

Tourism in Neamț county, between untapped potential and solutions for revitalization

Le tourisme dans le comté de Neamț, entre potentiel inexploité et solutions de revitalisation

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ABSTRACT: This study analyzes tourism in Neamț County, with the aim of identifying the factors that limit its development and proposing strategic directions for revitalizing the sector. The research is based on statistical analysis of tourism indicators for the period 2005–2024, using official data provided by the National Institute of Statistics. The comparative method was applied to analyze the dynamics of tourist flows, accommodation capacity, and existing tourism infrastructure. Field observations complemented the quantitative analysis, contributing to a better understanding of local realities. The results highlight a clear contrast between the county's high tourism potential and the low level of exploitation, determined by infrastructure deficiencies, insufficient promotion strategies, and the pronounced seasonal nature of tourism activity. In this context, measures such as infrastructure modernization, the development of integrated tourism marketing strategies, and the diversification of the offer to stimulate tourism throughout the year are proposed.

KEY WORDS: regional tourism, Neamț County, tourism development, poor infrastructure, tourism seasonality, revitalization strategies.

RÉSUMÉ : Cette étude explore le tourisme dans le comté de Neamț, dans le but d'identifier les facteurs limitant son développement et de proposer des orientations stratégiques pour revitaliser le secteur. Sur la base d'une analyse statistique des indicateurs touristiques de 2005 à 2024 à partir des données officielles de l'Institut national de la statistique, la recherche applique des méthodes comparatives pour évaluer la dynamique des flux touristiques, la capacité d'hébergement et les infrastructures touristiques. Des observations sur le terrain complètent les données quantitatives, offrant un aperçu plus approfondi des réalités locales. Les résultats révèlent un contraste frappant entre le potentiel touristique considérable du comté et sa sous-utilisation, principalement due à des lacunes en matière d'infrastructures, à des stratégies de promotion insuffisantes et à une forte saisonnalité. En réponse, l'étude recommande la modernisation des infrastructures, des stratégies de marketing intégrées et une offre diversifiée afin de promouvoir le tourisme tout au long de l'année.

MOTS CLÉS : tourisme régional, comté de Neamț, développement touristique, lacunes en matière d'infrastructures, saisonnalité du tourisme, stratégies de revitalisation.

1. Introduction

Tourism is recognized as a strategic sector of the global and regional economy, capable of contributing significantly to economic growth, employment, and the revitalization of rural or peripheral areas. In the Romanian literature, numerous studies have addressed the development of tourism in established territories such as Transylvania, Maramureș, or Bucovina, highlighting the role of these regions in strengthening territorial identity, promoting cultural heritage, and attracting international tourist flows. From a theoretical and methodological perspective, the contributions of Romanian tourism geography have been brought together in the works of authors such as Ielenicz and Comănescu (2006), Erdeli and Gheorghilăș (2006), Neguț (2003), Muntele and Iașu (2003, 2006), and Ciangă (1997, 2007), who have provided a solid foundation for the analysis of tourism as a spatial phenomenon. This research highlights the complex relationships between natural and anthropic resources, infrastructure, accessibility, and the dynamics of tourist demand.

International literature proposes relevant conceptual frameworks for the analysis of tourism in Neamț County, through contributions on the competitiveness of tourist destinations (Dwyer et al. 2003), their life cycles (Butler, 2006), or innovation in rural tourism (Lane & Kastenholtz, 2015). In analyzing the competitiveness of a destination, Dwyer et al. (2003) propose an integrative framework that includes both natural and cultural resources, as well as created factors (infrastructure, diversity of tourist activities), supporting elements (services, accessibility, hospitality), and the efficiency of destination management. The application of this model highlights the relevance of factors such as road and rail accessibility, service quality, and administrative coordination in explaining the differences in development between tourist areas in Neamț. The analysis of the evolution of tourism in the county can be correlated, at least partially, with the destination life cycle model (Butler), in which some areas seem to have reached the stage of consolidation or stagnation, requiring strategic interventions to reconfigure and diversify the offer. At the same time, the evolution of rural tourism towards a new generation concept, analyzed by Lane & Kastenholtz (2015), provides a useful framework for understanding the transformations in areas such as Ceahlău, Agapia, Vânători-Neamț, where tourism includes diversified forms such as ecotourism, religious tourism, or the valorization of local gastronomic heritage. The aforementioned works build a coherent conceptual framework for understanding tourism as a vector of regional development and argue for the need to correlate geographical analysis with spatial planning policies and strategies.

With regard to Neamț County, existing studies are few and often fragmentary. Neacșu (2001) carried out pioneering work on the exploitation of tourism potential in a territorial profile – a case study of Neamț County. Tanasă (2013) discussed the potential of rural tourism, and Bulai (2013) highlighted the role of accessibility in the development of tourism at the regional level, with references to Moldova. However, these contributions do not analyze in depth the evolution of tourism indicators and the impact of major events such as the economic crisis or the COVID-19 pandemic. Furthermore, studies focusing on mobility and infrastructure (Prideaux, 2004; Lumsdon & Page, 2004) have highlighted the importance of connectivity and investment in transport for the integration of a destination into national and international tourist circuits, a critical issue for Neamț County.

Regional planning and institutional interventions offer relevant perspectives for analyzing tourism in Neamț County. In this regard, regional and county planning documents that underpin tourism development play an important role: the Monitoring Report of the North-East Regional Action Plan for Tourism (PRAT) 2017–2023 (ADR North-East, 2019), the North-East Regional Development Plan 2021–2027 (Northeast RDA, 2021) and the Neamț County Tourism Master Plan 2020–2030 (Bulai et

al., 2020), which set out the strategic directions for the development, diversification, and sustainable exploitation of tourism potential.

Croitoru (2011) suggests that, although Romania has a favorable geographical position and natural and cultural resources, the lack of a viable strategy, together with the failure to effectively implement the principles of sustainable development, limits its competitiveness in tourism compared to other countries, which is also true for Neamț County.

In this context, there is a need for a study that highlights the relationship between supply and demand, between infrastructure potential and tourism dynamics, as an expression of territorial imbalances and how they influence tourism development.

This research aims to supplement the literature with a longitudinal analysis of tourism in Neamț County between 2005 and 2024, focusing on identifying the limiting factors that have hindered the coherent development of the sector. The study combines quantitative methods, based on official statistical data from the National Institute of Statistics (INS), with field observations and qualitative interpretations, in order to formulate concrete proposals for intervention.

The purpose of the research is to analyze the link between tourism demand and supply in Neamț County, with a view to identifying the main limiting factors affecting the development of this sector and formulating strategic directions for revitalization.

The objectives pursued were to analyze the evolution of the main tourism indicators in Neamț County between 2005 and 2024, to identify the limiting factors and major challenges for tourism in Neamț, and to propose strategic solutions for the effective exploitation of the tourism potential of Neamț County.

2. Study area

Neamț County, located in northeastern Romania, has a varied natural landscape, consisting of mountains in the west (Ceahlău, Hășmaș), sub-Carpathian hills in the center, and a plateau in the east, complemented by a well-defined hydrographic network (the Bistrița River, Lake Izvorul Muntelui) and protected areas of tourist interest (Ceahlău National Park, Vânători-Neamț Natural Park). This physical and geographical background is supported by valuable anthropic resources, such as monasteries, historical monuments, elements of urban heritage, and well-preserved cultural traditions.

In terms of the spatial organization of tourism, the specialized literature (Neacșu, 2001; Tanasă, 2013) and recent strategic documents (Master Plan 2020–2030) propose functional delimitations around poles of interest: Ceahlău, Bicăz, Târgu Neamț, Piatra Neamț, Roman, and Roznov. These delimitations have evolved from simple natural or cultural landmarks to complex models that include criteria such as accessibility, local identity, and administrative capacity.

Thus, the current tourism zoning reflects a transition from a descriptive approach to a functional-integrative one, capable of supporting coherent and sustainable tourism development at the county level.

In Neamț County, five tourist areas are emerging (Figure 1): Ceahlău, Bicăz, Târgu, Piatra, and Roman, with the removal of the attribute "Neamț" aimed at dissociating the city itself from the tourist area (Neamț County Tourism Master Plan 2020–2030). The first two form the natural tourist core, with their spectacular landscapes, potential for winter sports, and biogeographical value, while the others stand out mainly for their density of cultural tourist attractions.

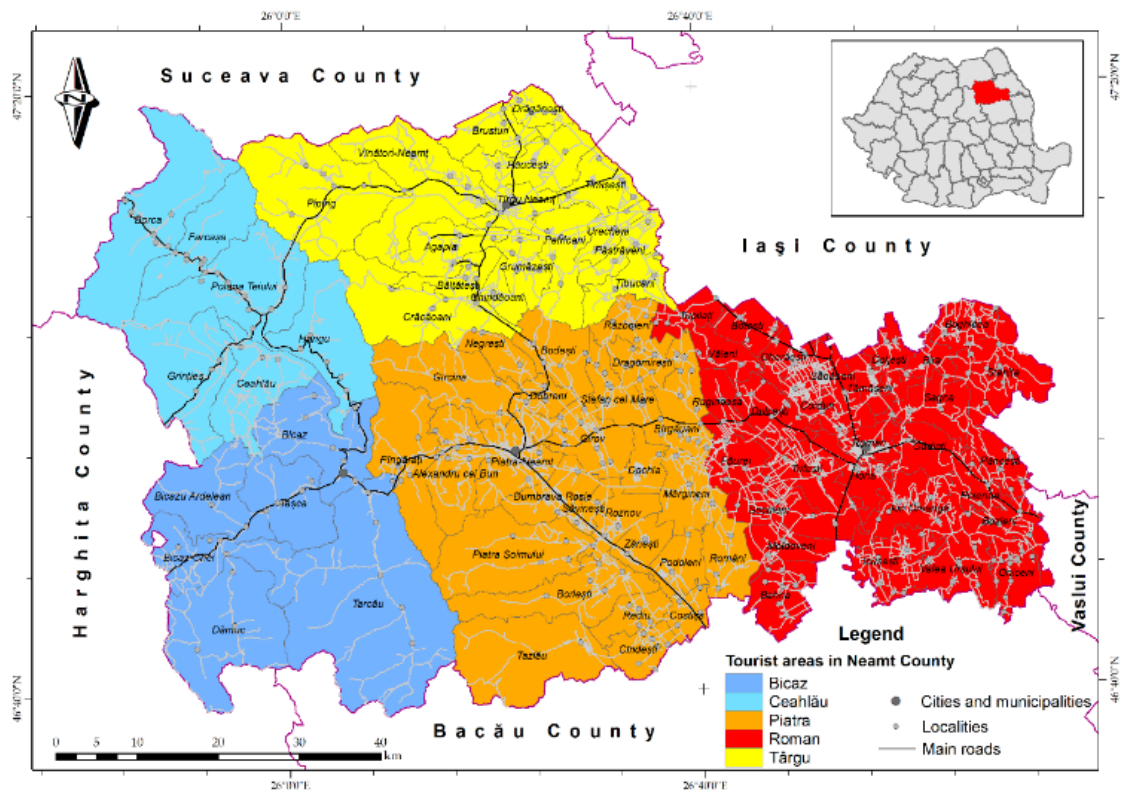


Figure 1 Tourist areas in Neamț County.

3. Methods

The research is based on a mixed quantitative and qualitative approach, recommended in the literature for territorial studies due to the advantages of methodological triangulation. The analysis focused on the evolution and spatial distribution of the main indicators of tourism activity in Neamț County: accommodation capacity, number of arrivals and overnight stays, degree of utilization, and seasonality of flows, in relation to the average values for the North-East Development Region. The statistical data were taken from official sources (Tempo Online-INS, Neamț Regional Statistics Directorate) for the period 2005-2024, a sufficient interval to capture major trends and the impact of significant discontinuities, such as the global economic crisis or the COVID-19 pandemic. The data was processed in Microsoft Excel, using time series analysis and correlation methods frequently used in regional tourism research (Bulai, 2013; Tanasă, 2013; PRAT North-East 2019; ADR Nord-Est, 2021, etc.). The comparative-correlational analysis allowed the identification of the relationship between tourism demand and supply, territorial differences, and the degree of integration of Neamț County into regional tourism dynamics, while also highlighting the discrepancies between tourism potential and the actual level of exploitation.

This quantitative-comparative approach allowed the identification of significant trends and factors influencing tourism development in Neamț County, thus contributing to the substantiation of possible strategic directions for intervention.

Complementarily, a qualitative field analysis was carried out, which included direct observations on the state of infrastructure, identification of dysfunctions, and informal discussions with local actors. This method is useful for complementing quantitative interpretation and is frequently used in studies applied to limited geographical areas.

In order to support the theoretical framework, a selective review of the literature was carried out, focusing on works addressing the fundamentals of regional tourism and sustainable development strategies (PRAT Nord-Est 2019; ADR Nord-Est 2021; Master Plan 2020–2030). This integrated approach allowed for the formulation of well-founded conclusions regarding the current state and prospects of tourism in Neamț County.

4. Results and discussion

4.1. The tourism potential of Neamț County

According to Ielenicz and Comănescu (2006), tourism potential refers to all the natural and anthropic resources of a territory that are capable of attracting tourists and supporting tourism activities, while Muntele and Iașu (2006) define potential as a set of objective, natural, or social conditions, to which are added subjective factors related to motivations and needs that are in a state of constant flux. In this interpretation, the analysis of the tourism potential of Neamț County involves not only an inventory of existing resources, but also an assessment of their ability to respond to the changing demands of the current tourism market.

Neamț County is a valuable tourist destination due to its varied tourism potential. Natural, cultural, historical, ethnographic, balneoclimatic, and religious tourist attractions are concentrated on an area of 5,897 square kilometers (Statistical Yearbook of Neamț County, 2024), representing 2.5% of Romania's total area.

The tourist areas of Ceahlău and Bicaz have the greatest potential and tourist flow: natural landscapes of great tourist interest (Ceahlău National Park, Cheile Bicazului-Hășmaș National Park, Bistrița Valley, etc.), skiing potential (Durău), a stimulating bioclimate, mineral water resources, cultural and historical elements (Ceahlău Monastery, Bicaz History and Ethnography Museum, Tașca Heroes Monument, Cnejilor Palace, etc.).

The Târgu area has numerous cultural and historical resources, some of which are of international interest: monasteries (Agapia, Văratec, Neamț Monastery, Secu, Sihăstria, etc.), memorial houses (Mihail Sadoveanu, Ion Creangă), as well as natural resources such as the mineral waters of Băltătești and Oglinzi, elements of biodiversity (the "Dragoș Vodă" Bison Reserve, the Silver Forest, the Copper Woods, Lake Cuiejdul, etc.) and a topoclimate favorable to tourist activities.

The Piatra area has some cultural and historical elements of national value (the Royal Court, the Bell Tower, the Synagogue, etc.).

The Roman area is notable for its large number of monuments, mostly religious, with a predominance of walled buildings that could also serve defensive purposes when necessary: the Roman Episcopal Complex, the Armenian Church, the Musatin House, etc.

The division of the county into tourist areas clearly highlights the role played by geographical factors in determining the degree of tourist attractiveness. A region becomes attractive from a tourist point of view when it benefits from valuable resources, is easily accessible, and has adequate tourist infrastructure.

4.2. Dynamics of tourist accommodation structures and capacity in Neamț County (2005–2024)

Between 2005 and 2024, the number of tourist accommodation structures in Neamț County increased from 94 to 397 units (Figure 2), with a significant jump between 2008 and 2009 (from 120 to 181 units) due to European investments and funding. After stagnating in 2015–2016 and growing steadily in 2017, it peaked in 2024. The evolution was marked by periods of decline: 2010–2012 and

2018–2020, when many guesthouses and small establishments suspended their activity due to the economic and health crises.

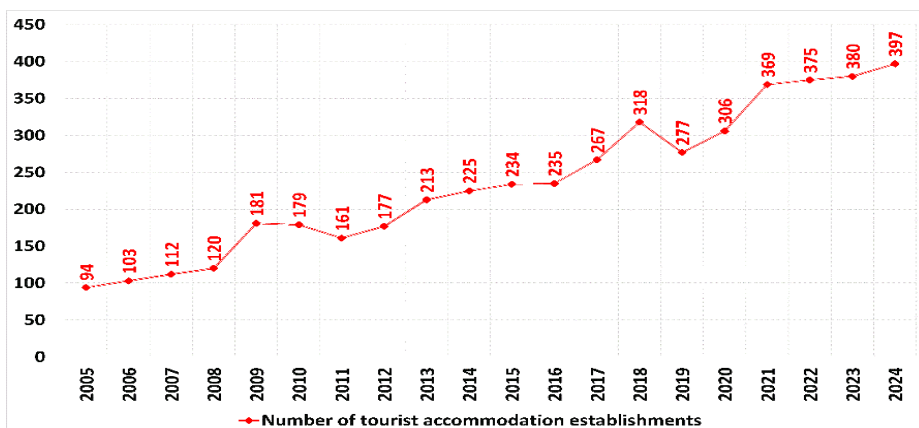


Figure 2 Evolution and trends of tourist accommodation establishments in Neamț county (2005–2024).

The increase in the number of accommodation structures in Neamț County reflects the positive influence of European funding programs, such as SAPARD and the Regional Operational Program, which have stimulated rural tourism in particular (Tanasă, 2013). However, this quantitative expansion has not been accompanied by functional consolidation: many establishments are small, poorly capitalized, and vulnerable to crises, as shown by the decline in 2010–2012 and 2018–2020. According to the analysis carried out by Croitoru (2011), the competitiveness of tourism does not depend only on the number of structures, but also on their integration into a coherent offer, adapted to market demand. In Neamț County, the discrepancy between increased capacity and low tourism exploitation highlights the absence of an integrated strategy that correlates investment with promotion, accessibility, and diversification of tourism products.

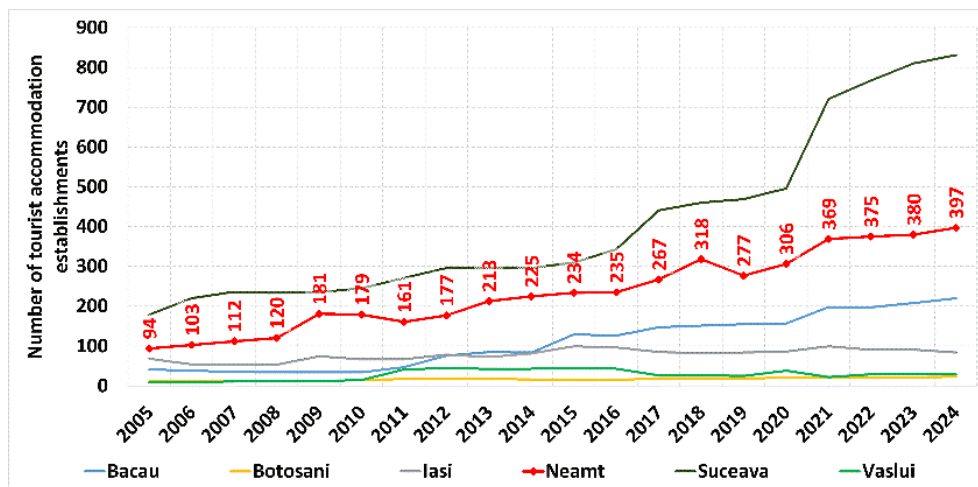


Figure 3 Dynamics of the number of tourist accommodation establishments – comparative analysis for the counties of the North-East Region (RNE).

In the North-East Development Region, there is a general trend of growth in the total number of tourist accommodation structures in the six counties. While in 2005 the differences between counties were moderate, in the period 2020–2024 there is a marked divergence, with Suceava exceeding 800 structures, while Neamț is approaching 400 (Figure 3). This discrepancy reveals not

only differences in tourist attractiveness, but also different strategies for development, marketing, and exploitation of local resources. Bacău and Iași, although important counties, lag behind Neamț County, which may indicate a regional competitive potential for Neamț tourism.

The position of Neamț County (based on the total number of tourist accommodation establishments) in second place in the North-East Region, after Suceava, reflects differences in strategic approach and distribution of funding, not just in terms of tourist attractiveness. According to the PRAT North-East Monitoring Report (2019), Suceava attracted 37% of the 2014–2020 ROP projects in tourism in the North-East Region, while Neamț benefited from only 16% (3rd place), but compensated for this with the highest share of public investment through the PNDR (31.42%) (1st place) in the region. This development model led to the prioritization of public infrastructure in Neamț, in contrast to the revitalization of the private sector in Suceava. The situation confirms Croitoru's (2011) observations, according to which the competitiveness of tourism depends not only on infrastructure, but also on its coherent integration into the market offer. Similar patterns of differentiated growth, determined by the structure of funding, have also been highlighted at the European level: cohesion funds are prioritized in less developed regions in order to reduce regional disparities (Eurostat, 2024).

Tourist accommodation capacity, expressed in terms of beds, shows a clear differentiation between Moldovan counties, similar to accommodation structures. Suceava County dominates with rapid growth, reaching almost 18,000 places in 2024 (Figure 4). Neamț County is showing progressive growth, exceeding 8,000 places, which confirms the investment efforts in diversifying and expanding accommodation facilities.

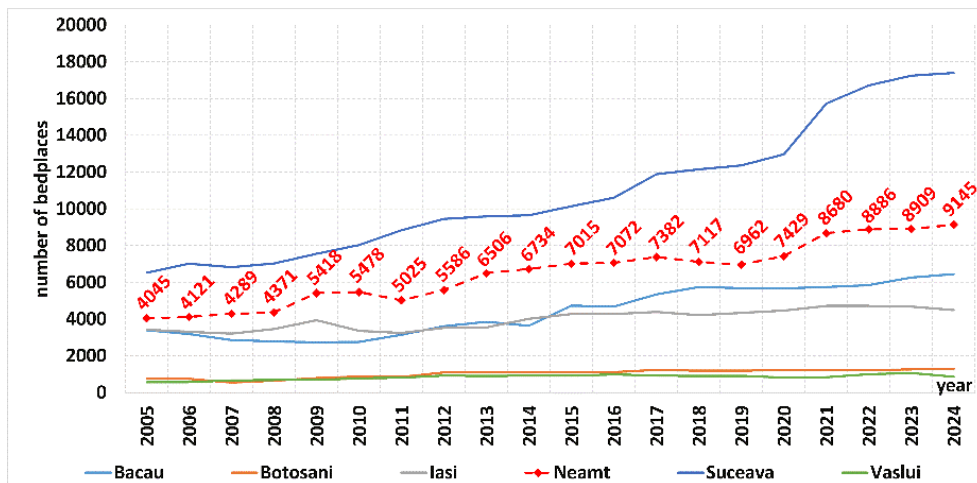


Figure 4 Existing tourist accommodation capacity by type of tourist accommodation establishments (2005–2024).

The steady increase in accommodation capacity in Neamț County, which exceeded the threshold of 8,000 places in 2024, can be directly correlated with the dynamics of investments in rural tourism. Tanasă (2013) points out that, at the national level, SAPARD-type programs have contributed significantly to the expansion of the guesthouse network, generating over 13,000 new places between 2002 and 2009. In Neamț, the effects of this funding are particularly visible in the period 2008–2009, when the number of accommodation places increased by 1,047, compared to an average annual increase of 107 accommodation places until then. This local acceleration reflects the county's ability to attract funds and adapt its tourism offer to market demands, even if the pace remains lower than that recorded by Suceava County, the regional leader in this field.

The structure of accommodation in Neamț County underwent significant changes between 2005 and 2023. Agrotourism guesthouses and apartments/rooms for rent recorded the most spectacular growth, indicating a trend towards rural, family, or alternative forms of tourism. In contrast, classic types of accommodation (hotels, motels, inns) have stagnated or evolved slowly, signaling a reorientation of demand towards personalized experiences and integration into local life (Figure 5).

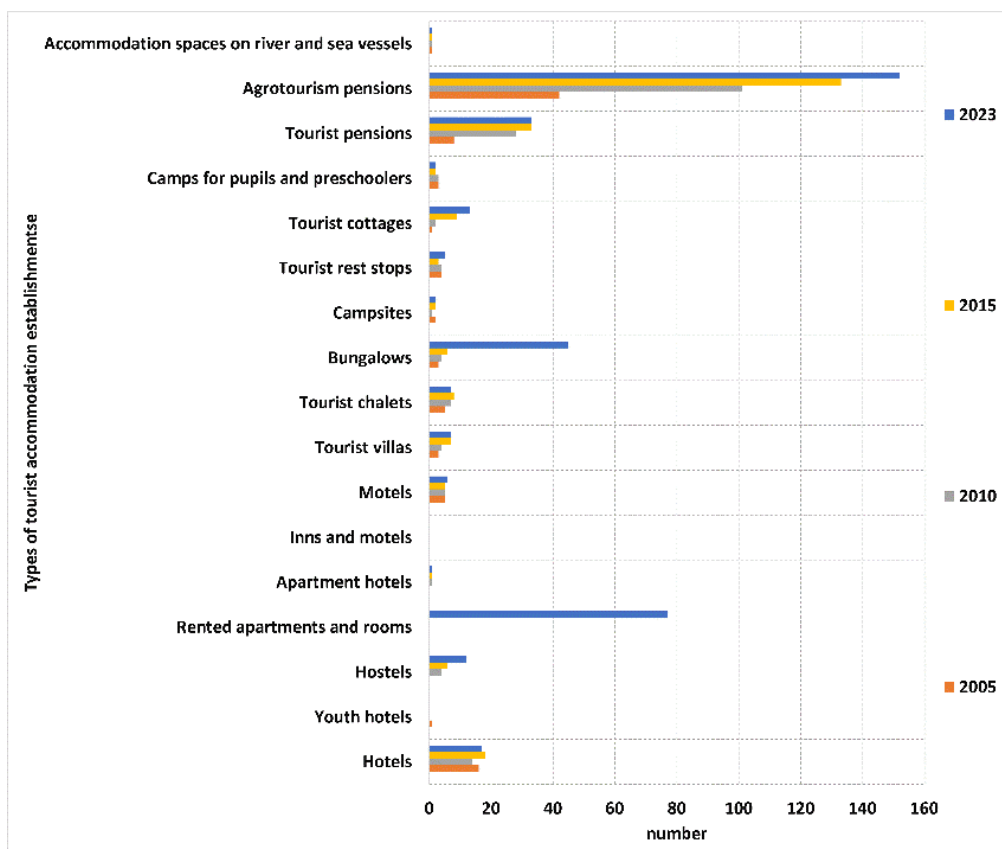


Figure 5 Evolution and trends of the types of tourist accommodation establishments, 2005-2023.

The typological transformations in Neamț tourism, with the rapid expansion of agrotourism guesthouses and apartments/rooms for rent, confirm the dominant role of these forms in the dynamics of rural tourism. These structures have been stimulated by SAPARD and PNDR funding (Tanasă, 2013 and PRAT Nord-Est, 2019), becoming the main channels for increasing tourism capacity in rural areas. This focus on family and experiential tourism meets the demands of modern tourists, but requires the professionalization of services and compliance with quality standards in order to avoid market fragmentation and damage to the destination's image.

There has been a remarkable evolution in the category of "apartments and rooms for rent" in the North-East Region, especially after 2015, reaching almost 500 units in 2024. Neamț County follows this trend, but in smaller numbers (under 100) (Figure 6). This evolution reflects the development of individualized tourism, facilitated by digital booking platforms. At the same time, the number of hotels has remained relatively constant, which may suggest a preservation of the classic offer and a slow adaptation to new accommodation preferences.

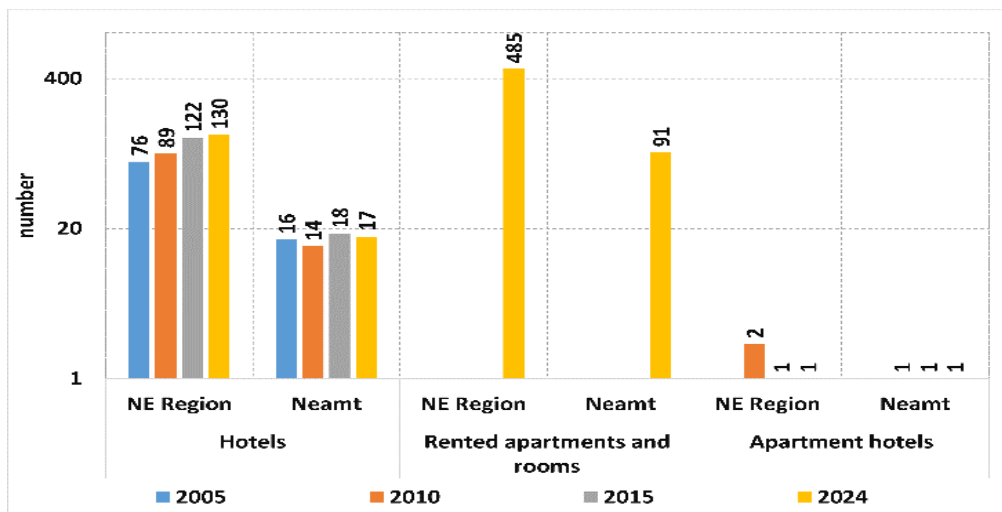


Figure 6 Dynamics of the types of tourist accommodation establishments (comparative analysis).

Tourist and agrotourist guesthouses have experienced significant expansion both in Neamț County and at the regional level. For agrotourism guesthouses, the increase is over 300% in the region and almost 100% in the county, confirming the orientation of tourists towards rural tourism (Figure 7). This dynamic reflects significant potential for the development of ecotourism and the promotion of local traditions, provided that the infrastructure and promotion are adapted to this segment.

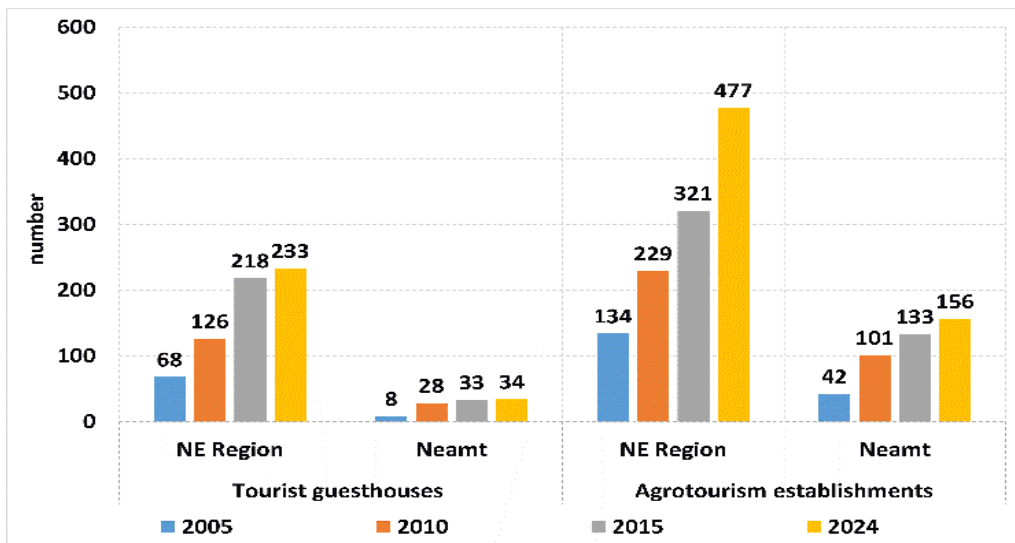


Figure 7 Dynamics of guesthouse-type tourist accommodation, 2005–2024.

Alternative types of accommodation (villas, cabins, bungalows) are gradually diversifying the tourist offer, with an emphasis on recreational and seasonal accommodation. In Neamț County, bungalows are experiencing significant growth, while the number of tourist cabins has remained relatively constant, with a slight decrease in the last year. This development can be associated with the growth of nature tourism, ecotourism, and a preference for more flexible forms of accommodation, adapted to short stays (Figure 8). This segment may represent an opportunity to extend the length of stay, especially in mountainous areas or near lakes.

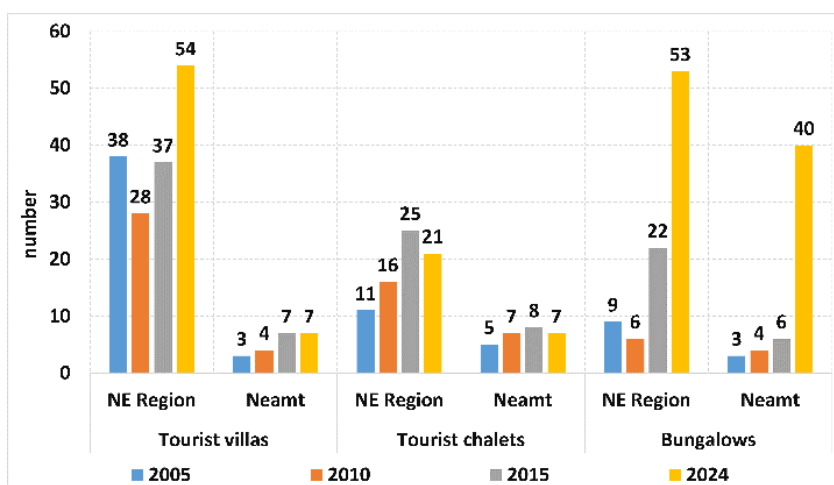


Figure 8 Evolution of tourist accommodation structures, 2005-2024.

The diversification of alternative accommodation in Neamț County reflects the adaptation of the offer to European trends in nature and recreational tourism (Hall, Müller & Saarinen, 2020). These structures can contribute to extending the length of stay if they are integrated with leisure infrastructure and thematic products (mountain trails, water sports, ecotourism), as analyzed in the North-East Regional Development Plan (ADR Nord-Est, 2021) and PRAT Nord-Est 2019. At the same time, the accelerated growth of agrotourism guesthouses, supported by SAPARD and PNDR funds (Tanasă, 2013; PRAT Nord-Est, 2019), confirms a strategic orientation towards rural tourism and the promotion of local heritage. The stagnation of other types of establishments, such as tourist cabins or hotels, suggests a need to reconfigure the classic offer in the context of increasingly flexible and personalized demand. Thus, Neamț County has significant potential to consolidate alternative tourism, provided that it continuously adapts to tourist preferences and supports investments in service quality.

Between 2005 and 2024, Neamț County has seen steady development and diversification of its tourism infrastructure, with a significant increase in accommodation units and available capacity. Ranked second in the Northeast Region after Suceava, the county has a partial competitive advantage. The expansion of agrotourism guesthouses, rental apartments, and alternative forms of accommodation shows adaptation to the demand for authentic experiences, but the lack of a proportional increase in demand highlights the need to correlate investments with marketing actions, events, and the consolidation of the local tourism brand.

4.3. Analysis of tourist flows in Neamț County (2005-2024)

In Neamț County, the number of tourist arrivals almost tripled between 2005 and 2024, increasing from 117,344 arrivals in 2005 to 312,035 arrivals in 2024 (Figure 9). After a sharp decline during the financial crisis and a dramatic drop in 2020 due to the COVID-19 pandemic (149,167 arrivals), the county experienced a strong recovery, exceeding previous levels. Compared to other counties in the region, Neamț County remained in the middle range, surpassed by Suceava and Iași, but clearly superior to Botoșani and Vaslui counties. The data indicate a notable resilience of the tourism sector in Neamț, but also an underutilized development opportunity, especially when compared to counties with a more defined tourism profile, such as Suceava. These dynamics underscore the importance of coherent public policies and strategic investments in tourism infrastructure for Neamț to fully realize its potential.

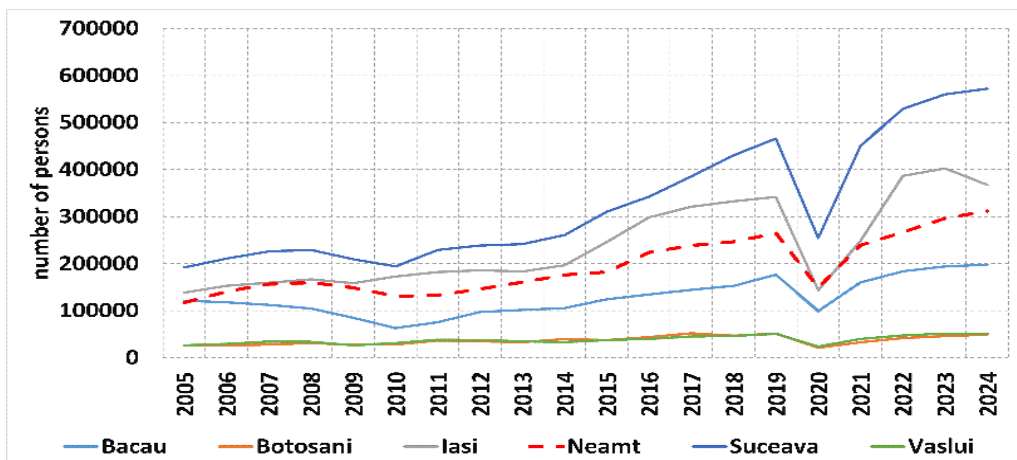


Figure 9 Arrivals of tourists at tourist accommodation establishments, by county (2005-2024).

The evolution of tourist arrivals in Neamț County (2005-2024) shows significant growth, interrupted by the economic crisis and the COVID-19 pandemic, followed by a rapid recovery above pre-pandemic levels. The growth was supported by circumstantial factors - increased household income, fiscal incentives in 2015-2018, reduced VAT for tourist services, and a shift towards domestic tourism due to external risks (ADR Nord-Est, 2021).

The distribution of tourist arrivals in Neamț County, by origin, shows a clear predominance of Romanian tourists, who consistently accounted for over 90% of total visitors. The number of arrivals in this category recorded an overall long-term increase, reaching over 294,000 in 2024. In contrast, the flow of foreign tourists remained low and relatively constant throughout the period analyzed, with modest annual variations, ranging between 10,000 and 20,000 people (Figure 10). This discrepancy suggests a predominantly domestic orientation of tourism in the county, with insufficient potential exploited in attracting international visitors.

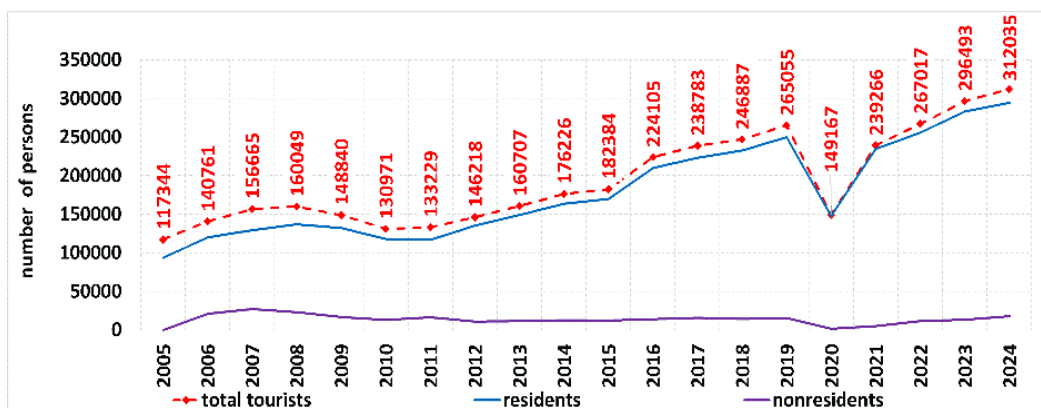


Figure 10 Arrivals of tourists at tourist accommodation establishments in Neamț County (2005-2024).

A comparative analysis of Romanian tourists in the counties of the North-East Region shows that Neamț ranks in the middle, ahead of Botoșani and Vaslui, but consistently behind Suceava and Iași (Figure 11). This positioning confirms the moderate attractiveness of the county among domestic tourists and the need to strengthen the tourist offer.

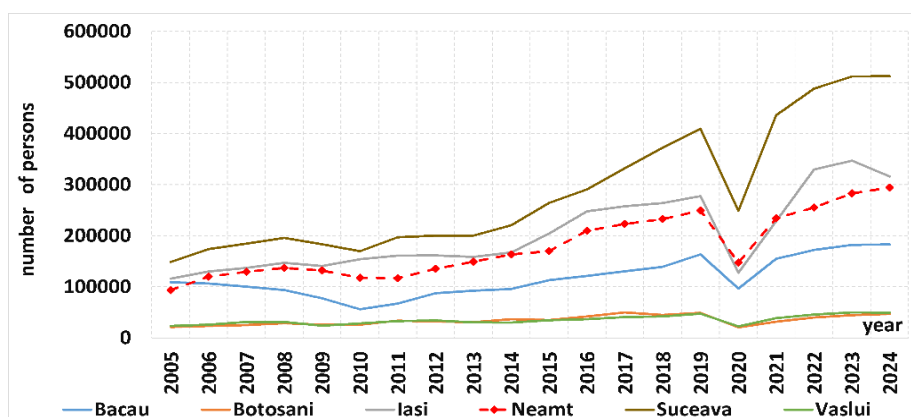


Figure 11 Comparative analysis of the dynamics of resident tourist arrivals across the counties of the North-East Development Region, 2005-2024.

Between 2006 and 2024, foreign tourist arrivals in Neamț County fluctuated, from 20,848 in 2006 to 17,693 in 2024, with a peak in 2007 (27,273) and a collapse in 2020 (1,715) caused by the pandemic (Figure 12). Recovery has been slow, with pre-pandemic levels only being reached in 2024. Comparatively, Neamț remained below Suceava and Iași, counties with superior infrastructure and international openness, although it has significant cultural and religious potential. The evolution indicates the need for more effective strategies for promotion and integration into external tourist circuits.

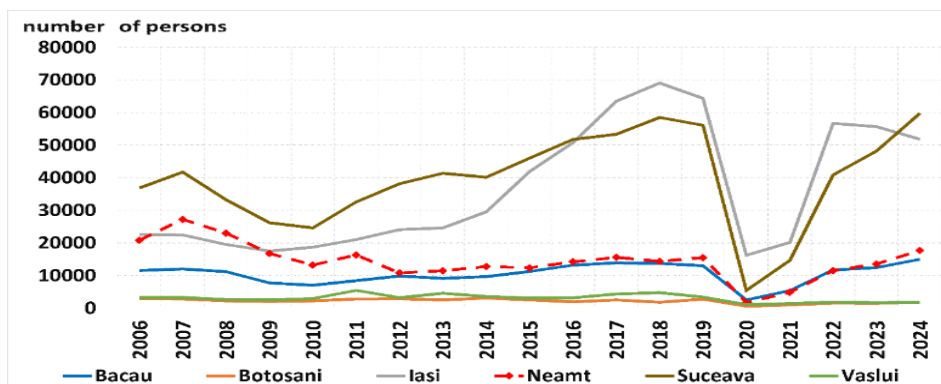


Figure 12 Comparative analysis of the dynamics of non-resident tourist arrivals at tourist accommodation establishments, by county, 2006-2024.

The structure of tourist arrivals in Neamț County shows a major dependence on the domestic market, with over 90% of visitors being Romanian, which indicates the sector's vulnerability to changes in domestic consumption and a low exploitation of international potential. The lower presence of foreign tourists in Neamț County, compared to Suceava and Iași, is correlated with less developed tourist infrastructure and insufficient external promotion. These trends highlight the need to diversify the offer and integrate the county into thematic tourist itineraries in order to increase its attractiveness and the number of tourists, including foreign ones, aspects also highlighted in the Neamț County Tourism Master Plan 2020-2030 (2020).

An analysis of tourist preferences in terms of accommodation shows a clear dominance of guesthouses and hotels, which are the most popular forms of accommodation in Neamț County. In 2024 in particular, tourist and agrotourist guesthouses recorded the highest number of overnight stays, signaling a preference for more authentic and accessible experiences. At the same time,

alternative structures (cabins, bungalows) are recording slow but steady growth (Figure 13). Tourists' preference for guesthouses and hotels, especially 3- and 4-star establishments, indicates a focus on quality services and a favorable comfort-price ratio. The gradual increase in the use of alternative structures, such as cabins and bungalows, shows an emerging interest in active and nature tourism, but on a still small scale. This distribution of demand reflects visitors' increasingly high expectations regarding accommodation conditions and confirms the need to diversify the offer in order to attract various segments of tourists.

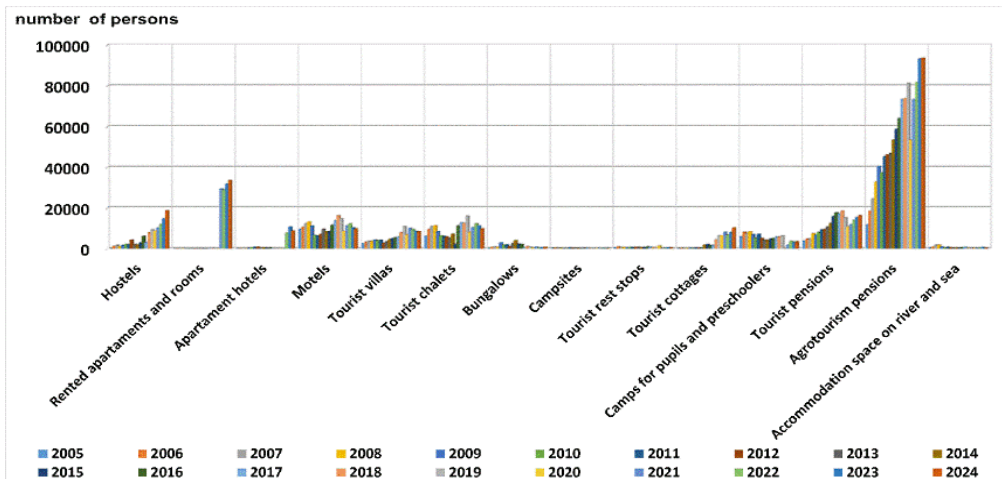


Figure 13 Tourists' preference for tourist accommodation establishments (2005-2024).

In terms of comfort, tourists mainly choose 3-and 4-star establishments, which record the highest number of overnight stays. Unclassified or low-comfort establishments (1 star, 1 flower) are much less used (Figure 14).

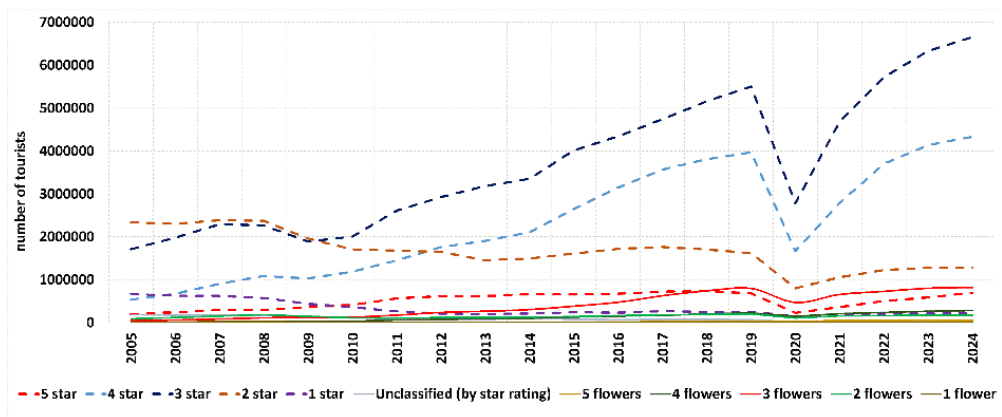


Figure 14 Tourists' preference by comfort category (2005-2024).

The number of tourist overnight stays in Neamț County increased slightly between 2005 and 2008, followed by a decline until 2011. After this period, the trend became upward, with a gradual increase until 2019. The year 2020 marked a sharp decline due to the pandemic, and between 2021 and 2024 there is a partial recovery (Figure 15). Compared to the other counties in the North-East Development Region, Neamț occupies a median position in terms of overnight stays, suggesting a limited capacity to retain tourists for longer periods.

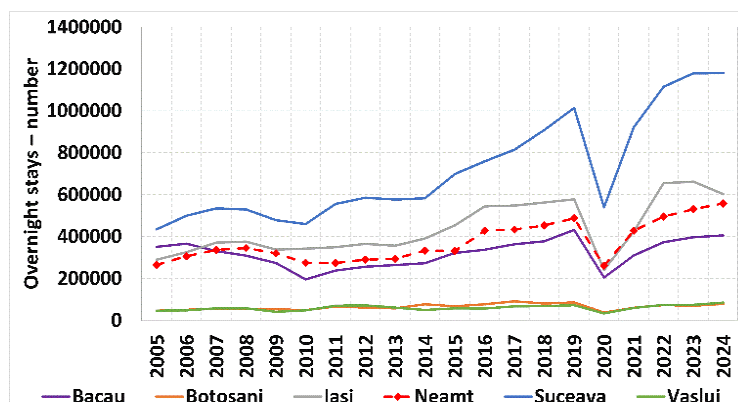


Figure 15 Comparative analysis of the dynamics of overnight stays in tourist accommodation establishments across the counties of the North-East Development Region, 2005-2024.

The net accommodation capacity utilisation index in Neamț County (Figure 16) generally varies between 17% and 26%, with a maximum recorded in 2007 (26.5%) and a minimum in 2020 (14.1%). This fluctuation, coupled with the short length of stay, indicates modest efficiency in utilizing existing capacity and raises questions about the economic sustainability of tourist facilities outside the peak season.

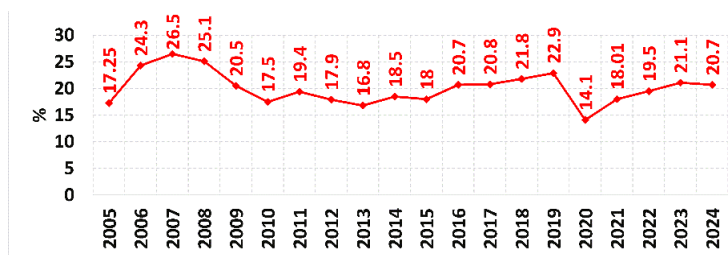


Figure 16 Net occupancy rate of bed-places in tourist accommodation establishments in Neamț County (2005-2024).

The average length of stay of tourists in Neamț County remains below the 2-day threshold throughout the period analyzed, with a slight downward trend, from 1.92 days in 2005 to 1.7 days in 2024 (Figure 17). This short duration reflects transit or weekend tourism, which limits the revenue generated per tourist and highlights the need to diversify activities and attractions to encourage longer stays.

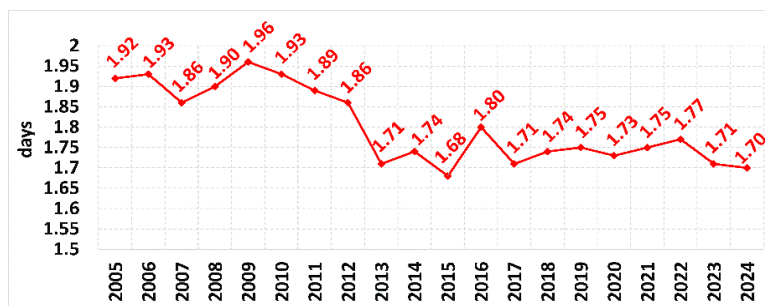


Figure 17 Dynamics of the average length of stay (days) of tourists in Neamț County, 2005-2024.

The average length of stay of foreign tourists in Neamț County fluctuated between 2006 and 2024, generally remaining below two days (Figure 18).

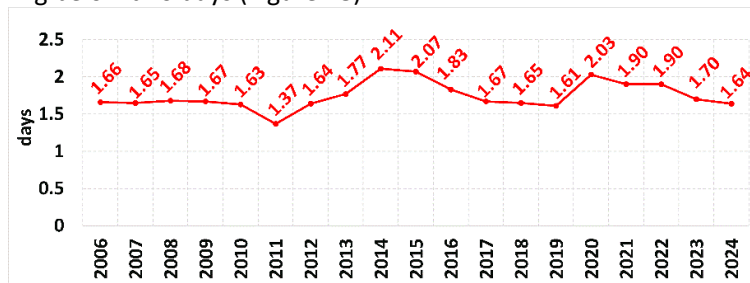


Figure 18 Dynamics of the average length of stay (in days) of non-resident tourists (2005-2024).

The tourism performance indicators in Neamț County (number of overnight stays, average length of stay, net utilization index) paint a picture of predominantly transit or weekend tourism, with limited capacity to retain tourists, a fact also confirmed by PRAT (2019). The North-East Regional Development Plan 2021-2027 highlights the need to extend the length of stay by diversifying local activities and events, especially leisure activities. Similarly, areas with varied thematic offerings (active, cultural, gastronomic tourism) manage to attract visitors for longer periods. In this context, the low and fluctuating value of the net accommodation capacity utilisation index in Neamț signals a structural vulnerability of the sector, which requires integrated measures to increase off-season attractiveness and strengthen the international market.

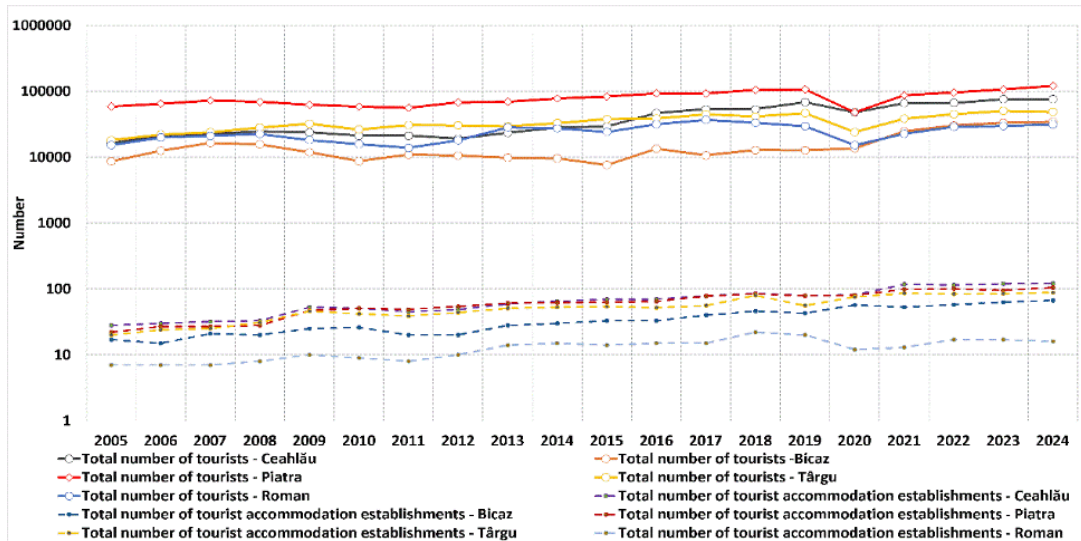


Figure 19 Comparative evolution of tourist demand and accommodation supply across the main tourist zones of Neamț County (2005-2024).

The comparative and correlational analysis between the number of tourists and tourist accommodation structures (Figure 19) highlights a positive but uneven relationship between the five tourist areas of Neamț County. The Ceahlău area has high tourism potential and has benefited from substantial investments in accommodation infrastructure, but tourist flows remain below expectations, influenced by reduced accessibility, seasonality, and insufficient promotion. In the Piatra and Târgu areas, supply and demand remain in relative balance, supported by urban infrastructure, the diversity of tourist functions, and cultural and religious attractions, which give them a stable position in the county's tourism hierarchy. The Bicăz area, although it has valuable

tourist resources, has low levels of both investment in accommodation and tourist flows, which indicates that its potential is only partially exploited. In contrast, the Roman area, characterized by very good accessibility, is distinguished by a low level of investment in accommodation infrastructure and limited tourist flows, reflecting a limited integration of tourism into the local economic profile.

Overall, the indicators analyzed confirm a predominantly short-term tourism, dominated by transit visits and weekend stays.

4.4. Factors limiting the development of tourism

Tourism is a social phenomenon, an economic activity influenced in its evolution by a series of factors that act differently at different times. Neacșu (2012) classifies the determining factors of tourism activity according to: content, importance, duration, direction of action, marketing profile, effect on tourism, attractiveness.

This study aims to identify and analyze, on a documented basis, the main causes of the relative stagnation of tourism in Neamț County.

4.4.1. Natural factors with a limiting impact: geographical position and environmental dysfunctions

Although Neamț County has a diverse and attractive natural environment, its peripheral geographical position (far from major urban centers, motorways, and modernized railways, without an airport) limits the development of mass tourism, especially city breaks, transit tourism, or event-dependent tourism. Reduced accessibility is combined with environmental problems affecting key destinations: in Durău there are problems with waste management, traffic congestion and pressure on routes; in Bicăz Gorges and the lake areas (Izvorul Muntelui, proximity to Red Lake), the lack of sewage systems, deforestation, and uncontrolled tourism (unauthorized camping, ATVs) are degrading the landscape. The Bicăz Gorges-Hășmaș National Park is exposed to pollution due to heavy traffic, geological risks, and the impact of transit tourism. These vulnerabilities, if not addressed through eco-tourism and sustainable management policies, risk diminishing the competitive advantages of the county's natural heritage.

Bulai (2010) highlights the importance of accessibility as a key factor in tourism development, emphasizing that the level of connectivity of a destination directly influences its attractiveness and ability to attract constant flows of visitors. In this context, the situation in Neamț County shows that infrastructure limitations amplify the difficulties of increasing tourism competitiveness. Correlating improved access with environmental protection measures becomes essential in order to sustainably exploit natural resources and transform existing advantages into real development potential.

4.4.2. Transport infrastructure, an obstacle to tourist accessibility

Limited accessibility remains one of the main barriers to the development of tourism in Neamț County. Although it has valuable natural and cultural resources, the lack of a modern transport network significantly reduces the county's attractiveness. The road infrastructure is dominated by the E85 European road, which does not provide direct access to the major tourist areas in the west (Ceahlău, Durău, Bicăz Gorges, Bicăz), and the DN15, DN12C, and DN17B national roads have degraded sections. Tourist links, such as the Tarcău-Trotuș Valley road or access to Lake Cuiejdol, remain underutilized. Rail connectivity is limited, with secondary lines that do not efficiently serve the west of the county, and the lack of an airport forces tourists to use slow roads from Bacău, Suceava, or Iași. The average travel speed of less than 60 km/h in mountainous areas prolongs access time, discouraging frequent visits and affecting local tourism consumption. Without coherent

investments in mobility, Neamț risks remaining peripheral in terms of tourism, despite its natural and cultural potential.

Accessibility is an essential element of tourism competitiveness, directly influencing the decision to travel and the length of stay. Bulai (2010) points out that road and rail infrastructure is fundamental to a region's attractiveness and the dynamics of tourism indicators, as the tourism value of a primary resource is conditioned by the existence of adequate infrastructure, whether tourism-related or socio-economic, especially transport. In its absence, neither the presence of an attractive resource nor a favorable socio-economic context is sufficient to support the development of tourism. Prideaux (2000) emphasizes that transport inefficiencies, including internal connections, can cause tourists to opt for more accessible and less expensive destinations. At the same time, Prideaux (2004) shows that transport often plays a subtle role in tourism development, becoming visible especially when it is deficient or does not meet the requirements of tourists and the destination, and that there is a relationship between the cost of transport (as a function of the distance between origin and destination) and the total budget allocated to the holiday: travel expenses cannot exceed a certain percentage of the budget, and exceeding this percentage discourages the choice of destination. In this context, the reduced connectivity and deterioration of some roads to the main tourist areas in Neamț County reduce the attractiveness for visitors from outside the region and hinder integration into national and international tourist circuits. Overcoming these limitations requires strategic investments in the modernization of transport infrastructure and linking them to the development of tourist services, so that the natural and cultural advantages of the county can be exploited in a sustainable manner.

4.4.3. Accommodation infrastructure, quantitative expansion without a proportional impact on tourist flows

The number of accommodation structures in Neamț County increased significantly between 2005 and 2024, reaching 397 units, but this expansion did not translate into a proportional increase in tourist flows, and the average length of stay remained below two days. The increase was mainly concentrated in tourist guesthouses, agrotourism establishments, and small alternative accommodation units (apartments and rooms for rent), while 3-4 star hotels and integrated complexes remain few, located mainly in Piatra Neamț, Durău, and Târgu Neamț. This structure has resulted in a fragmented offer that is difficult to promote as a whole and insufficiently adapted to the current demands of tourists. The low proportion of higher-category establishments and the lack of complementary services (leisure centers, relaxation areas, restaurants, spas) explain the low occupancy rate (17-26%), the marked seasonality, and the difficulty in attracting international tourists, organized groups, and the business segment. As a result, many visitors, especially those with higher incomes, reduce the length of their stay or choose destinations in neighboring counties, such as Suceava and Harghita, where the hotel infrastructure is more diverse and better aligned with market requirements.

An analysis of the accommodation infrastructure in Neamț County indicates a clear quantitative expansion, particularly through an increase in the number of guesthouses, but without a proportional impact on tourist flows. This discrepancy suggests an inefficient use of available capacity and confirms the idea that tourism development cannot be sustained solely by increasing the number of accommodation structures. Croitoru (2011) draws attention to the fact that the quality-price ratio, as a central element of a destination's competitiveness, must be supported by appropriate promotion strategies. Thus, in the absence of diversified facilities, complementary services, and effective communication of the tourist offer, even increased accommodation capacity may remain underutilized. In this context, infrastructure development must be correlated with improving service quality and adapting the offer to the changing demands of the tourist market.

4.4.4. Seasonality of tourist flows and vulnerability to climatic factors

From the analysis of the monthly distribution of tourist arrivals in Neamț County between 2010 and 2024, we observed a pronounced seasonality, with a peak in July, August, and September and a constant low in February, March, and November (Figure 20). This dynamic is strongly influenced by climatic factors, which shape both tourists' willingness to travel and the possibility of engaging in outdoor tourist activities.

In recent years, climate change has had visible effects on the seasonal calendar. Increasingly mild winters, with unstable or non-existent snowfall in the key months (January-February), have led to a decline in the attractiveness of winter tourism, directly affecting areas such as Durău or Ceahlău, where the slopes can no longer operate consistently. At the same time, excessively hot summers, with temperatures frequently above 30°C and episodes of intense rainfall, create thermal discomfort that limits mountain hiking and cultural visits, discouraging active tourism.

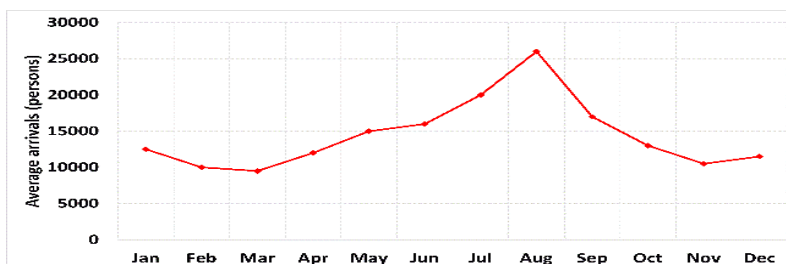


Figure 20 Analysis of tourism seasonality in Neamț County (monthly averages, 2010-2024).

The high seasonality of tourism in Neamț County follows the pattern of European regions, where over 40% of overnight stays are concentrated in the first two months of the season (July and August) (Eurostat, 2024). A similar pattern can be found in the North-East Region, where, according to PRAT 2019, more than 33% of tourists are registered in the summer season, while the other seasons attract lower percentages. This concentration of tourist flows in the summer months limits income stability and affects the economic sustainability of tourism operators. The persistence of low long-term tourist occupancy rates, combined with pronounced seasonality, leads to weak specialization in the field of tourism. Under these conditions, many accommodation managers are also involved in other economic activities to secure the necessary income, an issue also highlighted in the 2020-2023 Master Plan. The impact of climate change is becoming increasingly visible: reduced snowfall is affecting winter tourism, and thermal discomfort during the summer is reducing the length of stay and interest in outdoor activities. In the absence of adaptation measures, such as expanding infrastructure for the cold season, creating covered facilities, and organizing themed events in the off-season, tourism in Neamț County risks remaining vulnerable to climate variability and changes in visitor behavior.

4.4.5. Demographic factors and their influence on local tourism

Following an analysis of the evolution of the resident population in Neamț County between 2012 and 2023, we were able to identify a clear trend of demographic decline, from 466,644 inhabitants in 2012 to 448,647 in 2023, a deficit of almost 18,000 people in just a decade. This reduction is visible both in urban areas (from 167,829 to 157,921 people) and in rural areas (from 298,815 to 290,726 people) (Figure 21), signaling a process of demographic decline with significant implications for the development of local tourism.

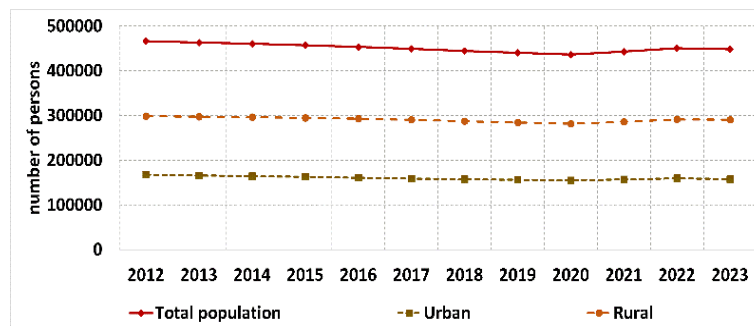


Figure 21 Number of resident population in Neamț County, by area of residence (2012-2023).

The decline in the resident population in Neamț County is gradually reducing the local workforce, especially in rural and mountainous areas, which is impacting tourism development due to a lack of human resources (especially skilled ones). These challenges are also addressed in the Regional Action Plan for Tourism in the Northeast, which emphasizes the need for a "human resources analysis" (PRAT Northeast, 2019). Within the 2020-2023 Master Plan, human resource development is treated as one of the priority areas of the 2016-2020 National Strategy for the Development of Ecotourism in Romania. In this context, demographic decline exacerbates the difficulties of professionalizing and retaining staff, and the lack of coherent training measures may affect the long-term quality of services and the attractiveness of tourism in the county.

4.4.6. The role of tourism and the low share of the sector in the local economy

According to data provided by the National Institute of Statistics for the period 2015-2023, Neamț County has seen significant changes in the structure of employment. A key aspect is the significant decline in the agricultural sector, from 67,600 people in 2015 to only 29,300 people in 2023, reflecting a transition to other economic sectors, as well as industry, from 33,800 in 2015 to 32,300 in 2023, while the construction sector has seen a slight increase, from 8,700 to 10,900. In this context, the tourism sector (hotels and restaurants) has seen relatively small growth, from 3,700 people in 2015 to 4,100 people in 2023. This modest growth is significant, given the county's potential and its exceptional natural and cultural resources. However, tourism remains a sector with a low impact on employment compared to other areas such as trade (26.9 thousand people in 2023) or transport (9 thousand people). This suggests that, despite recent investments in tourism infrastructure and growing interest in natural and cultural destinations, the tourism sector has not managed to become an economic priority in Neamț County. Although growing, tourism has not consolidated its role as an economic driver in the county, remaining marginal as an employer compared to traditional sectors. This low share reflects both the orientation of the local economy towards other areas and the insufficient exploitation of natural and cultural resources. The development of tourism as a competitive sector requires diversification of the offer, professionalization of human resources, and its integration into local economic development strategies.

4.4.7. Tourism marketing and promotion of Neamț County

The promotion of tourism in Neamț County is marked by relatively low visibility, both on domestic and foreign markets, despite its high natural and cultural potential. Tourist information centers are limited in their effectiveness, few in number, and unevenly distributed across the territory, while communication strategies remain fragmented. However, in recent years, notable progress has been made with the establishment of the Destination Management Organizations in Piatra-Neamț and Vânători-Neamț, which have contributed to a more coherent tourism message through the local brands "*Hai la Piatra!*" (currently being rebranded as "*Visit Piatra-Neamț,*" Agerpres, 2025) and

"Ținutul Zimbrului" (*Bizon Land*). These initiatives reflect a trend towards professionalization of promotion, even if the persistence of insufficient coordination at the county level and the lack of consistent promotion throughout the year limit the impact on tourist flows for the time being.

A model of good practice relevant to the analysis of DMOs in Neamț County is provided by Bobková's (2015) study on the management process in Austrian destinations, which highlights how destination management organizations can operate effectively through public-private cooperation, diversified financing, and unified strategic coordination. Although the DMOs in Piatra-Neamț and Vânători-Neamț are still in their infancy, the direction taken is similar to the European principles described in the research, confirming the importance of clear governance and the constant involvement of local actors in the development and promotion of tourism.

In this context, the fragmentation of marketing efforts and the absence of a unified promotion strategy at the county level continue to affect the ability to capitalize on natural and cultural resources throughout the year and to position the region as a competitive destination. Just as the competitiveness of an economy is influenced by strategy, the structure of firms, and the promotion of competition (Croitoru 2011), so too does the tourism competitiveness of a region such as Neamț County depends directly on the quality of promotion strategies, the ability of local institutions and private operators to collaborate effectively, and how the area's strengths are communicated to the target audience. The lack of a unified approach and coherent branding reduces the visibility of the destination on the domestic and international markets, thus affecting its attractiveness and tourist flows.

In this regard, the 2019 Regional Action Plan for Tourism in the Northeast identifies tourism promotion as a strategic priority (Strategic Action Direction 3: Tourism Promotion), proposing the creation of a competitive brand and the coordinated promotion of destinations in the component counties, including Neamț. The document emphasizes the need to develop integrated marketing campaigns and thematic packages tailored to local specificities (mountain, monastic, cultural, ecotourism, etc.). In the absence of this institutional coherence and vision, Neamț County risks remaining peripheral in the national tourism landscape, despite its remarkable potential.

4.5. Solutions for the sustainable development of tourism in Neamț County

Although Neamț County has considerable tourism potential, the sector continues to be affected by structural and economic challenges that limit its development. In order to revitalize it, integrated and sustainable strategies need to be adopted:

a. Investments in tourism infrastructure. Findings regarding reduced accessibility and uneven road infrastructure show that tourism development is particularly limited in mountainous areas such as Durău, Ceahlău, and Bicaz Chei, where difficult road access affects tourist flows. Therefore, investments should be prioritized towards modernizing access roads to these destinations and expanding the public transport network between urban centers and tourist areas. The construction of expressways connecting Neamț County with the main cities in Moldova (Iași, Suceava, Bacău) would contribute to increasing visibility and expanding the tourist market. At the same time, promoting environmentally friendly transport solutions (electric buses, bike lanes, charging stations) would strengthen the county's image as a sustainable destination.

b. Promoting Neamț County as a tourist destination is an essential component of regional tourism development. In this context, creating and strengthening a strong tourism brand becomes a necessary condition for attracting visitors and increasing the county's visibility, a *Unique Selling Proposition*, as defined in the Neamț County Tourism Master Plan 2020-2030 (2020). The county's still limited visibility on domestic and international markets highlights the need for more coherent promotion and a unified identity. In this regard, existing brands should be integrated into a common

county strategy capable of capitalizing on the complementarity between urban and natural destinations. The launch of an integrated tourism marketing campaign aimed at promoting the county as an ecological and cultural tourism destination, together with constant participation in international trade fairs, could significantly contribute to increasing the region's recognition and attractiveness.

c. Diversifying the tourism offer is essential to becoming a successful long-term tourist destination and attracting tourists throughout the year.

The low occupancy rate, associated with dependence on summer tourism, confirms the need to extend the tourist season and create attractive products in the off-season. Diversifying the offer by developing winter tourism (skiing, mountain sports), adventure tourism, but also by capitalizing on cultural and spiritual components (monastic themed routes, winter festivals, traditional workshops) would contribute to a more consistent use of accommodation capacities. According to the Neamț County Tourism Master Plan 2020-2030, the development of integrated tourist packages and the digitization of tourism are strategic directions for visitor loyalty and reducing seasonality.

d. Another essential solution for the development of tourism in Neamț is attracting and training the workforce in this field. The dominance of rural accommodation structures and the high proportion of family-run guesthouses highlight the need for continuous training of owners and employees in this segment. The implementation of professional training programs in areas such as tourism management, local gastronomy, and marketing would improve the quality of services and contribute to tourist loyalty. Partnerships between local authorities, universities, and MDOs can support the development of a local network for professional training and certification, with a direct impact on the quality of the tourist experience.

e. Focus on sustainable and responsible tourism. Growing interest in eco-tourism and climate change requires the adaptation of development models to the principles of sustainability. The implementation of green solutions in the field of accommodation (use of renewable energy, waste reduction), the promotion of non-polluting transport and activities with a low environmental impact can transform Neamț County into a benchmark destination for responsible tourism. At the same time, integrating environmental education into tourism offerings through guided tours, awareness workshops, and the promotion of agrotourism would strengthen the bond between the community and visitors. As Croitoru (2011) points out, environmental sustainability is one of the three fundamental dimensions of tourism competitiveness, alongside the business environment and infrastructure, and natural, cultural, and human resources, and the consistent application of these principles is essential for maintaining the county's long-term attractiveness.

The implementation of these solutions can transform tourism in Neamț County from a sector with underutilized potential into a real vector of economic development. Correlating investments in infrastructure, promotion, and diversification with professional training programs and sustainable tourism strategies will contribute to increasing competitiveness and the long-term valorization of the region's natural and cultural resources.

5. Conclusion

An analysis of the evolution of tourism in Neamț County between 2005 and 2024 shows a quantitative increase in accommodation capacity and tourist arrivals, but this development has not been supported by the structural and functional coherence needed to transform tourism into a real driver of economic development. The low degree of accommodation capacity utilization (on average between 17% and 26%) and the average length of stay of less than two days reflect a poorly integrated offer, with a predominance of transient and seasonal tourism. The accommodation

structure is dominated by small units, especially guesthouses, and the low number of hotels and modern facilities limits the county's attractiveness for niche tourism segments. However, the predominance of guesthouses and family-run establishments contributes to maintaining the authentic character of the destination and the resilience of the sector, favoring more sustainable development and a direct relationship between the community and visitors. The lack of modern and accessible transport infrastructure, especially in mountainous and heritage areas, contributes to the perception of isolation and reduces the flow of tourists. There is also a marked seasonality, with peaks in the summer months, also influenced by recent climate change, which has affected the predictability of the cold season. From a socio-economic perspective, population decline and active migration are leading to a decrease in the available workforce and local entrepreneurial initiative in tourism. However, Neamț County has remarkable tourism potential, based on its natural, cultural, and religious heritage, which can be exploited more effectively.

The paper has achieved its overall objective of providing an objective and up-to-date picture of tourism in Neamț County, while also laying the foundations for viable directions for revitalization. Through a detailed analysis of the main tourism indicators, the identification of limiting factors and structural challenges, and the formulation of strategic proposals for sustainable development, a comprehensive diagnosis of the local tourism sector has been outlined.

In order to transform tourism into a competitive and sustainable sector, a coherent strategy is needed, based on: diversifying tourism products (ecotourism, cultural, religious, and active tourism), modernizing access and accommodation infrastructure, expanding and professionalizing tourism services, developing human resources through training and retention, creating a coherent tourism brand, and promoting the county on national and international markets. Linking these directions with regional development policies and attracting private investment and European funds can contribute to increasing tourism competitiveness and the sustainable integration of tourism into the local economy.

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