

THE PARTICIPATION OF TOURISM AGENCIES IN TOURISM ACTIVITY BETWEEN 2008-2024

Anca Iulia DUDAȘ GĂLĂȘEL

1 University of Oradea, Faculty of Environmental Protection, 26 Gen. Magheru St., 410048, Oradea, Romania

RESEARCH ARTICLE

Abstract

This study analyzes the impact of tourism agencies, both those with organizing activity (tour operators) and those with intermediation activity, on tourism activity. The main source of information used was the National Institute of Statistics. Data was collected on tourist arrivals through tour operating and intermediating tourism agencies, categorized by types of tourism activities: incoming activity (receptive tourism), domestic tourism activity, and outgoing activity (emittive tourism). The collected data spans a period of 17 years, from 2008 to 2024. Following the interpretation of the data, we observed that the share of tourism agencies in tourism activity varies from 9% in 2010 to 22% in 2023.

Keywords: tourism agency, tour operator, intermediation agencies, incoming, outgoing.

#Corresponding author: anca.dudas@uoradea.ro

INTRODUCTION

Today, the business volume of tourism equals or even surpasses that of oil exports, food products or automobiles. Tourism has become one of the major players in international commerce, and represents at the same time one of the main income sources for many developing countries. This growth goes hand in hand with an increasing diversification and competition among destinations. (UNWTO, 2025)

Today, tourism has probably become one of the most internationalized industries, with effects on numerous fields of activity and economic branches. Tourism is, simultaneously, an economic and social phenomenon. Tourism activity can be considered a real industry, a definition of tourism that relies on a logical consideration, namely, one of ensuring the coherence of this important sector.

As a phenomenon specific to the modern world, tourism represents one of the most dynamic branches of the world economy, with a major impact on economic and social life, and a role as a promoter of sustainable development. Tourism has a considerable impact on the economies, societies, and cultures of different reference countries. (Mănescu C., et al, 2024)

Tourism constitutes a domain of strategic importance and a priority branch of Romania's national economy. (ANAT, 2025)

Tourism is seen as an alternative to the decline in traditional industries such as

agriculture in general, particularly in lagging or peripheral regions, where territorial policies promote diversification strategies. This is especially true for localities that rely on tourism as a key driver for economic diversification and revitalization. Given the constant changes in the tourism market, accommodation providers must continually diversify their service offerings in order to remain appealing to potential clients. Tourism businesses are increasingly required to innovate and expand their range of products and services to stay competitive. (Dan M.M., 2025)

The elimination of geographical and cultural barriers has led to an increase in tourism worldwide. The World Tourism Organization highlights the continuous growth in the number of tourists, a fact attributed to the significant diversification of the industry in recent years. This growth is also due to the multitude of options available to tourists, with offers becoming increasingly complex, thus attracting a more diverse range of consumers. (Poruțiu A.R., 2024)

Tourism as a mass phenomenon was the precursor to the appearance and development of organized tourism, which takes place only on the basis of a perfect contract between the tourism agencies and the tourist service units (tourist accommodation units, transport, leisure facilities, etc.) (Rabontu C.I., 2018)

Tourism agencies represent a key element in the functional infrastructure of the tourism system. They act as organizers of tourism

products, intermediaries, generators of tourist flows, and actors in structuring tourism demand. Even though digitalization has modified consumer behavior, agencies remain relevant due to professional expertise, negotiation capacity, and their role in reducing information asymmetry.

Agencies function as intermediaries between producers of tourism services (hotels, transport providers, leisure operators) and final consumers. They contribute to: optimizing the distribution of tourism products; reducing transaction costs; integrating disparate services into a coherent tourism package; increasing supplier visibility through sales platforms.

Tourism agencies are important actors in channeling tourist flows because: they promote specific destinations (sometimes dominating the emissive activity on certain routes); they influence seasonality through early-booking offers or thematic packages; they contribute to increasing the competitiveness of less-known destinations.

European and national regulations oblige agencies to offer guaranteed refunds, protection in case of insolvency, transparent contracts, and assistance in unforeseen situations (cancellations, pandemics, conflicts).

Given that the participation of tourism agencies in Romania's tourism activity is significant, in this paper we aimed to analyze (highlight) the share held by tourism agencies in Romania's tourism activity, as well as the evolution of this share between 2008 and 2024. Furthermore, the paper presents the types of tourism activities carried out by both organizing and intermediating tourism agencies, namely, incoming activity, domestic tourism activity, and outgoing activity, and their evolution over a period of 17 years, between 2008 and 2024.

Organizing tourism agencies are those tourism agencies specialized in organizing tourism programs and actions, which they commercialize directly or through other tourism agencies, based on contracts and agreements. Intermediary tourism agencies are those tourism agencies that sell the tourism programs and actions of organizing tourism agencies. (INS, 2025)

MATERIAL AND METHOD

To determine the share of tourist arrivals through tourism agencies in total arrivals and their evolution over time, we used and processed data from the website of the National

Institute of Statistics, as well as information from specialized literature.

The objectives we pursued were: retrieving and systematizing statistical data on tourist arrivals, calculating the share of arrivals through tourism agencies compared to total arrivals, analyzing the evolution of these shares over time, and formulating conclusions.

The research has a quantitative-descriptive character, supplemented by a conceptual analysis of the specialized literature.

Statistical-descriptive analysis was used for evaluating the volume of tourist arrivals, comparing evolutions between years, structuring tourist flows by types of activities, as well as determining the shares of arrivals through tourism agencies in total arrivals.

To calculate the shares of tourist arrivals through tourism agencies in total arrivals, we used the following formula:

$$P = \frac{\text{Arrivals through Tourism Agencies}}{\text{Total Arrivals}} * 100$$

To calculate the share of each type of tourism activity (incoming activity, domestic tourism activity, outgoing activity) we used the following formulas:

$$P = \frac{\text{Incoming Arrivals}}{\text{Total Arrivals through Agencies}} \times 100$$

$$P = \frac{\text{Domestic Tourism Arrivals}}{\text{Total Arrivals through Agencies}} \times 100$$

$$P = \frac{\text{Outgoing Arrivals}}{\text{Total Arrivals through Agencies}} \times 100$$

RESULTS AND DISCUSSIONS

In Table 1, we presented the comparative evolution of two essential variables for analyzing tourism dynamics in Romania during the 2008–2024 period: total tourist arrivals and total arrivals realized through tourism agencies. This representation allows for observing how the general flow of tourists relates to the segment organized by agencies, highlighting both common trends and periods of divergence.

Firstly, the total number of tourist arrivals shows an upward long-term trend, marking a significant increase from approximately 7 million tourists in 2008 to over 14 million in 2024. This evolution reflects the continuous development of the tourism sector, the diversification of the offer, and the increased attractiveness of domestic destinations. A major anomaly appears in 2020, when the chart indicates an abrupt drop in arrivals, a direct

effect of the COVID-19 pandemic and mobility restrictions.

Table 1

The Participation of Tourism Agencies in Tourism Activity between 2008-2024

Year	Total Tourist Arrivals	Romanians	Foreigners	Arrivals through Tourism Agencies	Agencies with Organizing Activity (Tour Operators)	Agencies with Intermediation Activity	Share of Tourism Agencies in Total Arrivals (%)
2008	7,125,307	5,659,416	1,465,891	1,334,608	1,277,235	57,373	18,73%
2009	6,141,135	4,865,545	1,275,590	869,711	636,251	233,460	14,16%
2010	6,072,757	4,726,414	1,346,343	569,872	461,112	108,760	9,38%
2011	7,031,606	5,514,907	1,516,699	1,480,029	1,226,738	253,291	21,05%
2012	7,686,489	6,030,053	1,656,436	2,266,048	1,938,288	327,760	19,25%
2013	7,943,153	6,225,798	1,717,355	1,337,334	987,121	350,213	16,84%
2014	8,465,909	6,551,339	1,914,570	1,749,078	1,302,349	446,729	20,66%
2015	9,921,874	7,681,896	2,239,978	1,649,928	1,190,522	459,406	16,63%
2016	11,002,522	8,521,698	2,480,824	1,780,922	1,205,662	575,260	16,19%
2017	12,143,346	9,383,266	2,760,080	1,778,014	1,522,666	255,348	14,64%
2018	12,905,131	10,108,509	2,796,622	2,422,481	1,875,326	547,155	18,77%
2019	13,374,943	10,691,195	2,683,748	2,526,523	2,176,274	350,249	18,89%
2020	6,398,642	5,944,775	453,867	900,341	807,572	92,769	14,07%
2021	10,205,322	9,326,348	878,974	1,608,204	1,485,223	122,981	15,76%
2022	12,588,333	10,914,023	1,674,310	2,308,822	1,991,120	317,702	18,34%
2023	13,910,956	11,790,888	2,120,068	3,026,151	2,623,782	402,369	21,75%
2024	14,569,794	12,156,984	2,412,810	2,787,891	2,584,008	203,883	19,13%

Source: Own processing based on tempo Online, INS

Regarding arrivals through tourism agencies, the evolution follows a similar pattern, but with smaller amplitudes. A gradual increase is noted until 2019, followed by a sharp decrease in 2020, which highlights the vulnerability of the organized segment during crisis periods. Post-pandemic recovery is visible starting in 2021, but values remain lower than those recorded in the 2018–2019 period.

Agencies maintain a constant role in the market. The majority of tourists choose individual organizational forms, but agencies remain relevant, especially during periods of uncertainty or for complex tourism products.

Table 2 highlights the evolution of tourism activities carried out by tourism agencies in Romania during the 2008–2024 period, structured into the three main forms of activities: incoming, domestic tourism, and outgoing.

The analysis of the values shows significant differences between the types of activities, both in terms of the volume of activities and their dynamics over time.

The incoming activity (receptive tourism) is the most volatile segment, recording strong fluctuations and being profoundly influenced by the international

economic and geopolitical context. The high values from the 2011–2012 period are followed by accentuated decreases in subsequent years, culminating with the collapse in 2020, caused by the COVID-19 pandemic.

The recovery after 2021 is slow, and the values remain far below the levels of domestic and outgoing tourism, confirming the vulnerability of the receptive sector.

Domestic tourism is the dominant segment of the Romanian tourism market.

Organizing activity records a consistent growth until 2012, followed by a stabilization period and a strong relaunch after 2016.

The peaks in 2018–2019 and 2023 demonstrate the high resilience of domestic tourism, which remains the main engine of the industry, including during crisis periods.

Intermediation, although on an upward trend, remains secondary compared to organizing, suggesting the preference of Romanian tourists for complete packages.

Outgoing activity represents the segment with the greatest positive dynamic, especially after 2014, when values grew sustainedly to historical highs in 2018–2019 and 2023. This reflects the increasingly accentuated orientation of Romanian tourists towards

external destinations, facilitated by the accessibility of flights and the diversification of agency offers.

Although the pandemic caused an abrupt decline in 2020, outgoing activity

quickly recovered, even surpassing pre-pandemic levels in the years 2022–2024, which indicates mature consumer behavior and a strong demand for external tourism.

Table 2

Tourist Arrivals through Agencies by Activity Type

Year	Incoming Activity (RECEPTIVE)		Domestic Tourism Activity		Outgoing Activity (EMITTIVE)		TOTAL
	Tourism Agencies with Organizing Activity	Tourism Agencies with Intermediation Activity	Tourism Agencies with Organizing Activity	Tourism Agencies with Intermediation Activity	Tourism Agencies with Intermediation Activity	Tourism Agencies with Intermediation Activity	
2008	148,663	8,526	416,541	21,103	712,031	27,744	1,334,608
2009	172,260	6,210	129,990	98,076	334,001	129,174	869,711
2010	78,099	2,503	113,841	49,584	269,172	56,673	569,872
2011	235,742	22,922	364,107	58,211	626,889	172,158	1,480,029
2012	240,101	23,295	642,268	41,395	1,055,919	263,070	2,266,048
2013	118,712	14,326	401,726	122,527	466,683	21,360	1,337,334
2014	217,705	1,808	374,667	127,434	709,977	317,487	1,749,078
2015	253,507	2,163	430,832	133,502	506,183	323,741	1,649,928
2016	74,125	3,417	590,500	162,618	541,037	409,225	1,780,922
2017	105,310	8,766	670,428	93,791	746,928	152,791	1,778,014
2018	111,686	10,523	959,030	187,187	804,610	349,445	2,422,481
2019	104,861	1,229	1,064,115	231,340	1,007,298	117,680	2,526,523
2020	9,175	653	521,475	39,464	276,922	52,652	900,341
2021	9,449	799	793,858	58,085	681,916	64,097	1,608,204
2022	24,407	1,701	838,416	86,582	1,128,297	229,419	2,308,822
2023	38,866	598	1,133,866	99,536	1,451,050	302,235	3,026,151
2024	53,463	352	1,094,107	42,067	1,436,438	161,464	2,787,891

Source: Own processing based on tempo Online, INS

Comparatively, domestic tourism remains the most stable and voluminous category, outgoing activity the most dynamic and expansive, and incoming activity the most vulnerable and least developed. In all three segments, organizing activity is superior to intermediation, confirming the market maturation and the capacity of Romanian agencies to generate their own, competitive, and demand-adapted tourism products.

Overall, the presented evolutions reflect the profound transformations of the Romanian tourism market, influenced by economic, technological, and social factors, as well as major global events, such as the pandemic.

The upward trends in the 2021–2024 period suggest a vigorous relaunch of the industry and a repositioning of tourism agencies as central actors in population mobility.

Table 3

Share of Tourist Arrivals through Agencies by Activity Type

YEAR	Incoming Activity (RECEPTIVE)	Domestic Tourism Activity	Outgoing Activity (EMITTIVE)	TOTAL
2008	12%	33%	55%	100%
2009	21%	26%	53%	100%
2010	14%	29%	57%	100%
2011	17%	29%	54%	100%
2012	12%	30%	58%	100%
2013	10%	39%	51%	100%
2014	13%	29%	59%	100%
2015	15%	34%	50%	100%
2016	4%	42%	53%	100%
2017	6%	43%	51%	100%
2018	5%	47%	48%	100%
2019	4%	51%	45%	100%
2020	1%	62%	37%	100%
2021	1%	53%	46%	100%
2022	1%	40%	59%	100%

2023	1%	41%	58%	100%
2024	2%	41%	57%	100%

Source: Own processing based on tempo Online, INS

The analysis of the evolution of the shares of the three forms of tourism activity highlights significant transformations in the structure of tourism demand in Romania throughout the 2008–2024 interval. Firstly, domestic tourism records a constant upward trend, marking a substantial increase in the 2018–2021 period, when it exceeded 50% of the total tourism activity. This evolution can be associated both with changes in tourism consumption behavior and with conjunctural factors such as the improvement of internal infrastructure or constraints generated by socio-economic contexts, including the pandemic period.

In contrast, outgoing tourism shows wide variations, indicating high sensitivity to changes in the external environment. After a pronounced decline in 2020, explainable by international mobility restrictions, the segment shows a significant rebound in subsequent years, which suggests the restoration of consumer confidence and the normalization of travel conditions. However, the volatility of this segment remains a determining characteristic.

CONCLUSIONS

In relation to the concrete conditions of each country, tourism represents an export or an import: the goods and services consumed by tourists during their travel in a country can be assimilated to an export, while the expenses incurred by a tourist abroad represent an import for their country of residence. (Niță, 2019).

This paper highlights not only the numerical evolution of tourism, but also the changes in consumer behavior, the impact of external contexts, and the positioning of agencies in the structure of the Romanian tourism market.

Domestic tourism is the most stable, resilient, and dominant segment, maintaining a majority share in agency activity throughout the analyzed interval.

Outgoing activity presents the highest growth dynamic, confirming the orientation of Romanian tourists towards international experiences.

Incoming activity remains the least developed segment, with oscillating evolutions and reduced post-pandemic recovery.

Incoming activity, representative of Romania's attractiveness as a destination for foreign tourists, records a significant long-term decrease, with minimum values in the 2020–2023 period. This evolution raises questions regarding the destination's competitiveness in the international context, as well as the structural effects of economic and sanitary crises on foreign tourist flows. The slight increase in 2024 may indicate the beginning of a relaunch process, but the low level suggests the need for more efficient public policies and promotion strategies.

Overall, the distribution of tourism activities over the analyzed period shows a consolidation of domestic tourism, moderate resilience of outgoing activity, and accentuated vulnerability of incoming activity. These results underline the necessity of adopting differentiated tourism development strategies, adapted to the characteristics of each segment and aimed at increasing Romania's competitiveness in the international tourism market.

The small percentage of foreign tourist arrivals (incoming) in our country and a large percentage of Romanian tourists traveling abroad (outgoing) leads to a deficit in the tourism balance of payments due to tourism exports being greater than imports.

Tour operators clearly dominate the market. Organizing activity has grown massively compared to intermediation activity.

The pandemic temporarily distorted the data, but after 2021, the market fully recovered.

2023 was the peak year for agencies, both in absolute and relative values.

The pandemic marks the most severe decline in the analyzed period, but the rapid recovery from 2021–2024 demonstrates the industry's adaptability.

The 2022–2024 period is distinguished by the strongest post-crisis expansion, with tourism agencies regaining and surpassing the operational capacities of previous years.

REFERENCES

- Brouder, P., Anton Clavé, S., Gill, A., Ioannides, D., 2017. Why is tourism not evolutionary science? In *Tourism Destination Evolution*, Brouder, P., Anton Clavé, S., Ioannides, D., Eds.; Routledge: New York, NY, USA
- Dan, M.M., Sebastien, L.E., Iova, I., Dudaș Gălășel, A.I., Casău Crainic, M.S., Chereji, A.I., 2025. Strategies for the diversification of economic activities to improve the financial performance of the Roua Muntelui, Baia de Aries, Alba County, Romania, *Annals of the University of Oradea, Fascicle: Ecotoxicology, Animal Science and Food Science and Technology*, Vol. XXIV/A, 66-74.
- Gaube, G., 2015. Cercetari Privind Impactul Turismului Asupra Societatii Si Mediului în Matricea Dezvoltarii Durabile. Ph.D. Thesis, Universitatea Stefan cel Mare Suceava, Facultatea de Stiinte Economice si Administratie Publica, Suceava, Romania, 2015; p. 7.
- Liao, C.-S., Chuang, H.-K., 2020. Tourist preferences for package tour attributes in tourism destination design and development. *J. Vacat. Mark.* 2020, 26, 230–246. [Google Scholar] [CrossRef]
- Mănescu, C., Mateoc-Sîrb, N., Adamov, T.C., Marin, D., Moisa, S., Gordan, M.I., 2024. Identification of Opportunities for Capitalizing on Tourist Potential in Hunedoara County through Rural Tourism Activities and Supporting the Development of the Local Community, *Sustainability*. Vol.16 (19).
- McCann, P., Ortega-Argilés, R., 2015. Smart Specialization, Regional Growth and Applications to European Union Cohesion Policy. *Reg. Stud.* 2015, 49, 1291-1302
- Niță, C., 2019. Expansiunea turismului românesc – realizări, probleme, direcții de acțiune, Libris Editorial, Brașov.
- Pender, L., 1999. *Marketing Management for Travel and Tourism*; Stanley Thornes: Cheltenham, UK.
- Py, P., 1986. *Le Tourisme. Un Phenomene Economique*; La Documentation Francaise: Paris, France, p. 10. [Google Scholar]
- Poruțiu, A.R., Brata, A.M., Dumitraș, D.E., Oros, O.P., Mureșan, I.C., 2024. Understanding Romanian Generational Preferences and Travel Decision-Making When Choosing a Rural Destination, *Sustainability*. Vol.16 (10).
- Rabontu, C.I. D., 2018. The Romanian tourism through the travel agencies in period 2012-2017, *Journal of tourism*, No. 26, Available online: <https://revistadeturism.ro/index.php/rdt/issue/view/27>
- Rasool, H., Maqbool, S., Tarique, M., 2021. The relationship between tourism and economic growth among BRICS countries: A panel cointegration analysis. *Future Bus. J.* 2021, 7, 1–11. [Google Scholar] [CrossRef]
- Sethukumari, S.N., Thirumagal, A., Mani, M., 2021. Spotlight on UNWTO Elibrary. *Libr. Philos. Pract.* 2021, 1–12. Available online: <https://digitalcommons.unl.edu/libphilprac/4808/> (accessed on 26 February 2024).
- Weidenfeld A., 2018. Tourism Diversification and Its Implications for Smart Specialisation. *Sustainability*. 2018; 10(2):319. <https://doi.org/10.3390/su10020319>
- Zaman, G., Geamanu, M., 2014. *Eficiența Economică în Condițiile Dezvoltării Durabile*; Editura Fundației România de mâine: București, Romania. [Google Scholar] <https://www.anat.ro/wp-content/uploads/2019/04/Legea-turismului-1.pdf>
- Organizația Mondială a Turismului (UNWTO). Available online: <https://www.untourism.int/why-tourism> (accessed on 8 December 2025). <http://statistici.insse.ro:8077/tempo-online/#/pages/tables/insse-table>