



THE ANALYSIS OF THE ROMANIAN TOUR OPERATOR AGENCIES SECTOR

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Abstract *Tour operators perform an important and specific function in the tourism activity. They purchase distinct elements of transport, accommodation, meals, entertainment and other services, and combine them into a tour package which they can sell directly or indirectly to tourists. The present paper presents an analysis of the Romanian tour operator agencies sector and the evolution inside this important domain of activity using important key figures as: the number of Romanian tourists taking part in external tourist actions organized by the tour operator agencies and the number of tourists taking part in tourist actions organized by tour operator agencies by activity (internal touristic activity, incoming activity and outgoing activity).*

Keywords:

Agency, operator, tourism, hotels, tourism industry

Introduction

The tourism industry incorporates many different sectors, including transport (airlines, airports, cruise ships, train operators, ferry operators, car rental firms), travel agencies (tour-operators and travel agencies retailers), hotels (resorts hotels, chain hotels and independent hotels), restaurants and entertainment companies, transfers, tourism associations, touristic attractions, the public sector responsible with tourism management destinations, professional associations, insurance and even the tourists.

Tourism activity represents “a people industry” (Pender, 1999) where tour operators and travel agency retailer make the connection between suppliers and tourists. As Pender (1999) underlines travel agents skills are particularly important as the production and consumption of a tourist service take place simultaneously. So, it is very hard for tour operators to work and to perform their activities without a good communication with the parts implicated “in the tourism action”.

The reputation of the tour operator is crucial when tourist wants to buy a package tour. It is not always the price that affects the choice of buying a package tour. After price and tour operator reputation, we have the previous experience of the customer, flight times, airline used, airport of departure (Syratt, 2003).

A study of numerous tour operators’ brochures and websites help us to understand the great choice available on the market.

Authors like Tribe (2001), Cooper and Fletcher (2008), Page (2001), Holloway (2009) presents in their

paper work the importance of the tour operating sector pointing out the fact that tour operators represents *the core* of what we understand as the travel industry.

“The tour operator has to be able to assemble and present to the customer a package (an inclusive tour), that is both convenient to purchase and competitively priced” (Holloway, 2009).

The tour operators have specialized role: the domestic operator, the incoming operator and the outgoing operator (Holloway, 2009). The domestic operator organizes package holidays domestically (to a destination within the country in which the tourists reside), the incoming operator are handling foreign visitors for holidays and outgoing operator deals with those tourists that want to spend their holidays outside their residence country.

The present paper presents an analysis of the Romanian tour operator agencies sector and the evolution inside this important domain of activity using important key figures as: the number of Romanian tourists taking part in external tourist actions organized by the tour operator agencies and the number of tourists taking part in tourist actions organized by tour operator agencies *by activity (internal touristic activity, incoming activity and outgoing activity)*.

2. The Romanian tour operator agencies market place

The Romania’s tourism market is oversaturated as we have around 1,500 active tour operator agencies in the country and over 450 active tour operator agencies in Bucharest.

The Romanian tour operators' total receipts amounted to 800 million euro. But, unfortunately only the first 150 tour operators from top 500 have a turnover above 1 million euro. The rest, 1,350 travel agencies have a turnover less than 1 million euro.

Regarding the Top 10 tour operators in Romania, in 2013 the results according to the turnover shows us that TOURING EUROPABUS ROMANIA SRL (Eurolines and TUI Travel Center) is the market leader, followed closely by PERFECT TOUR and CHRISTIAN TOUR.

Table 1. Top 10 tour operators in Romania in 2013

No.	Tour operators name	Turnover (euro)	Profit (euro)	Loss (euro)	Employees (Number)
1	TOURING EUROPABUS ROMANIA SRL	50,904,931	202625.8		293
2	PERFECT TOUR SRL	46,386,859	304054.2		163
3	CHRISTIAN'76 TOUR SRL	43,891,615	980308.1		100
4	HAPPY TOUR SRL	36,377,463	-	672978.9	86
5	EXIMTUR SRL	35,972,502	316295.3		130
6	CONCEPT CONSULT & PROSPECT S.R.L.	26,669,323	1357441		45
7	VOLA.RO SRL	24,146,829	189564.9		43
8	HOTELAIR SRL	18,305,959	237804.5		10
9	BUSINESS TRAVEL TURISM SRL	15,767,371	1016591		40
10	MAREEA COMTUR S.R.L.	15,175,058	10414.38		72

Source: calculated after <http://www.vrajitorul.eu/top/157/agentii-de-turism?an=2013>

The HAPPY TOUR operator is the only one in top ten in 2013 which records a significant financial loss. In 2012, HAPPY TOUR was the leader of the Romanians

tour operators with a turnover of 40,884,654 euro and 108 employees.

Table 2. Romanian tour operators market share in 2013

No.	Tour operators name	Market share
1	TOURING EUROPABUS ROMANIA SRL	6.36
2	PERFECT TOUR SRL	5.80
3	CHRISTIAN'76 TOUR SRL	5.49
4	HAPPY TOUR SRL	4.55
5	EXIMTUR SRL	4.50
6	CONCEPT CONSULT & PROSPECT S.R.L.	3.33
7	VOLA.RO SRL	3.02
8	HOTELAIR SRL	2.29
9	BUSINESS TRAVEL TURISM SRL	1.97
10	MAREEA COMTUR S.R.L.	1.90

Source: calculated as the turnover of the agency/the total turnover*100

3. The analysis of the Romanian tour operator agencies activities

Tour operators organize package tours for the tourist and their offer became more and more diversified and sophisticated to fit the customers' expectations.

Romanian tourists still buy package tours using professional tour operator agencies and like to travel outside the country to destinations like Turkey, Bulgaria, Greece, Spain, Italy and so on. Particularly, for these travel destinations, the Romanian tourists find All Inclusive package tours and Ultra All Inclusive package tours.

Table 3. Number of Romanian tourists taking part in external tourist actions organized by tour operator agencies by destination country in 2013 (Top 25 country destination for the Romanian tourists)

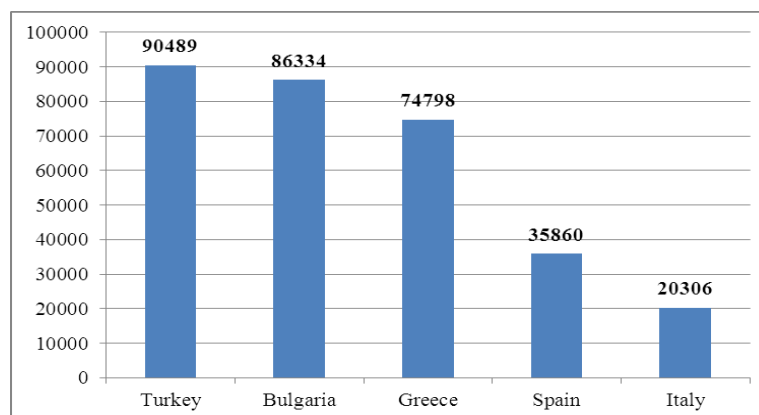
No.	Destination country	No of Romanian tourists
1	Turkey	90489
2	Bulgaria	86334
3	Greece	74798
4	Spain	35860
5	Italy	20306
6	Austria	15334
7	France	15150
8	Germany	15061
9	United Kingdom	7146
10	Croatia	4412
11	Hungary	4360
12	Malta	4253
13	Portugal	2500
14	Egypt	2473
15	Netherlands	1910
16	Cyprus	1802
17	Czech Republic	1766
18	United States of America	1386
19	Australia	1295
20	Denmark	1247
21	Montenegro	1226
22	Switzerland	1107
23	Belgium	723
24	Tunisia	659
25	Mexico	568

Source: adapted after INS, <http://www.insse.ro/cms/>,
<http://statistici.insse.ro/shop/index.jsp?page=tempo3&lang=ro&ind=TUR109C>

The leader in tourists' preferences was in 2013 Turkey with more than 90000 Romanian tourists choosing to spend their holidays in this country. The

Turkey tourism services distinguish for a good price quality rapport and commodity.

Graphic 1. Number of Romanian tourists taking part in external tourist actions organized by tour operator agencies in 2013



Source: Number of Romanian tourists, adapted after INS, <http://www.insse.ro/cms/>,
<http://statistici.insse.ro/shop/index.jsp?page=tempo3&lang=ro&ind=TUR109C>

The second place was reserved to Bulgaria in 2013 with more than 85000 Romanian tourists choosing to spend their vacation in this country. The close distance to our country and all inclusive system makes Bulgaria a very attractive holiday destination for the Romanian tourists.

On the third position we find Greece, a very important tourism destination for the Romanian tourists when choosing to go the islands (almost 75000). The

tour operator agencies offer attractive package tours in Greece in early booking system or in last minute system with significant discounts (from 5% up to 30%).

The Spain and Italy tourism destinations are at considerable distance from the leader but nevertheless important in Romanian tourists preferences for cultural tourism, shopping tourism, visiting relative and friends and events and entertainment possibilities.

Table 4. Number of tourists taking part in tourist actions organized by tour operator agencies *by activity*

Types of touristic activities	Number of tourists	
	Year 2008	Year 2013
Internal touristic activity	416541	401726
Incoming activity	148663	118712
Outgoing activity	712031	466683

Source: adapted after INS, <http://statistici.insse.ro/shop/index.jsp?page=tempo3&lang=ro&ind=TUR109A>

It can be notice that in Romania the tourists preferred more the outgoing activities that the Internal touristic activities to be purchased using a tour operator agency. Also in 2013 the activity of the tour operators compared to 2008 was in decline due to the economic crisis and to the customers' preference to "put in the box" their money.

4. Conclusions

Analysing the Romanian tour operator agencies sector we came to the conclusions that the Romanian tour operators sector is very shared and crumbled.

The leader on the tourism market is Eurolines followed by Perfect Tour and Christian Tour. Romanian tourists still buy package tours using professional tour operator agencies and like to travel outside the country to destinations like Turkey, Bulgaria, Greece, Spain, Italy and so on. Particularly, for these travel destinations, the Romanian tourists find All Inclusive package tours and Ultra All Inclusive package tours.

A revitalization of the Romanian tour operators sector is required in order for them to earn more and to be more competitive on the international market.

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