

THE CONCEPT OF ANALYSING THE MARKETING ORIENTATION OF TOUR OPERATORS ON THE EUROPEAN MARKET

Aleksander Panasiuk, Genka Rafailova***

Abstract

Background. The implementation of the marketing concept to company activities lead to adopting a marketing orientation which enables achieving a long-term competitive advantage. Taking into consideration the position of tour operators in the tourism market structure, that is between partial tourism service providers and sales agents and final consumers, and simultaneously this highly competitive market in the global conditions, it is deemed that tour operators are characterised by a high level of marketing orientation.

Research aims. The objective of this study is to present the concept of the marketing orientation of tour operators as well as indicate elements determining the level of market orientation which stem from relationships of a tour operator with other participants of this market. In addition, the results of research on the level of marketing orientation of tour operators operating in Poland and in selected European Union countries were presented, bearing in mind the level of economic freedom in the analysed countries.

Methodology. Such research methods were applied as a critical analysis of literature on the subject, logical operations, and statistical methods.

Key findings. The conducted research shows that marketing orientation and factors determining it can be subject to assessment by means of measurable quantitative criteria. Therefore, it is possible to estimate the level of marketing orientation and establish it according to a scale. Regardless of the marketing orientation of tour operators addressed to final consumers of services (tourists), it should be noted that there is a necessity to build a proper level of marketing orientation of tour operators with regard to partial service providers and travel agencies.

Keywords: marketing, marketing orientation, tour operator market, tour operator.

* Jagiellonian University in Krakow, Faculty of Management and Social Communication, Institute of Entrepreneurship, Entrepreneurship in Tourism Department. E-mail: aleksander.panasiuk@uj.edu.pl

** University of Economics in Varna, College of Tourism. E-mail: genka@rafailova.org

INTRODUCTION

An important element of the tourism market determining the effects of the remaining entities of this market is the tour operator market. Tour operators are entities functioning under highly competitive conditions and therefore strongly support their own activities with marketing instruments. The implementation of the marketing concept to company activities lead to adopting marketing orientation which enables achieving a long-term competitive advantage. Taking into consideration the position of tour operators in the tourism market structure, that is between partial tourism service providers and sales agents and final consumers, and simultaneously this highly competitive market in the global conditions, it is deemed that tour operators are characterised by a high level of marketing orientation. The objective of this study is to present the concept of the marketing orientation of tour operators as well as indicate elements determining the level of market orientation which stem from relationships of a tour operator with other participants of this market. Moreover, the article also includes the research findings of the assessment of the level of the market orientation on tour operators operating in Poland and in European countries with a high level of economic freedom. This is a theoretical and empirical study. Such research methods were applied as a critical analysis of literature on the subject, logical operations, and statistical methods.

THE ESSENCE AND STAGES OF MARKETING ORIENTATION DEVELOPMENT

Marketing orientation is the effect of understanding, acceptance, and internalisation of the rules of marketing management in a given organisation (i.e. adopting the rules to its organisational structure) (Kohli & Jaworski, 1990, pp. 1–18). In literature, the term marketing orientation is often associated and/or connected with other terms: market orientation, customer orientation, and competitive orientation (Sutherland & Canwell, 2008, pp. 177–178; Mazurek-Łopacińska, 2002, pp. 17–182).

The interpretation of marketing orientation can be conducted by presenting views on marketing development. The impact of

changing conditions on the emergence and development of marketing (Kaczmarczyk & Pałgan, 2005, p. 103) can be presented with consecutive stages (phases). On the one hand, these stages show the historical evolution of marketing, but on the other hand they refer to the stages of company development which marketing adopts for the purposes of its activities. Taking account of many views on the development of marketing, six stages can be distinguished, i.e. (Kotler & Keller, 2012, pp. 19–20; Mazur & Sznajder, 1998, p. 14; Garbarski, Rutkowski & Wrzosek, 1998, p. 31; Bielski, 2002, p. 11; Andruszkiewicz, 2001, pp. 23–27; Daszkowska, 1994, p. 18; Panasiuk, 2003, pp. 75–76):

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

In literature, there is a general agreement on the evolution of companies' orientation which due to various conditions, including competition (Lado, Maydeu-Olivares & Rivera, 1998, pp. 23–39), are subject to constant transformations. Marketing orientation, which reflects producers' interest in consumer needs, is conducted through the integration of production and trade in marketing activities (Rosa, 2002, p. 59). Market research is also effectively used and constitutes the basis for making decisions and introducing marketing management in a company. The most significant task is to determine the needs and demands of the target market as well as to adopt a company so that means of fulfilling consumer needs are provided in a more effective, efficient, and competitive manner (Kotler, 1994, p. 11).

TOUR OPERATOR AS THE TOURISM MARKET ENTITY

Travel agencies are specialised companies organising and being intermediaries in the sales of tourism services (Michalska-Dudek & Przeorek-Smyka, 2010, p. 35). To simplify, travel agencies include two types of the tourism market entities, i.e. tour operators and travel intermediaries working for them.

A tour operator is a company which purchases, as a rule on a massive scale, partial tourism services, which are then included in packages

for a given tourism event (Yale, 2001, p. 5). The company works on its own behalf, on its own account and assumes the risk resulting from possible failure to sell the offer to its clients. The package comprising partial services is sold to clients as its own product. Therefore, the tour operator is liable towards the client for the proper provision of services. A tour operator earns through a mark-up (margin) resulting from the settlements with the providers of partial services.

Although on the present tourism market there are travel agencies that combine in their activities the provision of organisation and intermediary services, some of the national markets due to strong competition are forced to make these companies specialise, what results in a visible division into travel organisers and intermediaries.

A special position of tour operators on the tourism market results from the functions performed for the producers of partial tourism services and consumers of tourism packages (Konieczna-Domańska, 2008, pp. 59–64) as well as business relationships of tour operators with travel agencies and the fact that they deal with package offers on remote markets (tourist destinations). It determines certain market activities of these entities and directly affects marketing orientation.

MARKETING ORIENTATION OF TOUR OPERATORS

Marketing activities of the entities from the tour operator market are dynamic, dependent on the market conditions, changes in consumption patterns and state regulatory decisions. It means that tour operators and entities cooperating with them need to adapt to the changeable market situation. The marketing concept used by a tour operator is subject to evolution similar as in other economic areas (Panasiuk, 2013, p. 82). An essential element of the specific marketing activities of tour operators is a consumer understood in a broad sense. The consumer of tour operator services is not only a final user (tourist), but also the providers of partial services who reach consumers with their offers through to a travel package created by a tour operator. Therefore, a tour operator provides services to the providers of partial services in the form of travel package organisation. The position of tour operators in the process of tourism service distribution also affects their method of developing marketing orientation.

Furthermore, it should be also noted that tour operators predominantly deal with outbound tourism movement. Travel agencies offering travel packages participate in creating the tourism offer of many tourist destinations located outside a direct region of these entities' activities. Therefore, they are multi-organisers for external tourist destinations (Panasiuk, 2014, pp. 163–164).

The adoption of marketing orientation by a tour operator requires special attention in terms of the development of the price-product quality relationship (Steenkamp, 1988, pp. 491–492). A fundamental condition that has to be met in order to make activities connected with creating the price-quality relationship successful is thinking in line with consumers and their needs, as well as the possibility of capturing the difference between usefulness in offer classes. The effect of activities aiming to create marketing orientation is achieving a high level of the quality assessment of the offered products from consumers, that is the so-called perceived quality (Skrzypek, 2001, pp. 81–91). Such a measure type is the customer satisfaction level (Łańcucki, 2012, pp. 271–281). It is measured on the basis of market research using various techniques of collecting information and evaluating results (Stamatis, 1996, pp. 158–194). In terms of the travel agency offers, the measurement should concern the whole offer in the form of a travel package. The assessment of service quality depends primarily on clients' expectations and their satisfaction with the consumed service is equal to fulfilled expectations. Measuring customer satisfaction is a starting point for enhancing the system of the tour operator's activities (Panasiuk, Dobska & Urban, 2016, pp. 38–40).

The issue of the marketing orientation of tour operators is based on the corresponding concept of marketing development stages as in the case of the remaining market entities. It should be emphasised that the activities of companies improving their orientation addressed to consumers and the entire market at the first three stages, i.e. production, product, and sales, are the components of traditional marketing orientation. Activities created at the strategic marketing and social responsibility stages attempt to develop marketing (market) orientation understood in a traditional way. Therefore, the term marketing orientation collectively includes elements resulting from particular stages of marketing development. The aim of the exemplification of the listed stages is to highlight the fact that marketing is dynamic,

which means that it adapts to changeable market conditions and takes account of company activities and its environment.

RELATIONSHIPS IN THE SYSTEM OF MARKETING ORIENTATION OF TOUR OPERATORS

A tour operator is an entity which independently decides about marketing orientation, setting its own market objectives and the method of influencing the market, including a consumer (Panasiuk, 2017b, pp. 73–82). Taking account of the place of a tour operator in the performance of functions on the tourism service market, it should be highlighted that the following entities affect the tour operator's marketing orientation:

- a) consumers – purchasing offers in the form of travel packages (individuals, institutions),
- b) partial service providers – being a special group of consumers whose services reach consumers through travel packages,
- c) tour operator service intermediaries (travel intermediaries) – constituting a link of direct contact with a client purchasing a travel package,
- d) tourist destinations – places where tour operators direct their consumers; destinations where tourism services are directly consumed (Panasiuk & Rafailova, 2017, pp. 37–44),
- e) competitors – having their own competitive methods of reaching consumers as well as a specific level of marketing orientation,
- f) entities regulating the market – whose activities directly or indirectly affect the marketing orientation level of tour operators.

FACTORS AFFECTING MARKETING ORIENTATION OF TOUR OPERATORS

In addition to the issues connected with entities which influence the level of marketing orientation of tour operators, one should also indicate the market structural factors mainly of an official and organisational nature:

- a) the tour operator market development stage, in a country where a tour operator is registered,

- b) the combination or separation of the functions concerning travel organisation or travel intermediaries by a specific tour operator entity,
- c) the market scale of tour operators' activities – servicing the local, regional, domestic, continental, global markets,
- d) the specialisation of tour operators focusing on a specifically defined market,
- e) the marketing orientation of partial service providers in tourist destinations,
- f) dominating sales technology (traditional, online),
- g) the regulatory intensity (Panasiuk, 2017a, pp. 406–407).

METHODOLOGY FOR MARKETING ORIENTATION RESEARCH OF TOUR OPERATORS

The presented research results are part of the research work carried out under the grant by a research team headed by the author of this article. An attempt to comprehensively study marketing orientation of tour operators is a complex and multiphase task. The inspiration for this part of the research was the studies characterising marketing orientation in a quantitative manner which appeared in the 1990s (Kohli & Jaworski, 1990, pp. 1–18; Narver & Slater 1990, pp. 20–35). In these works, the measurement was conducted through surveys addressed to companies where managers assessed particular elements affecting marketing orientation of their companies on a 7- or 5-point Likert scale (from 15 to 32 items) grouped into relevant areas. Marketing orientation was estimated as the average (or weighted average) of responses to given questions. For the purposes of estimating the level of marketing orientation of tour operators in Poland and in 10 selected European countries, the research was conducted in the following phases:

Phase 1 – preparation of the research.

Phase 2 – expert method.

Phase 3 – pilot research.

Phase 4 – full-scale research.

Phase 5 – interpretation of the research results.

Phase 6 – assessment of the results (diagnosis) and recommendations.

The first research phase involved building a database of tour operators for countries where marketing orientation was measured. The assumed size was 4,000 addresses with 10% response rate (400 surveys). During this phase, however, 3,828 e-mail addresses of tour operators from 11 countries were established and collected. These addresses were used to send survey forms in the next part of the research. This phase also involved devising an initial version of the survey questionnaire. To this end, like in the case of the earlier authors (Kohli & Jaworski, 1990, pp. 1–18; Jaworski & Kohli, 1993, pp. 53–70; Kohli, Jaworski & Kumar, 1993, pp. 467–477), several dozen statements were devised which should measure the marketing orientation of tour operators.

Then, this set was provided for assessment to twelve experts dealing with marketing, market research and the tourism market. The experts assessed the compatibility and correctness of the statement on a four-level scale; they could also put forward their comments and proposals for the questionnaire content. On the basis of experts' suggestions about the questionnaire structure, the statements which received a score equal or higher than the median were chosen. Additionally, the survey was assessed by two focus groups consisting of economics and tourism graduates having at least two-year professional experience in the tourism industry. The prepared questionnaire was again given to the experts for assessment. None of the experts raised any objections to the devised survey. The next, third phase involved the additional verification of the form by means of the pilot research. The survey was handed over to twenty travel agencies whose task was to complete it. None of them submitted any comments on the survey content.

After the expert consultations and the pilot research, the survey form comprised 44 questions grouped into nine thematic areas:

1. Orientation of a travel agency towards clients' needs (five particular issues were assessed).
2. Communication in a travel agency (six issues).
3. Response of a travel agency to changes in their environment (seven issues).
4. Implementation of changes appropriately to the market response (six issues).
5. Management of a travel agency (three issues).
6. Orientation to the incentive scheme (four issues).

7. People's sense of identification with a travel agency (six issues).
8. Market turbulence (four issues).
9. Intensity of competition (three issues).

Within every area, each of 44 questions was put on a five-point Likert scale, where 1 meant "definitely not," whereas 5 meant "definitely yes." With the form structured in such a way, the assessment of the marketing orientation of a tour operator constituted a construct measured by all questions. Adopting such an approach meant the necessity to verify a problem concerning evaluation whether the scale measured exactly this phenomenon which was given to the respondents to assess and which it was supposed to measure. In order to establish it, it was required to indicate various aspects of the scale relevance, determine the scale accuracy in terms of actual diversification of the studied phenomenon, that is to verify the scale reliability.

BASIC INFORMATION ON THE TOUR OPERATORS PARTICIPATING IN THE RESEARCH

The survey questionnaire was designed in three language versions and it was mainly sent by electronic means. For the purpose of research, a Google module was used to send the survey questionnaire to tour operators in Poland and 10 selected European countries with the highest Index of Economic Freedom in 2015 (i.e. Switzerland, Ireland, Estonia, the UK, Denmark, the Netherlands, Germany, Luxembourg, Finland, and Sweden), which was the fourth research phase. The request for completing the form was sent to 3,828 travel agencies in total. In Poland as well as other countries there was some difficulty receiving the expected number of responses (400). Due to a low response rate, the surveys were sent again (over 6,200 emails) and it was decided that there was a need to go to the studied countries in order to reach the representatives of travel organisers personally. Therefore, some responses are the results of personal interviews. The research was conducted from March to November 2016. Ultimately, 204 correctly completed forms from Poland and 176 from other European countries involved in the research were received.

The effect of the research was the collection of 380 correctly completed survey questionnaires. There were slightly more completed surveys from Poland (54%) than from the remaining European countries (46%).

Among the studied tour operators, a dominating group consisted of micro-enterprises employing up to nine employees in total. Such companies constituted slightly over 70% of respondents, whereas together with small enterprises it was the total of around 93%. Companies employing over 250 employees constituted only around 2% of respondents. It should be noted that the structure of tour operators in terms of their size (the number of employees) obtained during the research corresponds to the actual structure of the entities of the tour operator market in the European countries. A dominating group of travel organisers are micro and small enterprises.

RESEARCH ON THE LEVEL OF MARKETING ORIENTATION OF TOUR OPERATORS

After analysing the structure of the studied tour operators, the main research part was started, that is an attempt to determine the level of the marketing orientation of tour operators functioning on the European market. This objective was achieved on the basis of the conducted research on each tour operator. On that basis, the level of the market orientation on tour operators in Poland and the selected European countries was established.

The average level of the marketing orientation of tour operators was 166.82 pts in total, whereas the maximum level was 204 pts and the minimal one 100 pts. Statistically, the average level of the marketing orientation of tour operators with a 95% probability should be between 165 and 169 pts. Variation in terms of the marketing orientation of tour operators among the studied countries can be deemed low (the coefficient of variation CV was 11.16) (Panasiuk, 2017b, pp. 140–146).

With the criterion of the value of the average marketing orientation of tour operators, Table 1 presents countries starting with those which represent the highest level of marketing orientation.

According to the information presented in Table 1, the country with the highest level of marketing orientation among the studied tour operators was Switzerland (175.25 pts), whereas the lowest level of marketing orientation among the entities of the tour operator market was observed in Luxembourg (156.2 pts). The analysis of the data from Table 1 implies that the marketing orientation of Polish

tour operators participating in the research is average. Despite that, due to tour operators from Germany, Denmark, and Luxembourg which considerably lowered the average for the studied European countries, the average level of the marketing orientation of Polish tour operators is higher than in the case of tour operators from the remaining countries in total.

Table 1. Countries acc. to the average level of marketing orientation of tour operators (MOT)

Country	MOT (average) Pts
Switzerland	175.25
United Kingdom	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 work on the basis of the research on tour operators in particular countries.

To extend the research, the concept of measurement was devised and it was called a synthetic indicator of marketing orientation of tour operators (siMOT). In order to construct it, thematic areas, into which 44 questions from the survey form were grouped, were used. Data normalisation resulted in vectors with values between <0, 1> for particular 380 tour operators in 11 studied countries across nine thematic areas.

For the marketing orientation of tour operators estimated in such a way, the level of siMOT for tour operators in all 11 analysed countries was 0.538 in total, including 0.558 for Poland and 0.515 for the remaining European countries. The marketing orientation of tour operators in Poland is on average slightly higher than of tour operators from the remaining countries. Nevertheless, these differences seem to be of little significance, which is shown in Table 2.

Table 2. The average levels of the Synthetic Indicator of Marketing Orientation of Tour operators acc. to the analysed countries

Country	siMOT (average)
United Kingdom	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 work on the basis of the research on tour operators in particular countries.

Comparing the results obtained for the synthetic indicator (siMOT) from Table 2 with the results from Table 1, it can be observed that after normalising and recoding the variables, Polish tour operators hold the third position in the ranking of countries with the strongest marketing orientation. The differences between Polish tour operators and the next tour operators from other countries on the list are insignificant.

CONCLUSION

The conducted research shows that marketing orientation and factors determining it can be subject to assessment by means of measurable quantitative criteria. Therefore, it is possible to estimate the level of marketing orientation and establish it according to a scale.

Regardless of the marketing orientation of tour operators addressed to final consumers of services (tourists), it should be noted that there is a necessity to build a proper level of marketing orientation of tour operators with regard to:

- partial service providers,
- sales agencies (travel intermediaries).

As it was mentioned before, the first group of entities is a special recipient of tour operator services. Tour operators should aim for the

selection of partial service providers who are highly client-oriented and simultaneously offer them cooperation focusing on a marketing approach to their market needs. The marketing approach of tour operators is also expected in terms of travel agencies which represent them before their consumers. It is essential that the offers of tour operators striving to obtain a high level of marketing orientation are available in travel agencies' points of sale, following similar marketing principles as that of the tour operators.

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KONCEPCJA ANALIZY ORIENTACJI MARKETINGOWEJ TOUROPERATORÓW NA RYNKU EUROPEJSKIM

Abstrakt

Tło badań. Implementacja koncepcji marketingu w działalności przedsiębiorstwa prowadzi do przyjęcia orientacji marketingowej, która umożliwia osiągnięcie długoterminowej przewagi konkurencyjnej. Mając na uwadze miejsce touroperatorów w strukturze rynku turystycznego, pomiędzy wytwórcami turystycznych usług cząstkowych a agentami sprzedaży i końcowymi konsumentami, a jednocześnie wysoką konkurencyjność tego rynku w warunkach globalnych, uznaje się, że podmioty tourooperatorskie charakteryzują się wysokim poziomem orientacji marketingowej.

Cel badań. Celem opracowania jest zaprezentowanie koncepcji orientacji marketingowej touroperatorów wraz ze wskazaniem elementów determinujących poziom orientacji marketingowej, wynikającym z powiązań touroperatora z innymi uczestnikami tego rynku. Ponadto dokonano oceny poziomu orientacji marketingowej touroperatorów funkcjonujących w Polsce i wybranych krajach Unii Europejskiej, mając na względzie poziom swobody gospodarczej w analizowanych krajach.

Metodologia. Wykorzystano metodę krytycznej analizy literatury przedmiotu, metody operacji logicznych, metody statystyczne.

Kluczowe wnioski. Z przeprowadzonych badań wynika, że orientacja marketingowa oraz czynniki ją kształtujące mogą być poddawane ocenie poprzez mierzalne kryteria ilościowe. Tym samym możliwe jest oszacowanie poziomu orientacji marketingowej i określenie jej według skali. Niezależnie od orientacji marketingowej touroperatorów skierowanej na ostatecznych konsumentów usług (turystów), należy zwrócić uwagę na konieczność budowania należytego poziomu orientacji marketingowej firm tourooperatorskich w powiązaniu z wytwórcami usług cząstkowych oraz agentami turystycznymi.

Słowa kluczowe: marketing, orientacja marketingowa, rynek tourooperatorski, touroperator.