

BEYOND THE CAPITAL: MEASURING URBAN TOURISM HIERARCHIES IN ROMANIAN CITIES

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Abstract: *The present study analyses the spatial distribution of tourist accommodation demand across Romanian cities. Utilizing Eurostat's city-level data, the investigation encompasses short-stay accommodation offered via collaborative economy platforms. The analysis employs data from 2018 to 2024, with a particular emphasis on key indicators such as stays, nights spent, and the distinction between domestic and international guests. The paper draws on the concepts of urban tourism hierarchy, tourism concentration, and polycentric urban development to investigate whether Bucharest continues to dominate Romania's urban tourism market or whether a more diversified territorial pattern is emerging. The empirical approach is based on comparative graphical analysis of city-level tourism dynamics, market shares, and post-pandemic recovery trends. The findings reveal that Bucharest maintains its status as the preeminent urban destination, accounting for the highest proportions of both stays and nights spent, particularly within the international segment. However, its pre-eminence appears to be increasingly contested by the emergence of prominent secondary destinations, particularly Braşov and Cluj-Napoca, followed by Sibiu and Timișoara. The tourism functions of these cities are heterogeneous, with Braşov relying more strongly on domestic leisure demand, while Cluj-Napoca combines business, academic, and event-related tourism. The findings also underscore the accelerated recovery of collaborative economy accommodation post-2021, signifying the mounting significance of digital platforms in influencing urban tourism flows. The Romanian urban tourism system is characterized by its capital-led nature, yet it is undergoing a process of diversification, marked by the emergence of competitive secondary cities. The present study makes a contribution to the literature on urban tourism geography in emerging European markets and provides useful implications for destination management, tourism decentralization, and sustainable regulation of short-term rentals.*

Keywords: *short-stay accommodation; Romanian cities; urban tourism*

JEL Classification: Z32; O35

1. Introduction and Theoretical Background

Urban tourism has emerged as a highly dynamic segment of the European visitor economy, exerting considerable influence on various aspects such as local income,

employment, infrastructure development, and city branding. The concentration of accommodation capacity, transport connectivity, cultural assets, business services, and events in large cities naturally results in these cities becoming focal points of tourism demand (Ashworth & Page, 2011). Concurrently, numerous countries have witnessed the emergence of secondary urban destinations, propelled by the affordability of low-cost air transportation, the revitalization of heritage districts, the implementation of digital marketing strategies, and the shift in travel preferences toward more concise and varied urban excursions (Maitland & Newman, 2009).

An increasingly significant component of these transformations is the expansion of the collaborative economy, particularly short-stay accommodation platforms that connect hosts and guests through digital marketplaces. Platforms such as Airbnb, Booking.com, and analogous peer-to-peer or platform-mediated services have profoundly impacted urban accommodation markets by increasing capacity, diversifying lodging options, and enabling tourism growth beyond the traditional hotel sector (Guttentag, 2015; Sigala, 2017). The aforementioned phenomena have also intensified competition, altered neighbourhood tourism geographies, and expanded access to city-break tourism (Adamiak, 2022). Consequently, the collaborative economy sector has emerged as a pivotal component in contemporary urban tourism analysis.

Within this broader context, the spatial distribution of tourism demand across cities is a topic of significant interest for researchers and policymakers alike. A highly concentrated tourism system may generate efficiency advantages through agglomeration effects; however, it can also create congestion, housing pressure, unequal territorial development, and overdependence on a single destination (Hall & Page, 2014). Conversely, a more balanced or polycentric urban tourism system may stimulate wider regional growth, distribute visitor flows more evenly, and strengthen the resilience of the national tourism sector (ESPON, 2016).

Romania offers a pertinent case for examining these dynamics. As the national capital and the most populous metropolitan area, Bucharest has traditionally occupied a dominant position due to its administrative role, international accessibility, business travel demand, and concentration of tourism infrastructure. However, over the past decade, several regional cities have experienced a notable increase in both visibility and tourism. Cities such as Cluj-Napoca, Braşov, Sibiu and Timișoara have experienced notable benefits from enhanced air connectivity, cultural events, heritage tourism, business investment, and strengthened destination branding. The diffusion of short-stay rentals through collaborative platforms may have further supported the rise of these destinations by lowering market entry barriers and increasing accommodation flexibility (Crommelin et al., 2018).

The present study investigates the spatial distribution of tourist accommodation demand across Romanian cities using Eurostat's city-level dataset on short-stay accommodation offered via collaborative economy platforms by residence of the guest and cities (*tour_ce_oarc*). The database provides comparable information on guest stays, including distinctions between domestic and international visitors, thereby offering valuable insight into the platform-based segment of urban tourism demand (Eurostat, 2025).

2. Urban tourism hierarchies in Romanian cities

The analysis is based on Eurostat city-level data regarding stays and nights spent in short-stay accommodation offered via collaborative economy platforms. The following section examines the territorial distribution of demand, recent growth dynamics, and differences between domestic and foreign guests across the main Romanian urban destinations.

2.1. Spatial concentration of collaborative economy accommodation demand in Romanian cities

As shown in Figure 1, the 2024 territorial distribution of stays in short-stay accommodation offered via collaborative economy platforms across major Romanian cities, highlighting the relative concentration of demand within a limited number of urban destinations (Eurostat, 2025).

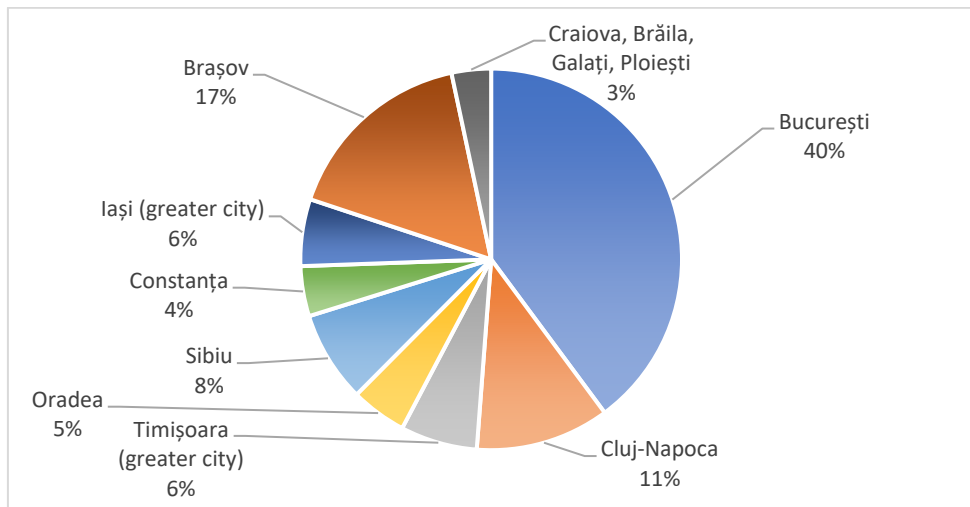


Figure 1: Total stays in short-stay accommodation offered via collaborative economy platforms, by city, 2024

Source: own elaboration, based on Eurostat data

The graphical evidence indicates that tourist demand for short-stay accommodation offered via collaborative economy platforms remains concentrated in a limited number of Romanian cities, while also showing signs of territorial diversification. As we shown in Figure 1, Bucharest accounted for approximately 40% of total stays recorded in the analysed urban sample, confirming its leading position within Romania's platform-based accommodation market. This finding aligns with prior studies that have underscored the pivotal function of capital cities in attracting urban tourism flows, particularly in terms of accessibility, business functions, cultural assets, and metropolitan scale (Edwards et al., 2008).

Concurrently, Figure 1 demonstrates the increasing significance of secondary destinations. The analysis revealed that Brașov accounted for approximately 17% of total stays, followed by Cluj-Napoca with around 11%. Other cities, including Timișoara, Sibiu, Iași, and Constanța, hold smaller but nonetheless significant

shares. These findings suggest that, although demand remains concentrated, Romania's urban tourism market is no longer exclusively capital-centred.

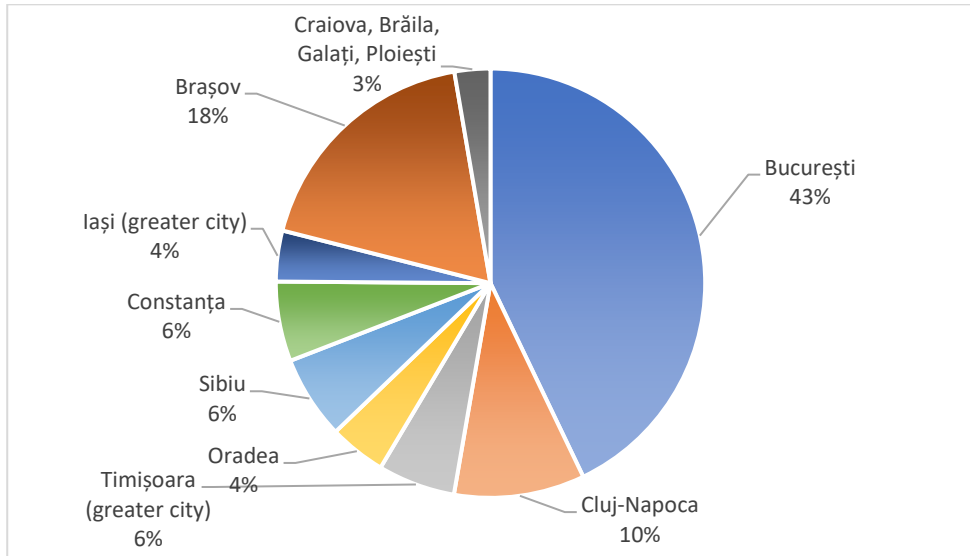


Figure 2: Total nights spent in short-stay accommodation offered via collaborative economy platforms, by city, 2024

Source: own elaboration, based on Eurostat data

A similar pattern is evident in the distribution of total nights spent. As illustrated in Figure 2, Bucharest accounted for approximately 43% of the total nights spent, followed by Brașov with 18%, and Cluj-Napoca with 10%. The higher proportion of Bucharest in terms of nights spent as opposed to stays indicates both high visitor volumes and relatively intensive accommodation utilization.

2.2. Growth dynamics between 2018 and 2024

Figure 3 presents the evolution of stays in the five leading Romanian urban destinations between 2018 and 2024. The time-series evidence demonstrates a pronounced long-term upward trend, interrupted by the contraction associated with the COVID-19 pandemic in 2020 and partially in 2021. This pattern aligns with broader European developments, where urban tourism demand experienced a significant decline during mobility restrictions and subsequently demonstrated a robust recovery (UNWTO, 2023).

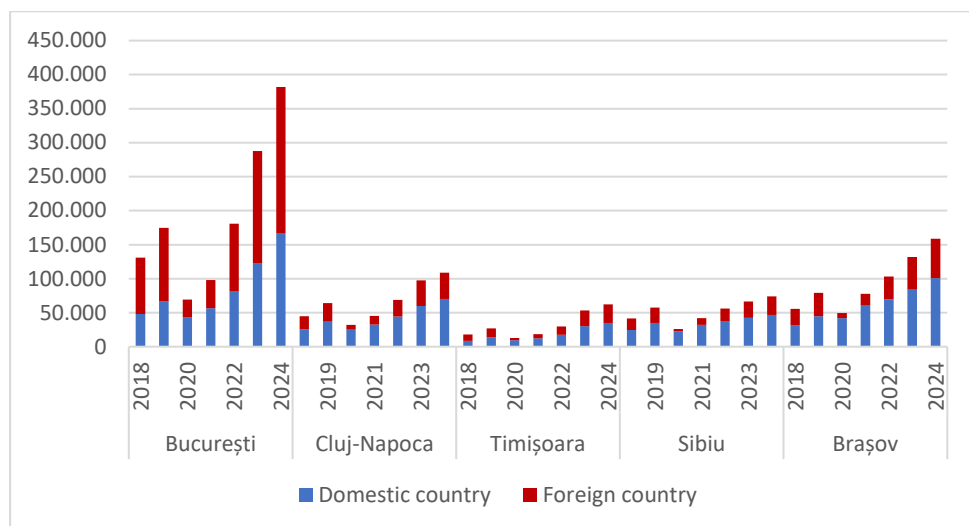


Figure 3: Evolution of stays in short-stay accommodation offered via collaborative economy platforms in five major Romanian cities, 2018–2024

Source: own elaboration, based on Eurostat data

Bucharest (see Figure 3) recorded the most substantial absolute increase during the post-pandemic recovery period, particularly after 2022. This outcome serves to substantiate the resilience of the capital city, a resilience that is bolstered by its international connectivity, the prevalence of business travel, and the diversification of visitor motives.

Braşov exhibited a particularly pronounced upward trajectory, achieving unprecedented levels by 2024. The city's performance is indicative of its robust leisure profile, convenient location for mountain tourism, and its popularity as a destination for domestic short breaks. Destinations that offer a combination of urban amenities and nearby natural attractions often demonstrate robust performance in short-stay tourism markets (Maitland & Newman, 2009).

Cluj-Napoca also experienced robust growth, consistent with its expanding role as an innovation, education, and event centre. Timişoara and Sibiu demonstrated a favorable trend, albeit on a reduced scale.

The preponderance of evidence suggests a concurrent process of concentration and expansion; whereby leading cities maintain their dominance while several secondary centres experience an escalation in their relevance.

2.3. Domestic and foreign demand patterns

The charts disaggregated by guest residence reveal notable structural differences between Romanian cities.

In Bucharest (Figure 4), foreign stays exceed domestic stays during most of the analysed period and rise sharply after 2022. This confirms the stronger international orientation of the capital, a common feature among metropolitan destinations integrated into European transport and business networks (Hall & Page, 2014).

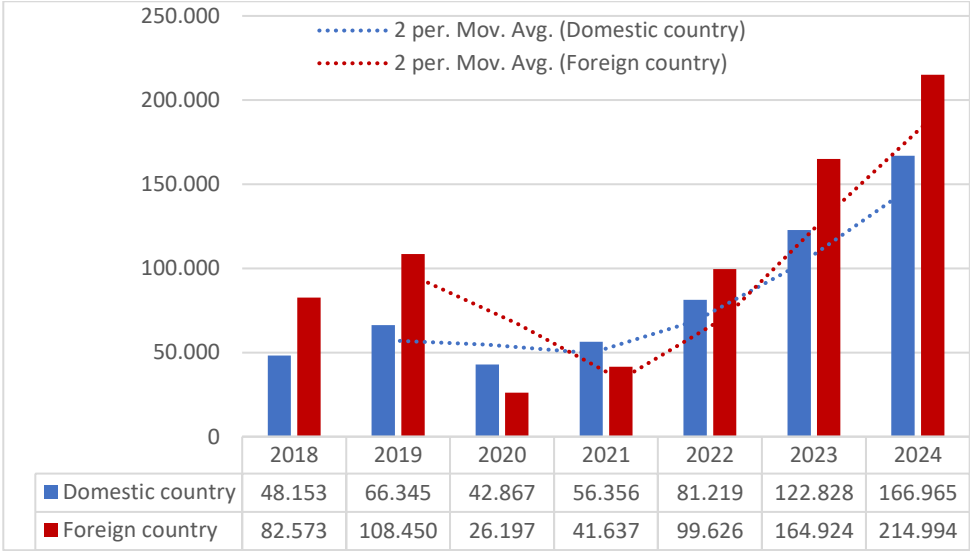


Figure 4: Evolution of stays in Bucharest, by residence of guests, 2018–2024
Source: own elaboration, based on Eurostat data

Conversely, in Figure 5 below we have shown that Braşov exhibits robust domestic demand, although the foreign segment also experienced a substantial increase by 2024. This suggests a dual market profile, where domestic leisure tourism remains central while international visibility continues to improve.

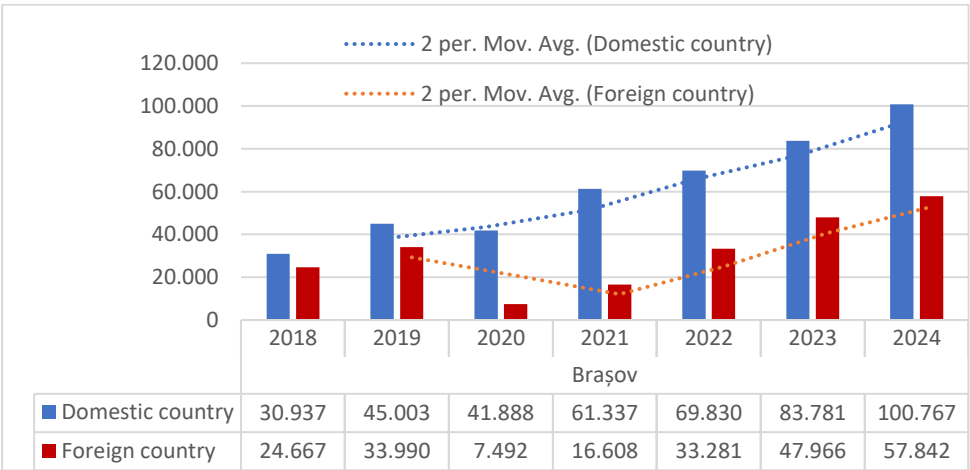


Figure 5: Evolution of stays in Braşov, by residence of guests, 2018–2024
Source: own elaboration, based on Eurostat data

Figure 6 indicates a more balanced structure in Cluj-Napoca between domestic and foreign guests. Such a profile may reflect the city's multiple tourism functions, including business travel, university mobility, cultural events, and short urban visits.

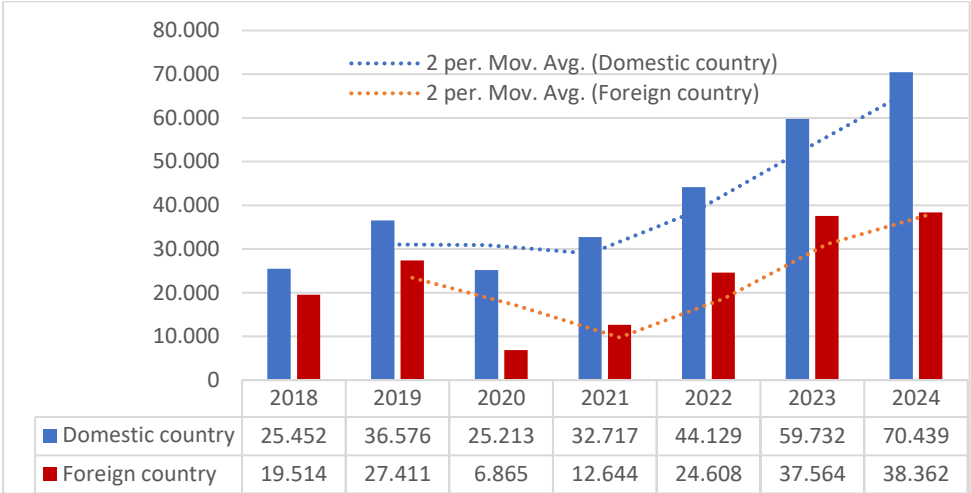


Figure 6: Evolution of stays in Cluj-Napoca, by residence of guests, 2018-2024
Source: own elaboration, based on Eurostat data

The differing composition of demand indicates that Romanian cities do not compete on identical tourism products. Instead, they appear increasingly specialized in distinct market segments.

In Figure 7 below we have shown a comparison of foreign tourist stays in 2024 with 2021 and highlights exceptionally strong percentage increases in many cities. While part of this growth reflects recovery from the depressed pandemic base year, it also signals structural expansion of collaborative economy accommodation.

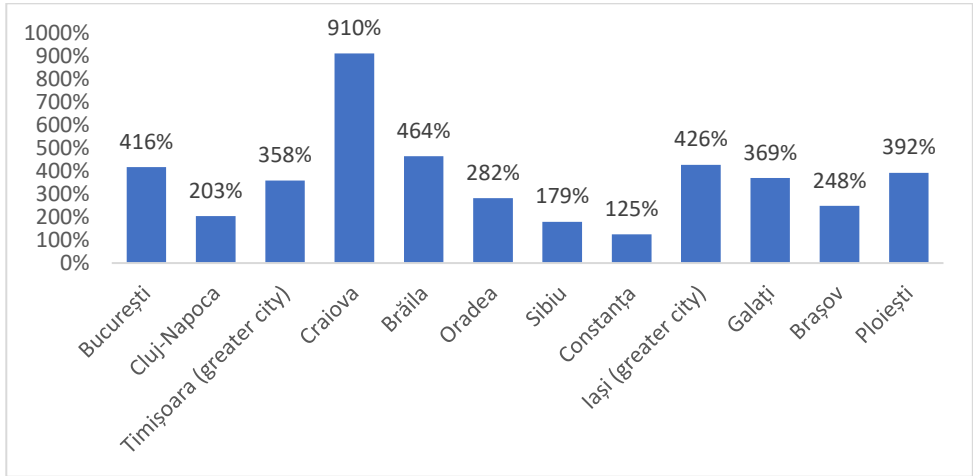


Figure 7: Increase in foreign tourist stays by city, 2024 compared with 2021
Source: own elaboration, based on Eurostat data

Digital accommodation platforms have been shown to reduce entry barriers for hosts, increase lodging flexibility, and enable tourism growth outside the traditional hotel sector (Sigala, 2017). In Romania, this phenomenon is particularly evident in

secondary cities, where platform-based supply has the potential to complement a more limited conventional accommodation stock.

The most pronounced relative increases were observed not only in the largest destinations but also in medium-sized cities. This finding indicates that collaborative economy platforms may facilitate a broader territorial distribution of tourism demand. The graphical outcomes further indicate an emergent functional hierarchy among Romanian urban destinations:

Bucharest: A prominent international gateway, a preeminent business and metropolitan tourism hub.

Brașov: A leading leisure-oriented city with robust domestic demand.

Cluj-Napoca: A diversified business, academic, and event destination.

Sibiu: A heritage and cultural tourism center.

Timișoara: A western urban node that combines business and city-break tourism.

This differentiation suggests that the growth of Romanian urban tourism is not merely quantitative; rather, it is increasingly shaped by specialization and destination positioning.

The collaborative economy tourism market in Romania is undergoing a transition from a highly centralized structure to a more diversified urban system, with Bucharest maintaining a prominent role in this transformation. The rise of Brașov and Cluj-Napoca is of particular significance, as it indicates heightened competition among cities and a more extensive territorial distribution of tourism expenditure.

However, the rapid growth of short-term rentals may also create regulatory challenges related to taxation, neighbourhood pressures, housing affordability, and urban governance (Crommelin et al., 2018; Adamiak, 2022).

3. Conclusions

The present study examined the spatial distribution of tourist demand in short-stay accommodation offered via collaborative economy platforms across Romanian cities. To this end, Eurostat city-level data for the period 2018–2024 was utilized. The findings suggest that Bucharest maintains its preeminent standing within Romania's urban platform-based tourism market, leading in both the number of total stays and the number of nights spent. The capital maintains its status as the predominant gateway for international visitors and the preeminent metropolitan tourism hub, thereby substantiating the enduring appeal of substantial urban centres within the digital accommodation economy (Hall & Page, 2014).

At the same time, the findings indicate a progressive diversification of Romania's urban tourism geography. Brașov emerged as the strongest secondary destination, particularly through its strong domestic leisure demand and sustained post-pandemic expansion. Cluj-Napoca has also fortified its standing as a multifunctional destination, integrating business, academic, and event-related tourism. Additional cities such as Sibiu and Timișoara contribute to the development of a more extensive and diversified national urban tourism system.

A comparative analysis of the evidence pertaining to domestic and foreign guests reveals that Romanian cities are increasingly occupying diversified market roles. While Bucharest exhibits a pronounced international orientation, destinations such as Brașov place greater emphasis on domestic demand, while Cluj-Napoca demonstrates a more balanced approach. This suggests that growth in collaborative economy accommodation is shaped not only by volume, but also by specialization and destination positioning.

A notable conclusion pertains to the post-pandemic recovery of urban tourism. The substantial increases observed after 2021 underscore the resilience of short-stay accommodation platforms and their expanding role within the tourism economy. Digital platforms have seemingly promoted a swift recovery in visitor flows by providing flexible supply, a wide array of accommodation options, and enhanced market access for hosts.

The study's findings are subject to several limitations. Firstly, the analysis is constrained to the domain of collaborative economy accommodation, excluding the comprehensive scope of the hotel or traditional lodging sector. Secondly, Eurostat data for this segment are classified as experimental statistics, which may involve future methodological refinements.

We found that the results of the study indicate that Romania's urban tourism system is characterized by its strong reliance on the capital, Bucharest, yet it is undergoing a process of diversification, marked by the emergence of prominent secondary cities and the proliferation of collaborative economy accommodation. This evolving structure may contribute to the enhancement of the resilience and competitiveness of Romanian urban tourism in the forthcoming years.

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