ANALYSIS OF THE ROMANIAN TOURISM TRAVEL AGENCIES

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Abstract: *Tourism market underwent significant changes in the last decade, because of the Internet and the new possibilities given to consumers to book their travel, undermining sometimes the traditional role of intermediare tourism agencies. The presents study aimes to analyze the general activity of tourism agencies on the Romanian market starting from secondary data, but also the competition on the tourism market from Cluj County. Atferwards the particular case of a tourism agency from Cluj-Napoca was studied in order to evidentiate its' market performance using BCG matrix. Secondary data indicated a decreasing trend in sales both for tour agencies and retail agencies. Consumers' mostly preffered destinations are Greece, Bulgary and Turkey. BCG matrix could be use by other tourism operators as a starting point in building market strategies.*

Key words*: BCG matrix, tourism destination, tourism market strategy*

INTRODUCTION

Tourism market underwent significant changes in the last decade, because of the Internet and the new possibilities given to consumers to book their travel, undermining sometimes the traditional role of intermediaries tourism agencies [1, 2]. Rob Law et al. [3] mentions the phenomenon of disintermediation on the tourism market, even if an important segment of consumers still remains attached to the traditional way of purchasing tourism products. Still, their role on the market is not at all neglectable, first because of their role in creating the destination image and also as demand creators for different destinations for whom the image was created [4, 5]. Another important role of tourism agencies refers to their capacity of informing the consumers, being a trusted source of information [6]. Even if the Internet development is obvious and impossible to ignore, it was stated that there is no system which could replace the personal relationship which is developed with a travel agent, a person who can offer pertinent information for customers and evaluate their satisfaction in order to improve the tourism product [7]. Therefore, employees' attitude towards clients is an essential key in building customers' satisfaction [8]. In this particular context, managers of tourism agencies need to acknowledge data about competitors' position in order to become successful on the market and offer better products and services[9].

MATERIALS AND METHODS

The presents study aims to analyze the general activity of tourism agencies on the Romanian market starting from secondary data collected from the Romanian National Institute of Statistics [10] using descriptive statistics in the context of a strong competition because of the Internet development and the increasing possibilities of tourists of organizing self-voyages. Afterwards the particular case of a tourism agency from Cluj-Napoca was studied in order to evidentiate its' market performance. For this particular purpose the method used was the Boston Consulting Group matrix which is a model of classification of products in four categories based on two criteria (market growth and market share relative to the most important competitor on the market). The relative market share is calculated by dividing the turnover of the analyzed company to the turnover of the main competitor (1). Market growth (MG) indicator is calculated as indicating the formula

(2). Results of the product positioning within the matrix in four categories (question marks, stars, money bags and problems) offers important suggestions for future developing strategies [11].

$$\text{RMS} = \frac{\textit{Turnover of the analyzed company}}{\textit{Turnover of the main competitor}} \quad (1)$$

$$\text{MG}= \frac{\textit{Total sales on the market Year1} - \textit{Total sales on the market Year0}}{\textit{Total sales on the market Year0}} \times 100 \quad (2)$$

RESEARCH RESULTS

After a brief analysis of the number of tourists participating to internal touristic actions organized by tourism agencies, it can be stated that the Romanian tourism market follows an ascendant trend in the case of retail agencies and the number of participants to organized voyages had increased from 2012 when a small number of 41.395 participants was recorded to 162.618 participants in 2016. In the case of tour operators it can be noticed a fluctuation but the number of participants did not decreased under the level of 374.667 participants (Table 1).

Table 1

Number of Romanian tourists participating to internal touristic actions organized by tourism agencies

Tourism agencies	2012	2013	2014	2015	2016
Tour operators	642.268	401.726	374.667	430.832	590.500
Retail agencies	41.395	122.527	127.434	133.502	162.618

The analysis of the number of Romanian tourists participating to external tourism actions revealed the fact that from 2012 to 2016 the number of participants decreased substantially from 902.783 participants to 426.134 (Table 2) in the case of tour operators. In the case of retail agencies the number of participants remained approximately to the same level from 2012 to 2016 with some decreases in 2013 and 2014 (Table 2).

Table 2

Number of Romanian tourists participating to external touristic actions organized by tourism agencies

Tourism agencies	2012	2013	2014	2015	2016
Tour operators	902,783	409,895	355,853	430,629	426,134
Retail agencies	202,063	168,265	186,178	215,707	270,856

In both cases (internal and external actions) it was noticed that by comparison to the year 2012 the number of tourist participating to actions organized by tour operators decreased, fact which is in accordance to the general phenomenon's observed by scholars, that tourists agree the self-voyages [1, 2, 3].

An important aspect to analyze is the country of destination mostly preferred by Romanian tourists. Among the tour operators it can be noticed a significant decrease in the number of tourist from 2012 to 2016 for all the countries of destination. Among the retail agencies the process is quite different, significant increases of the number of tourists can be observed for some destinations like: Bulgaria, Greece and Italy. A particular case is observed for Croatia, where initially the tourists chose intermediaries for their travels, starting with 2013 the tourists became to travel on their own (Table 3). A similar phenomenon is observed in the case of Montenegro for the tour operators, while for the retail agencies, data indicate that very few tourists are choosing the intermediaries. Turkey is a destination for which the demand is decreased in both cases (tours operators and retail agencies). The mostly preferred destinations for Romanian tourists are Greece, Bulgaria and Turkey (Table 3, 4).

Table 3

Number of Romanian tourists participating to external touristic actions organized by tour operators agencies by countries of destinations

Country of destination	2012	2013	2014	2015	2016
	Number of tourists				
Bulgaria	104.044	86.334	67.537	87.318	93.568
Greece	119.658	74.798	77.743	105.198	88.450
Italy	73.672	20.306	18.659	26.290	30.303
Croatia	12.519	4.412	3.161	1.953	2.364
Montenegro	1.134	1.226	366	305	333
Turkey	156.925	90.489	66.895	63.700	69.867

Table 4

Number of Romanian tourists participating to external touristic actions organized by retail tourism agencies by countries of destinations

Country of destination	2012	2013	2014	2015	2016
	Number of tourists				
Bulgaria	34.601	14.692	17.986	23.240	38.947
Greece	27.198	23.605	28.009	31.614	48.019
Italy	16.407	24.429	18.711	20.827	22.081
Croatia	4.136	448	428	72	211
Montenegro	-	39	8	13	9
Turkey	40.027	26.717	38.575	34.927	32.713

The second objective of the present research consisted in the analysis of the main competitors on the Cluj market of tourism agencies and conducting a particular analysis of destinations' performance. The competitor on Cluj tourism market is dominated by two tourism agencies with a turnover approximately similar (Alfa Touring and Z Tour). They can be considered the leaders on the market. Aerocenter and Eximtur registered also high turnovers, while Air Express is quite far from the first four with a turnover of 10.0770.272 (Ministry of Finance) (Table 5).

Table 5

Main competitors on Cluj tourism market [11]

Name of tourist agency	Turnover in 2016 (lei)	Name of tourist agency	Turnover in 2016 (lei)
ALFA TOURING SRL	22.233.651	HOLIDAY MALL SRL -D	789.086
Z TOUR SRL	21.563.873	ACCORD TRAVEL	750.831
AEROCENTER SRL	18.581.342	PAN TRAVEL COMTUR SRL	376.690
EXIMTUR SRL	18.148.837	AVE ACCOMODATION SRL	217.170
AIR EXPRESS SRL	10.077.272	EUROPATUR SRL	211.233
PRODAN TOUR SRL	6.836.711	BLUE TRAVEL SRL	176.543
ADEO INVEST SRL	4.111.932	BLUE TRAVEL SRL	176.543
BEST TRADE SRL (SELECT TRAVEL)	3.972.333	SYNAPSE TRAVEL SRL	157.966
INNTOUR SRL	3.434.837	TUDOR TURISM COM SRL	149.573
NATURA TRAVEL SRL	2.801.453	TRES JOLI VOYAGE SRL	111.933
MADISON SRL	1.941.132	TRANSSYLVANIA TOURS SRL	111.342
CORA TRAVEL AGENCY SRL	1.792.623	OLD LINE SRL	108.416
LINEA BLU TRAVEL SRL	1.777.041	ATS AVANGARDE SRL	102.664
CIEL VOYAGES SRL	1.256.642	ADO CRUISE SRL	61.951
SENS VEST SRL	787.984	CADISERV SRL	54.141

Following the competition analysis, two companies were analyzed in terms of tourism product performance using the Boston Consulting Group matrix in order to offer proper recommendation for building tourism strategies (Table 6).

Table 6

Data used for building BCG matrix

Destination tourism product	Turnover (lei) Agency A	Turnover (lei) Agency B	Relative market share	Market growth (%)
Bulgaria	520,000	490,628	1.05	12
Turkey	180,928	310,500	0.58	5
Greece	450,486	830,200	0.54	11
Italy	270,000	180,500	1.50	8
Croatia	150,000	120,000	1.25	5
Montenegro	50,995	90,600	0.56	11

The BCG matrix indicate that for the analyzed company Greece and Montenegro represent the question marks meaning new released products for which special attention is needed in order to develop them, mainly if the market is increasing. Bulgaria is the star destination which means that the agency is mostly wanted for this particular product, which is very well developed. Italy and Croatia represent money bags being mature tourism destinations for which the company obtains significant turnover. Turkey is the problem destination, sales are decreased and the company must identify some methods to improve its' image on the market or to improve the services (Figure 1).

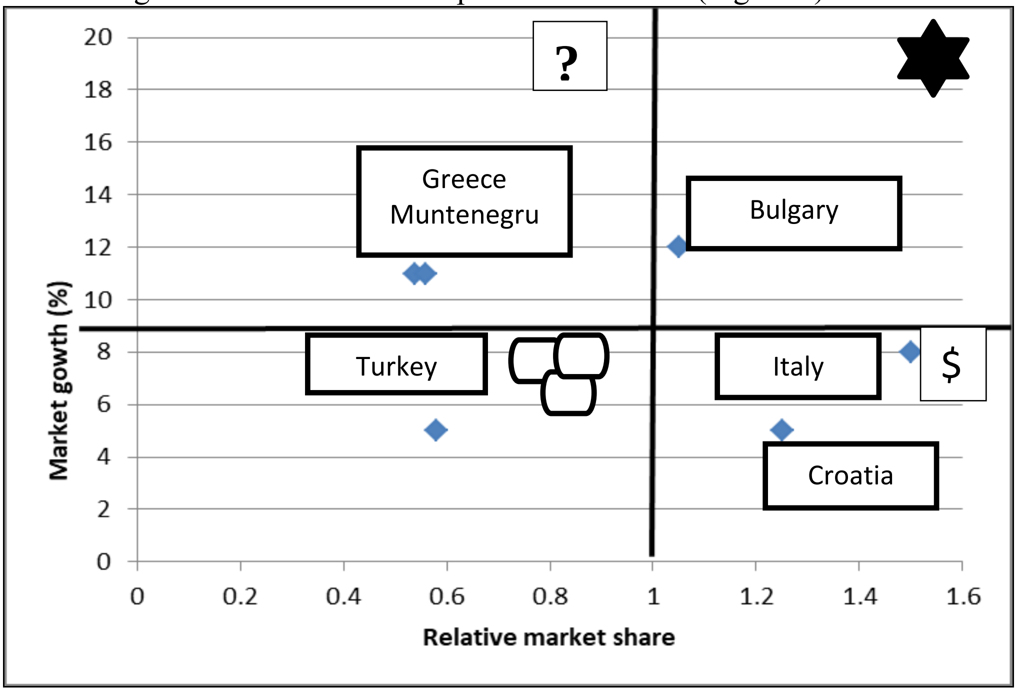

Figure 1. Boston Consulting Group Matrix

CONCLUSIONS

In the context of major changes on the tourism marketing arise with the Internet development, the sector of tourism agencies was directly affected by the large number of consumers which now choose to travel by their own and avoiding intermediaries. The study firstly aimed to analyze whether this phenomenon affected also the Romanian tourism market and results of secondary data indicate a decreasing trend in sales both for tour agencies and retail agencies. Consumers' preferred destinations were also analyzed. The next purpose was to analyze the competition of tourism agencies from Cluj County and the level of their turnover, using the data for evaluating the performance of some destinations at a specific tourism agency. The model used was the BCG matrix which can be used for future analysis by the tourism stakeholders because important data are obtained which can be used in building future strategies.

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