# MATURITY IN DIGITAL ENVIRONMENT - EVOLUTION, ACTIVITY AND PROMOTION. CASE STUDY REGARDING TRAVEL AGENCIES FROM CLUJ-NAPOCA

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#### Abstract

Globalisation of digital market imposed on companies relocating their activities into the digital environment where interactivity, direct communication, interfacing of the company and its offer with the digital consumer are implemented through the digital identity in its traditional or mobile form. Tourism was among the first digitalised global industries, the web presence of tourism companies becoming the main tool for presentation and marketing their products and services. The form, usability and promotion of digital presence represent essential elements for any company in differentiating from global competition and creation of a unique image. In this context, in its first part, the article draws an image of the digital environment and the evolution of online tourism, while in the second part a study regarding the web presence of travel agencies registered in Cluj-Napoca is presented using for analysis elements as the online history, the quality level of the digital presence and the online promotion tools used by these agencies. We consider that the results of the present study can offer a set of information that is useful to travel agencies, but also to web solution, e-tourism, e-marketing and web and mobile advertising service providers.

Key words: Online tourism, Online promotion, Online travel agencies, Mobile promotion, Travel agencies.

JEL Classification: L83, L86, M15, M37

#### I. INTRODUCTION AND LITERATURE REVIEW

The ICT industry and its continuous development together with the development and expansion of mobile technology usage, brought about important changes in human and economic activities; the impact of technological evolution was quickly felt, especially in the field of services, which, due to their intangibility, where the first to move to the digital business environment, and eventually to the mobile.

Tourism industry was one of the most receptive industries to these evolutionary stages of ICT and mobile industries and, as a consequence, through etourism the digitalization of all the activities and specific processes of this large industry became visible. E-tourism marked the expansion of integrating the use of Internet, Extranet and Intranet into the activities of the companies from the tourism industry, integrating all specific functions of the online business environment with the specific features of tourism services.

E-tourism is defined as "the digitization of processes and value chains to optimize their effectiveness; the e-tourism phenomenon primarily involves e-information, e-booking (hotels, transportation, etc.) and e-payment; other stages are involved among these, but which depend more on tour operators like e-planning/e-management, etc." (Babaita et al., 2010).

Relocation of tourism activities towards the digital environment determined companies from this field to integrate e-commerce, e-community, webvertising, e-branding, etc. activities initially generating commercial online presence, and later global tourism portals and vortals.

The present study was structured so that the first part depicts a general image of the digital environments (www, websites number, Internet users, digital presence of travel agencies in the worlds and in Romania, websites (evolution of webdesign and evaluation), online promotion), while the second part of the study carried out regarding the digital presence of travel agencies registered in Cluj-Napoca, following their online maturity and its evolution from point of view of activities deployed, quality of their web presence and of the online promotion tools used.

#### WWW, websites and Internet users

In 1989, Tim Berners-Lee, a British scientist at CERN, invented the WWW (World Wide Web), to which the first ever website was dedicated, hosted on Berners-Lee's NeXT computer and which included the description of the main features of the website (http://home.web.cern.ch).

From lunching of the first ever website until 2014 the world has come close to having one billion website. In 2013, there were over 700 million websites registered, and the number of Internet users was of 2,756,198,420, having registered 4 users per website, in diminution in comparison to previous years (http://www.internetlivestats.com).

In December 2013, at world level a total of 2,802,478,934 Internet users was reported, and their regional distribution in the first trimester of 2013 indicated Asia as having the largest segment of users (45.1%), while Oceania/Australia was very little represented online (0.9%)

(http://www.internetworldstats.com) (Figure 1).

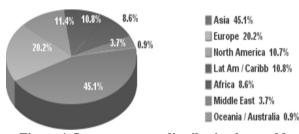


Figure 1. Internet users - distribution by world regions

Source: www.internetworldstats.com/stats.htm, accessed on June 2014

Web statistics indicate 14.3 trillion webpages, 48 billion webpages indexed by Google Inc., 14 billion webpages indexed by Microsoft's Bing. It was also registered an increase of 23% in the average dimension of a webpage and a decrease of 13% in the loading time of a webpage (http://www.factshunt.com).

#### **Online travel agencies**

Taking into account specific criteria such as "booking and search options (travel bundles, airfare, hotel, car rental, cruise, deals finder), ease of use (email confirmation, comparative rates, predictive destination pop-ups, calendar style date selection, book specific dates, search flexible dates, travel reminders), additional features (travel insurance, mobile app, check flight status, manage itinerary, earn frequent flyer miles, rewards program, travel news or blog), help and support (faqs, telephone support, email support, live chat), for year 2014 Online Travel Sites Review elaborated a worldwide ranking as follows (http://online-travel-sites-review.toptenreviews.com):

- Orbitz (http://www.orbitz.com);
   CheapTickets (http://www.cheaptickets.com); Travelocity (http://www.travelocity.com);
- Priceline (http://www.priceline.com);
- CheapOair (http://www.cheapoair.com);
- Last Minute Travel
- (http://www.lastminutetravel.com);
- OneTravel (http://www.onetravel.com);
- AirGorilla (http://airgorilla.com);
- Expedia (http://www.expedia.com);
- Kayak (http://kayak.com);
- Hotwire (www.hotwire.com).

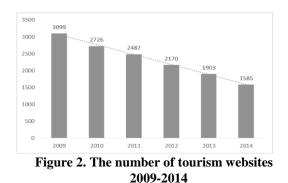
In 2013, World Travel Awards declared Expedia as winner of the World's Leading Online Travel Agency Website title from a list of important nominees (http://www.worldtravelawards.com): (www.ebookers.com), Ebookers eDreams (www.edreams.com, GetGoing (www.getgoing.com), Opodo (www.opodo.com), Orbitz. Priceline, Wotif Travelocity, (www.wotif.com), Expedia Booking (www.booking.com).

The degree of satisfaction of travel agencies' online website consumers is determined based on specific criteria: (66%), past experience with the brand (44%), brand reputation (22%) and positive reviews of the brand (website, article, blog, etc.) (19%). The preferences for visiting online travel agencies are: booking hotels (58%), flight reservations (52%), vacation packages (33%) and car rental (31%). Consumers with a high degree of satisfaction regarding web presence and online services of travel agencies return for online purchase 4.4 times per year (http://www.reuters.com).

In 2013, Carlson Wagonlit Travel elaborated a ranking of the agencies based on their global sales, in which the company was situated on the fourth place with sales of 26.9 billion U.S. dollars, after Expedia Inc., PriceLine Group and American Express (http://www.statista.com).

## **Online tourism in Romania**

The evolution of the number of Romanian companies in the field of tourism launched and registered online in the period 2009 - 2014 indicates a substantial decrease (51.15%) (www.trafic.ro) (Figure 2).



In case of travel agencies with activity in the digital environment, their evolution had a different tendency between 2010 - 2014, showing an increase between 2010-2013, and stagnation and slight decrease in 2014 (Figure 3).

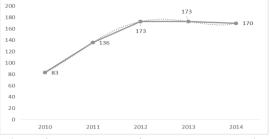


Figure 3. The number of travel agency websites 2010-2014

#### Websites - design evolution and evaluation

The evolution of webdesign was marked by a few important phases starting with the 1990s, i.e. launch of text-based webdesign, followed by table and graphics based content, then online site builders, images, flash objects; after 2000 CSS, Javascript and Semantics was introduced. The elements brought by Javascript (navigation bars and menus, web forms, user created content, etc.) are well-known. In parallel, we assisted at the development and evolution in usage of the WWW - WEB 1.0, 2.0, 3.0 technologies, as well as the HTML language (Hypertext Markup Language) 1.0, HTML 2.0, HTML 3.0, HTML 3.2, HTML 4.01, XHTML 1.0, and HTML5. In time the development of free or paid CMS (content management systems)-type resources were also launched, allowing the rapid development and massive increase in the number of websites launched online.

The evaluation of websites has several methods, namely by phase, by features (content, design), by features and effectiveness (expert evaluation, consumers' intention, user satisfaction) (Pai et al., 2014).

In website evaluation important aspects of usability are also taken into account influenced by a set of factors such as "accessibility, interactivity, personalization, privacy and security, content, learnability, design-structure, navigation, performance, interface memorability" (Muhtaseb et al., 2012).

In case of website evaluation, four specific dimensions are considered (Li and Wang, 2011): "information (activities, attraction, accommodation, travel packages, transportation, maps, photo gallery, etc.), communication (search, social media, multiple languages, feedbacks, surveys, etc.), transaction (online reservation, shopping carts, personalization, customer loyalty programs, etc.), technical (load time, search engine recognition, visual appearance, navigation, design, etc.)" and they can present a complete and very useful image.

# **Online promotion**

Tavor (2011) identified five different forms of online promotion, namely: "sponsorship, keyword linking, commercial sites, pop-up advertising and banners".

Firoiu and Croitoru (2013) estimated a continuously increasing tendency of travel agencies using interactive websites as tools for online promotion and integration of interactive games, blogs and social networks in their web presence.

Volek (2011) indicated the use of SEO (search engine optimization) as having the aim "to help Internet users to find web pages that are most relevant to them" based on search words introduced by them and as a result search engines identify the similarities in their own website-bases and list the results in SERP (Search Engine Result Pages) format. Another solution for online promotion, underlined by the same author, are social networks, also named in the specialised literature as Web 2.0 context and that can be considered as "the second generation of the World Wide Web, which is aimed at a bilateral conversation, interaction and communication, where the content is generated by the user", while the very used concept of social media can be thus considered as a "form of communication and publishing placed on social networks" integrating diverse forms such as forums, blogs, multimedia contexts, links, user profiles, etc. (Volek, 2011).

Mobility is one of the individual dimensions developed by the new mobile technologies and by the software industry which individualised a segment in continuous development dedicated to applications for mobile devices. As in the case of adoption of solutions for online deployment of tourism activities, the tourism industry was among the first which felt the necessity of adopting solutions based on mobile Internet services, their integration in the tourism service offer becoming an important objective for global tourism service developers and providers.

According to Euromonitor, we assist at an important development in the use of mobile devices in traditional online reservations of OTAs (online tourism agencies) in parallel with the formation of a market niche specialised in mobile technologies which develops MTA (mobile tourism agencies)-type web presence (http://blog.euromonitor.com).

In the development of brand promotion activities the use of mobile advergame, which can use and offer information on tourism destinations and offered services, may represent a differentiating advantage for travel agencies (Cettek, 2010).

Starting from the image of tourism, digital environment, evolution of online tourism, we considered useful to carry out a research on the web presence of travel agencies registered in Cluj-Napoca, from the perspective of their online evolution, in order to identify their history in the digital environment, the quality level of their digital presence and the type of promotion tools used by them during their online presence.

The results of this study can offer useful information for the travel agencies, as well as for providers of web solutions, e-tourism, e-marketing, and web and mobile-advertising services.

## II. STUDY REGARDING THE EVOLUTION, ACTIVITIES AND PROMOTION IN DIGITAL ENVIRONMENT OF TRAVEL AGENCIES FROM CLUJ-NAPOCA

A static image of the demand and offer on the Romanian tourism market shows the following evolution in time:

- In 2010, the number of Romanian tourists participating in activities organised by travel agencies was as follows: "Incoming activity (2503), domestic tourism (49584), Outgoing activity (56673)", each of these registering important diminution in comparison to years 2008 and 2009 (Rabontu and Vasilescu, 2012);
- In 2012, the number of Romanian travel agents and tour operators was 2800, in decrease in comparison to 2008 and 2009 (http://www.ectaa.org).

Insufficiency of statistical data for carrying out the study imposed the need for identifying other sources of viable information regarding travel agencies registered in Romania.

For creating a database regarding Romanian travel agencies we used and combined information provided by several specialised digital resources, such as:

- http://www.infotravelromania.com;
- http://www.anat.ro/despre-

anat/membri/lista-membrilor;

- http://agentii.infocons.ro;
- http://agentiideturism.infoturism.ro;
- http://www.destinatiieuropene.ro/agentii/dir ector/.

The primary database consisted of 2993 travel agencies distributed by counties as shown in Table 1, while the frequency of the number of travel agencies for defined intervals are presented in Table 2. Regarding the number of travel agencies per counties it must be highlighted that the highest frequency appears for the number of agencies below 25 and between 26-50.

# Table 1. Repartition by counties of travel agencies registered in Romania

County	Number of travel agencies	(%)		
BM	7	0,23%		
IF	8	0,27%		
CL	10	0,33%		
TR	10	0,33%		
SJ	12	0,40%		
MH	13	0,43%		
SM	13	0,43%		
GR	14	0,47%		
OT	14	0,47%		
BT	16	0,53%		
CS	16	0,53%		
VS	17	0,57%		
HR	25	0,84%		
HD	28	0,94%		
AB	29	0,97%		
TL	29	0,97%		
BN	32	1,07%		
MM	32	1,07%		
BZ	34	1,14%		
BR	37	1,24%		
AR	42	1,40%		
VR	44	1,47%		
DJ	46	1,54%		
NT	48	1,60%		

County	Number of travel agencies	(%)
VL	49	1,64%
AG	53	1,77%
BC	54	1,80%
BH	55	1,84%
SV	55	1,84%
MS	65	2,17%
GL	66	2,21%
PH	82	2,74%
SB	86	2,87%
TM	90	3,01%
IS	118	3,94%
BV	140	4,68%
CJ	163	5,45%
СТ	180	6,01%
В	1128	37,69%

Table 2.	Frequencies	of travel	agencies
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Number of travel agencies	Frequency		
< 25	13		
25-50	12		
51-75	6		
76-100	3		
101-125	1		
126-150	1		
151-175	1		
176-200	1		

# **III. RESULTS AND DISCUSSIONS**

In Cluj County there are 163 registered travel agencies, which, at first sight, situate the county in the category of counties rich in this type of touristic presence.

From the filtered database for this county only agencies registered in Cluj-Napoca and having living websites were selected; as a consequence the final sample consisted of 33 travel agencies, the rest being registered only with working points in Cluj-Napoca.

It is useful to point out the membership of travel agencies in organisations for representation and accreditation in tourism (ANAT (National Agency of Travel Agencies), IATA (International Air Transport Association), CLIA (Cruise Lines International Association), and ACE (Association of Cruise Experts)). Only 36 of the registered travel agencies are members of such organisations. From the sample selected for the study only 12 are registered as members, representing 33% of the total number of registered members.

Taking into account the year when the registration website was last updated, the evolution of travel agencies from Cluj-Napoca indicates two peak years: 2009 and 2011 (Figure 4).

The method used in the study was webobservation and critical analysis of online presence, taking into account the following aspects:

- Online history of travel agencies;
- Qualitative level of online presences;
- Online promotion tools used.

From point of view of online history we criteria related to the identification of backlinks and the date when the first snapshots appeared online for each website.

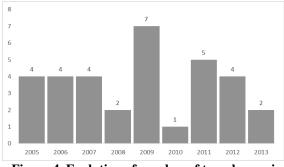


Figure 4. Evolution of number of travel agencies in Cluj-Napoca

As a consequence, for all websites belonging to companies from the sample we analysed the *date when it was launched online, periods when the online activities intensified and the seasonality of updating the website.* 

A very important aspect must be highlighted regarding the identification of a chronological difference that characterises the analysed travel agencies: the travel agencies' digital presence could be found online before they registered on specific monitoring website. This observation can indicate an early conscientiousness of travel agencies regarding the importance of generating an online presence, which allowed some of them to maintain and intense and recognised activity in the field.

In relation to the online launch of travel agencies from Cluj-Napoca we can identify an early beginning in the digital environment in 1999 (eximtur.ro), a peak period in 2007 and gaps in launching digital presence in the years 2000, 2002 and 2004 (Figure 5).

From point of view of online activities, intensification of updating touristic web presences, the period 2007-2008 marked an increased interest for enhancing the quality of digital presence, while during the rest of the years the tendency of online development of specific activities was reduced (Figure 6).

The identification of seasonality of updating their websites, performed by online agencies made possible to draw some profiles:

• *Permanent updaters* (21.11%) - agencies using high performance CMS solutions or solutions from specialised webdesign companies; this segment continuously updates its overall content (information, design, promotion); • *Seasonal updaters* (52.23%) - those who intensify their online activity only in certain periods of the year (March-April, July, September, November-December) and their activities are centred on content and promotion;

• *Promotional updaters* (8.33%) - those who focus on online promotion activities without essential modification of the web presence;

• *Non-updaters* (2.95%) - those who maintain static web presence, having unimportant updates.

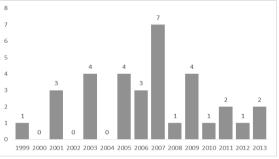


Figure 5. Online evolution of travel agencies

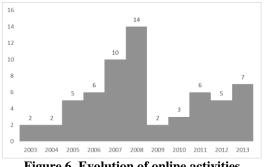


Figure 6. Evolution of online activities

The second aspect followed within the study was the identification of the quality level of the web presence and was carried out through the evaluation of dimensions regarding important elements such as: *informational, transactional, communicational and technical content* (Li and Wang, 2011).

The four dimensions were evaluated using a scale (very low, low, satisfactory, good and very good). The results of evaluation identified as the lowest dimension the transactional aspect (24%), and the best realised dimension the information (45%), while communication was situated at a very good level for 33% of the web presences; 15% of analysed websites also had low level web presence from informational and technical points of view, while transactional and communicational dimensions were low for over 18% of digital agencies (Table 3).

Table 3. Evaluation of web presences of travel agencies

	V	ery poor	F	Poor	Sa	tisfactory	(	Good	Ver	y good
Information	3	9%	5	15%	3	9%	15	45%	7	21%
Transaction	8	24%	6	18%	5	15%	9	27%	5	15%
Communication	3	9%	6	18%	7	21%	6	18%	11	33%
Technical	7	21%	5	15%	5	15%	11	33%	5	15%

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For the analysis and identification of promotion tolls adopted by travel agencies, the following categories were used in the first stage: display ads (popups, banners, multimedia ads, etc.), social networks, and promotional ads (discounts, special offers, etc.), and mobile ads; eventually the SEO (Search engine optimization) tools used by the agencies were also analysed (https://www.udemy.com).

The results obtained (Table 4), situate on the first places display ads (94%) and social networks (91%), while for mobile ads there was not a single user, even though mobile technologies have had a fulminant development during the last years, mobility of tourists is a real and well-known fact, and Romanians are users of mobile technologies.

Display ads	Multimedia ads	Social networks	Promotional ads	Mobile Ads
31	26	30	25	0
94%	79%	91%	76%	0%

From point of view of social networks, it is wellknown the level of attraction exercised by this on the users of mobile or traditional Internet connections. Reports realised by Facebrands.ro (service for monitoring the Facebook pages from Romania), the city of Cluj-Napoca appears on the second place after Bucharest as number of users (260.040, 3.86% from the total of 7.200.000 Romanian users registered in June 2014). In the top of activity categories for pages tourism and vacations has 844 occurrences and it is situated on the fifth place from fifty categories from the top searches. From the travel agencies of Cluj-Napoca on this list eximtur.ro comes first with 40754 fans, in sustained increase, followed by kartagotours.ro with 1883 fans, in slight increase, ciel-voyages.ro with 1155 fans, in slight decrease, www.betatour.ro with 462 fans in stagnation, www.calibratravel.ro with 413 fans, in stagnation.

From the analysis of SEO tools used the scores of websites were calculated based on the basic SEO tools (tests of metatags, keywords, headings status, robots, favicons, validators, page objects (HTML, CSS (Cascading Style Sheets), scripts, images, etc.), SEO friendly URL, broken links, Google analytics, page ranks, site loading speed, directory browsing, social media check, etc.). The scores resulting for the websites (only those with over 30 were taken into account) position on the first places the following digital www.ztour-travel.ro, presences: www.eximtur.ro, www.kartagotour.ro, www.ciel-voyages.ro, www.betatour.ro, www.calibratravel.ro.

This ranking allows relate the quality level of the digital presence to the chronology of launching and that of online activities. Thus, the first four ranked agencies were launched online in the period 1999 -2003, while the last two ranked agencies use digital environment only since 2006. The first ranked agencies have better ranking also for the other evaluation criteria and dimensions taken into account.

As a consequence, it is possible to link the maturity in digital environment with the quality of web presence and the online promotion activities.

#### CONCLUSIONS

Globalisation of Internet and of the digital market transformed substantially the consumer from individual and corporate perspective. On the offline market, in traditional market environment, passive individual consumer did not required abilities for identification, selection and comparison of information needed for identifying the suitable product of service. The digital market, the online business environment and then the mobile environment generated a new type of consumer who is interactive, mobile and with digital abilities for quick, precise identification of automatically filtered information, accessible from anywhere and at any time, and then finding the product/service that he/she can personalise according to his/her wishes.

The rapid evolution of the number of Internet users evidently influenced the development of an online market dominated by the digital consumer for whose attraction and retention the endeavours for differentiation in a globally competitive world become more and more increased.

Any company that has chosen to deploy its activities in the digital environment has at disposal a set of promotion and publicity tools for attracting consumers, well-known to e-marketing specialists. Interactivity, direct relationship, interfacing the company and its offer with the potential digital consumer, are offered, ultimately, by website in its traditional or mobile form. As a consequence, digital identity of the companies should generate differentiation and unicity in the consumer's perception.

The tourism industry has always been very sensitive to all new evolutionary tendencies from ICT industry succeeding to pioneer the extension of specific activities in the digital environment and then in the mobile. On the other hand, tourism was among the first digitally globalised sectors, companies from this sector having the opportunity to quickly access a demand of global dimension, but also very segmented.

Web presence has become the main presentation and commercialisation tool for tourism companies' products and services, its form, usability and promotion representing the basic set for differentiating themselves from global competition.

Taking into account these considerations, the results of the present study offer information to the two important pillars of the tourism market (offer (in this study the travel agencies) and demand of touristic products and services (traditional and mobile Internet users)), but also to the providers of web, e-tourism, emarketing web and mobile advertising solutions.

The aspects related to the numerical involution of travel agencies in the traditional environment may indicate either a saturation of the specialised market from point of view of offer, or a reduction or redirecting of the demand.

The online history of the offer segment of travel agencies from Cluj-Napoca points out as the most important aspects:

- The existence of an early beginning of the digital activity in 1999 and then in 2007, a year rich in online launches;
- The period 2007-2008 represented for the digital image of the travel agencies from Cluj-Napoca an intensification of concerns for developing digital identities;
- It outlines a segment of seasonal updaters (52.23%) of their web presence who intensify their online activity in certain periods of the year and focus only on informational and promotional content;
- When analysing together the four evaluation dimensions of the quality of web presence, over 9% of studied digital presences have very low quality level, while only 15% can be considered very good;
- Preferred online promotion tools used are those belonging to the display ads and social networks categories;
- Mobile promotion tools such as mobile ads are non-existent;

- On social networks, more exactly on Facebook, tourismandvacations category is on the ninth place in user searches, while from the agencies from Cluj-Napoca only five use the potential of social networks, but not in a sufficiently high rhythm;
- The scores of the websites resulted from the analysis of SEO tools used were low, only six obtaining an evaluation higher than 30 which represents an important lack of attention given to the activities of optimisation, having a very high importance in differentiating from the competition.

In the end, we can connect the digital maturity of travel agencies and the quality level of their web presence and their attention given to the activity of continuous updating it to the new tendencies in web design, but also the diversification of online promotion tools used.

The study carried out has some *limitations* related to the representativeness of the population, on one hand, due to the strong digital segmentation carried out, on the other hand, to the subjects belonging to a very restricted geographical area. We consider that this limitations may be overcome through the extension of the research from digital perspective as well as geolocational perspective, and the results obtained to constitute the basis for comparison with similar studies or a starting point for more complex studies that also take into consideration other specific aspects of online environment and tourism industry, and not only.

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