

Article

Marketing Orientation of Entities on the Tourism Market

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Abstract: The tourism market is characterized by a high level of competition. Hence, the entities providing tourism services and creating their offers in tourist destinations take actions aimed at satisfying the consumers' (tourists') needs. These activities are realized by achieving the appropriate level of marketing orientation. In terms of behaviour, marketing orientation is based on the implementation of a marketing concept focusing on customers' needs and also on the achieved economic results. In cultural terms, marketing orientation should be understood as a type of business culture. The study is of theoretical, empirical and conceptual nature. The theoretical part presents the following issues: genesis and essence of marketing orientation and methods of its measurement, the concept and the scope of the tourism market, along with the implementation of marketing orientation issues necessary to assess the functioning of entities on this market. The concept of a system of connections of a selected type of tourist market entity with other entities in terms of shaping marketing orientation was presented. An example of the research on the level of marketing orientation on the tour operator market in selected European countries was presented in the empirical part. Tour operator market entities in Poland are characterized by a slightly higher average marketing orientation than entities from other European countries. Tour operators operating on the Polish market are also more diversified in terms of the level of marketing orientation than entities from other surveyed European countries. The main aim of the study is to adapt the theoretical and methodological issues related to the assessment of the level of marketing orientation to the entities operating on the tourism market. The specific aim is to analyze the level of marketing orientation of the entities on the tour operator market. The following research methods were used: a critical analysis of the literature on the subject, methods of logical operations; observation, quantitative methods, and diagnostic survey based on a standard questionnaire.



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Keywords: marketing; marketing orientation; tourism market; tour operator market; tour operator

1. Introduction

The implementation of the marketing concept in the company's operations leads to the adoption of marketing orientation that achieves a long-term competitive advantage through market, environment and competition research. The assessment of the level of marketing orientation may apply to all market entities creating their offers in order to meet consumers' needs. The research concepts of marketing orientation suggested by Kohli and Jaworski [1–3] can also be used in the activities of tourism market entities. A research gap regarding the lack of research concepts and results regarding the level of marketing orientation of market entities was identified. The article is of a theoretical-empirical-conceptual character. The theoretical part presents the assumptions for the assessment of marketing orientation of the tourism market entities, with particular emphasis on the tour operator market. Theoretical research was supported by general issues concerning marketing orientation, its genesis, essence and research methods. Thereafter, the theoretical foundations of functioning of the tourism market were presented. The concept of a system of links between the tour operator and other entities of the tourism market in terms of shaping marketing orientation was proposed. The empirical part presents an example of an analysis of the level of marketing orientation on the tour operator market in selected

European countries. The main goal (Gm) of the study is to adapt the theoretical and methodological issues related to the assessment of the level of marketing orientation to the entities operating on the tourism market. A specific objective (Gs) was adopted for the empirical part of the study, i.e., presentation of the method of analysis and research results of the marketing orientation of tour operator market entities, as well as a detailed research hypothesis (H), according to which the level of marketing orientation of tour operators operating on the Polish market is lower than the level of marketing orientation of tour operators in 10 selected European markets where the level of economic freedom is higher than in Poland.

The following research methods were used:

- for the theoretical part: a critical analysis of the literature on the subject in the field of: marketing, tourism economics, travel agencies, quantitative methods; methods of logical operations; observations;
- for the empirical part: a diagnostic survey based on a standard questionnaire concerning the features determining the level of marketing orientation of tour operators; statistical methods concerning the operationalization of the level of marketing orientation of tour operators on the basis of the results of the survey.

2. Literature Review

2.1. Genesis and Essence of Marketing Orientation

Certain principles of conduct in practical market conditions result from the essence of the marketing concept. The basis for undertaking marketing activities is targeting the actions at the consumer, i.e., adopting a market orientation. Hence, the following marketing principles ought to be pointed out [4]:

- deliberate choice and shaping of the market;
- market research that enables information to be obtained on the needs and desires, motives that drive market behaviour of potential buyers, and enable information to be obtained on competitors and their activities aimed at consumers;
- integrated influence on the market through a bundle of instruments called marketing-mix;
- planning of market activities, i.e., the need to collect and analyze relevant information, as well as to design the intended activities and assess their expected effects;
- control of the effectiveness of marketing activities by checking whether the market effect intended in the plan has been achieved in practical activities.

According to the concept by Peter Drucker [5], the primary marketing goal is to know and understand client's needs so well that goods and services sell themselves as a result of optimal adaptation to these needs. Hence, it is necessary to emphasize the need to take customers and their needs as a starting point for marketing activities. However, a complementary goal of marketing activities is profit, as the main goal of any commercial activity.

The idea of the marketing concept is related to marketing orientation, which is the effect of understanding, accepting and internalizing of the rules of the marketing concept of management in a given organization, i.e., embedding the rules in its organizational culture. Marketing orientation is the real implementation of the marketing concept in the company's operations that achieves a long-term competitive advantage through market, environment and competition analysis, as well as through programmed actions using the obtained information [6]. In literature, the term marketing orientation is often equated and/or related to other terms: market orientation, customer orientation, competitive orientation [7,8].

Interpretation of marketing orientation can be carried out through the presentation of views and opinions on marketing development. This makes it possible to identify the way the given enterprise influences the market using appropriate instruments which at a certain stage of development decide about the marketing process of enterprise management [9]. The impact of changing conditions on the creation and shaping of marketing [10] can be

presented through the successive stages (phases). Using many views and opinions on marketing development, six phases can be distinguished, i.e., [11,12]:

- production orientation;
- product orientation;
- sales (distribution) orientation;
- market orientation (marketing, traditional marketing);
- strategic marketing orientation; and
- social orientation (social responsibility, social marketing).

Production orientation of the enterprise was shaped in the period preceding the development of contemporary marketing, in which the market was characterized by the characteristics of a seller (producer), while the enterprise's activity was focused on production processes. Product orientation [13] should be understood as the final sub-stage of production orientation. It focuses on a specific product and its features, which is to determine the level of satisfaction of consumer's needs. The transition to market orientation is distribution orientation consisting in increasing sales aggressiveness, influencing the trademark, intensifying advertisement and improving the pricing policy [14]. Marketing orientation can be interpreted in two perspectives: behavioural and cultural [15]. An example of a behavioural approach is the definition by Kohli and Jaworski [1], according to whom it is the implementation of a philosophy of a marketing concept that focuses on the needs of customers and profits of the organization. The view includes generating knowledge on the current and future needs of consumers, disseminating this knowledge in the enterprise and reacting across the entire organization [16]. Narver and Slater [17] interpret marketing orientation from a cultural perspective, describing it as a type of business culture. The authors indicate that culture is an indispensable element of creation of the continuous highest value for customers and gaining a sustainable competitive advantage [18]. The most important marketing tasks include defining the target needs and requirements of the market and adaptation of the enterprise to make it possible to provide more effective, efficient and competitive means to meet purchasers' needs through various activities in the field of shaping of the level and structure of demand so that the enterprise is able to achieve its goals [19]. Strategic marketing orientation is considered an advanced phase of marketing orientation. Its separation is related to the fact that enterprises perceive the need to develop long-term strategies of adapting to market changes [20], both in the competitive environment and, above all, on consumer's needs. Initially, new offers meet the needs of market niches or discover new mass markets [21]. Thanks to the intensification of social and consumer movements, as well as those related to environmental protection, the concept of social marketing, or the so-called social orientation, also known as social responsibility orientation, was created [22]. This orientation is a variation of the traditional and strategic marketing orientation and focuses on the aspects that not only refer to meeting consumers' needs, but also those aimed at customer care and carrying out production activities in accordance with the principles of sustainable development and protection of the natural environment [23,24]. Moreover, Kotler and Keller [25] distinguish a holistic orientation, which is based on the development, design and implementation of marketing programmes, processes and activities in a way that takes a broad approach and interdependencies into account. The four main components of holistic marketing are [26]:

- relationship marketing which aims to build mutually satisfying, long-term relationships with key partners [27];
- integrated marketing which consists in synergistic design of activities and integration of marketing programmes [28];
- internal marketing which refers to the admission, training and motivation of employees whose task is good customer service, and perceiving employees as an internal customer of a business [29,30]; and
- performance marketing which consists of understanding the essence of financial and non-financial benefits that are brought to the business and society by marketing activities [31].

The presentation of the concept of holistic marketing aims to indicate the integration of individual phases of marketing development (marketing orientations). It should be emphasized that the evolution of the marketing concept takes into account many elements resulting from historical conditions (the genesis of marketing development), as well as contemporary concepts, generated especially within the theory of service marketing.

2.2. Marketing Orientation Measurement Methods

Due to the complexity of market entities' behaviour, measurement of marketing orientation is not an easy task. The number and scope of marketing activities may be smaller or larger; it may concern many different aspects, as well as depend on many factors. Obtaining this information requires not only the use of quantitative methods, but also supplementing them with the use of qualitative methods [32,33]. In the aspect of marketing orientation understood as a philosophy of thinking, first in terms of the needs of current and potential consumers, and only then in terms of the manufactured and sold product, identification of the regularities governing consumers' needs, as well as those related to the functioning of the enterprise, is crucial.

A questionnaire is the most frequently used data collection tool when studying marketing orientation. On the other hand, the research method is usually one of the partial research methods, i.e., the survey method [34]. For a quantitative approach, a comprehensive approach to the research in the field of marketing orientation requires the development of scales [35] that consist of questions that assess various aspects of company's consumer-oriented activities. These questions not only make it possible to determine the fact of the occurrence or absence of a certain phenomenon, but also to assess its impact on marketing orientation. Such a solution requires the construction of a proper scale which during the study will enable the respondents to make an adequate assessment that measures exactly the phenomenon that is to be measured. In order to confirm this fact, it is necessary to indicate various aspects of scale accuracy, to determine the degree of accuracy with which the scale reflects the natural differentiation of the examined phenomenon, that is, to determine the reliability of the scale. The issue of quantitative research in the tourism industry has been developed in works on the functioning of tourist destinations [36,37].

Qualitative research serves as a diagnostic tool, being a source of inspiration and a guide for further activities of the company [38]. They can also be used to assess marketing orientation [39]. This is a very diverse group of methods. For instance, the method of marketing analysis can be used to measure marketing orientation [40]. Marketing analysis is based on the analysis of individual elements of marketing-mix in relation to one another. It allows identification of relationships between intensity and structure of marketing activities and economic results, including marketing ones. The case study can also serve as another example of qualitative research methods that can be used to research marketing orientation. However, it is not a standalone measurement method. It combines several different methods, including multi-stage observation with in-depth interviews and analysis of secondary sources [41]. The issues of qualitative research conducted as part of tourism marketing include research conducted by tourism enterprises [42] and in tourist destinations [43].

When studying marketing orientation, the so-called mixed methods should be distinguished [44,45]. This concept is a combination of quantitative and qualitative research methods that are referred to by some authors as the methodological third way [46]. Qualitative methods are then the basis for generating ideas for quantitative research [47,48], definition of the research areas (which issues should be mentioned in the survey), creating questions for the questionnaire (which terms to use so that they were understood for the respondent) and formulating hypotheses. Qualitative research can also complement quantitative research in order to clarify, deepen and better understand the obtained results.

2.3. Concept and Scope of the Tourism Market

The tourism market should be interpreted two-fold: allowing market participants to be identified and interpretation of the components of the market. The participants of this market are:

- traditionally understood tourist service providers (entrepreneurs operating on a commercial basis);
- organizations (public ones, including local governments, commercial, non-profit units) providing conditions for creating and sharing a tourist offer in the tourist area;
- tourist consumers; and
- tourism policy units.

On the other hand, however, the components of the tourism market structure are tourism demand and tourism supply, along with the price, terms of sales and the level of offer quality [49].

Therefore, the subject of the offer on the tourism market are not only narrowly understood products, that is goods and services offered by tourism enterprises, but also benefits (e.g., sharing tourist values or tourist attractions) and general terms and conditions for using the tourist function of the area (of an infrastructural or informational nature) shared between tourist destinations [50] by local government units and tourist organizations [51]. It is expressed by the concept of an area tourism product which is spatially determined [52,53].

The term 'tourism market' should be understood as the sum of processes in which the tourist product providers and buyers (mainly tourists) determine products of the tourist offer exchange and prices, along with the purchase and sale conditions, leading to a transaction [49,54]. At the same time, the offer of the tourism market is related to meeting consumers' needs when travelling and staying outside of their everyday environment, and is a derivative of the motives of tourism [55].

Considering the magnitude of elements constituting the basis of market exchange and the fact that every single trip and stay is associated with numerous transactions, the market processes related to the sale of a tourist product are multiplied, and the exchange processes are carried out by a great number of entities of the supply side of the market, both commercial ones and those operating on a non-profit basis [56]. The transactions concern individual benefits, as well as advanced packages of different sizes [57].

Therefore, the tourism market is understood as all of the processes that take place between tourism consumers who purchase tourism services and use the area tourism product, and the offerers, i.e., enterprises that provide tourism services, and tourist destinations [58]. The tourism market has an extensive structure [59] that can be analyzed according to various criteria. The most typical criterion is of the subject of activity, within which it is necessary to distinguish, inter alia, the following sub-markets: the hotel services market, catering market, travel agency services market, tourist transport market, and the tourist attractions market (including events).

2.4. Marketing Orientation of Entities on the Tourism Market

The issue of marketing orientation of entities on the tourism market is based on the presented concept of marketing development phases. Activities of tour operators who improve their orientation towards consumers and tourism market, which is understood as a whole, are in the first three phases, i.e., production, product and sale, and components of traditional marketing orientation. The activities created in the phases of strategic marketing and social responsibility are an attempt to develop the traditionally understood marketing (market) orientation. Exemplification of the suggested phases is primarily an indication of the fact that marketing is treated in a dynamic aspect, adapting to changing market conditions, taking the company's activity and its environment (consumers, suppliers, intermediaries, competition, market regulators) [58] into account.

The entities of the supply side of the tourism market independently decide on their marketing orientation. Therefore, they set their own market goals and the way they affect the market, including the consumer. Marketing orientation of tourism enterprises and tourist destinations is influenced by:

- (a) consumers purchasing tourist offers;
- (b) providers of individual partial services co-creating the tourist offer;
- (c) competitors who have their own competitive methods of reaching consumers and who represent a specific level of marketing orientation;
- (d) entities of market regulation whose activities directly or indirectly affect the level of marketing orientation; and
- (e) entities of the tourism business environment, including an economic self-government.

The consciously adopted method of shaping of the market orientation by tourism market entities or the use of specific marketing tools only in order to implement marketing activities by tourism enterprises and destinations is a possibility to influence the competitive market and tourism consumers. A higher level of orientation determines the possibility of achieving specific effects related to, for instance, an increase in sales of services, an increase in the volume of tourist traffic, a market share, and improvement of the tourist image.

The research part includes a case study based on an analysis of the level of marketing orientation of entities of the tour operator market. The conducted literature studies indicate that, so far, no research on marketing orientation has been conducted in this tourist sub-market. The research has so far focused on the marketing orientation of the hotel market [60–62] and restaurant market [63]. The example of this sub-market is the most characteristic illustration of the study of marketing orientation in the tourism market. It is evidenced by the following indications:

- (a) it is a tourism sub-market that is subject to strong regulatory pressure, especially in the European Union countries, and thereby the market is subject to the processes of strong competition;
- (b) the recipients of the tour operators' offer are primarily final consumers of tourist packages. However, the clients of tour operators in a particular way are the producers of partial tourism services whose services contribute to the ready tourist package and ultimately reach consumers;
- (c) tour operators perform the function of creating of tourist demand in relation to tourist destinations [64];
- (d) services of tour operators are available through direct channels (including online ones) and also through a network of travel agents (Online Travel Agencies); and
- (e) tour operators participate in institutional cooperation of entities of the market at various levels (from international to local), shaping the network of connections and industry lobbying.

Figure 1 presents the subjective links in the creation of marketing orientation from the point of view of a single tour operator.

As shown in Figure 1, the activities of tour operators that have a decisive impact on the level of marketing orientation are aimed at end consumers of the tourist package. The tour operator's level of marketing orientation also results from direct relations between the producers of partial services and tourist agents. Marketing activities are determined by the remaining entities of the tourism market, which were listed above and presented in the figure.

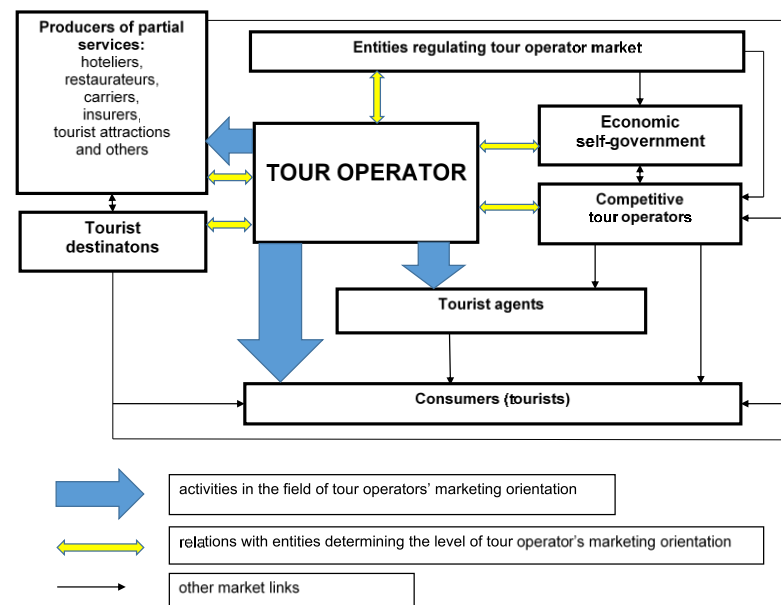


Figure 1. Relationships of entities in the system of tour operator's marketing orientation. Source: author's own elaboration.

3. The Concept of Measurement of Marketing Orientation on the Tour Operator Market

3.1. Research Methodology

An attempt of a complex approach to the research of marketing orientation of tour operators is a complex and multi-stage task. This part of the study was inspired by the works by Kohli, Jaworski and Kumar [1–3] and Narver and Slater [17] published in the 1990s that characterize marketing orientation in a quantitative manner. In these works, the measurement was made through questionnaires addressed to enterprises where managers assessed individual elements that influenced marketing orientation in their enterprises using the 7-point or 5-point Likert scale (from 15 to 32 items), grouped into appropriate areas. Marketing orientation was estimated as the average (or weighted average) of respondents' answers to particular questions. For the purpose of assessment of the level of marketing orientation of tour operators in Poland and in 10 European countries, the research was carried out in the following stages: (1) preparation of the research consisting in building a database of tour operators and developing the initial version of the questionnaire; (2) expert method consisting in assessing the compliance and correctness of statements in the questionnaire addressed to tour operators; (3) a pilot study carried out in 20: tour operators; (4) proper research; (5) development of the research results; and (6) evaluation of the results (diagnosis), and recommendations.

The questionnaire consisted of 44 questions grouped into nine thematic areas:

Area I. Orientation of the travel agency on the client's needs (Due to the fact that some of the questions are of a destimulant nature, these statements were marked: (*), and for the purposes of the analysis, it was necessary to recode the results achieved in the study.)

1. Individual travel agents communicate directly with their customers to gain knowledge that will enable better service provision in the future.
2. The travel agency conducts market research.
3. Noticing changes in the travel agency's environment is slow (*).
4. Clients of the travel agency, thanks to having a dialogue, participate in increasing the value of the provided services.
5. Information on clients' needs is obtained from contractors.

Area II. Communication in the travel agency:

6. At least once every three months, meetings are held at the travel agency to discuss market trends and the company's strategy.
7. Marketing department staff talks with other employees about their customers' future needs.
8. When something important happens on the market, all travel agency employees get to know about it shortly after.
9. As soon as one department of the travel agency gets information on the competition, the information reaches the other departments with a delay (*).
10. Information on clients is regularly disseminated throughout the enterprise.
11. Modern technologies play an increasingly important role in the communication process between travel agency employees.

Area III. Travel agency's reaction to changes in the environment:

12. Market segmentation affects the process of improving the travel agency's offer.
13. Activities of employees in various positions are coordinated with one another.
14. Changes in customer needs (*) are ignored in the company.
15. The range of products depends more often on the internal policy of the company than on the real needs of customers (*).
16. Activities in terms of compliance of product development with the customers' expectations are periodically assessed.
17. Modern marketing communication is not a problematic issue.
18. When creating an offer, a travel agency introduces some innovative solutions.

Area IV. Implementations (implementation of changes adequately to the market reaction):

19. The company reacts quickly when competitors' pricing policies change.
20. Customer complaints at the travel agency are ignored (*).
21. Even though a marketing action plan was developed, it would probably not be possible to be implemented quickly enough in line with current trends (*).
22. In case any information from customers on the lack of satisfaction with the services is received, appropriate actions are taken immediately.
23. When changes to the offer are expected, they are implemented.
24. In case the main competitor launches an intense campaign targeting the company's customers, the reaction should be immediate.

Area V. Travel agency management:

25. Managers constantly inform all employees on the need to be prepared to meet customer needs.
26. According to management, customer service is the most important part of the company's operations.
27. Management encourages their employees to develop innovative marketing strategies, to be aware that some of these may be unsuccessful.

Area VI. Reward system orientation:

28. Assessment of customer satisfaction affects the remuneration of agency's employees.
29. Salespeople's performance is measured by the strength of the relationship they have built with their customers.
30. Formal rewards are offered to those who constantly demonstrate good marketing sense.
31. Remuneration of the employees of the sales department depends on the sales results.

Area VII. Employees' identification with the travel agency:

32. Employees feel that their future lies in the travel agency.
33. The ties between the travel agency and their staff are weak (*).
34. Employees are generally proud of being employed in a travel agency.
35. Employees identify themselves with the travel agency they work for.

36. Communication between employees is free of any trouble, regardless of the posts they hold.
37. Employees are keen on each other's needs and problems.

Area VIII. Market turbulence:

38. Customer preferences change rapidly in the tour operator industry.
39. The travel agency's offer is popular with many new clients.
40. Aggressive promotional activities are used in the tour operator industry.
41. A travel agency meets the needs of the same customers as in the past.

Area IX. Competition intensity:

42. Competition positively affects the development of the enterprise.
43. If one of the competitors presents a new offer, others may introduce it easily.
44. Price competition is characteristic of the tour operator industry.

Within each area, the questions were scaled on a 5-point Likert scale where 1 means "definitely no" and 5 means "definitely yes". Assessment of the level of tour operator's marketing orientation is a construct measured by a total of all 44 questions. In order to assess compliance and reliability of the applied scale, the method of estimation of internal compliance, which is a method of reliability estimation, was used, i.e., the formula by L.J. Cronbach:

$$\alpha = \frac{k}{k-1} \left(1 - \frac{\sum_{i=1}^k s_i^2}{s_c^2} \right)$$

where:

- k —number of test items,
- s_c^2 —variance of the overall test scores,
- $\sum_{i=1}^k s_i^2$ —sum of the variations of the test items.

According to the Nunnally's [35] criterion, correctly constructed scales are characterized by a Cronbach's alpha coefficient higher than 0.7 [65]. As a result of the analysis, Cronbach's alpha coefficient, calculated for 44 variables, was 0.878, which makes it possible to treat the study unambiguously as appropriate to describe marketing orientation of tour operators.

The questionnaire was constructed in three language versions and was disseminated mainly in an electronic form. For the purposes of the study, a request to fill in the questionnaire was sent to a total of 3828 tour operators in Poland and 10 selected European countries. Both in Poland and in other countries, there were some difficulties in obtaining the assumed number of responses (400). In the end, 204 correctly completed forms from Poland and 176 from other European countries were received. The choice of countries was deliberate. The European countries with a high level of economic freedom were qualified for the study. Micro-enterprises dominated among the surveyed tour operators—70%; together with small enterprises—93%. Entities employing over 250 people constituted only 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 the European countries. The dominant group of tour operators are micro and small enterprises.

3.2. Results of the Research on the Level of Marketing Orientation of Tour Operators

The aim of the study is to determine the level of marketing orientation of tour operator companies operating in Poland and selected European countries. The inquiry with a request to fill in the form was sent to a total of 3828 tour operators. The goal was achieved on the basis of the research carried out by each of the total of 380 surveyed tour operators. Table 1 presents exemplary detailed results for the answers to the questions in the first thematic area by 204 Polish tour operators.

Table 1. Orientation of travel agencies to customer's needs in Poland (%).

Statements	Definitely Not	Rather Not	Neither Yes, Nor Not	Rather Yes	Definitely Yes
Individuals from the travel agency directly contact customers to gain knowledge that will enable better service provision in the future	9.80	3.92	5.88	47.06	33.33
Various market research is carried out in the travel agency	9.80	23.53	25.49	33.33	7.84
Noticing changes in the travel agency's environment is slow (*)	15.69	50.98	21.57	9.80	1.96
The clients of our travel agency, thanks to having dialogues, participate in increasing the value of the provided services	1.96	5.88	3.92	37.25	50.98
We obtain information on customers' needs from our contractors	3.92	13.73	5.88	49.02	27.45

Source: study based on primary research.

On the grounds of the concept by Jaworski, Kohli [2,3], the level of tour operators' marketing orientation as an unweighted sum based on the indications for all 44 variables was determined. Thanks to the calculated level of marketing orientation, it can be assessed that the higher the sum, the higher the level of marketing orientation of tour operators. Table 2 presents, in total, the selected measures of the structure for marketing orientation of all tour operators from the analyzed countries.

Table 2. Selected measures of the structure for marketing orientation of tour operators (OMT).

Mean	Trust –95%	Trust 95%	Median	Minimum	Maximum	Standard Deviation	Coefficient of Variation
166.821	164.943	168.699	168.0	100.0	204.0	18.625	11.1619

Source: study based on primary research.

The average level of marketing orientation of tour operators in total was 166.82 points, with the maximum level of 204 points and a minimum of 100 points. According to the data presented in Table 2, the average level of marketing orientation of tour operators with 95% probability should be between 165 and 169 points. The differentiation in terms of marketing orientation of tour operators among the surveyed countries can be considered low (coefficient of variation $V_s = 11.16$) (the coefficient of variation measuring the variation takes values in the range of 0–100%, where the value of 0 means total lack of differentiation). The average obtained in this way can be used as a critical value for the division of companies into those with a lower and higher level of marketing orientation. In accordance with the research assumptions, Table 3 presents a list of results for which the grouping variable was the country of origin of the surveyed tour operator.

Table 3. Selected measures of the structure for the marketing orientation of tour operators, presented separately for Poland and other examined European countries.

	Mean	Trust –95%	Trust 95%	Median	Minimum	Maximum	Standard Deviation	Coefficient of Variation
Poland	168.1961	165.3981	170.9941	170.0	100.0	204.0	20.26817	12.05032
other European countries	165.2273	162.7845	167.6700	168.0	121.0	201.0	16.42001	9.937831

Source: study based on primary research.

Table 3 shows that the entities of the tour operator market in Poland are characterized by a slightly higher average marketing orientation than the entities from other European countries. Tour operators operating on the Polish market are also more diversified in terms of the level of marketing orientation than the entities from other examined European countries.

Taking the average value of marketing orientation of tour operators as the criterion, Table 4 lists the countries starting with those representing the highest level of marketing orientation of tour operators.

Table 4. Countries by average level of marketing orientation of tour operators (OMT).

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

Source: study based on primary research.

According to the information presented in Table 4, Switzerland was the country with the highest level of marketing orientation among the surveyed tour operators (175.25 points), while the lowest level of marketing orientation among the entities of the tour operator market was recorded in Luxembourg (156.2 points). The analysis of the data presented in Table 4 proves that the marketing orientation of Polish tour operators participating in the survey is average. Nevertheless, as the tour operators of Germany, Denmark and Luxembourg significantly lowered the average for the analyzed European countries, the average level of marketing orientation of Polish tour operators is higher than the one for tour operators of other analyzed countries in total.

In order to present the level of marketing orientation of tour operators both in Poland and other selected European countries, positional measures of location, i.e., quartiles, were used (Table 5).

Table 5. The level of marketing orientation of tour operators in relation to average positional values.

Class	Poland %
low level of OMT (Q1)	23.53
moderate level of OMT (Q2)	45.10
high level of OMT (Q3)	31.37
Other European Countries %	
low level of OMT (Q1)	25.00
moderate level of OMT (Q2)	59.09
high level of OMT (Q3)	15.91

Source: study based on primary research.

With the figures presented in this way, the formulated conclusion confirms that Polish tour operators, compared to tour operators of other analyzed countries, represent a higher level of marketing orientation. The percentage of tour operators with a high level of marketing orientation in Poland is twice as high as in the other analyzed countries.

The entire study was conducted to compare the level of marketing orientation of tour operators of the Polish market to the level of tour operators of the remaining 10 European countries. In order to test whether it is possible to distinguish between the surveyed countries those with stronger and weaker marketing orientation of tour operators, the t-Student test was used, i.e., the test of significance of differences between the means. The test enables verification of the hypothesis of equality of average values in two populations. The following hypotheses were made:

$H_0: \mu_1 = \mu_2$ —the means of the populations do not differ significantly,

$H_1: \mu_1 \neq \mu_2$ —the means of the populations differ significantly.

The result of the research proved that the average level of marketing orientation in Poland was 0.557734, while in other countries it was 0.515152 ($t = 1.668345$, $df = 378$, $p = 0.096075$). At the adopted significance level of 0.05, it was found that from a statistical point of view, the differences in the level of marketing orientation of tour operators in Poland and other countries of the research area are not statistically significant.

4. Discussion and Conclusions

There has been no similar research on marketing orientation carried out so far. Therefore, it is not possible to refer to any comparative studies. The aim of the research was to answer the question whether there are any significant differences in marketing orientation of tour operators in the European market. Marketing orientation is a philosophy of focusing on customers and their needs. Therefore, the aim of any tour operator should be to offer tourist packages that meet customers' needs rather than look for customers to sell ready-made products [18]. The key to achieve the organization's goals is to be more effective than any competitor in creating, providing and communicating higher values to the target markets [25,66].

The theoretical part of the thesis presents theoretical problematic issues related to marketing orientation, as well as basic issues related to the tourism market. Then, the issues related to the adaptation of marketing orientation to the assessment of its level in the entities of the supply side of the tourism market were presented. An example that illustrates the problem is the research on marketing orientation in the tourism market based on tour operators of the European market. The determinants of the marketing orientation of travel agencies were identified. They were divided into nine thematic areas, and then investigated. Comparing the results of the research with the studies of the literature, it should be stated that tour operators adopt customer-oriented marketing orientation.

Given the content of the article, it is concluded that the main goal of the study (G_m), consisting of the adaptation of theoretical and methodological issues regarding the assessment of the level of marketing orientation to the entities operating on the tourism market, was achieved. The specific objective (G_s) concerning the empirical part, relating to the method of analysis and research results of marketing orientation of the entities of the tour operator market, was also achieved. On the other hand, the detailed hypothesis (H), on the basis of which a comparative study of the level of marketing orientation of tour operators in Poland and in 10 European countries with a higher level of economic freedom was conducted, was verified negatively. It should also be kept in mind that the level of marketing orientation of tour operators in individual countries is a derivative of many other exogenous factors that are not conditioned by regulations, such as socio-cultural, economic, spatial and technological conditions. The level of marketing orientation of tour operators is mostly determined by endogenous aspects resulting from the management system of individual entities, based mainly on the marketing concept. Moreover, a higher level of market regulations may force tour operators to intensify their marketing activities to become adapted to the market rules, and at the same time to stand out from the competition. Full liberalization of the market would probably facilitate the comparability of the research results of marketing orientation.

The method developed by Kohli and Jaworski [1–3] was implemented on the basis of the conducted research on assessment of the level of marketing orientation of tour operators.

5. Inference Limitations

The presented analysis of theoretical issues concerning marketing orientation on the tourism market was developed on the basis of the available literature sources, as well as on the author's knowledge and concept. The presented example of the research on the level of marketing orientation of tour operators operating on the European market concerns the analyzed research sample and is an empirical attempt of illustration of the issue. The presented analyzes may constitute a basis for comparative research in relation to tour operators and other entities on the tourist market.

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Data Availability Statement: The data presented in this study are available on request from the corresponding author.

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