TOURISM RESILIENCE IN THE FACE OF COVID-19: INSIGHTS FROM ACCOMMODATION ENTERPRISES IN NORTH-WESTERN ROMANIA

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Abstract

Tourism, a sector of the globalised economy particularly susceptible to disruption, was severely affected by the emergence of the novel Coronavirus (SARS-CoV-2). The ability of destinations to absorb shocks and recover3 rapidly, i.e. their resilience, became a key research issue. This paper investigates the tourism sector's resilience in the historical Partium region of north-western Romania (Arad, Bihor, Maramureș, Satu Mare and Sălaj counties) between 2019 and 2023. The period under investigation encompassed pre-crisis prosperity, two pan3demic years and the immediate post-pandemic rebound, further complicated by the war in Ukraine. This study utilised a curated micro-database comprising nearly 1,000 accommodation enterprises (CAEN Rev. 2 codes 5510, 5520, 5530, 5590), complemented by official fiscal returns, to conduct a comprehensive analysis. The analysis encompassed net turnover, employment, and labour productivity alterations, delineating intraregional disparities. Furthermore, identifying factors underpinning disparate recovery trajectories was a pivotal objective. The results demonstrate several key findings: (i) a substantial 34 per cent decline in net turnover and a 9 per cent decrease in employment in 2020; (ii) a swift recovery, with 2023 turnover 50 per cent higher than the 2019 baseline, while employment remained 4 per cent lower; (iii) significant north-south variations, with Maramureș and Satu Mare exhibiting stronger growth in both firm numbers and turnover; (iv) the pivotal role of thermal resorts and mountain destinations in driving recovery; and (v) indications of structural reallocation of labour towards the Bihor metropolitan zone. The argument is that local natural assets, pre-existing tourism specialisation, and frontier position shape resilience outcomes. At the same time, the war-induced uncertainty mainly dampened growth in the immediate border zone. The policy implications of these findings underscore the necessity for targeted support to be provided to peripheral communities, diversified product development, and cross-border collaboration in the Schengen era.

Keywords

Tourism resilience; COVID-19; accommodation enterprises; Partium; regional disparities; labour productivity.

INTRODUCTION

Tourism is an industry that reacts sharply to external shocks, whether economic crises, political conflicts or, most dramatically, public health emergencies (Szívós et al, 2024). The COVID-19 pandemic triggered an unprecedented collapse in international and domestic visitor flows. Therefore, understanding why some destinations rebound rapidly while others face prolonged difficulties is of considerable theoretical and practical importance. The concept of tourism resilience highlights this adaptive capacity and post-crisis regenerative potential.

The Partium region—comprising the counties of Arad, Bihor, Maramureș, Satu Mare and Sălaj in north-western Romania—offers an especially instructive case (Stupariu et al., 2022). As an external EU borderland, it combines frontier functionality with pronounced geographical, economic, and historical diversity. The study period (2019–2023) spans four distinct phases: pre-pandemic prosperity, two pandemic years (2020–2021) and the immediate rebound (2022–2023); the economic uncertainty and geopolitical repercussions of the war in Ukraine further shaped all. Additionally, the COVID-19 pandemic can be framed as part of a broader global “polycrisis” context (Matlovič & Matlovičová, 2024). This perspective recognises that the pandemic was not an isolated shock but one of several overlapping economic, geopolitical, environmental, and social crises that collectively shape regional resilience dynamics.

OBJECTIVES

The primary objective of this paper is to assess the resilience of the tourism sector—operationalised through accommodation services—in the Partium region during 2019–2023. Specifically, the following aspects are covered:

An overview of the performance of accommodation enterprises, highlighting changes in net turnover and employment;

The evolution of labour productivity as an efficiency indicator;

County-level spatial disparities, with special attention to frontier position, thermal-spa traditions and mountain/rural tourism potential;

The possible effects of the COVID-19 crisis, the post-COVID phase and the Ukrainian war on the tourism sector.

Addressing these aims gives rise to three fundamental research questions:

1) To what extent did the pandemic and subsequent crises unsettle the region’s tourism sector?
2) How quickly and through which mechanisms were accommodation enterprises able to recover?

3) What inter-county differences emerged, and how are these linked to specific geographical and economic characteristics?

The article is organised into five main sections. The following section reviews the theoretical literature on tourism resilience, followed by a detailed presentation of the study area. Section 4 outlines the data sources, variables, and research methods. Section 5 presents the empirical results, emphasising temporal dynamics and spatial patterns. Section 6 discusses the findings, and formulates conclusions for stakeholders and policy-makers.

THEORETICAL FRAMEWORK

The popularisation of the concept of resilience is most often associated with a 1973 paper by ecologist Holling on the resilience and stability of ecological systems (Holling, 1973). After this, the term has been applied to other disciplines, including psychology and engineering. In these fields, the study focuses on the response of individuals, objects, and systems to disturbances. Consequently, resilience has been incorporated into economic geography, finding extensive utilisation among researchers due to the heterogeneous responses of regional economies to the 2008 recession (Sutton, J. et al.). The concept of regional economic resilience, as delineated in the literature, encompasses a range of definitions. However, a comprehensive overview is provided by Sutton et al. (2023), who define it as the capacity of regional economies to withstand, adapt to, or transform in the face of economic shocks and to recover from such shocks, thereby maintaining or even enhancing their pre-shock economic performance.

In this interpretation, four types of resilience are delineated: The engineering field focuses on regions' capacity to rapidly regain stability following external shocks, emphasising the rapidity of their recovery. In the ecological domain, the focus is on the ability of systems to absorb shocks and maintain their current equilibrium through minimal structural and/or functional change, emphasising system stability in the face of external disturbances. The evolutionary perspective emphasises adaptation, the capacity to adjust and the capacity to 'leap forward' in response to a shock by adapting parts of their structure and functions so that regions either maintain their current growth trajectory or develop a new, more favourable one, is termed 'transformative resilience'. In addition, regions can transform their structure and functions in response to a shock so that regions develop a more favourable growth trajectory after the shock. (Martin, R.) Sunley, P. (2020; Sutton, J. et al., 2023). In their seminal work, Sutton et al. (2023) propose a five-dimensional framework for understanding regional economic resilience, encompassing vulnerability, resilience, adaptation, recovery, and preparedness for shocks. A region can either demonstrate resilience or recovery in the face of a shock or undergo a gradual or steady decline (Tóth, 2012).

The concept of resilience was introduced into tourism studies later than in other fields (Hall, C. M., 2017). In tourism, resilience can be conceptualised as encompassing tourists, destinations, transportation and destinations (6A). However, Hall (2017) contends that the prevailing approach has been oriented towards the resilience of destinations and communities. A literature review reveals that most tourism research adopts an engineering concept of resilience that assumes equilibrium before disturbance as its goal (Hall, 2017). This contrasts a notion of resilience that emphasises complexity and the possible multiple states in which a system can exist. Although evident in many works, authors generally do not refer to this alternative concept. According to Gonda (2022), the extant literature suggests that the concept of resilience is interpreted in a way relevant to tourism: 'the ability of a system to withstand shocks and ensure the rapid recovery of essential functions. It is, therefore, a system's defensive capacity and self-healing and self-improvement mechanisms, which are particularly important for surviving shocks that threaten the system's existence." (Gonda, 2022, p. 28). Concurrently, he posits that the concept of tourism resilience may be delineated as the capacity of a destination (in its entirety) to sustain or reinvigorate its tourist appeal, offerings, and operational framework in the aftermath of a disruptive event.

In practice, Sharma et al (2021) proposed a resilience-based framework for the industry and stated that with the help of the resilient approach from governments, market players, technology innovators, and the workforce employed in the industry, the tourism sector may end up evolving in a much more sustainable way post-pandemic. Furthermore Tegelberg and Griffin (2024) highlighted that the experiences of researched SMEs during the pandemic carry lessons for resiliency planning that align with increasingly urgent demands for decarbonization and a greening of the tourism system.

Recent shifts in geographical thought, notably influenced by metamodern perspectives, move beyond the classical division between modernist and postmodernist frameworks, emphasising instead the importance of complexity, ambiguity, and interconnectedness (Matlovič & Matlovičová, 2020; Matlovič & Matlovičová, 2025). Utilising this theoretical approach could significantly deepen our understanding of tourism resilience, enabling more refined interpretations of uncertainty, adaptation, and transformative responses within the context of overlapping global crises. Moreover, it provides fertile ground for employing new methodologies and narrative techniques, which are better suited to capturing the multifaceted and nonlinear impacts of such crises on tourism in peripheral regions.

For a broader theoretical scope, the literature highlights additional global and regional factors influencing tourism resilience. One emerging theme is the transformative role of technology, particularly artificial intelligence (AI), which is reshaping the travel industry by improving operational efficiency, optimising costs, and enhancing customer experiences (Mura & Stehlíková, 2025). Another important discourse examines the interplay between place identity, place image, and place reputation-elements crucial to strategic tourism development, which can affect how destinations recover from crises (Matlovičová, 2024). Furthermore, comparative studies from Central and Eastern Europe provide valuable context for North-Western Romania's experience. For instance, Boros and Korcsmáros (2024) investigate rural tourism along the Danube in a different regional setting, offering a comparative baseline. In contrast, Herman et al. (2022) analyse post-pandemic tourism dynamics in Bihor County, Romania – a central area within the region under study – thus providing locally specific insights. Together, these parallel findings help to situate the present results within a broader regional framework.

Accommodation and the crisis

A fundamental component of the 5A elements (attractions, accessibility, accommodation, activities and services) or 6A elements (attractions, accessibility, services, packages available, activities and ancillary services) of a destination is accommodation as a service. Conversely, this approach is regarded as the most effective method for quantifying tourism associated with a specific geographical location, as it encompasses variables such as the number of tourists registered, their respective nationalities, and the number of nights spent by each individual. Thirdly, it is a sensitive point in the system, alongside or even ahead of the number of visitors to the attraction, because in a crisis, the number of guests booked (number of nights) falls quickly. The loss of revenue due to tourists not coming to the destination can be made up for with little or no compensation (guest workers, renting, etc.). This final point renders it a pivotal tourism indicator during economic cycles and crises.

The most recent global crisis in tourism was precipitated by the emergence of the novel Coronavirus (COVID-19) pandemic and the subsequent imposition of closures and travel restrictions. This represented the most significant tourism crisis globally since the Second World War (Creţu et al., 2024). Between 2019 and 2020, global tourism GDP contracted by 48.4%, while sectoral employment declined by 20.8%. During the same interval, the European Union experienced a comparable, albeit somewhat less pronounced, downturn, with tourism GDP falling by 42.3% and employment by 14.7% (WTTC, 2024). The number of nights spent in tourist accommodation (NACE Rev. 2: hotels, holiday and other short-stay accommodation; camping grounds, recreational vehicle parks and trailer parks) fell by 50.5% from 2.9 million in 2019 to 2020 in the EU, including a 51.7% decline in Romania. After this, a gradual recovery commenced in the EU, with the indicator only attaining the 2019 level in 2023. A comparable process occurred in Romania; however, the 2023 value remained marginally below the four-year high (Eurostat, 2024).

About the number of tourist accommodation establishments in the EU, the values for 2020 were 96.2%; for 2021, they were 97.0%; for 2022, they were 100.7%; and for 2023, they were 103.0%. Half of the Member States elected to close their accommodation completely during the pandemic or make it available only for business purposes and business travellers (Kaszás & Keller, 2022). This was a temporary closure, with several reopenings later. In contrast, Romania exhibited a consistent increase over the observed years, reaching a 140.8% growth in 2023 compared to 2019 (Eurostat, 2024). This represents the highest rate of growth among EU Member States, with a 100% increase in 2019 (8202 units), a 102.0% increase in 2020, a 131.3% increase in 2021, a 134.8% increase in 2022, and a 140.8% increase in 2023. The upward stagnation trend of the country in the years before 2019 continued and accelerated towards the end of the year due to the hotel construction wave in Romania, but mainly due to the explosion in the number of apartments and rooms available for rent for tourism purposes. During the pandemic, there was an increase in demand for these properties, primarily due to their enhanced privacy and seclusion, as they are often situated in more remote locations than hotels and guesthouses.

The number of people employed in accommodation (Coduri CAEN Rev. 2, 2024) in the EU fell from 100% in 2019 to 82.5% in 2020, then 78.5% in 2021, before reversing the trend to 92.6% in 2022 and 95.4% in 2023. A similar trend was observed in Romania, with the percentage of people who had received the vaccine increasing from 98.1% in 2020 to 112.2% in 2021, 108.5% in 2022, and 94.4% in 2023 (Eurostat, 2024). The reason for the overall smaller increase in the number of accommodation units compared to the number of accommodation establishments is that the increased number of apartments and rooms for rent does not require permanent staff.

Many studies have addressed the characteristics of accommodation establishments and their clients during the pandemic and the strategies employed by these parties to deal with the crisis. For example, these academic works have been summarised by Nekova (2023), whose work is highlighted in the summary sections, which we supplement with the main conclusions of the studies we have identified (Nekova, 2023).

Concerning shifts in tourist behaviour and the evolution of the accommodation model, research findings indicate customers prefer reduced interaction with staff and enhanced cleanliness standards in hotels (Nekova, 2023). For instance, studies by Çetin and Coşkuner (2021), Pappas and Gryptou (2021) and Erol et al. (2023) have drawn attention to the fact that the outbreak of the novel coronavirus has precipitated a shift in tourists' preferences about accommodation, resulting in a demand for safe and healthy environments (distance, hygiene regulations, etc.). Recent studies have indicated a growing preference among hotel guests (ÇetiN & Coşkuner, 2021; Pappas & Glyptou, 2021; Erol et al., 2023). The study's findings demonstrated a positive correlation between implementing stringent restrictions and the more severe negative impacts of the pandemic on the hotel sector. This observation was reported by Dogru (Dr. True) et al. in 2024. Nekova (2023) has highlighted that, prior to the advent of the pandemic, tourists predominantly opted for hotel accommodation, with shared houses and apartments being the second most popular choice. However, in the aftermath of the pandemic, there has been an observable shift in traveller preferences, with an increasing number opting to rent full apartments or houses (Traino, 2024). Nekova (2023) also demonstrates that business tourism has declined less than leisure tourism, contrary to the hypothesis and her study also shows that urban areas pose a greater risk to tourists than rural areas regarding the spread of the epidemic. Nekova's (2023) findings concur with the assertion that small tourism enterprises constitute the most vulnerable sector, necessitating a public support framework that prioritises their needs by providing financial and non-financial resources. The following analysis examines the changes in accommodation services in the Partium area.

STUDY AREA AND CONTEXT

The impact of the pandemic on tourism in Romania

In 2020, the tourism sector experienced a downturn. The number of overnight stays fell by approximately 50% compared to 2019. Foreign tourist arrivals decreased by 83%, while domestic arrivals fell by 45% (Popescu, 2021). In spring 2020, tourism turnover virtually ceased; although there was some recovery in the summer, the sector still suffered an unprecedented annual loss of revenue and turnover, with many businesses closing. Domestic tourism has become increasingly significant, with Romanian travellers opting for domestic destinations (coastal, mountain and rural areas) over foreign trips and prefer small accommodation facilities (Popescu, 2021).

Outbreak waves and restrictions

Two outbreak waves were identified in Romania in 2020 and 2021. The fourth wave, which peaked in autumn 2021, was the most severe, with a record number of cases (Túri et al., 2022). In order to contain the outbreak, a national state of emergency was declared from March 15 to May 15 2020. This emergency was accompanied by a curfew and the closure of borders and restaurants (Mitrică et al., 2022). In October 2021, a night-time curfew was implemented, and a range of services were required to adhere to a protection pass system. Following the termination of the state of emergency on March 9 2022, restrictions were finally lifted (Ilie, 2022).

Description of the area under study. The Spatial Structure of Partium

The present research focuses on the north-western part of Romania, historically identifiable as Partium, a distinct geographical and historical region. The spatial framework of the study is delineated by the five counties (Arad, Bihor, Maramureș, Satu Mare and Sălaj) established by the administrative reform 1968. These administrative units are predominantly located within the geographical boundaries of the historical Partium, although the present administrative division does not fully encompass the historical borders (Szilágyi & Fogarasi, 2024). The Partium region is distinguished by its specific characteristics, representing the entire country and the broader Central European region. These characteristics can be attributed to several factors, including its borderland status, state borders with Hungary to the west and Ukraine to the north, and natural dividing lines in the east.

Four counties under scrutiny (Arad, Bihor, Maramureș and Satu Mare) are located close to state borders. Arad, Bihor, and Satu Mare counties are located along the Hungarian-Romanian border, and Maramureș with Satu Mare are also along the Romanian-Ukrainian border. In the case of the four counties under discussion, the border sections in question are also home to several railway and road crossing points involved in international freight and passenger traffic (Szilágyi & Elekes, 2020). However, the county of Sălaj does not have a state border and thus benefits less from direct cross-border (transnational) traffic. The border region character also significantly influences the spatial structure and the economic periphery position. The western location of the counties has been demonstrated to result in a comparatively more advantageous position for the region about the interior of the country (Szilágyi & Miklósné Zakar, 2021).

The particularities of borderlessness and tourism

The territory of Partium is delimited to the west by designated administrative boundaries (Romanian-Hungarian, Romanian-Ukrainian) and to the east by geographical boundaries (e.g. Eastern Carpathians, Transylvanian Mountains) (Szilágyi, 2019a, 2019b). The region's tourism potential is consequently diverse. Arad, Bihor and Satu Mare counties are distinguished by their abundant thermal water resources, which constitute a substantial component of the Romanian tourism sector. Of these, the county of Bihor is a notable exemplar of a regional leader in thermal tourism (Herman et al, 2020). Arad, Bihor and Satu Mare, also referred to as the gateway to the West, experience a significant volume of transit traffic of people and goods, representing both an opportunity and an area for development (e.g. in terms of infrastructure and hospitality).

The ongoing Russian-Ukrainian conflict has engendered several uncertainties, particularly in the northern border areas of Maramureș and Satu Mare counties, where border crossing is difficult and the war situation is not conducive to tourism. Moreover, the absence of infrastructure development in the region, compounded by the restrictions imposed during the pandemic, has further compounded the erosion of external relations. Concurrently, the geographical and cultural resources of Partium, encompassing thermal tourism, rural tourism, and historical and architectural heritage, possess considerable development potential, which can be further augmented through appropriate investment and a coordinated development policy. The accession to Schengen on January 1, 2025, can enhance this potential by facilitating cross-border cooperation between Hungary and Romania and increasing the economic and tourist openness of the region.

DATA AND METHODS

Data sources and data management

The research is based on firm-level data from the Romanian Tax Agency (Agentia Nationala de Administrare Fiscala - ANAF) for the period 2019-2023 (Informații fiscale și bilanțuri - Acasa - MF, 2024). The source data were initially linked to comprehensive taxpayer records, for which the databases from 2020 to 2024 were also utilised, given the one-year lead time for actual taxation and tax returns. The resultant data set was filtered, cleaned and integrated to create a five-year consolidated frame. The accommodation service enterprises relevant to this study were selected from this frame.

The selection of the relevant firm records was made based on the CAEN2 (Coduri CAEN [NACE] Rev. 2, 2024) codes valid in Romania until the end of 2024, along with the following main activities:

a. 5510 - Hotels and similar accommodation ("Hoteluri și alte facilități de cazare similare")
b. 5520 - Holiday and short-stay accommodation ("Facilități de cazare prin vacanțe și perioade de scurtă durată")
c. 5530 - Caravan parks, camping sites and camping grounds ("Parcuri pentru rulote, campinguri și tabere")
d. 5590 - Other accommodation services ("Alte serviciu de cazare")

The aforementioned codes belong to the primary category I (Accommodation services) and represent the predominant types of accommodation sector in the Parthian region. The spatial focus of the study was exclusively on the north-western counties of Arad, Bihor, Maramureș, Satu Mare and Sălaj, resulting in the exclusion of all entries belonging to other county units from the raw database. The resulting database comprised a five-year time series and contained approximately 5000 firm records (n = 4995). The study revealed a substantial increase in accommodation categories over the five years under investigation. The accommodation category classified as 5520 accounted for most of this increase (Tab. 1).

Tab. 1: The active accommodation enterprises in the Partium region, disaggregated by CAEN (NACE) Rev. 2 codes

Year	**5510 Hotels & similar**	**5520 Holiday & short-stay**	**5530 Caravan parks & campsites**	**5590 Other accommodation**	**Total**
2019	308	325	19	221	**873**
2020	304	338	18	213	**873**
2021	307	393	24	218	**942**
2022	338	508	34	240	**1 120**
2023	338	559	34	256	**1 187**

Source: edited by the authors by the censuses from the ANAF (2019-2023)

The integration of territorial and population information

In order to facilitate spatial analysis at the settlement level (LAU) and current demographic characteristics, two additional data sources have been linked to the firm data.

Eurostat LAU-level spatial data from 2023 incorporates municipality, city and county codes for the reference year 2021 (Eurostat, 2024).

A detailed data set of the Romanian 2021 Census (Rezultate definitive RPL 2021 - Recensamantul Populatiei si Locuintelor, 2023) (Tabel 1.05_1.05.2_actualizat) was extracted to provide information on the population and other demographic indicators of the municipalities.

The "housekeeping" process entailed standardising the key fields in the database and matching the municipality names/codes to identify the exact municipality level of each firm record. This process yielded a dataset comprising approximately 1000 records (n = 1044), encompassing the primary indicators of the selected firms, which have been aggregated by municipality and year. This configuration facilitates the execution of both spatial and time series analyses. The geospatial database was accessed from the Eurostat NUTS site. More specifically, the shapefiles for LAU and NUTS3 levels were searched and restricted to the territorial unit under study (Local administrative units (LAU) - GISCO - Eurostat, 2024).

The following variables were subjected to rigorous testing:

The finalised database encompasses four financial indicators expressed in RON (lei) and the average annual number of employees:

The following variables will be the focus of the research:

- Net turnover

- Revenue
- Total net sales
- Gross profit/loss
- Average annual number of employees

The study will assess net turnover's spatial and temporal evolution, as this is one of the most important measures of the economic performance generated by accommodation service enterprises. The remaining three financial variables – revenue, expenditure and gross profit/loss – function as complementary or control variables, particularly in identifying potential data quality issues.

Two factors justify the analysis of the number of employees. Firstly, there is a need to map the trends in the tourism labour market. Secondly, efficiency can be interpreted. The efficiency indicator was calculated using labour productivity, defined as the net turnover ratio to the number of employees (Cifra_afaceri_N / Salariati). This indicator provides a measurement of the turnover generated by each employee and thus offers a means to assess the sector's response to crises (e.g., the pandemic period) or market changes, particularly in spatial and temporal comparisons.

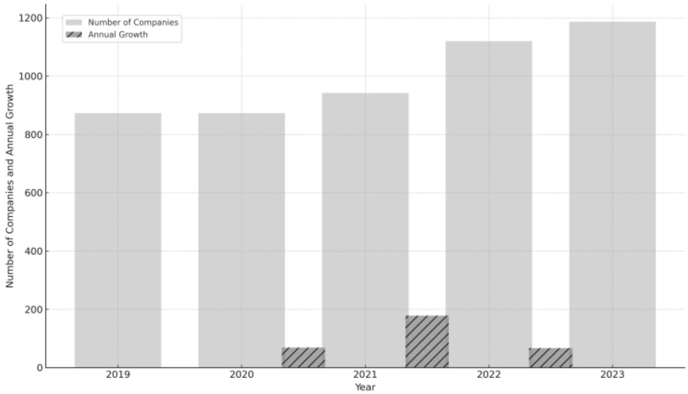
Indicators and methods

The resilience of the accommodation services sector in Partium for 2019-2023 is first assessed using three key indicators (net turnover, number of employees, and labour productivity, calculated as the ratio of the two). The statistical analysis compares data for each year, and the analysis increases and decreases over time. Furthermore, a cartographic visualisation has been produced to demonstrate spatial differences and patterns.

A. Evolution of the number of enterprises

The number of accommodation establishments in the database that filed a tax return increased from 873 to 1187 over the five years under review, representing an increase of 36% (Figure 1). Notably, the number of businesses remained constant in the initial year of the pandemic (2020), indicating no decline but rather stagnation (873 → 873). However, in the subsequent year (2021), a 5% increase was observed. During 2021-2022, there was a marked increase in growth, with a figure over 19%. This growth continued at a slower but still positive pace in 2023. However, a proportion of the entrepreneurial base has been replaced.

Fig. 1 Evolution of the number of enterprises



Source: Own editing according to the datasets of MF

Between 2019 and 2020, the number of accommodation providers disappeared or entered the sector was equal.

In 2020-2021, the number of new registrations was more significant.

Between 2021-2022, 267 new establishments appeared compared to 89 "lost" establishments.

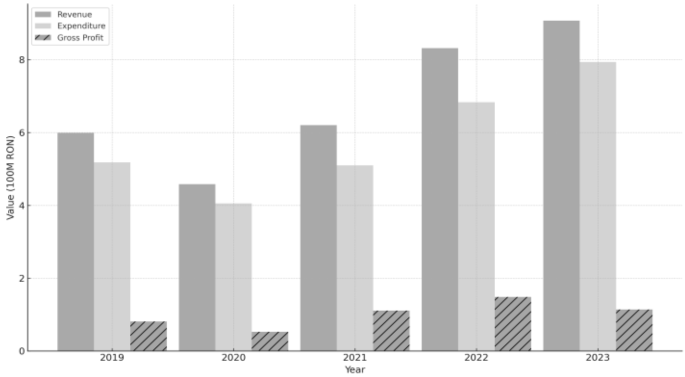
This represents a net increase of almost 20% compared to the total stock.

Between 2022 and 2023, the sector lost 125 firms, while 192 new units joined.

B. Changes in revenue, expenditure and gross profit

As demonstrated in Figure 2, the sector's total (aggregate) revenue, expenditure, and gross profit exhibit substantial fluctuations. During the period under consideration, namely 2019 to 2020, the revenue experienced a decline of -23.6% (from RON 598.99 M to RON 458.15 M), the expenditure decreased by -21.8% (from RON 518.11 M to RON 405.32 M), and the gross profit witnessed a significant decrease of -34.7% (from RON 80.88 M to RON 52.85 M). The initial year of the epidemic has thus evidently witnessed a precipitous decline.

Fig. 2 Changes in revenue, expenditure and gross profit



Source: Own editing according to the datasets of MF

Significant developments characterise the transition from 2020 to 2021. Evidently, revenues in 2021 surpassed the 2019 figure and exhibited a 35% increase compared to 2020, reaching RON 620.69 million from RON 458.15 million. Conversely, expenditure nearly equalled the 2019 figure, registering an increase of 25.8% from RON 405.3 million to RON 509.85 million. The primary factors contributing to this surge in revenues are the recovery of domestic tourism and the partial lifting of epidemiological restrictions. Furthermore, revenues exhibited greater growth than expenditures during the low point 2020, resulting in a notable profit increase (Boiciuc, 2021).

The positive trend observed in the preceding period continued in the subsequent period, with revenues, expenditure and profits all rising by a further 34%. The profit value increased from RON 110.84 M to RON 148.68 M (+34%).

Significant developments and transitions characterise the transition from 2022 to 2023. Despite the sustained revenue increase (from RON 831.76 M to RON 907.67 M), the growth rate decelerated (9%). In comparison, expenditure growth remained at a higher level (from RON 683.08 M to RON 793.76 M - 16%), due to the impact of the upsurge in inflation at European level (HICP - annual data (average index and rate of change), 2025). Consequently, profit declined from RON 148.68 M to RON 113.91 M, representing a decrease of approximately -23.4%, thus reverting to the 2021 level.

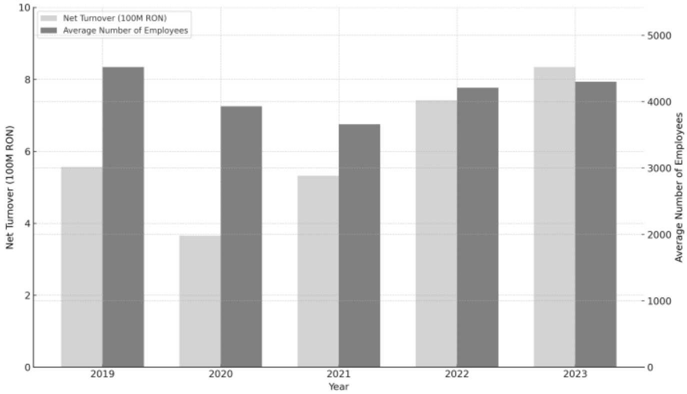
C. Changes in net turnover

Net turnover (Cifra_afaceri_N) is a pivotal metric for evaluating the economic viability of accommodation providers. The following data illustrates this point:

- RON 556.35 M in 2019,

- RON 365.42 M in 2020 (a decline of approximately -34.3%),
- RON 532.32 M in 2021,
- RON 741.91 M in 2022,
- RON 834.36 M in 2023.

Fig. 3 Changes in net turnover



Source: Own editing according to the datasets of MF

A comprehensive analysis reveals that the aggregate turnover for the year 2023 has exhibited a substantial increase of approximately 50% compared with the 2019 baseline (Figure 3). Comparing the present situation with the low point in 2020 reveals an increase of +128%, indicating a rapid rebound of the sector after the epidemic.

D. Change in the average number of employees

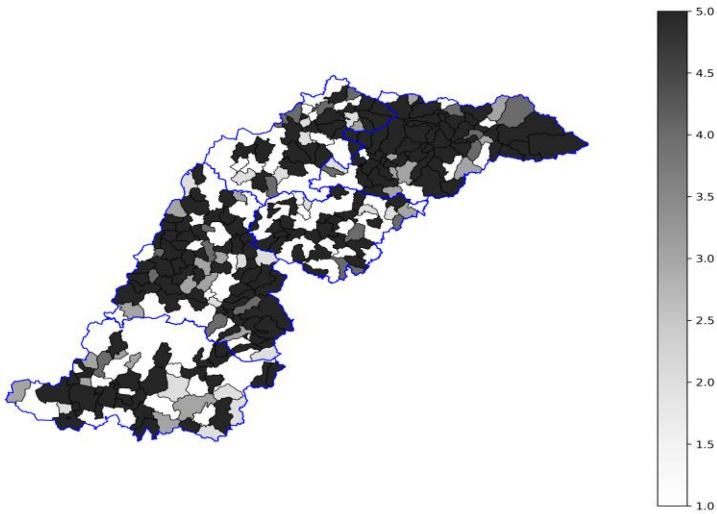
The number of employees followed the trend in net business turnover, albeit with a slight lag. The data shows a decrease of almost 9% from 2019 to 2020 (from 4524 to 4132 employees). This is followed by a further decrease of 5% from 2020 to 2021 (from 4,938 to 3,938), even though the financial indicators showed a substantial improvement. Finally, the data shows a further decrease from 2021 to 2022 (not shown). A rapid expansion of almost 9% (to 4,287) occurred during a period in which the recovery in market demand was already reflected on the labour side. In the 2022–2023 period, there was a slower increase of around +2% (4,360 persons), which was still below the 2019 baseline.

Consequently, the aggregate number of employees declined by approximately 4% between 2019 and 2023 (Figure 3). This finding indicates that businesses could function with a reduced workforce, which would enhance labour productivity and, consequently, efficiency.

RESULTS AND DISCUSSION

In 2019, approximately 50% of the region's municipalities had accommodation businesses. A substantial enhancement in this regard is evident, with the proportion increasing to 58% by the conclusion of the designated timeframe. Regional disparities exist about dynamics and coverage, with Maramureș and Bihor counties being particularly noteworthy. Initially, over 60% of the municipalities in both counties possessed a registered accommodation establishment, which increased to nearly 80% in Maramureș and 70% in Bihor by the conclusion of the period under scrutiny. At the start, Sălaj was in the middle of the ranking in the number of municipalities (47%). However, it is noteworthy that it is the only county where the number of municipalities concerned did not increase over the five years. About territorial coverage, Arad and Satu Mare were the leaders (35-37%), but both had successfully caught up with Sălaj, which had almost reached 47% by the end of the period (Figure 4.).

Fig. 4 Annual Frequency of Local Governments in the Dataset



Source: Own editing according to the datasets of MF

The area covered in Bihor is relatively isolated from its neighbours. It is not visible on this map but overlaps with its Hungarian neighbours, and a weak territorial link with Sălaj can be detected. The

Maramureș block is broadly contiguous with the Satu Mare belt and has a weak territorial link with Sălaj. However, there is also a presumed territorial link along its mountainous outer borders with the counties of Bistrița-Năsăud and Suceava. Arad is entirely isolated from Bihor; only the south-western part of the county is considered to be largely covered, where there may be a continuous territorial link towards Csongrád-Csanád (HU) and Timiș, following the main infrastructure routes.

Analysis of business turnover at the municipal level

When the two reference years, 2019 and 2023, are compared in a static cross-section, both continuities and divergences emerge. In 2019, the sector's turnover exceeded RON 10 million in eleven regional municipalities comprising Oradea and the other four county capitals. By 2023, this number had risen to thirteen, although in Bihor, it had fallen from three municipalities to two.

Bihor County. Business activity in the region's tourism sector is concentrated in Oradea and Sânmartin. In 2019, these two localities accounted for almost 45 per cent (RON 249.8 million) of the five counties' aggregate turnover of RON 556 million, adding that the neighbouring Nojorid raised their share to 47.8 per cent. By 2023, regional turnover had soared to RON 834.3 million, yet the three central Bihor municipalities followed divergent paths. Although Sânmartin (RON 233.4 million) and Oradea (RON 124.1 million) both recorded substantial absolute gains (together RON 357.5 million), their combined share slipped to 42.8 per cent as turnover became more widely distributed. Nojorid, by contrast, forfeited its earlier position, its 2023 figure shrinking to barely one-tenth of that for 2019. Therefore, the trio's collective share fell to 42.9 per cent—still sizeable but appreciably lower than before.

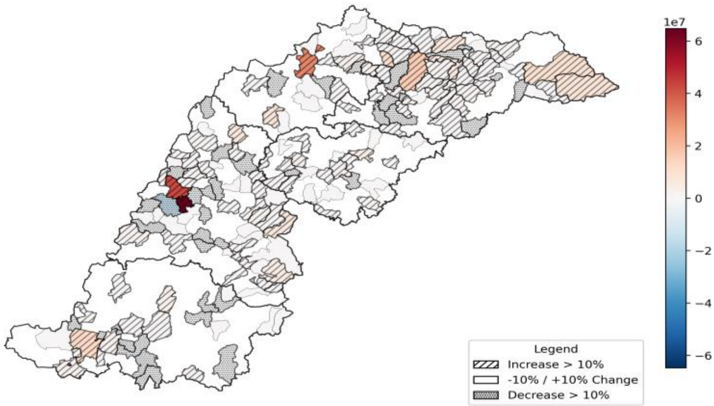
Arad and Sălaj Counties. In terms of stability, Arad and Sălaj stand out. In Arad, two municipalities, and in Sălaj, only Zalău surpassed the RON 10 million threshold in both years. The municipality of Arad, Romania's chief road- and rail gateway, enjoys substantial transit traffic that sustains accommodation demand. As border restrictions hit this branch hardest in 2020, turnover plunged to roughly 60 per cent of its 2019 level (RON 46.3 million versus RON 28.4 million), regaining and surpassing the benchmark only in 2022. The mountain resort of Moneasa likewise suffered in 2020, restoring its 2019 turnover only by 2023. Parallel trends were observed in Zalău, although the slightly higher baseline was reached again in 2022.

Satu Mare and Maramureș Counties. The northern counties showed markedly more dynamic growth over the five-year horizon. In Satu Mare, two additional municipalities joined the over-RON 10 million category alongside the county capital, and all three displayed spectacular expansion: in Satu Mare, city turnover more than doubled—from RON 25 million to RON 57 million—despite having halved between 2019 and 2020. A similar trajectory is evident in

Tăşnad, known for its thermal baths, where turnover jumped from RON 8.2 million to RON 15.3 million. The most rapid growth occurred in Vama, a new Oaș Mountains resort's turnover leapt from a negligible RON 0.5 million to RON 12 million.

Maramureș displays the least concentrated spatial distribution of turnover: the list of high-turnover municipalities rose from four to five (and briefly to six in 2022 with Baia Sprie). Although Baia Mare retains a leading role, it no longer dominates the county. Growth trends are upward but non-linear, with occasional setbacks that may be directly or indirectly linked to proximity to the Ukrainian border and the associated geopolitical tensions. For example, Borșa, which performed strongly during the COVID period, registered a decline in 2022—an atypical development—possibly because accommodation was requisitioned under a government programme for refugees and, therefore, did not operate commercially. Baia Sprie provides a further anomaly: it crossed the RON 10 million threshold in 2022 but fell below it again in 2023. Notwithstanding these exceptions, the principal centres post distinctly positive balances: Baia Mare's turnover, after two years of decline, climbed from RON 25 million to RON 41.3 million; Borșa's rose from RON 18.7 million to RON 26.4 million; Vișeu de Sus advanced from RON 18 million to RON 28 million; and Ocna Șugatag—a salt-water spa—doubled its turnover from RON 6 million to RON 12 million.

Fig 5 Change in Business Turnover at Partium Accommodations, 2019–2023



Source: Own editing according to the datasets of MF

Over the five years, the most significant absolute increases occurred in Sânmartin, Oradea and Satu Mare, whereas the steepest contraction—proportionally and in absolute terms—was recorded in Nojorid (Figure 5.). Most municipalities registering growth over ten per cent are situated in the region's northern half, while those showing comparable declines cluster in the south. Thus, in Maramureș, 32 municipalities experienced substantial expansion against nine with falling turnover; in Satu Mare, the ratio was eleven to three; in Sălaj, thirteen to two; whereas in Bihor (27 rising, 14 falling) and especially Arad (eleven rising, eleven falling) the picture is more balanced.

Municipal-level analysis of average staff numbers

The number of people employed in the accommodation services sector in the period under review (2019-2023) was relatively small for the region, ranging between 3,600 and 4,600. Whilst 4,524 individuals were registered in 2019, the 2023 figure of 4,302 falls short of the initial headcount, thereby indicating that human resources have been significantly impacted by the period of COVID-19 and the subsequent economic uncertainty. The following section will examine the principal alterations and regional particularities by year.

County Arad. In 2019, the sector employed 630 people, most in Arad (387), with the mountain resort of Moneasa notable among smaller localities (86). The first COVID wave in 2020 cut the county total to 490 (Arad 280; Moneasa 75). Contraction continued in the second pandemic year, 2021 when employment fell to 408 (county town 269; Moneasa 54). A sharp rebound followed in 2022: numbers rose by one-fifth to 513, Arad accounting for 303 and Moneasa 70. Growth in 2023 was marginal (515 overall) and uneven—the county town inched up to 315 while Moneasa slipped to 63, illustrating the volatility of small destinations.

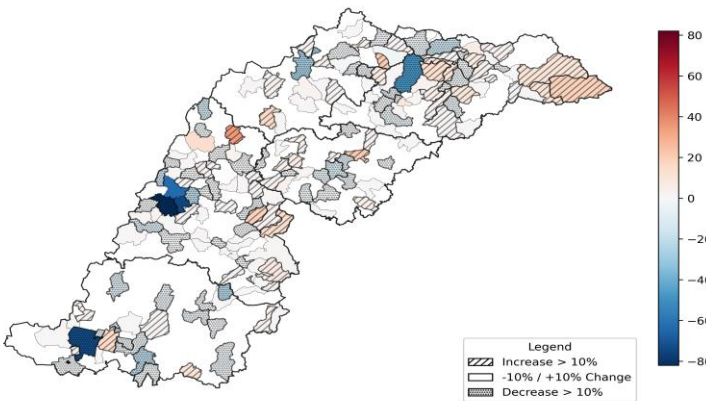
Bihor County. Bihor consistently held the region’s largest workforce: 2,384 employees in 2019, almost half based in Sânmartin (1,331) and a further 651 in Oradea; Nojorid (83) and Borș (53) also maintained sizeable staffs. Despite a fall to 2,128 in 2020, the county's primacy was unaltered, though numbers declined in all four centres. By 2021, only 1,955 employees remained, and Nojorid virtually disappeared from the records. A turning point in 2022 lifted the total to 2,140, chiefly through expansion in Sânmartin (1,339), while Oradea was still contracting. In 2023, the county closed on 2,186, and the county town (587) now provided momentum, whereas Sânmartin (1,256) and Borș (36) receded slightly. Rural centres such as Bulz (40), Șuncuiuș (37) and Marghita (50) continue to grow, pointing to an internal reconfiguration.

Maramureș County. Employment in 2019 reached 976—the region’s second-highest figure—thanks to Baia Mare (297), Sighetu Marmației (114) and Borșa (109). Numbers fell to 809 in 2020: Baia Mare tumbled to 202 and Sighetu Marmației to 77, while Borșa edged up, apparently boosted by returning expatriate guest-house owners and relatives. Baia Sprie shrank to 72, Vișeu de Sus to 74, with Ocna Șugatag stable at 36. A slight recovery in 2021 took the county to 815. The 2022 total—just under 1,000—signalled a near return to pre-pandemic levels, though Baia Mare (225) remained below its former peak. The 2023 record of 1,020 reflects renewed growth in Baia Mare (249) and further gains in Borșa (128) and Vișeu de Sus (98); Ocna Șugatag (48), Sighetu Marmației (97) and Baia Sprie (80) stagnated or dipped.

Sălaj County. With 183 employees in 2019, Sălaj had the region's smallest workforce, almost half of it in Zalău (91). Numbers barely shifted in 2020 (182), though Zalău fell to 65 while smaller settlements—Jibou in particular—grew. The county recorded 171 employees in 2021, then climbed to 215 in 2022, Zalău improving to 88. By 2023, the total had returned to 182; Zalău stood at 80, and Jibou, now the second hub, at 24. Fluctuations were modest, mirroring the county's intrinsically small tourism base.

Satu Mare County. In 2019, the county employed 351 people, 205 in the capital and 53 in Tășnad. The 2020 total of 321 entailed a 25 per cent drop for the capital (152) and a fall to 40 in Tășnad, while the newcomer Vama expanded by 35. Employment decreased to 310 in 2021; the capital slipped marginally to 156, but Tășnad contracted to 29. The workforce rebounded to 372 in 2022, with the capital (175) and Tășnad (49) reviving. A further rise to 399 in 2023 saw the capital reach 178, Tășnad surge to 68, and Vama remain steady at 33, suggesting the county still holds considerable potential and is beginning to catch up with Arad.

Fig. 6 Changes in the Number of Employees at Partium Accommodations, 2019 to 2023

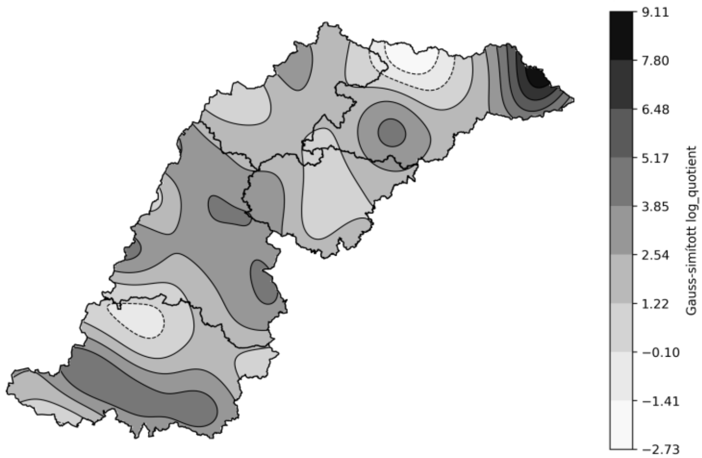


Source: Own editing according to the datasets of MF

Across the region, the workforce never regained its 2019 size, although a clear upturn is visible from 2022. Most county capitals show a negative balance relative to 2019; Oradea is the exception, exerting a marked pull on labour—especially in 2022–2023—at the expense of neighbouring settlements. Nojorid illustrates near-total collapse, whereas mountain and thermal destinations (Borșa, Vișeu de Sus, Tășnad, Marghita, Șuncuiuș, Bulz and others) have moved ahead. A north-south divide is evident: more municipalities are expanding in Maramureș and Satu Mare, while Arad and Bihor display balanced or declining trends (Figure 6.). In Sălaj, change is negligible relative to the low 2019 baseline. Thus, although the post-COVID recovery in employment statistics from 2022 onwards is unmistakable, it has not fully reinstated the 2019 level. Localities endowed with natural, cultural or thermal resources appear more resilient; border location and county-capital status—though still influential—tend to redistribute labour rather than enlarge the region's employment base. This internal restructuring shows that the adaptability of enterprises and employees in the accommodation sector is highly differentiated spatially and over time.

Using the 2019 and 2023 datasets, we mapped firms' net turnover (log-transformed) and changes in headcount at settlement level through a gravity-type surface. We then portrayed the inter-period difference on a diverging colour ramp.

Fig. 7 Change in labour productivity index of accommodations in Partium (2019 – 2023)



Source: Own editing according to the datasets of MF

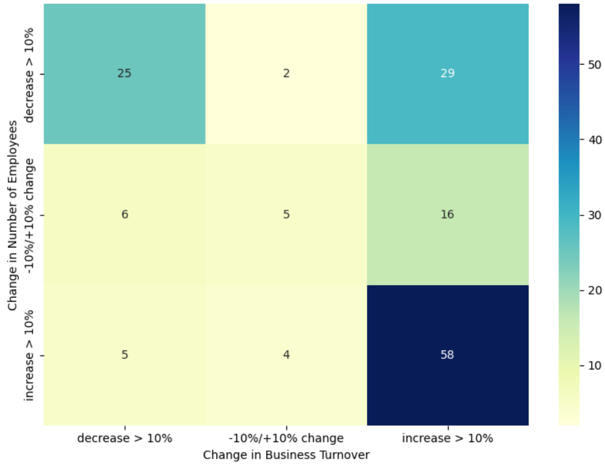
Labour productivity in the accommodation trade was computed for each locality as the ratio of the change in net turnover to the change in employment. The logarithm of that quotient (log *quotient*) was treated as the "mass" to be fed into a gravity framework: the individual masses were aggregated using a Gaussian weighting function so that influence decays with distance from each centre. The procedure yields a single, continuous surface that depicts the regional morphology of productivity change (Figure 7.).

In the resulting image, the zones where the turnover-to-staff ratio improved between 2019 and 2023 stand out. Darker shades occupy the positive range, indicating where enterprises generated higher revenue with fewer workers. Such concentrated increases are most evident around county capitals and rapidly developing resorts. Conversely, lighter tones—or areas falling into the negative spectrum—imply that certain settlements have failed to raise efficiency; in some, robust hiring was not matched by proportionate revenue growth. These are typically peripheral districts or ones with modest tourism capacity, where market volatility and capital scarcity often obstruct modernisation. The gravity surface, therefore, not only portrays average performance but also reveals the "pull" or "drag" exerted by adjacent territories, underscoring the extent to which efficiency gains in Partium's accommodation sector remain contingent on inter-municipal linkages.

The strongest upswings appear in the previously neglected high-mountain segment: the Maramureș hubs of Borșa and Vișeu de Sus, lying at the foot of the Rodna and Maramureș ranges. Smaller mountain clusters are also discernible—Pădurea Craiului and the Bihor Mountains in Bihor County, the Chioar area in Maramureș, and the Mureș valley in Arad—each standing out as isolated "islands" of improvement. Pockets of decline, by contrast, occasionally emerge right beside these rising cores; here, the Maramureș Basin is most conspicuous, centred on Sighetu Marmației along the Ukrainian frontier.

To further elaborate on the regional heterogeneity of resilience dynamics, municipalities were categorised according to their joint changes in business turnover and employment using a cross-tabulation approach. Both indicators were classified into three distinct groups: substantial increase (>10%), moderate/no significant change (±10%), and substantial decrease (>10%). This analysis includes only municipalities that had active accommodation establishments in both 2019 and 2023 (n=150). Overall, the results indicated a robustly positive dynamic: despite the closure of 234 (26.8%) of the initial 873 enterprises by 2023, the establishment of 548 new businesses resulted in a net increase of 36%, raising the total to 1187 active enterprises by the end of the study period. The resulting typology (Figure 8) revealed considerable variability among the municipalities. The largest group (58 municipalities) experienced substantial growth in both employment and turnover, demonstrating pronounced adaptive resilience. Conversely, another substantial group (25 municipalities) exhibited significant declines in both indicators, highlighting local vulnerabilities. Mixed patterns were also evident: notably, 29 municipalities experienced turnover growth despite declining employment, suggesting structural shifts towards greater labour efficiency or productivity gains.

Fig. 8 Change in Number of Municipalities by Employees and Business Turnover (2019-2023)



Source: Own editing according to the datasets of MF

Conclusions and recommendations

Our investigation reveals that the accommodation sector demonstrated an exceptionally swift rebound from the COVID-19 shock. Although net sales contracted sharply and employment declined moderately in 2020, by 2023 revenues had already risen to well over 50 per cent of their pre-pandemic level, indicating a remarkably rapid three-year recovery.

A distinct north–south economic fracture also became apparent within the region. Almost every branch of the economy now exhibits a divergence between the two southern counties (Bihor and Arad) and the three northern ones. Characteristics previously deemed disadvantageous for tourism – lower traffic volumes, smaller capacities and relative isolation – have evolved into competitive assets. Growth, therefore, has been most pronounced in Maramureș and Satu Mare, which lie off the main transit corridors, whereas Arad and Bihor have experienced stagnation or merely selective expansion.

The resurgence has been driven chiefly by destinations offering thermal baths (for example Sânmartin/Băile Felix and Tășnad) together with alpine resorts that serve secondary-home functions, notably Borșa and Vișeu de Sus. By contrast, proximity to border crossings and an essentially urban character appear to have moderated the pace of development.

Despite the general upturn, total employment in 2023 remained four per cent below its 2019 baseline, implying a substantial reallocation of labour and a concomitant rise in productivity. The sector's structure has shifted decisively towards small-scale, short-stay accommodation: over the five-year period the number of active firms expanded by more than one-third, from 873 to 1 187, with micro- and small-sized enterprises – specialising chiefly in short visits – now accounting for over 80 per cent of all providers.

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