

Original article

Marketing orientation of tour operators on the European travel agency market

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INFORMATION

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ABSTRACT

The article addresses implementing the marketing concept to the activities of travel agency market entities using the example of tour operators. The issues of the essence of marketing orientation and the stages of its development are presented. Then, theoretical information on the functioning of the travel agency market is given, along with an indication of the processes taking place in this market. Therefore, the paper discusses the position of tour operators on the tourism market and the problem of shaping the marketing orientation by tour operators in more detail. The relationships of entities in the system of creating marketing orientation on the travel agency market and the factors that determine it are presented. The methodology of the empirical research and the results of research on the level of marketing orientation of tour operators operating in Poland and selected European countries are described synthetically. The study was conducted in the second half of 2016 based on a survey. The research covered 204 tour operators from Poland and 176 from selected European countries. The study aims to present the concept of tour operators' marketing orientation, together with the presentation of the results of research assessing the level of marketing orientation of tour operators operating in Poland and selected European countries. The work is theoretical and empirical.

KEYWORDS

marketing, marketing orientation, travel agency market, tour operator



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Introduction

The tour operator market is an integral part of the tourism market since it determines the effects of other entities on this market. Tour operator enterprises are entities operating in the conditions of high competition; hence they strongly support themselves with marketing instruments. Implementing the concept of marketing in the company's operations leads to the adoption of a marketing orientation that allows achieving a long-term competitive advantage. Given the place of tour operators in the structure of the tourism market, between producers of partial tourist services, sales agents, and end consumers, and, at the same time,

high competitiveness of this market in global conditions, it is recognized that a high level of marketing orientation characterizes tour operators. The study aims to present the concept of marketing orientation of tour operators, along with the presentation of the results of research assessing the level of marketing orientation of tour operators operating in Poland and selected European countries. The work is theoretical and empirical. The method of critical analysis of the subject literature, methods of logical operations, and statistical methods were applied.

Introduction to the marketing orientation

The marketing orientation is the effect of understanding, accepting, and internalizing the rules of the marketing concept of management in a given organization (i.e., embedding the rules in its organizational culture) [1, 2]. The term marketing orientation in literature is often equated and/or related to other terms: market orientation, customer orientation, competitive orientation.

Marketing orientation can be interpreted through the presentation of views on the development of marketing. The influence of changing conditions on the emergence and development of marketing [3] can be presented through successive stages (phases). On the one hand, these stages represent the historical evolution of marketing. On the other hand, they relate to the stages of a company's development that will be implemented by marketing in its activities. Among many views on the development of marketing, six phases can be distinguished, i.e., orientation: production, product, sales, market (marketing, traditional marketing), strategic marketing, and social (social responsibility, social marketing) [4-10].

In the literature, there is general agreement on the orientation evolution of enterprises, which, due to various conditions, including competitive ones [11, 12], are subject to constant transformations. Marketing orientation, which is an expression of producers' interest in the needs of buyers, occurs through the integration of production and trade through marketing activities [13, 14]. Market research is effectively used since it constitutes the basis for making decisions and, consequently, leading to the enterprise's marketing management. The most important task is to define the needs and requirements of the target market segments and adapt the enterprise to provide the means to meet buyers' needs in a more effective, efficient, and competitive way [15].

Travel agencies market

Travel agencies are specialized organizations and intermediaries for the sale of tourist services [11]. To put it simply, travel agencies include two types of entities on the tourist market, i.e., tour operators and tourist agents operating on their behalf [16].

Figure 1 shows a conceptual structure of the functioning of the travel agency market.

A tour operator is an enterprise that purchases, usually on a mass scale, benefits – partial tourist services, then included in the benefits package in a given tourist event [17]. The enterprise acts on its behalf, on its account, and bears the risk of not selling the offer to customers. A package consisting of partial services is sold to the customer as an own product. Thus, the tour operator is responsible for the proper service performance to the customer. The tour operator is remunerated by the price mark-up (margin) from settlements with producers of partial services.

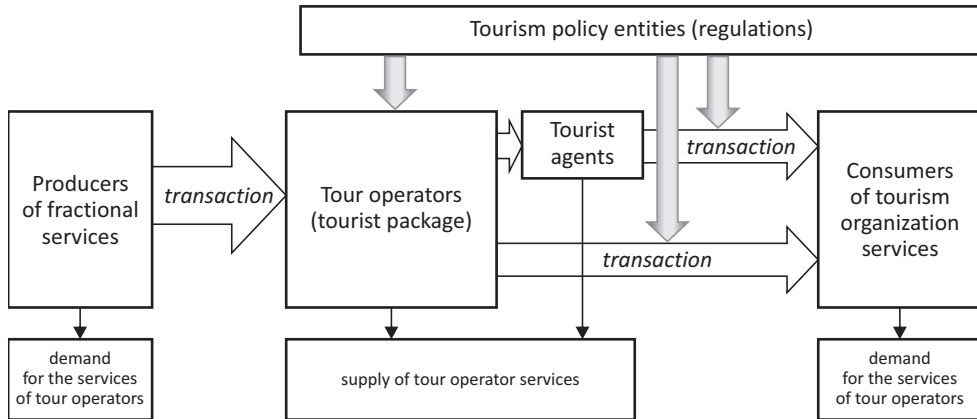


Fig. 1. Structural system of the travel agency market
Source: Own study.

Although there are travel agencies in the contemporary tourism market that combine the provision of organizational services and intermediation in their activities, some national markets, due to the high competition, are forced to specialize the enterprises so as to clearly separate between organizing travel and intermediation.

The special position of tour operators on the tourism market stems from the functions implemented for the benefit of producers of partial tourist services and consumers of tourist packages [18], as well as commercial ties of tour operators with tourist agents, and the fact of operating with package offers on distant markets (in tourist destinations). It determines the specific shape of the market activities of these entities and directly affects the marketing orientation.

Travel agency market

The marketing activity of entities on the tour operator market is dynamic, susceptible to the market situation, changes in consumption patterns, and state regulatory decisions. It means the necessity to adapt tour operators and entities cooperating with them to the changing market situation. The concept of marketing used by the tour operator is analogous to the evolution as in other economic areas [19]. A vital element of the specificity of tour operators' marketing activities is a broader defined consumer. The consumer of tour operator services is not only the final recipient (tourist) but also the suppliers of partial services, who reach the consumer with their offer through the tourist package created by the tour operator. Thus, through the organization service, the tour operator provides partial services to suppliers. The place of tour operators in distributing tourist services also determines how to create marketing orientation.

Additionally, attention should be paid to the fact that tour operators predominantly handle outbound tourism. Travel agencies offering travel packages co-create the tourist offer of many tourist destinations located outside the direct area of their operation. Thus, they are multi-organizers for external tourist destinations [20].

Adopting a tour operator's marketing orientation requires special attention in shaping the price-product quality relationship [21]. The main premise for the success of activities related

to shaping this relationship is thinking in terms of the consumer and his/her needs and capturing the utility difference between the offer classes. The effect of activities aimed at creating a marketing orientation is the achievement of a high level of consumer evaluation of the quality of the offered products, i.e., the quality as perceived [22] by the consumer/tourist. Such a measure is the consumer satisfaction level [14]. Measurement of consumer satisfaction is based on marketing research, using various techniques for collecting information, and evaluating results [18]. In the case of travel agencies' offer, the measurement should refer to the comprehensive offer in the form of a travel package. The assessment of the quality of services depends primarily on the client's expectations, and his/her satisfaction with the service consumed is a function of the fulfilled expectations. Measurement of consumer satisfaction is the starting point for improving the tour operator's system [23].

The adoption of the marketing orientation of tour operators is based on an analogous concept of marketing development phases, as in the case of other market entities. It should be noted that the enterprises' activities that improve their orientation towards consumers and the overall market understood in the first three phases, i.e., production, product, and sales are components of traditional marketing orientation. The actions created in the phases of strategic marketing and social responsibility are an attempt to develop the traditionally understood marketing (market) orientation. Hence, it is assumed that the concept of marketing orientation is used, which includes collectively elements resulting from particular phases of marketing development. The exemplification of the phases, as mentioned above, is primarily the fact that marketing is treated in a dynamic aspect, adapting to changing market conditions, taking into account the company's activity, and its environment.

The tour-operator is an entity that decides on its own marketing orientation, thus setting its own market goals and the way of influencing the market, including the consumer [24]. However, taking account of the tour operator's position in the implementation of functions on the market of tourist services, it should be noted that the marketing orientation of the tour operator is influenced by the following entities:

- a) consumers – purchasing offers in the form of tourist packages (individual, institutional),
- b) partial service providers – being a specific group of consumers whose services reach consumers through tourist packages,
- c) intermediaries for the sale of tour operator services (tourist agents) – who are a link in direct contact with the customer who purchases a tourist package,
- d) tourist destinations – where tour operators direct their consumers and tourist services are directly consumed,
- e) competitors – having their own, competitive methods of reaching consumers and a specific level of marketing orientation,
- f) market regulators – whose activities affect directly or indirectly the level of marketing orientation of tour-operators.

In addition to the subjective issues that affect the level of tour operators' marketing orientation, the structural factors of the market, mainly of a formal and organizational nature, should also be identified:

- a) the stage of development of the tour operator market in the country that is the seat of the tour operator,

- b) combining or separating the performance of the functions in the field of tourism organization and sales intermediation (travel agent) by a specific tour operator,
- c) the market scale of tour operators' activities – servicing sales markets: local, regional, national, continental, global,
- d) tour operator specialization aimed at a strictly defined market,
- e) marketing orientation of producers of partial services, providing services in tourist destinations,
- f) the dominant sales technology (traditional, internet),
- g) the intensity of regulation [19].

Marketing orientation research on the European travel agency market

Attempting a comprehensive approach to researching the marketing orientation of tour operators is a complex and multi-stage task. This part of the research was inspired by works that appeared in the 1990s, characterizing marketing orientation in a quantitative manner [25-28]. In these works, the measurement was carried out using questionnaires addressed to enterprises, in which managers assessed individual elements, grouped into appropriate problem areas, influencing the marketing orientation of their enterprises on a 7- or 5-point Likert scale (from 15 to 32 items). Marketing orientation was estimated as the average (or weighted average) respondents' answers to particular questions. A similar research method was adopted for the needs of estimating the marketing orientation level of tour operators in Poland and ten selected European countries.

In the beginning, a database of tour operators was built for the countries where the marketing orientation was measured. Then, expert and focus studies were conducted on the construction of the research tool (survey questionnaire), and finally, pilot studies were carried out in twenty Polish travel agencies. On this basis, a survey form was constructed, which consisted of 44 questions grouped into nine thematic areas:

1. Orientation of the travel agency towards the client's needs (5 detailed issues were assessed).
2. Communication in the travel agency (6).
3. A travel agency's response to changes in the environment (7).
4. Implementations of changes adequately to the market reaction (6).
5. Travel agency management (3).
6. Reward system orientation (4).
7. Employees' identification with the travel agency (6).
8. Market turbulence (4).
9. Intensity of competition (3).

Within each area, the 44 questions were rated on a 5-point Likert scale, where 1 meant "definitely not" and 5 "definitely yes". With such a constructed form, the assessment of the tour operator's marketing orientation was a construct measured jointly by all the questions. The approach adoption meant the necessity to verify the problem by assessing whether the scale measured precisely the phenomenon that was presented to the respondents for assessment. In order to state this fact, it was necessary to indicate various aspects of the scale's accuracy

and establish the degree of accuracy with which the scale reflects the actual differentiation of the studied phenomenon, i.e., determine the reliability of the scale.

The questionnaire was developed in three language versions and sent mainly in the electronic form. The questionnaire was requested to be filled in by tour operators in Poland and ten selected European countries with the highest level of economic freedom index for 2015 (Switzerland, Ireland, Estonia, Great Britain, Denmark, the Netherlands, Germany, Luxembourg, Finland, Sweden). The request for filling in the form was directed to 3,828 offices in total. The assumed response rate was 10%. The research was conducted from March to November 2016. Ultimately, 204 correctly completed forms were received from Poland and 176 from other European countries covered by the study, which constituted the 9.9% return level.

Micro-enterprises employing up to 9 employees were dominant among the surveyed tour operators. Such companies constituted slightly over 70% of the respondents, and together with small companies – almost 93% of the respondents. Companies employing over 250 employees accounted for only about 2% of the respondents. It should be noted that the structure of tour operators in terms of the size (number of employees) obtained during the study is consistent with the actual structure of tour operator market entities in European countries. The dominant group of tour operators is micro and small enterprises.

After analyzing the structure of the surveyed tour operator companies, the main part of the research was launched, i.e., an attempt to determine the level of marketing orientation of tour operator companies operating on the European market. The goal was achieved through surveying each tour operator. On the grounds, the marketing orientation level of tour operators in Poland and selected European countries was determined.

The average level of tour operators' marketing orientation in total was 166.82 points, with a maximum level of 204 points and a minimum of 100 points. Statistically speaking, the average level of tour operators' marketing orientation with a 95% probability should be between 165 and 169 points. The differentiation in terms of the marketing orientation of tour operators among the studied countries can be considered low (the coefficient of variation V_s was 11.16).

Given the average value of tour operators' marketing orientation as the criterion, the countries were ranked in Table 1, starting with those representing the highest marketing orientation level.

According to the information presented in Table 1, Switzerland was the country with the highest marketing orientation level among the surveyed tour operators (175.25 points). In comparison, the lowest level of marketing orientation among entities on the tour operator market was recorded in Luxembourg (156.2 points). The analysis of the data in Table 1 proves that the marketing orientation of Polish tour operators participating in the survey is average. Due to tour operators from Germany, Denmark, and Luxembourg that significantly lowered the average for the analyzed European countries, the average level of marketing orientation of Polish tour operators is slightly higher than for tour operators from the remaining countries analyzed together.

The research was deepened by developing the concept of a measure called the synthetic indicator of tour operators' marketing orientation (swOMT). Thematic areas with 44 questions grouped in the questionnaire form were used for its construction. Vectors, the values of which

Table 1. Countries by average level marketing orientation of tour operators (OMT)

Country	OMT (average) points
Switzerland	175.25
Great Britain	175.00
Sweden	171.14
Finland	171.00
Ireland	171.00
Netherlands	170.00
Estonia	169.83
Poland	168.20
Germany	158.28
Denmark	157.00
Luxembourg	156.20

Source: Own study based on research by tour operators in individual countries.

were in the range $<0, 1>$ for individual 380 surveyed tour operators in 11 analyzed countries in 9 surveyed thematic areas, were obtained employing data normalization.

For the tour operators' marketing orientation estimated in this way, the average level of the swOMT indicator for tour operators from all 11 analyzed countries was 0.538 in total, including 0.558 for Poland and 0.515 for other European countries. The marketing orientation of tour operators in Poland is, on average, slightly higher than for tour operators from other studied countries. However, in general, these differences seem to be insignificant, as presented in Table 2.

Comparing the results obtained for the synthetic measure (swOMT) from Table 2 with those from Table 1, it can be seen that after the variables had been normalized and re-coded, Polish tour operators were ranked third in the ranking of countries with the strongest marketing orientation. The differences between Polish tour operators and other tour operators from other countries are insignificant.

Conclusion

As is seen from the presented arguments, marketing orientation, and the factors shaping it can be assessed through measurable quantitative criteria. Thus, it is possible to estimate the level of marketing orientation and define it according to the scale.

Regardless of the tour operators' marketing orientation aimed at the final consumers of services (tourists), attention should be paid to the need to build an appropriate level of marketing orientation of tour operator companies in connection with:

- producers of partial services,
- sales agents (travel agents).

Table 2. Average levels of the Synthetic Marketing Orientation Index of Tour operators by analyzed countries

Country	swMOT (average)
Great Britain	0.667
Switzerland	0.639
Poland	0.558
Netherlands	0.556
Ireland	0.556
Finland	0.556
Estonia	0.556
Denmark	0.500
Sweden	0.492
Luxembourg	0.489
Germany	0.455

Source: Own study based on research of tour operators in individual countries.

The first group of entities, as already mentioned, is a special recipient of tour operator services. Tour operators guided by a marketing approach to their market needs should be interested in selecting partial service providers with a high customer orientation level while offering them cooperation. Tour operators' marketing approach is also required for travel agents who represent them towards consumers. The offer of tour operators striving to gain a high level of marketing orientation must be available at the points of sale of travel agents following similar marketing principles as the tour operator.

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Conflict of interests

The author declared no conflict of interests.

Author contributions

The author contributed to the interpretation of results and writing of the paper. The author read and approved the final manuscript.

Ethical statement

The research complies with all national and international ethical requirements.

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Biographical note

Aleksander Panasiuk – professor of economic sciences, specializing in economic issues, including the field of management and quality sciences related to tourism. Head of the Institute of Entrepreneurship of the Jagiellonian University. Member of the Scientific Council of the National Institute of Telecommunications. His main areas of scientific interest are economics of services, management in the service sector, tourism economics, tourism management, service marketing, socio-economic policy, regional policy, sports management, free time, and quality management. Author of about 400 scientific and didactic publications. Member of the presidium of the National Board of PTE in Warsaw, member of the Association of Tourism Experts, founding member of the Euro-Asian Tourism Studies Association.

Orientacja marketingowa touroperatorów na europejskim rynku biur podróży

STRESZCZENIE

Artykuł przedstawia zagadnienia wdrażania koncepcji marketingowej do działalności podmiotów rynku biur podróży, na przykładzie touroperatorów. Przedstawione zostały kwestie istoty orientacji marketingowej i fazy jej rozwoju. Następnie przedstawiono informacje teoretyczne dotyczące funkcjonowania rynku biur podróży wraz ze wskazaniem na procesy zachodzące na tym rynku. Określano zatem miejsce touroperatorów na rynku turystycznym oraz przedstawiono bardziej szczegółowo problematykę kształtowania orientacji marketingowej przez touroperatorów. Omówione zostały powiązania podmiotów w systemie kreowania orientacji marketingowej na rynku biur podróży oraz czynniki, które ją determinują. Zaprezentowana została syntetyczna metodyka przeprowadzonych badań empirycznych oraz wyniki badań poziomu orientacji marketingowej touroperatorów działających w Polsce i wybranych krajach europejskich. Badanie przeprowadzono w drugiej połowie 2016 roku na podstawie badań ankietowych. Badaniami objęto 204 touroperatorów z Polski i 176 z wybranych krajów europejskich. Celem opracowania jest zaprezentowanie koncepcji orientacji marketingowej touroperatorów, wraz z prezentacją wyników badań oceny poziomu orientacji marketingowej touroperatorów funkcjonujących w Polsce i wybranych krajach europejskich. Praca ma charakter teoretyczno-empiryczny.

SŁOWA KLUCZOWE marketing, orientacja marketingowa, rynek biur podróży, touroperator

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