivals in 2020 varied between -40.1% and -55.3%, indicating similarities between the regions in terms of tourism offer and preparedness of tourism stakeholders for such contexts of crisis.

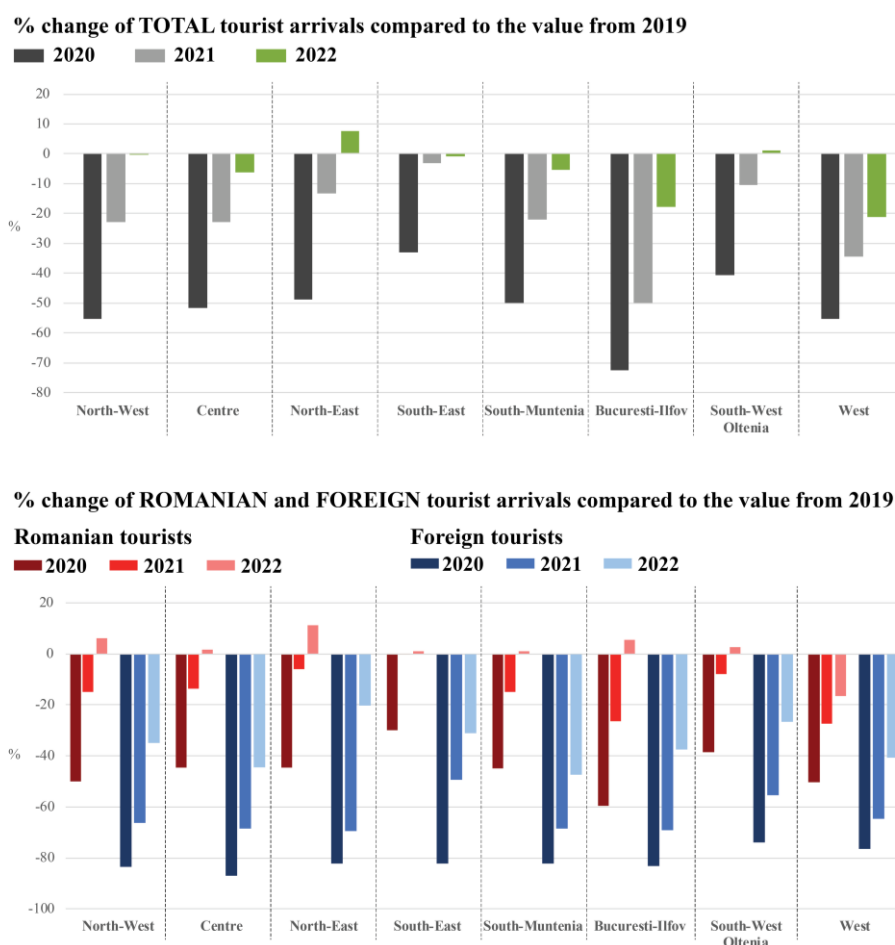


Figure 3. Evolution of tourist arrivals during COVID-19 pandemic at NUTS2 level (Source: the authors based on data from the National Institute of Statistics)

Although 2021 has not been the year of full recovery for any of the 8 regions, the discrepancies between them have considerably increased. While Bucharest-Ilfov continues to struggle, with a decrease of 50%, the South-East region almost reached the pre-pandemic level, with a slight decline of 3.24% compared to 2019. This rather rapid recovery of South-East region can also be explained by high geographical accessibility for inhabitants of the capital city, Bucharest. As for the other regions, their trajectories during 2021 are diverse, with South-West and North-East regions closer to recovery, while the other regions still register a decline of over -20% of the tourist arrivals. In 2022 all regions are closer to the pre-pandemic levels, but two of them stand out due to the fact that they even register a growth compared to 2019. These are the North-East and South-West regions and explanation for their faster recovery can probably be found, at least partly, in the presence of important nature-based destinations in both these regions, destinations which have clearly been among the preferences of tourists during the pandemic. An extremely important aspect to consider is the significant difference in the evolution of Romanian and foreign tourist arrivals. For all regions, the impact of the pandemic has been considerably more severe at the level of foreign tourists than it has been for the case of the Romanian ones. In the context of 2020,

this fact is a consequence of national border closures around the world and strict travel restrictions, which contributed to a global decline of international tourist arrivals by 73% in 2020 (World Tourism Organization, 2021), and for a certain period of time and for many destinations it even meant that the international tourists flows dropped to zero (Baum and Hai, 2020). Also, domestic tourism appeared as a solution for keeping the tourism sector afloat during the first year of the pandemic, determining the governments to develop specific strategies with the aim of promoting domestic tourism (World Tourism Organization, 2020). As such, these trends during the pandemic in Romania are no surprise, being a reflection of the global tendencies during this crisis context in terms of domestic and international tourism.

What could be a concern when discussing the particularities of international tourism in Romania is the fact that although in 2022 Europe reached nearly 80% of pre-pandemic levels of international tourism (World Tourism Organization, 2023a), for the Romanian case there was still specific a decrease of more than 30% in the case of 6 regions, and even more than 40% in one of these six (South-Muntenia). These results place emphasis on the important differences between domestic and international tourism during the COVID-19 pandemic, pointing out that international tourism has not only been extremely negatively impacted at the start of the pandemic, but it has also faced greater difficulties in recovering. Moreover, these negative tendencies should also be regarded with reference to the fact that the numbers of international tourists in Romania were not at high levels even before the pandemic, with a share of only 20.1% out of all tourists in 2019. Such a low share of international tourists even before the pandemic might have diverse causes, from the circumspection of foreign tourists towards Romania as a tourist destination to the lack of national and regional strategies focused on attracting international tourists in Romania. Therefore, how Romania intends to position itself as a tourism destination on the international tourism market should be a central matter in future policies and strategies.

A better understanding of the previously discussed realities when comparing NUTS2 regions can be provided by looking at the intra-regional disparities, respectively by analysing the evolution of tourism demand in each county (NUTS3) during the COVID-19 pandemic. As such, it becomes obvious which areas are most responsible for a better resilience of some NUTS2 regions and at the same time, some important intra-regional differences stand out.

During the first year of the pandemic, the decline of tourism demand has been devastating in all counties in Romania, a natural consequence of strict restrictions, general fright and raised concerns for safety, which installed in all areas of the country and of the world. Therefore, the question for that specific time of the pandemic was not whether certain areas declined or not in terms of tourist arrivals, but which was the intensity of the decline, since absolutely no region managed to avoid the downfall of the tourism activities. More precisely, tourist arrivals faced a decline between 40% and 60% in most counties (Figure 4), but some areas, respectively 9 counties (Cluj, Sălaj, Vrancea, Buzău, Călărași, Hunedoara, Giurgiu, Ilfov, the Municipality of Bucharest), were in an even worse state, with a decline of over 60% when compared to the previous year. Four counties, Constanța, Tulcea, Gorj, Mehedinți, registered a rather less severe decline, with values between -20% and 40%, which although placed these areas in a slightly better position than most of the counties, it still represented a damaging context, from which the destinations had to recover with considerable efforts.

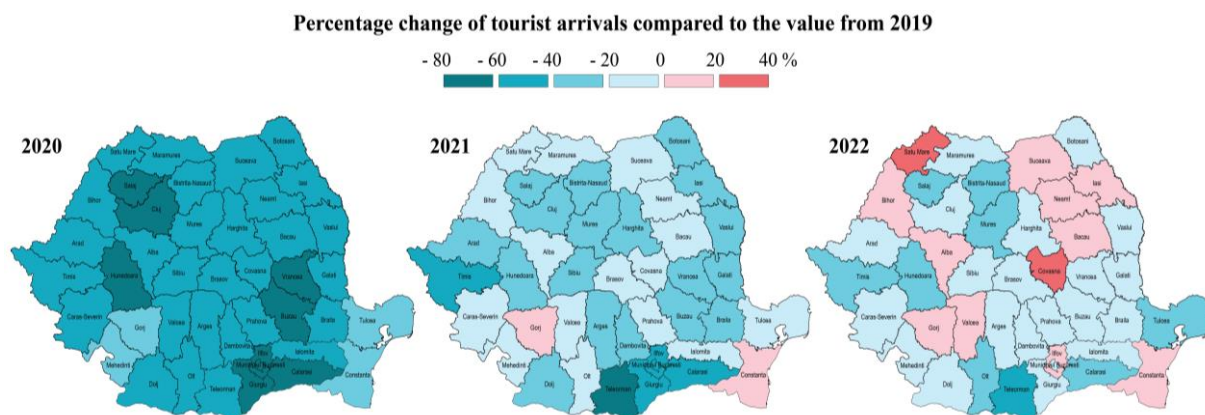


Figure 4. Evolution of tourist arrivals during the pandemic at NUTS3 level
(Source: the authors based on data from the National Institute of Statistics)

During 2021 the lower decline rates than in the previous year for most counties indicate that from this year these areas started their journey to recovery. While a reduced number of counties were still far from the pre-pandemic levels (Teleorman, Timiș, Giurgiu, Călărași, Ilfov, the Municipality of Bucharest), the general tendency was that of starting to attract tourists again. Two counties, Constanța and Gorj, demonstrate a better resilience capacity, as they reached and even surpassed their pre-pandemic levels already starting from this year and both counties appear to own their success on natural assets, such as the coastal area in Constanța and the diverse landscape of the mountainous area in Gorj. In 2022, these two counties continue their tendency of growth, and more counties are naturally following, some with even higher rates of growth (Covasna, Satu Mare). Among the counties facing a positive trend of tourist arrivals, the most geographically compact group is composed of those that are part of North-East region (Iași, Neamț, Suceava, Bacău), a region which previously stood out as one of the first to recover. It is notable for this case that unlike the case of the South-East region, where the constant popularity of seaside tourism concentrated in Constanța county is the main determinant of recovery, here a larger area (4 counties) and implicitly a higher diversity of destinations and resources can be assumed to be the root of the region's recovery.

When considering the relationship between the evolution of tourist arrivals during the pandemic and the attractiveness and popularity of each county prior to the COVID-19 pandemic, as reflected by the number of tourists in 2019, a series of important conclusions can be drawn (Table 1). First of all, top destinations present rather big differences concerning their evolution during each year of the crisis. The counties with over 1.000.000 tourists in 2019, respectively the Municipality of Bucharest, Braşov and Constanţa, have been impacted very differently in the first year, with contrasting intensities of decline, among which Bucharest stands out with a decrease of over 70%. During the next year, these counties' trajectories are still rather diverse, only in 2022 presenting similarities, but still with a significant disadvantage for Bucharest. Therefore, the high levels of popularity among tourists before the pandemic does not explain the evolution of territories during the pandemic, as some of these are among the most affected (Bucharest), while other such counties appear to be the fastest to recover (Constanţa). This significant difference is mainly explained by the opposite tourism profile of these two areas – Constanţa relies on nature, which has been more attractive during the pandemic, while Bucharest's tourism potential is mainly cultural. Also, Bucharest attracted high numbers of foreign tourists before the pandemic, a category of tourists which has been previously emphasized to have been more severely impacted after the outbreak of the pandemic.

Table 1. Counties according to tourism demand in 2019 and its evolution during COVID-19 (Source: the authors)

% change compared to 2019		Number of tourist arrivals in 2019 at county level				
		Over 1.000.000	500.000-1.000.000	200.000-500.000	100.000-200.000	Less than 100.000
2020	-80 - -60	1	1		3	4
	-60 - -40	1	4	11	7	6
	-40 - -20	1			3	
2021	-80 - -60					1
	-60 - -40	1		1	1	2
	-40 - -20		3	4	6	5
	-20 - 0	1	2	6	5	2
	0 - 20	1			1	
2022	-60 - -40					1
	-40 - -20		1	1	3	3
	-20 - 0	2	3	5	5	6
	0 - 20	1	1	5	3	
	20 - 40				2	

Secondly, it is important to draw attention over the fact that some of the counties that generated a rather reduced interest for tourists prior to the pandemic, are less impacted and in some cases faster to recover. In 2020, 3 out of 4 counties with a slightly reduced decline are counties with lower numbers of tourists prior to the pandemic (Gorj, Tulcea, Mehedinţi). Moreover, such counties are also predominant in the next 2 years among those less impacted or among those with higher levels of growth (Satu Mare, Covasna, Gorj). These examples present a totally opposed context to the one discussed through the case of Constanţa. As such, this data reflects the already well-documented tendency of tourists of choosing less famous destinations during and immediately after the first year of the pandemic, as a result of their intention of avoiding crowded areas and situations that might present health risks (Kim and Lee, 2020; Rahman et al., 2021).

Figure 5 presents a more detailed image of tourism demand evolution, this time for each month of 2023 (except for December as data is not available), as compared to same months of 2019. It is easily noticed that the counties vary significantly among themselves and from one month to another. While a number of 7 counties registered growth, to various degrees, during all months (Iaşi, Covasna, Giurgiu, Alba, Gorj, Dolj, Satu Mare), counties facing decline in all or almost all months are more prevalent. A number of 10 counties registered lower numbers of tourist arrivals than in 2019 for 10 or even 11 months. Among these counties, first of all the Municipality of Bucharest stands out, because although it has naturally been most severely impacted in the first stages of the pandemic, its high popularity among tourists before 2020 was expected to help in its recovery at least starting with 2023, when the pandemic was already a topic of the past. Another notable example is Timiş, which due to the title of European Capital of Culture in 2023 that Timişoara received, could have been expected not only to recover from the pandemic, but to overpass considerably 2019 levels of tourism demand.

Some of the months appear to have been more favourable to tourism demand growth than others in terms of geographical dispersion of positive percentage change in comparison to 2019. In January, February, April, July, August and November more than 60% of the counties registered growth, being important to notice that this behaviour is present both in months known as the peak season in Romania (July-August) and in months with a reduced presence of tourists. May is by far the month that is still the most negatively impacted, with only 12 counties recovering and overpassing pre-pandemic levels.

Diverse trajectories of tourist destinations during the pandemic

Important contrasting trajectories can be found inside the same county, as it has been noticed it is the case inside regions. An analysis of tourism demand evolution during the pandemic at LAU2 level is quite revealing in this regard. A typology based on the evolution of tourist arrivals during two phases of the pandemic – 2019-2020, as the period of decline and 2020-2022, as the period of recovery – emphasises the overall trends for the tourist destinations during this time, as well as the differences between the struggling areas and the more resilient ones (Figure 6).

The typical behaviour of tourist destinations during COVID-19 pandemic is characterised by decline in the first year followed by growth right from the second year of the pandemic. It is important to clarify that this growth does not imply that all these areas reached pre-pandemic levels already from this phase, but they clearly entered the path to recovery.

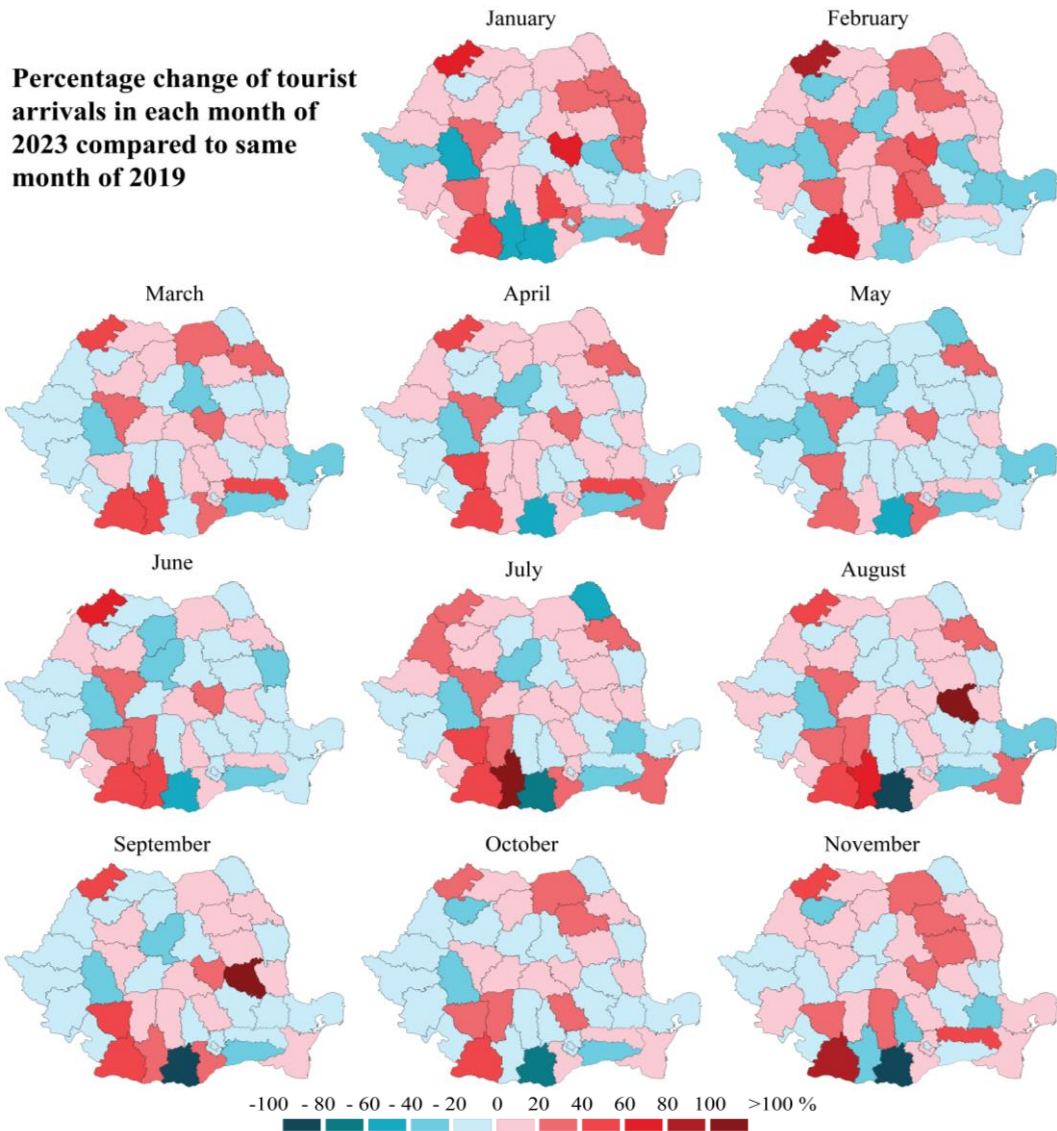


Figure 5. Monthly evolution of tourism demand 2019-2023 at NUTS3 level
(Source: the authors based on data from the National Institute of Statistics)

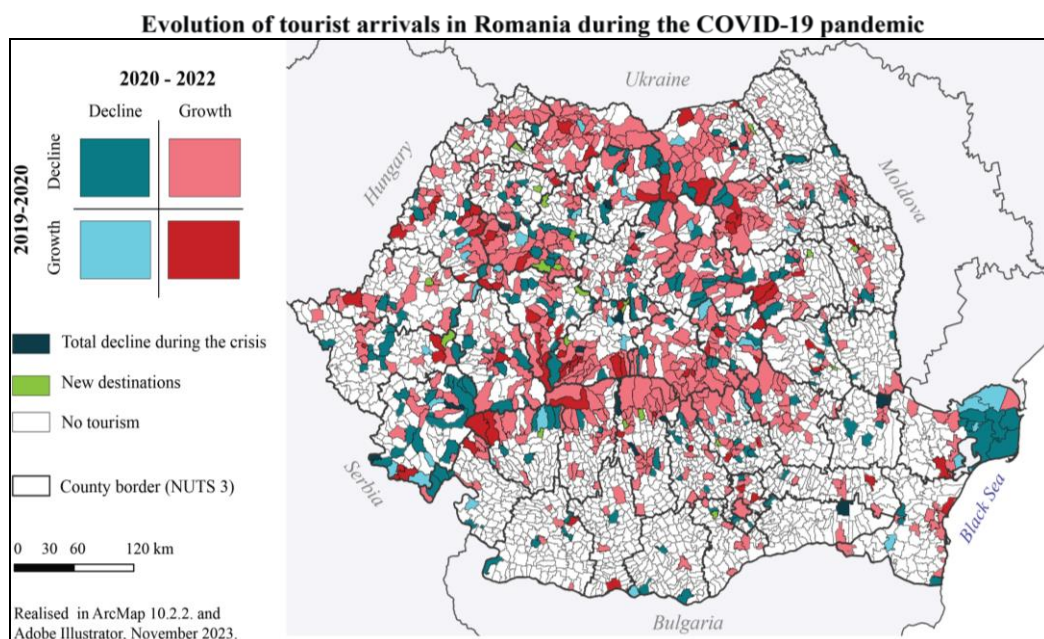


Figure 6. A typology of tourist destinations during COVID-19 pandemic
(Source: the authors based on data from the National Institute of Statistics)

This category of destinations, part of the group "Decline-Growth" represent 62.9% of all analysed destinations and they are dispersed across the country. Both rural (58% of all rural destinations) and urban (77% of all urban destinations) destinations are included in this category and in regard of the level of the intensity of tourism activity before the pandemic, all types of destinations, as defined through Defert Index, fall into this pattern, from "hyper destinations" to those with "little activity". Geographically, this pattern of evolution is specific to a high degree to the Carpathian area, but it is also encountered on the seaside, in large important cities (Bucharest, Iași, Cluj-Napoca, Timișoara) or in more isolated, less-known destinations. It is safe to say that other patterns of evolution of tourism demand should draw one's attention more. A first such case is represented by the 188 destinations (20.9% of total) which compose the "Decline-Decline" group. These are the most fragile destinations, which not only were severely impacted at the beginning of the pandemic, but they continued to decline even when most destinations managed to attract visitors and tourists again.

As the previous category, this one is diverse, specific to both urban and rural destinations, as well as to all types of destinations in terms of Defert Index. While these destinations are dispersed across the country, some hot spots for this category stand out in the Danube Delta area and in certain parts of the Carpathians (Banat Mountains, Retezat Mountains). An important characteristic of this category is the rather reduced demographic size, the destinations varying from very small rural areas, with little over 500 inhabitants to medium cities (Pașcani, with 44.034 inhabitants).

Secondly, a rather particular category is the one entitled "Growth-Growth", which consists of 78 destinations that not only did not decline at any stage of the pandemic, but they have been continuously growing, indicating them to be the most resilient ones and capable even to thrive in contexts of crisis. This group is predominantly composed of destinations with little or almost absent tourism activity prior to the pandemic (53%), mostly situated in rural areas (83%) and with small population size. While they present a high degree of geographical dispersion across the country, a common trait is the mountainous area, the location of 59% of them being in the Carpathians. The destinations from this group encompass all features that makes a place attractive during such a particular context as the COVID-19 pandemic, being in most cases small nature-based destinations, with less intense tourist activity, features that ensured a certain level of isolation and distance from the famous, more crowded areas, which were inevitably raising safety concerns (Kupi and Szemerédi, 2021; Park et al., 2021). The previous category is very similar regarding the constant growth of tourists numbers during the pandemic and general characteristics to the group of "New destinations", these ones being individualized by the fact that they registered zero tourist arrivals before the start of the pandemic. The "New destinations" category is considerably less frequent, with only 13 such cases, all rural destinations. Unlike the "Growth-Growth" group, in this case almost no destination is situated in the Carpathian Area, being associated with Subcarpathians or with the proximity of urban centres.

CONCLUSIONS

The COVID-19 pandemic brought significant challenges to the tourism sector worldwide and tourism sector in Romania has been naturally exposed to these challenges too. The current research reinforces, above all, the previously discussed idea that the impact of any crisis, and implicitly of the COVID-19 pandemic, has not been homogenous across regions, the nature and intensity of the impact depending on the resilience capacity of each territory (Duro et al., 2022; Škare et al., 2021). Results for the particular case of Romania, emphasise these differences at various geographical scales, differences which were also notable during different phases of the pandemic.

First of all, the overall evolution of tourism demand in Romania is aligned to global trends, as tourist arrivals show a severe decline in 2020 but gradually start to recover to pre-pandemic levels more and more each year. However, when comparing the regions, counties and destinations, diverse trajectories are revealed, as some areas still struggle to recover even in 2023, while others have been thriving right from the start of the pandemic, and some may argue, specifically because of the pandemic. It is naturally a matter of further research to investigate the determinants of success for these destinations which presented a positive evolution, and while efficient strategies and a smart management of the destination might be assumed as most probable factors, it should be also analysed whether at least in some cases it is not more of a matter of chance or of temporary alignment of those areas with the tourists' preferences. While this is undeniably still a positive perspective, if local stakeholders do not build on this chance that they have been offered, these cases will probably remain just temporary stories of success.

Secondly, while the current research did not attempt to identify the factors which influence the resilience capacity of destinations, and implicitly which could explain the observed diverse trajectories, some insights in this direction can be drawn from the obtained results. Nature-based destinations have a notable advantage in the context of the pandemic, confirming previous results on the topic, which indicated this type of destinations as being preferred by tourists, particularly in first stages of the pandemic (Kruczek et al., 2023; Mul et al., 2022), especially when nature was associated with a higher degree of geographical isolation. At the same time, a moderate or even reduced intensity of tourism activity prior to the pandemic appears to have influenced the positive evolution of particular destinations, both at regional level, and especially at local level, where in some cases destinations with a complete absence of tourists started to attract visitors during the pandemic. For these cases, this choice of the tourists is most probably a matter of avoiding the crowded areas of more famous destinations and implicitly avoiding the associated health risks (Kupi and Szemerédi, 2021; Park et al., 2021).

Further research on the topic should firstly focus on a complex analysis of the factors that determined the patterns of evolution of tourism demand identified through this research. Advanced statistical analysis could investigate those factors that influence the resilience capacity of tourist destinations in the particular context of a pandemic crisis. Secondly, this stream of research could benefit from case studies specific to each category of destinations as defined by their evolution during the pandemic. An in-depth qualitative approach on both the cases of the most fragile destinations and of the most resilient ones could reveal important lessons for future crisis management strategies.

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