

Study of Polish market sales in co-operation with intermediaries, Case: Company X

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<p>The aim of this case study is to find ways to increase sales of company X in the Polish market. Company X operates in hospitality field in Sweden, Finland, Estonia and Latvia. As there has been an increase in sales in the Polish market and there has been economic growth in Poland, as well as, growth in the country's outbound tourism in general, the company sees potential in the market area. The study focuses on the leisure travel from Poland, both group and free independent travel, FIT. Work related travel and meetings, incentive, conference and events, MICE, travel are left out of the scope of the study.</p> <p>The research is conducted in co-operation with the company's intermediaries, which are travel agencies and tour operators. The theoretical background of the research is studied first. In the beginning the Polish economy, outbound travel and outbound expenditure are studied, moving on to tourism motivation theories, marketing theories and tourism megatrends. The intermediaries were interviewed by using a semi-structured interview method. Based on the theoretical background of the research, the interviews were divided into 3 themes, which included motivation to travel, marketing theories and tourism megatrends.</p> <p>The results of the interviews provide a view of different group and FIT leisure travel segments of Polish guests. Group travel can be divided into catalogue groups, company groups as well as school and student groups. The FIT segment at the moment mostly relies on fishing tours. However, the interviewees explained that self-fly, self-drive and camping car FIT segments could have more potential to increase sales in the future. The guest's motivation to travel are related to the novelty of the product as well as the unique product and unique destinations, including nature in the destinations. A very important factor is that the company X's destinations are reachable with a car. An important need of the Polish guests is the value for money. A challenge in the marketing is the lack of marketing of the company X's destinations in Poland, therefore the company and its partners need to market the destinations themselves. The most relevant tourism megatrends in terms of company X and the Polish market are for example growing middle class and digital channels. Among the middle class there is a growing trend of travelling with a camping car.</p> <p>Based on the results of the research the study provides a marketing plan for a potential new segment of guests travelling to company X's destinations with a camping car, which is called as camper segment in the study. The implementation of the plan and measuring the results is left for the case company to conduct. The targeting of the camper segment should focus on the digital channels, and benefits greatly from co-operation with online travel agencies, OTA's. Cross-selling and cross-marketing are very important factors as well. Company X should not forget the group travel segments either, as most of the guests are travelling with groups. However, the current marketing plans done in co-operation with intermediaries, in the group travel segments, are most beneficial for the case company at the moment.</p>	
Keywords outbound tourism, Poland, marketing strategy, sales, market research, marketing plan	

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1 Introduction

This study aims to research and implement different means that would increase the Polish market sales of a case company, which is operating in hospitality field. The research is focused on outbound leisure tourism from Poland, meaning Polish residents travelling abroad to the case company's destinations and using their services and facilities. As the economy in Poland is growing and the country is located relatively near the case company's services geographically, the company sees potential in the sales development. Especially, due to the expected positive economic growth the topic is current and relevant for the case company. The study is conducted as qualitative research by interviewing the case company's intermediaries, which are representatives of Polish travel agencies and tour operators. Travel agencies usually sell the case company's products solely, whereas tour operators sell a packaged tour with different elements where the case company's products are one part of the tour. These intermediaries sell both for Polish groups and individuals, also known as free independent travellers, FIT.

1.1 Case company

For business secrecy reasons the case company does not wish for its name to be published in this study. Therefore, the company is referred to as company X and exact details of the company's operations cannot be described.

Without providing exact details, the case company is a hospitality field organization that operates in the Scandinavia and Baltic countries; in Sweden, Finland, Estonia and Latvia.

Company X needs international travellers to grow the sales. Local markets are very important part of its business, but the possibility of growth is limited, as there is only a certain number of people living in these countries. In recent years there has been remarkable growth in international markets sales, especially from Asian countries in company X as well as in its destinations. It is also good to look into the potential new market areas that are close to company X as these markets, such as Poland, have more potential to have repeated visitors as well.

1.2 Needs and objectives

The objective of this study is to find ways to develop the Polish leisure travel sales of company X and figure out best actions to do so, and give the company the action plan, which they can implement. As the case company sees potential in the sales growth from the market area and Poland's economic and outbound tourism development also suggests growth, there is a need for the study.

The main research question is:

How to increase company X's sales in the Polish market?

The sub-questions are:

What are the main criteria when the Polish clients choose their travel destinations according to the intermediaries?

How the intermediaries see the company X's product in the market area?

Which products do the intermediaries see as most appealing for the Polish guests?

How do the intermediaries see the impact of tourism megatrends considering the Polish outbound travellers?

1.3 Scope of the study

The study focuses on Polish leisure travel to company X's destinations and services, focusing on both group and individual travellers also known as Free Independent Travellers, usually referred in tourism industry as FIT. The acronym FIT can sometimes be explained as fully independent travel as well. FIT travel means individuals, couples or families that don't take a part of group package tour. FIT travellers can book company X's products directly from the company or through travel agencies. Leisure groups are usually booked through the company's intermediaries, which usually arrange a bus transportation from Poland to the company X's location.

Business travellers and meeting, incentive, conference and event travel, also known as MICE travel, is left out of the study scope and due to the different characteristics of these tourism areas, they could be researched separately.

The company has had relatively good sales in Polish business or work related travel in the past. However, leisure travel market was chosen as the focus, because of the rise in overall leisure travel of Polish people and the company's own data, which gives insight of the growth and future potential of this segment.

The study is conducted by using qualitative research method and by conducting interviews with the company's intermediaries. The intermediaries are the company's partners such as travel agencies and tour operators. They have already knowledge about company X's products and are experts in Polish travel industry.

Main theoretical framework focuses on studying the economic situation of Poland and its travel industry, tourism motivation theories and tourism marketing theories as well as tourism megatrends.

1.4 Structure of the study

The study is divided into 6 parts; introduction, Poland country overview, theoretical background, empirical part, analysis of the research and discussion.

Chapter 1 introduces the research question, the field of case company, and the needs and objectives and scope of the study.

Chapter 2 gives insight to the target country Poland and defines the target country's economic position and tourism development.

Chapter 3 focuses on the theoretical background of the study, firstly by looking into theories of tourism motivation followed by tourism marketing and tourism megatrends, which all give basis to the research questions.

Chapter 4 explains the research methodology used and the reasons for the selection of the qualitative method and for selecting to conduct interviews with the company's intermediaries. The conducted interviews are described, as well as the validity and reliability of the study are assessed in this chapter.

Chapter 5 provides an analysis of the findings from the research interviews, strengths, weaknesses, opportunities, and threats, SWOT, analysis and a marketing plan for a potential new segment.

Chapter 6 discusses the research findings related to research questions as well as the process of the study.

2 Poland country overview

Tourism is a complex field of business, which is related to many different fields such as the economy and is an area that can easily be affected by different geopolitical and natural events. In order to conduct a research on a potential target market for tourism, it is firstly good to look into the basic factors of the country. It is very important to look into the economic aspects of the market area as well, and equally essential is to research the markets outbound travel development.

Poland is a country located in the centre of Europe and has borders with Germany, Czech Republic, Slovakia, Ukraine, Belarus, Kaliningrad which belongs to Russia and with Lithuania and the Baltic Sea in the north of Poland, as visualized below where Poland is highlighted in red. Polish white and red flag is at the right side of the image.



Figure 1. Poland's location on map and Polish flag (Vectorstock 2018)

As company X has operation in the Baltic countries and Scandinavia Poland's Nordic borders are very close to its destinations. The country's history reaches back thousands of years, with periods of independence and periods when the country was dominated by another. Major religion in Poland is Christianity and the vast majority are Catholic. Religion of the market country can affect for example the times of travelling of the market area in terms of public holidays. The population in Poland in 2017 is 38,3 million people. Poland

joined European Union, EU, in 2004. Poland has not taken Euro as currency and are using Polish Zloty. (BBC News 2017.)

Since 2007 Poland has been part of Schengen Agreement countries, which means that Polish residents have unrestricted movement between the countries that are under the Schengen Agreement. This has a positive aspect on tourism as there is no need to for example to purchase a visa in order for the Polish residents to travel to company X's destinations. (Schengen Visa Info 2017.)

In 2017 Poland faced a lot of political turmoil, with a lot of demonstrations against the government's decision of juridical reforms (Strupczewski & Emmott. 2017). Politics and political decisions can have a large effect on tourism market. For example, if the Schengen Agreement were to be abolished the freedom of movement would become more difficult and can take a toll on the numbers of tourists. However, it is very unlikely for this to happen as Poland would have a lot in stake. According to Eurostat (Eurostat 2017) Polish people are among the five biggest groups of EU-citizens living in other EU member states in 2016. Schengen Agreement is as well a positive factor in inbound tourism in Poland, meaning tourists that come to Poland as a destination. As the visitors requiring a Schengen visa can visit all countries within the agreement without the need to file for separate visa applications. As tourism also boosts the economy, it can be seen as positive factor as well.

2.1 Economic development

Since the political and economic transformations in Poland started in the 1990's the country's economy have doubled. Between 1991 and 2008 the annual gross domestic product, GDP, growth was 4,6%. It was the only European Union country to avoid recession which was caused by a global financial crisis, which started to show effects in 2007. (Bogdan, Boniecki, Labaye, Marciniak & Nowacki 2015, 1.)

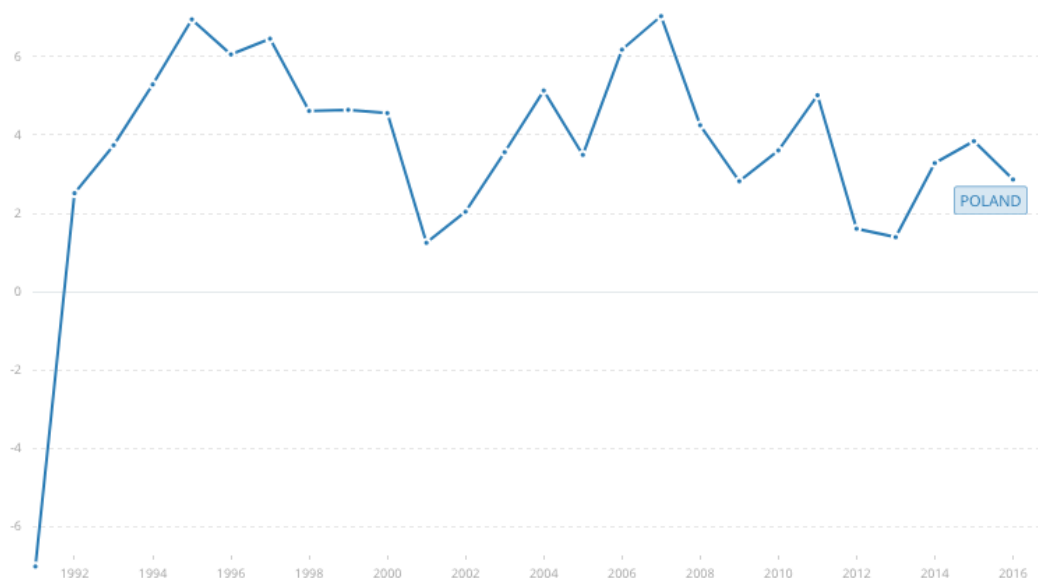


Figure 2. Poland's GDP growth in percentage between 1991-2016 (World Bank 2018)

The figure above shows Poland's GDP growth from 1991 until 2016 and it has stayed positive, since the rise started in 1991. There have been some fluctuations, but there has been constant growth.

Politics affect the economic situation and economic development of the country, which in return has effects on tourism. Outbound tourism usually grows when the purchasing power of the country's residents grows. Poland's economic growth has been positive in the recent years as well. The GDP growth in 2017 was 4,6 percent, which is the fastest since 2011. Household expenditure consumption grew 4,7% in 2017. (Reuters 2018.) In 2018 the real GDP is estimated to have remained the same as in 2017 with 4,6% growth rate. The economic growth in 2018 is mainly supported by strong private consumption, which is supported by fast wage increases and higher consumer confidence levels. In 2018 the unemployment rate in Poland was at a record low with 3,6% dropping from 2017, when the unemployment rate was 4,6%. (Euromonitor International 2019.)

2.2 Future outlook of Polish economy

In their report Poland 2025: Europe's new growth engine, Bogdan & al (2015, 1-3) argue that Poland has a chance to become an advanced European economy, the authors have created two scenarios the business as usual and aspirational scenario. In the Business as usual scenario, the GDP growth will be annually 2,6% and it puts Poland in the same level with countries like Cyprus and Portugal in 2025. In the aspirational scenario GDP growth

will be 4% annually and in 2025 Poland would be in the same level as Spain and Italy and it would make Poland a significant exporter of goods and services. The business as usual scenario would put Poland on 22nd place in terms of GDP per capita among the EU-28 and aspirational scenario would place it 17th.

As mentioned in the previous chapter GDP growth in 2017 and 2018 has exceeded the aspirational scenario. Euromonitor International estimates that Poland's real GDP growth will be stable in the next years, with estimate of 3,8% of growth in 2019, before slowing down to 2,5% by 2025 (Euromonitor International 2019). According to Global index provider FTSE Russell, Poland is considered as a developed market since 24th of September 2018, which means that Poland is considered as one of the 25 most advanced global economies according to this index provider. This could potentially mean, that Poland would become more attractive to global investors. (Emerging Europe, 2018.) However, in January 2019 the two other global index providers, MSCI incorporated and Standard & Poor, S&P, have not raised Poland's status from emerging market to a developed economy (MSCI 2018, S&P Dow Jones indices 2018). Naturally, Poland could possibly attract even more investment potential, if all the major index providers would consider it as a developed market.

In 2019, there are still many years until 2025 and economic, political and geopolitical situations may change even in a fast pace. However, the current economic development of the country seems very positive, which in return does give good reasons to look into the markets future potentials in outbound travel for company X.

2.3 Outbound tourism from Poland

It is expected that the outbound travel of Polish residents will be growing. Especially for shorter stays and city breaks, which is what the company X is offering (Euromonitor International 2014). According to World Travel Monitor outbound travel from Poland grew +7% in January-August 2016. Whereas, the average growth in European countries was +2,5%. (Messe Berlin GmbH 2016, 8.) In 2017 Poland was among the top performers of Europe's outbound travel as well (Messe Berlin GmbH 2018, 7). The number of outbound trips increased 5% in 2017, with the help of improvement in disposable income.

There have been new low cost airline routes opened from Poland to major tourism destinations, which has boosted the growth. Most popular destinations are UK and Italy. In the

UK lives a lot of people, who have Polish origin, which means that a lot of people are travelling there to visit family and friends. Italy on the other hand can be reached by car, which is another important factor for many Polish tourists. Safety of the destination is also a concern among many Polish travellers. For this reason, it is expected that Greece, Croatia, Spain and Bulgaria will have an increase in tourists from Poland. As those are typical holiday destinations, that are considered as safe. (Euromonitor International 2017.)

In Statistics Poland's study of Polish travel behaviour, in 2017, 52,7% of foreign trips from Poland were made with airplane, 14,3% with bus or coach transfer and 30,4% with a motor vehicle rented or own. The statistics of the study show also that from foreign trips 54,9% were leisure, recreation and holiday trips and 31,6% visiting family and friends. The survey shows answers of Polish residents who are 15 years old or older. (Statistics Poland 2018, 92, 94). The survey shows that accessibility of the destination by vehicle is a benefit, but airline connections should not be forgotten. Visiting family and friends is important factor, but more than half in the study stated that their trip was only for leisure.

2.3.1 Outbound departures

As seen on appendix 1, Outbound Departures position of Company X's destination countries 2017 & 2018 statistics according to Euromonitor, Company X's destinations are not at the top of the list. In 2017 Sweden is 17th, Finland 34th, Latvia 39th and Estonia 45th (Euromonitor International 2017). In 2018 statistics Sweden remains 17th, Finland has dropped to 36th, Latvia has risen to 32nd and Estonia to 43rd. Euromonitor forecasts of outbound departures by 2023 don't show significant changes for Company X's destinations. The outbound departures are estimated to rise for each country, but the rank is estimated to remain similar, Sweden is estimated to be 17th, Finland 36th, Latvia 33rd and Estonia 44th in 2023. (Euromonitor International 2018.) There is a challenge, how to move all the destinations up on the list. Perhaps they will not be the most popular, and will not exceed the UK and Italy, but there could be more potential. Perhaps interest in Baltic countries is slowly rising as both Latvia and Estonia have moved up on the list between 2017 and 2018. There are various reasons, for destination popularity and as mentioned in the previous chapter among Polish people visiting family and friends is one major motivation, as well as how the destination is reachable. One factor is also destination marketing, which has a challenge as Company X's destinations are not having marketing efforts in Poland. For example, with European markets, Visit Finland focuses mostly on Germany, UK, Benelux countries, Italy, France, Spain and Switzerland (Visit Finland 2018).

However, the destinations could have more potential for Polish outbound tourist, as the Company X destinations, especially in the Baltics are reachable by car from Poland. Which means that it is possible to organize tours with bus transfers from Poland as well. Bus tours from Poland are still the main means of leisure group travel by company X's tour operator and travel agency partners. Currently, Scandinavia and Baltics can be considered as safe destinations to travel to, which is showing as a major factor in choosing the travel destination among Poles. These factors are favourable in terms of tourism development to the company X's destinations.

Transfer by airplane and especially with low cost airlines is increasing the outbound tourism from Poland. Currently there are for example routes from Gdansk, Poland to Turku, Finland by Wizzair and from Stockholm, Sweden to 7 airports in Poland; Gdansk, Katowice, Lublin, Poznan, Szczecin, Warsaw and Wroclaw (Wizzair 2018). In May 2019 Wizzair will also start direct flights from Krakow to Turku (Finavia 2018). Flight connections from Poland to Baltic countries to Tallinn, Estonia are also getting better as LOT Polish airline made a strategic partner agreement with Nordica the national airline of Estonia and have currently direct flights between Warsaw and Tallinn (Nordica 2017).

Increased flight connections could naturally boost the destinations popularity as they are more easily reachable. Better flight connections can help to grow especially the FIT sales.

2.3.2 Outbound expenditure

Euromonitor has made estimates on how the outbound expenditure from Poland will develop by 2022, meaning how much are the Polish travellers spending on different fields of tourism, such as business and leisure travel, activities and food.

Table 1. Forecast Outbound Expenditure: percentage increase 2017-2022 (adapted from Euromonitor International 2017)

2017-2022	% change
Business	19 %
Leisure	23 %
Lodging	19 %
Activities	22 %
Food	22 %
Shopping	11 %
Travel in Destination	44 %
Other Outgoing Expenditure	19 %
Outbound Expenditure	22 %

The table above shows the forecast on Polish outbound expenditure and the forecast of the increase in percentage between 2017 and 2022. Outbound expenditure is the sum of business and leisure and the sum of activities, food, shopping, travel in destination and other outgoing expenditure. The growth of outbound expenditure is estimated to be approximately 22% between 2017-2022. The expenditure in outbound leisure travel is estimated to grow approximately 23%. Expenditure on food is estimated to increase with 23% as well. However, the expenditure on shopping is estimated to grow by approximately 11%. (Ibid 2017.) Reason might be, that depending on the destination, there can be lower consumer prices in Poland. For company X the positive development of outbound expenditure, and especially the growth in leisure travel expenditure is a positive sign and reinforces the fact that Polish outbound leisure travel has potential to grow in the recent years.

3 Tourism motivation, marketing and megatrends

This section focuses on the theory basis of this study, which help to develop the research questions. There are three main parts; tourism motivation, tourism marketing and the tourism megatrends.

Basic understanding of socio-psychological theories on travel motivation is needed in order to comprehend the primary needs for travelling and destination selection. These help to give more insight on the research questions related to travel motivation of the Polish market to company X's destinations and use of its services. Understanding customer's needs and wants are the basis of the marketing process of the travel services. Deeper understanding of tourism marketing, marketing strategy and the marketing mix help to develop research questions that are relevant to the study as the main focus is to develop a marketing plan, which would help to increase the company X's sales. Tourism megatrends help to give insight on what is predicted to be on focus in the future in tourism and can help to understand what can be predicted from the Polish market as well. Some of the megatrends could give insight on what the company X should focus on and most importantly related to this study, is there any existing factors that the company could benefit from in terms of marketing to the Polish market.

3.1 Tourism motivation theories

In order to understand the potential market and how to approach the research on the future development of the sales of the market area, it is good to understand the basic socio-psychological concepts of motivation to travel. There are however, many theories that try to explain and give insight to the motivation to travel. The reason why tourist travel is quite complex. Motivation to travel can naturally be different for different members of the target area. Same people can have different motivation depending on the concept of the travel, when they travel, in what stage of their lives and what are their interests then.

Maslow's hierarchy of needs has been connected to travel motivation studies made by many researches, as well as marketing theories. Maslow argues that needs that are lower in the pyramid should be first fulfilled before moving up. Starting from biological and physical needs, such as food and shelter, to safety needs, belongingness and love needs, esteem needs and lastly self-actualization. Travel career patterns and travel career ladder theories by Philip Pearce have emerged from the hierarchy of needs.

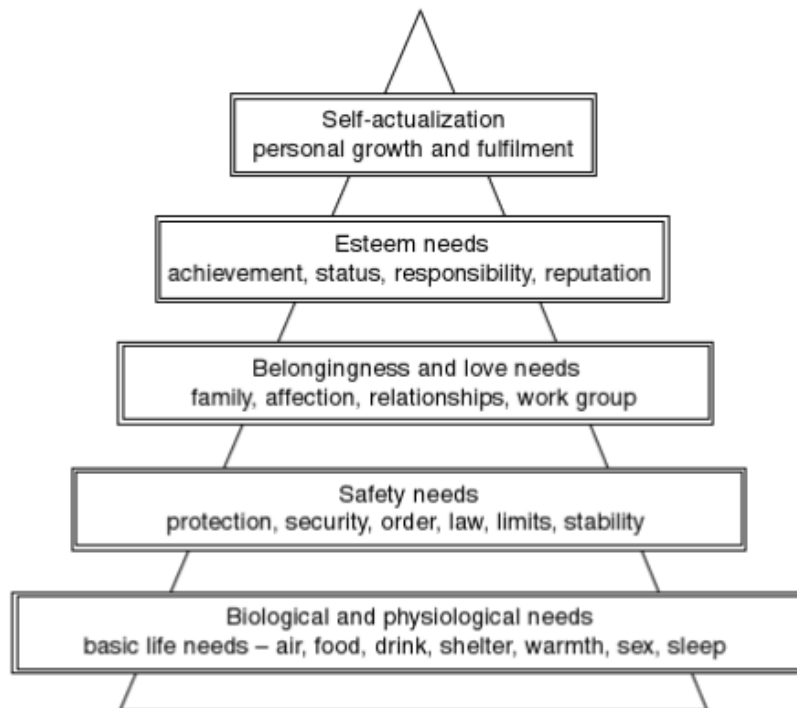


Figure 3. Maslow's hierarchy of needs (Martin & Woodside 2008, 15)

The hierarchy of needs table does not include two important human needs, which Maslow also described, aesthetic need and the need to know and understand, which could be in many cases related to motivation in tourism. For example, food tourism can be considered more perhaps as filling the aesthetic needs than the physiological need for nutrition. (Martin & Woodside 2008, 16.) The theory still gives a good basis in understanding different means of motivation. As mentioned in the chapter 2.3 safety needs have risen in the recent years among Polish travellers, perhaps due to different geopolitical events.

Pearce's travel career ladder explains tourism motivation in similar pyramid model, starting from the bottom; relaxation, safety/ security, relationship, self-esteem and development and lastly fulfilment. Fulfilment meaning fulfilling a dream or understanding oneself more. (Ibid, 17.)

As Liu and Chou mention in their study of travel to Kinmen island, a key factor in human behaviour related to tourism is the desire to escape daily pressures and to look for psychologically rewarding recreational opportunities. Another important factor of travel motivation is travel intention; which previous travel experiences can influence. (Liu & Chou, 2015, 300.) Travel intention could be in Polish market case, for example leisure travel,

however, there can be several other motivations behind, for example people who wish to see new cities.

Many researchers agree that push and pull factors describe the travel motivation quite well. Push factors are internal motives that make the visitor seek for fulfilment of their needs. Such as seeking for escape from daily routines, exploration and evaluation of self, relaxation, prestige or health and fitness. Pull factors are those that the destination attracts in the visitor. If the visitor or tourist seeks for health and fitness, they might seek for destinations that have good trekking paths for example. Crompton has argued that push factors can be explained with socio-psychological motives and pull factors are mostly related to cultural motives. (Martin & Woodside 2008, 18.)

Push and pull factors (Ibid, 18.):

Push factors

- Escape
- Self-Discovery
- Rest, relaxation
- Prestige
- Challenge
- Adventure
- Excitement
- Family togetherness
- Health & fitness
- Novelty

Pull factors

- Scenic beauty
- Historical areas
- Cultural attractions & events
- Sporting events
- Beaches
- Parks
- Recreation facilities
- Shopping

Push factors can be linked to Maslow's pyramid of needs as well, and they can be considered as factors that can make people want to travel in order to satisfy their needs (Seebaluck, Munhurrin, Naidoo & Rughoonauth 2014, 203). In other words, push factors tell more about the person's desire to travel and pull factors, where and which kind of environment they would like to travel to. As pull factors can be seen as destination attributes, which attract different kinds of people. Another important matter, which should not be overlooked, is that pull and push factors have to meet. There should be a link between these two factors, which usually is generated by destination authorities. (Caber & Albayrak 2016, 75.)

In this research for company X the aim is to determine, which push factors in general do the interviewed partners see as most powerful for Polish travellers, what are their needs. As well as, which pull factors most describe company X and what kind of target groups this attracts from Poland. Many of the pull factors can be related to the destinations of the

company, as many times they can be more important in the decision making, rather than the company's facilities itself. However, in some cases it is also possible that the facilities themselves are part of the main motivation. For example, it is possible that certain spas or resorts can be the main reason to choose the destination.

3.2 Tourism marketing

Travel-hospitality industry is interdependent and in this way a complex field of business. Successful hospitality marketing is dependent on the whole travel industry. For example, when thinking about the success of a hotel resort, accessibility and cost of it play an important role. If there for example are poor flight connections to the place where the hotel resort is located, it affects the amount of visitors. The quality of the hotel and the restaurants are important in attracting visitors. An example of Port of Boston explains the interdependence of the field very well. As Port of Boston wanted to increase the cruise line business, the port authority Massport started to heavily market Boston as a destination to cruise lines. After they had convinced cruise lines about the destination, the cruise lines promoted the destination to travel agents, which count for 95% of their business. Through the combined marketing effort, Boston doubled the number of port calls and this brought 17, 3 million dollars to the local economy. (Kotler, Bowen, Makens & Baloglu 2017, 30.) The example shows that not only does the travel-hospitality industry often need combined marketing efforts, but when the efforts are successful they often boost the economy of the destination, as tourist go shopping, to restaurants and do other activities as well.

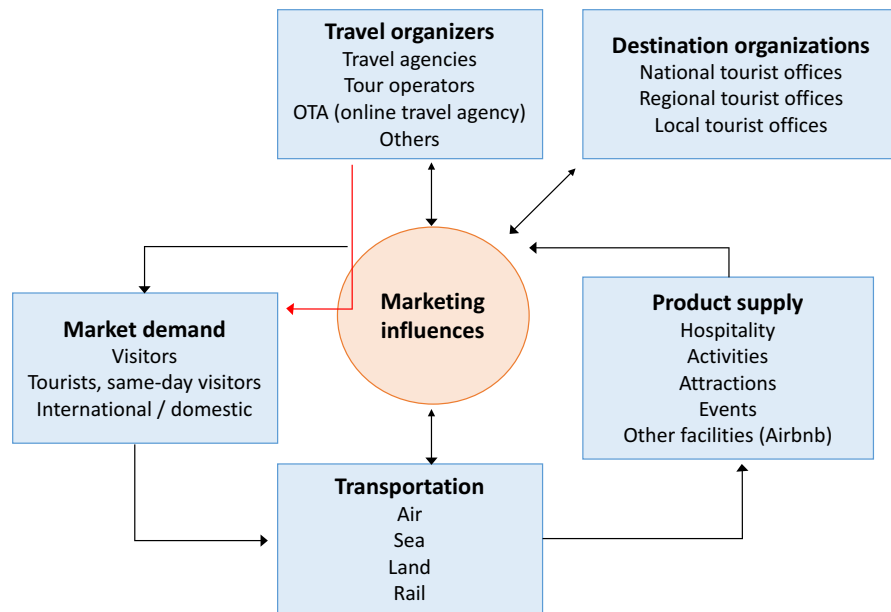


Figure 4. The systematic links between demand and supply: the influence of marketing (adapted from Middleton, Fyall, Morgan & Ranchhod 2009, 12).

The above figure visualizes interdependence of the tourism industry nicely as well. The market demand is usually generated in the places, where the visitor normally lives, visualized on the left at the above figure. In general, there are many type of visitors, domestic and international, tourists and some that are only at the destination for one day. Polish visitors for company X are international visitors. Next step is the physical access to destinations by air, sea, real or land. Product supply at destinations are the hospitality industry but also attractions and events. Marketing influences or marketing mix is an important factor to all fields and therefore is at the centre of the diagram. Travel organizers and destination organizations are connected to the marketing influences. There can be some cases where the visitors are not influenced by marketing activities, for example if they are visiting family and friends. (Middleton & al. 2009, 12.)

There is a challenge regarding company X and the Polish market, as the destination organizations for example Visit Finland are not having any marketing efforts in Poland, in Europe the main focus is in Germany and the UK and marketing efforts are also done in Benelux countries, Switzerland, Italy, France and Spain (Visit Finland 2018). However, in terms of package holidays it is possible that marketing decisions of the tour operator play a greater role in the whole marketing, illustrated with the arrow in red (Middleton & al. 2009, 12-13). In company X's case the co-operation with tour operator and travel agency partners plays a significant role in terms of Polish market. Because of confidentiality of the

study further details of company X's field of business and place on the above figure cannot be explained.

Not only are the combined marketing efforts important in tourism industry, but it is also very volatile and different geo-political events can have very massive effects that are difficult to predict. For example, if there is a natural catastrophe in the place of the hospitality business it will of course affect it largely. As well as, if there is a natural catastrophe in the country or city of origin of the international guests, it can also affect the sales of that specific market region.

This chapter takes a deeper look into the different aspects of tourism marketing, starting from basic understanding of the characteristics of service marketing, understanding the marketing process, marketing strategy, the marketing mix and marketing analysis help to develop research questions and understand how to conduct a marketing plan for company X.

3.2.1 Characteristics of service marketing

When marketing hospitality services, it is important to understand that marketing services differ from marketing traditional products, such as commodity items. In service marketing especially, customer focused strategy is very important. Customer usually has some expectations of the service product, which can be created by the company itself, and reflect the customer's previous experience, needs and values, word of mouth knowledge and images as well. The expectations can also be described as promises that the company makes. The service encounters should keep the promises, or exceed them. This can be also called interactive marketing. Every step the customer interacts with the firm affects these promises. (Grönroos 2015, 495.) In other words, Grönroos (2006, 406) sees the service marketing process as making, enabling and keeping promises to customers.

It is as well important to understand the special characteristics of services, as services are; intangible, inseparable, variable and perishable. Hospitality services are intangible in the sense that they cannot be tasted or experienced before they are purchased. They are inseparable as they cannot be separated from their providers, for example staff at the restaurant, hotel or a cruise. Variability means that the quality of the service depends on who provides it, where, when and how. Perishability means that the service cannot be stored for later use. (Kotler & al. 2017, 57.)

As **intangibility** of services means that they cannot be tasted, smelled, felt or heard before buying the product, it does not mean that these senses are not used when consuming the product. Purchasing the service however relies closely on the expectations. Expectations can be formed from previous experiences with the same or similar service. As services are essentially experiences, from which the consumer later has memories of. The consumer can later share the memories of the service and their experience with for example, friends, family and co-workers. (Shoemaker & Shaw 2008, 33.) Nowadays, with social media the consumer can share their thoughts easier with the entire world. Also companies can use for example 360° views and videos of their hotel rooms, to visualize them better for the consumer. Company X has done this kind of 360° content of its products as well.

Inseparability of production and consumption means that the service is produced at the same time it is consumed. This also means that the service is usually never exactly the same. Customers themselves can affect the service situation. If the customer is not friendly it can result to the service provider of not being friendly as well. Therefore, it is essential that the company has trained its service personnel well to produce the service that meets as well as exceeds the customer's expectations. This does not only include friendliness of staff, but a truly customer oriented service culture allows and trains its staff to solve the customer's problems. The service situation is often described as the "moment of truth". (Ibid. 2008. 39-40.) In the case of tour operator and travel agency sales this relates to the service the customer is getting from these partners as well. With usage of technology rising in hospitality field this should be taken part when looking at the whole experience, for example usability of online booking systems and check-in. Company X does have a service culture program internally as well as it does provide product trainings for its partners.

Variability can also be referred as heterogeneity. This refers to the same matter as mentioned in the previously as well, that services are usually never the same. They vary according to the situation, personnel and consumers themselves. As consumers are different, companies should also think about different way to serve each segment and also conclude this in the training of the personnel. (Ibid. 2008. 38-39.) Company X has many different segments in the local markets and also different service concepts for the international markets. There could be more training involved especially as amount of guests from various different cultures are growing.

Perishability meaning that the service cannot be stored for later use, means that for example an airline seat, hotel room or a cruise cabin that is left unused cannot be sold later on. Therefore, it is essential that marketing tries to create demand for the periods of travel

when the availability is high. Perishability therefore means fixed capacity as well, as the hospitality service provider usually has only certain amount of rooms or seats to offer. This can also have an effect on the quality of the service. In the peak seasons when the service provider has full capacity, the staff might have less time per guest. (Ibid. 2008. 36.) Company X has also periods of high demand and the aim is to increase the demand on the lower demand periods. This study can look into the Polish market in order to figure out if there are possibilities to increase the sales especially in lower demand periods.

Grönroos (2015, 494-497) argues that in service business, every employee carries a marketing role. The company can have a separate marketing function, which he calls full time marketers, but the personnel facing the customers are marketers as well, and they could be considered as part time marketers. As the so called moment of truth is in the service encounters. The employee's life path, personal needs, image, and role conflict and ambiguity also affect the service encounters. That is why in service businesses it is essential that all units have a clear vision of the marketing and brand message. Therefore, internal marketing, internal communication and training play an important role. As well, as Shoemaker and Shaw (2008, 32) state that because of the special characteristics of service marketing, every act of management in hospitality field is an act of marketing. Meaning that in this way everything that the customer experiences when enjoying the service is part of marketing. For example, cleanliness of a hotel room, the friendliness and professionalism of the staff and attractiveness of any materials given at the hotel are all part of the experience and thus part of the service marketing.

The Company X does have internal training programs for products as well as customer service and internal media for communication. Those are, for example, internal emailing list and staff meetings as well as intranets, where information is updated in real time. Company X's international sales has taken into consideration special needs of certain nationalities in its hospitality services, especially when designing service concepts for its growing Asian market, with Chinese, Japanese and Korean guests. This study aims to find out whether such a concept is needed for the Polish market as well.

3.2.2 Marketing process

As shown on the below figure 1, a simple model of marketing process, it is essential firstly to understand the marketplace and customer wants and needs. Customer needs are the basic human needs, such as food and clothing. Wants can be described as the form human needs take and they are shaped by culture and individual personality. For example,

people from different cultures may want different kind of foods, whereas the human need for food is the same. As people have limited resources, they choose products that satisfy their wants within their budget. When buying power is added to human wants, this can be described as customer demands. (Kotler & al. 2017, 31-32.)

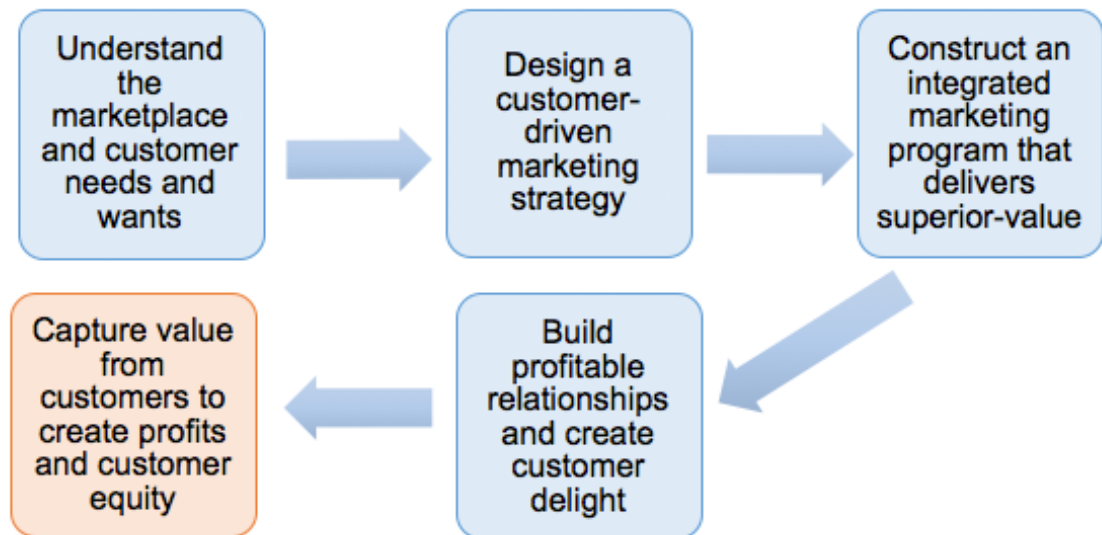


Figure 5. A simple model of marketing process (adapted from Kotler & al. 2017, 31)

This research aims to understand the customer wants and demands of the Polish market and see how company X could serve these demands better. For example, the company has learned that the Chinese customers prefer to have hot water rather than cold. Are there some specific demands from the Polish customers and how they can be met? The demands are of course not only related to eating habits or tangible products, but can relate to any part of the experience during their stay with company X, as a product is a combination of tangible services, information or experiential product components. Meaning that a product is not always something physical. Especially in the hospitality industry customer service and experiences can be considered more important than tangible products. (Ibid. 32.)

As mentioned in the previous chapter as well, customer should be in special focus in service marketing, therefore understanding the needs is essential and conducting research in order to figure out the needs and wants of international markets as well, would be beneficial for the company considering all its international markets. Such extensive research can however, sometimes be not feasible due to lack of resources.

3.2.3 Marketing strategy and marketing mix

The marketing strategy combined with the marketing mix explains the holistic view of marketing. See figure below.

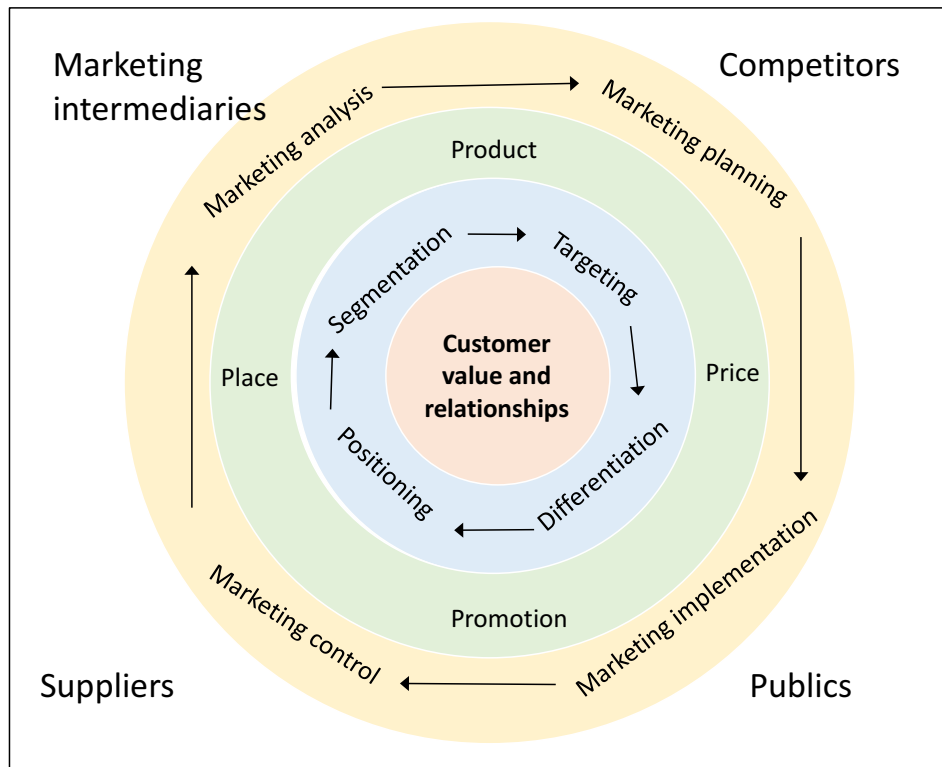


Figure 6. Marketing strategy and the marketing mix (adapted from Kotler & al. 2017, 91)

Firstly, the company should have a strategic plan, which defines the overall mission, meaning the goals, and the objectives, the targets on how to reach the overall goals. (Ibid, 91.) In company X's case the strategy of growth in the international market sales is the mission and one of the objectives is growth in the Polish market sales, as the Polish market is seen as one of the potential ones for future growth.

In the marketing strategy and marketing mix customer is at the centre of all. Creating value and maintaining profitable customer relationships should be the focus of all actions. After customer comes the marketing strategy, meaning the ways the company is looking to create the customer value and maintain the relationship. Marketing strategy includes, segmentation, targeting, differentiation and positioning.

Segmentation and targeting mean the customers the company aims to serve.

Differentiation and positioning means how the company will serve them. Further details about these four aspects can be found in the following chapters.

The marketing strategy guides the company to build an integrated marketing mix. The marketing mix includes the 4P's; product, price, place and promotion. In travel industry the product is considered as the service the business offers. (Ibid, 91.) In service and hospitality marketing there are additional 3 factors that can be considered, which add up to 7P's. The additional factors are people, process and physical evidence. (Hudson 2008, 16.) The company has a control to the marketing mix. It can for example decide the price it offers, but the marketing strategy gives insight of the direction of the pricing. (Kotler & al. 2017, 91.) For example, as some of company X's products/services are using a differentiation as being more luxurious than the competitors, the price should also follow the strategy. The company also has to segment the customers first of all to figure out if there is segment that is looking for products of this kind and if so determine how to best target the audience of this segment.

To find the best marketing strategy and marketing mix the company has to conduct marketing analysis, marketing planning, marketing implementation and marketing control. This study focuses on the marketing analysis and planning phases, and aims to give a marketing plan that the case company could implement, and which they could then follow and measure the results.

The outer layer of the figure explains the marketing environment. Marketing environment consists of marketing intermediaries, which help the company to promote and sell. In company X's case these are travel agencies, tour operators, online travel agencies and destination management agencies. Airlines can also be marketing intermediaries, when the company has collaboration with them. Competitors are other companies that offer similar products in the same destinations, but competitors can be seen especially in international sales also as other destinations. (Ibid, 91.) Publics are any public entities or groups that can have an effect on the interest of the company X. For example, government publics can have affect the regulations that need to be followed, media publics can have positive and negative effects. Social-media is also considered as a media public, and nowadays can sometimes play even a greater role. (Kotler & Armstrong 2014, 95.) Lastly the marketing environment includes suppliers, which in hospitality field businesses are for example restaurant product suppliers and retail product suppliers (Kotler & al. 2017, 91). It is also good to study how the case company's intermediaries see the marketing environment and the effects of it.

The company should adapt the marketing strategy and marketing mix according the marketing environment, as the environment is ever changing. Therefore, the marketing control is important, as the company has to follow up on the marketing efforts and when necessary make corrective actions. (Ibid, 91.) For this reasons as well, it is essential that the actions that the case company is implementing will be followed and further analysis is made if there is a need for change.

As the focus of this study is to determine factors that help to boost the Polish market sales of company X, the marketing strategy factors are studied in more focus, as well as the marketing mix. With the help of the findings, the marketing analysis is conducted and suggestions are given to marketing implementation phase.

3.2.4 Market segmentation and targeting

Not all products sell well with all types of customers. It is often said in marketing that if a company tries to be everything for all, they are usually nothing to no one. That is why companies need to develop market segments. With market segments, companies see which products offer the best opportunities with which types of customers. In market segmentation the customers or buyers are divided into different groups according to their needs, characteristics and behaviour. (Kotler & al. 2017, 92.) This study can help to figure out the Polish market needs, characteristics and behaviour and help with figuring which products of company X will give the best opportunities for business.

After determining the market segments companies evaluate the attractiveness of each market segment and decide which bring the best value and can sustain in the future (Ibid, 92). As in the end segments are only useful, if they can help the company to find the best matches with its target markets, by finding ways of satisfying the needs of these segments (Dai, Hein & Zhang 2018,158).

However, as Tkaczynski, Rundle-Thiele and Prebensen argue in their study of winter tourism to Norway, segments should be measurable, substantial, accessible and actionable. Measurability can relate to the segment size or purchasing power as well as substantiality. However, it is possible that a market with the most income, does not consume the most. Accessibly means how the segment is reached, which is ever more complex in the world of social media. Actionability means the available resources. In their study, for example, certain segments were not identified as actionable, meaning that there would not be

enough resources to target this segments and therefore segmentation would not be beneficial. (Tkaczynski & al. 2018, 16, 18-19.)

Polish market can have many different kinds of segments; the study can possibly help to understand what are the characteristics of the segment the company X's intermediaries see as the most profitable. Therefore, the aims find out, whether the Polish market has certain segments, which company X should target. The measurability and substantiality relies strongly on the company's own sales data.

3.2.5 Market differentiation and positioning

After the market segments are selected the company can plan how to differentiate in those markets. Product position means the place the product is in consumer's minds compared to the competitors. A unique marketing position is something marketers seek for, as in the case the product is seen as similar to the competing ones, there is hardly any reasons for the consumers to buy it. By positioning the product should have clear, distinctive and desirable place in the minds of the target consumers. By first identifying the customer value differences the company can then decide on the competitive advantages for building the positioning. (Kotler & al. 2017, 92.)

This study can help the company X to have a clearer view of the current positioning of the products and see if they have enough differentiation to the competitors. By finding these factors the company can decide on possible corrective actions.

Differentiation can also be considered as the product's unique selling proposition, USP, which are features of the product that distinguish the product from other similar products in the market. Aim of a company is to be the number one provider of this type of product or service. Especially, in the global tourism market this can be quite difficult. (Hudson 2008, 97-98.) However, as Heeley (2016, 94) found in his study, quite often destination management organizations, DMO's, don't rely on the unique selling points, but result on marketing of everything. As mentioned on the chapter 3.2., as DMO's of company X's destinations are not having large marketing efforts in in the Polish market, company X has to rely on the co-operation of intermediaries and in their joint marketing efforts of destinations as well.

Company X has unique selling propositions that can even compete with the global market, related to the surrounding nature, and is keeping the USP's in focus when marketing in

the international markets. Competitors in the same locations have of course these same USP's as well, but the company has other unique selling propositions to differentiate from them.

3.2.6 Service marketing mix

After looking into the overall marketing strategy the company should focus on the marketing mix and the details of it. Marketing mix is combination of controllable and tactical marketing tools that the company uses in the target market, to influence the demand for the product or service. (Kotler & al. 2017, 93.) This study aims to find the correct marketing strategy for the Polish market and also to give insight on how to utilize the areas of marketing mix and to give a marketing plan based on the findings.

The 4P's of marketing can be also considered in the buyer's point of view as 4C's. See the figure below.

4P's	4C's
Product	Customer solution
Price	Customer cost
Place	Convenience
Promotion	Communication

Service marketing mix + 3 P's
People
Process
Physical evidence

Figure 7. 4P's and 4C's of the Marketing mix, with service marketing mix (adapted from Kotler & al. 2017, 93, Hudson 2008, 15.)

It might be good to look into the marketing mix with the customer's point of view first and then turn the findings into seller's point of view. The traditional 4P's are product, price, place and promotion. Product does not only mean a tangible physical product, but services as well. It is the combination of the services for example which the company X offers. Thinking in customer point of view product is the customer solution. Price is naturally

the amount of money that the customers pay to get the service, customer cost. Place refers to where the customer can buy the product and can also be considered as convenience. In company X's case this could be their own online booking engine or tour operators online page and customer service. Promotion or communication are the activities that communicate the service and persuade the target consumers to buy it. (Ibid, 93.)

Because of the special characteristics of services, 3 additional P's have been added to the service or hospitality marketing mix as seen on the figure 7. The additional P's are; people, process and physical evidence. People mean the employees and customers, as mentioned in chapter 3.2.1 services are inseparable from their providers as well as their consumers. People mean other customers as well. Process means the flow of activities when purchasing and consuming the service. The flow of activities can be standardized or customized, the number of steps can be complex or clear. An example of a not too customer friendly process could be if a customer first has to wait a long time on the phone for a call centre and once reaching a clerk, they would be told to call to a different number for their matter to be solved. Physical evidence means the physical attributes of the service and the environment, and the tangible components of the services when experiencing them. (Hudson 2008, 15-17.)

3.2.7 Marketing analysis

Marketing analysis should be included in every step of the process. It gives information and evaluations for all the other marketing activities. (Kotler & al. 2017, 94.) The below figure visualizes the marketing process from start to finish. However, it is important to remember, as mentioned in the previous chapters, the process should be ongoing and the process should be repeated whenever necessary, for example if the company sees changes in the marketing environment or target markets.

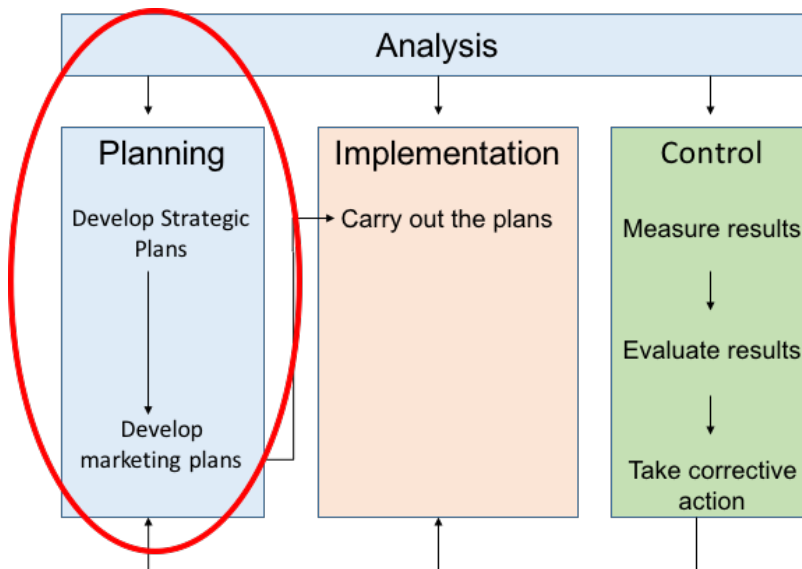


Figure 8. The relationship between analysis, planning, implementation and control.
(adapted from Kotler & al. 2017, 94.)

The area circled in red visualizes the part of the marketing process this case study focuses on, which is developing a strategic plan and developing marketing plan for the company X's Polish market. Implementation and control will be left for the case company to analyse and conduct. Especially in tour operator sales in hospitality field the results may be visible in years to come, as usually tour operators plan their products well ahead, at least a year in advance. For example, if a new product is implemented the tour operator can start planning a year ahead and results such as sales figures will only be visible during and after the season of the tour operator package. As the results will be visible in such a big timeframe they cannot be measured in this study.

A good method to conduct the analysis is to do a SWOT analysis of the company's situation. The analysis consists of internal factors such as company's strengths and weaknesses and external factors such as opportunities and threats.

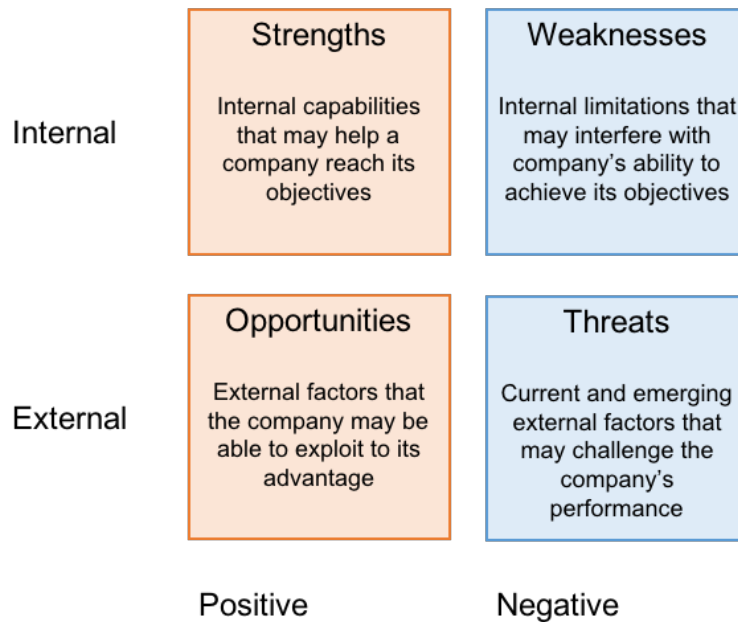


Figure 9. SWOT analysis. (adapted from Kotler & al. 2017, 94.)

Strengths are internal capabilities, resources and positive situational factors. Strengths can help the company to serve its customers and achieve its objectives. Weaknesses are internal limitations and negative situational factors. Opportunities are external factors and trends that can help the company and from which they can derive benefit from. Threats are negative external factors and trends that can challenge the development of the company. The goal is to look for the company's strengths that match the positive opportunities and look out for the weaknesses, and eliminate or overcome them, and minimize the threats. (Ibid, 94.)

As Goranczewski & Puciato (2010, 52) argue, it is important to conduct the SWOT analysis in a complete matter, analysing all important aspects fully, as conducting the analysis partially can result in incorrect outcomes.

SWOT analysis of the case company considering the Polish market is conducted in the beginning of the study with a representative of the Company X. The analysis will be revised after the results from the interviews with the company's intermediaries, as the study will give more insight on the matter. As the company's name nor business area cannot be revealed in the study, only parts of the SWOT analysis can be published and some of the areas can be only addressed in detail with the Company X representatives. The SWOT analysis can be found from chapter 5.7.

3.3 Tourism megatrends

Megatrends can be defined as a significant shift in the development of a society or of any other particular field or activity or any major movement (Oxford living dictionaries 2018). They can influence all businesses and it's good to take a look at them when planning any company's strategy. Therefore, it is also important to look at megatrends that can influence tourism development. The study aims to find out if there are any megatrends that the intermediaries find significant when looking at the Polish market, and how they reflect to company X's products.

Horwath hotel, tourism and leisure, HTL, a consulting brand for hospitality, defines 10 megatrends that have an impact on tourism, seen at the below figure.

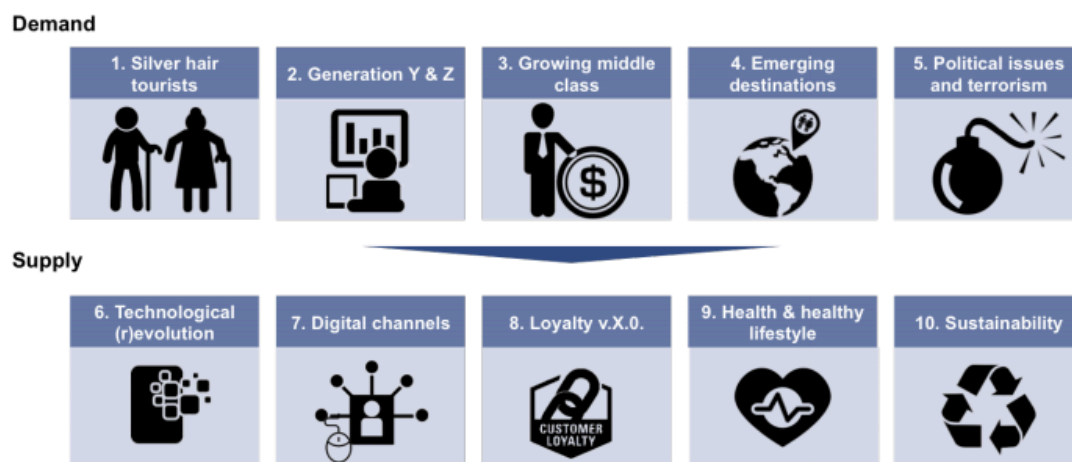


Figure 10. 10 Megatrends in tourism (Tutek, Gebbie, Chan & Durand 2015, 2).

The first five megatrends are related to demand and the last five are related to supply, these are interconnected, the demand will influence the supply for example.

Firstly, the silver hair tourists meaning the amount of elderly travellers will grow. It is estimated that by 2050 the amount of world population over 60 years old will grow by 21%. The increase in ageing population will appear mostly in China, US and India. Usually this segment is ready to spend money and they are active travellers. The elderly travellers are healthier and especially travellers from the developed world will be living longer. Health and wellness products in travel will be one of the growing segments. (Ibid, 3-4.) Even as the growth is mostly in Asia-Pacific countries, there is a growing ageing population Poland too.

For example, by 2030 it is predicted that 27% of Polish population is over 65 years old (Leszko & al. 2015).

On the contrary to the silver hair travellers there is a growing segment of the generation Y and Z travellers. There are many ways to define the generations and the exact years vary. Generation Y, which is also known as millennials, in general is defined as people born in the 1980's and 1990's. Generation Z proceeds generation Y and represent people born in 1990's to 2010's. (Francis & Hoefel 2018). Millennials are expected to represent 50% of the travellers by the year 2025. Their focus in travels is on exploration, interaction, and emotional experience. They wish to have a closer link between tourism services and their lifestyle. Especially, for the generation Z tourism industry has to be more agile and make services that suite them. This is very much linked to new technology rising and revolution, as well as digital channels. The generation Z is even using social media as a search tool very often. (Tutek & al. 2015, 5-6.) Company X has also presence in social media channels, and development of the channels to suite the Polish market could be assessed.

Growing of the middle class is set to increase from 1.8 billion in 2009 to 3.2 billion by 2020 and 4.9 billion by 2030. The growth will especially happen in Asia-Pacific region. Whereas in Europe and North America the growing of middle class is expected to decrease by 2030. (Ibid, 6-7.) It is true with most of the European countries. However, in Poland, economy has been growing as well as middle class. One of the characteristics is that the middle class will place importance in value for money and they will look for more affordable travel options. (Ibid, 6-7.) This is an important factor for company X's case as well.

Emerging destinations is meaning the rise in the popularity in the destinations that are located at the emerging markets (Ibid, 7). This would relate more to Poland's incoming tourism, and not to company X, as its products are located in the Northern part of Europe. However, Baltic countries could be considered as an emerging destination in some extend.

Political issues and terrorism are unfortunately becoming a bigger issue in tourism. When tragic terror attacks happened in France in November 2015, the amount of international visitors have dropped. Due to these events, the interest in Nordic countries has increased in recent years and travelling to Scandinavia has been seen as more safe. These events still might occur in the Nordics as well and can lead to decrease in tourism. Another factor can be more tight security measures, for example no luggage storages at the airports, which will lower the service levels for international passengers. (Ibid, 8.)

The 5 megatrends mentioned below in the chart influence the supply trends. The major trends in supply are the technological revolution or evolution, which can be seen in the increase of mobile services, real time insights with real time customization. For example, a hotel room playing your favourite music when you enter. As well as digital interaction, robots and wearables. (Ibid, 9.) Company X is also developing digital and technological solutions.

Digital channels are becoming the norm. There is still room for growth in the so called SoMo, social + mobile channels. Most importantly, people now give feedback at the same channels where they firstly search for the information about their trips, e.g. TripAdvisor, Facebook and Airbnb. (Ibid, 10.) Therefore, it is important that company X has presence in the social media channels.

Loyalty programs should respond to the dynamic digital environment as well. Loyalty programs have to be renewed as the bonus collecting is no longer as effective and sometimes the bonus systems can be confusing to the customers. The programs should find ways to personalize and tailor the rewards for each customer's needs. Integration between different service providers is also needed. (Ibid. 11.) Company X has also a loyalty program, which is mostly important for visitors from local markets.

Health and healthy lifestyle is becoming a major megatrend and tourism field can respond to this by offering more health related solutions, for example; destination spas, traditional sport and recreation, room lighting following individual biorhythm, spas that complements traditional areas with other lifestyle components and all-encompassing life coaching that embraces nutrition, physical exercise, stress management, goal setting and empowerment. (Ibid, 13.) Company X's products are not traditionally focusing on this megatrend, but there could be future developments in the healthy lifestyle in their products.

As tourism grows, there is a need to look into the sustainability, meaning the sustainability of natural resources as well as the economic sustainability. Economic sustainability provides socio-economic benefits to all stakeholders involved, implying fair distribution of income, stable employment and earning opportunities. (Ibid, 13.) Especially, with some of company X's products there could be a competitive advantage in terms of sustainability.

At the research interviews, these 10 megatrends were presented to the participants and their opinion about the significance in terms of Polish market was discussed.

3.4 Theoretical framework

The theoretical framework explains how the theory is linked to the research questions and interview themes. This is also visualized at the Overlap Matrix, which can be found at appendix 2. The matrix also visualizes where the results can be found in this study.

The main research question of the study is:

How to increase company X's sales in the Polish market?

Sub-questions are:

1. What are the main criteria when the Polish clients choose their travel destinations according to the intermediaries?
2. How the intermediaries see the company X's product in the market area?
3. Which products do the intermediaries see as most appealing for the Polish guests?
4. How do the intermediaries see the impact of tourism megatrends considering the Polish outbound travellers?

The interviews have three main themes that follow the theory chapter of the study:

1. Motivation to travel
2. Marketing concepts linked to Polish visitors
3. Tourism megatrends in terms of Polish visitors

As the interviews are conducted with the company intermediaries, the answers are representing their personal experience. However, the interviewees are experts in their field and have knowledge of the market and the case company. All of them have been working with the company already several years. The order of the questions related to different themes may be mixed in the interview and some questions may relate to many themes. As a semi-structured interview method is used, the order, amount and context of questions may also vary depending on the interviewee's background. More details about the interview method, and reason why it was selected as the most suitable one, can be read at chapter 4.2.

The first theme motivation to travel seeks to find out is there any specific needs of Polish visitors, their motivation when they select travel destinations and whether there are any specific factors that could benefit company X.

The second theme, marketing concepts, have a significant focus on the study as the aim is to write a marketing plan for the company X that would give suggestions how the case company could possibly have growth in Polish market sales. The theme aims to understand the Polish visitors needs and demands as well. Whether the intermediaries see that are there some specific factors that the Polish visitors are looking for in travel products. To understand if there is any segment of Polish visitors that the company should best target, and how they see the segment is best reached. If there are any specific products of company X that would better meet their expectations, and to find if there are specific factors for differentiation of company X. The aim is also to seek knowledge of the main factors regarding the service marketing mix. Lastly, to understand which marketing environment factors, if any, do the intermediaries see as most significant.

Finally, the study aims to seek if the intermediaries see any significance in tourism megatrends in terms of company X and the Polish market. To find out if there are specific megatrends that company X should consider more closely. Especially, if there are any factors that the company X could benefit from in regards of Polish market sales. Based on the answers this theme can also relate to the marketing or motivation theme.

Based on the results of interviews a marketing plan is conducted, with the help of marketing analysis theory and the strength, weaknesses, opportunities and threats, SWOT, analysis, which is also conducted before the interviews with the case company's representative. The analysis is then compared to the one conducted based on the research.

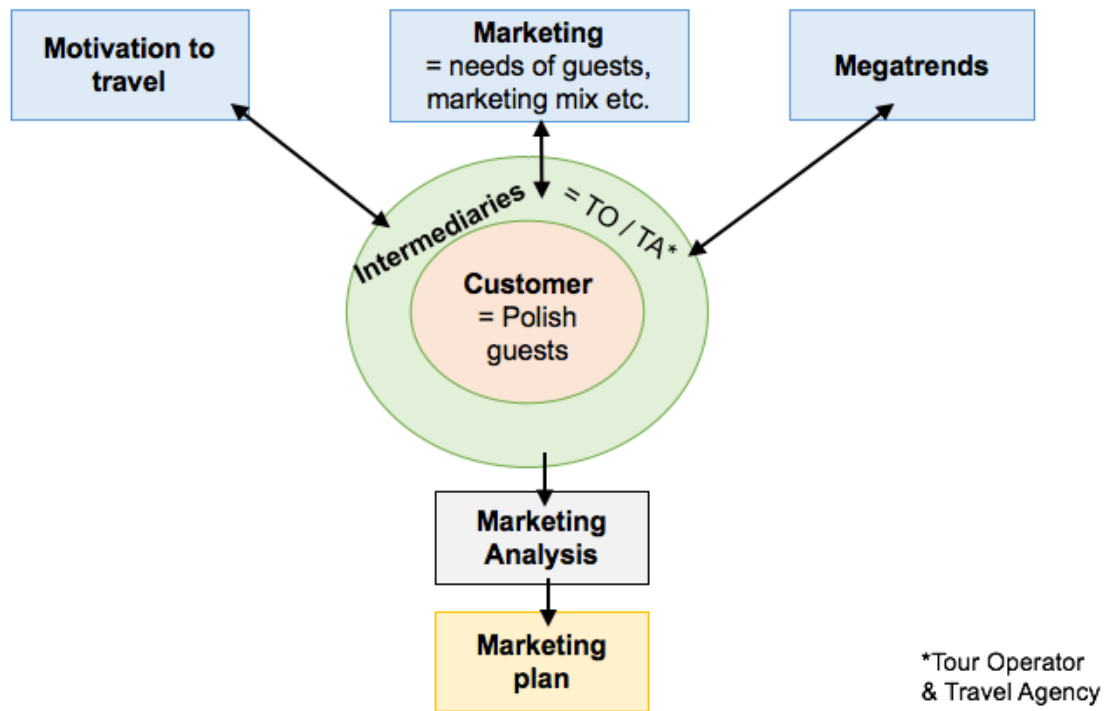


Figure 11. Theoretical framework of the study

The above figure visualizes the theoretical framework of the study. The Polish guests, the Polish leisure customers of Company X, are at the centre of the figure. As the interviews are conducted with intermediaries, tour operators and travel agencies, of the case company and not directly with the end customer, they are surrounding the guests. Motivation to travel, the marketing theories and megatrends are the main themes and through the findings a marketing analysis is conducted and a marketing plan is made for the case company.

4 Research methodology

Saunders and Lewis argue that basis of research methods can be described with an onion like diagram called the research onion, as a research has many layers. The outer layer is the research philosophy, followed by approach to theory development, methodological choice, research strategy or strategies, time horizon and inner layer is the research techniques and procedures. (Saunders & Lewis 2018, 105.)

In this study, the research philosophy is pragmatism. By using this philosophical approach, I consider that the most important factor in a research are the research questions and objectives of the study. With pragmatism, both quantitative and qualitative methods are often used or even a mix of different methods. (Ibid, 111.)

The research approach is deductive, which means the theories of the field are collected first and the research is made based on them (Ibid, 112). In this study the company X's data about the Polish market is firstly studied, followed by study of the Polish economy, which indicated a potential of growth. This is followed by study of theories related to tourism motivation, tourism marketing and tourism megatrends. The research questions are designed based on the theories. As the theory of the field gives a thorough background to the questions, deductive approach is the most suitable method for this study.

Explanatory methodology is used in the study, which is often used in studies that aim to explain a situation or problem and to explain the relationship between the variables. The explanatory methodology is supported by descriptive studies of the case company's data. Descriptive studies mean study of something that can be accurately measured, which in businesses is for example the company's sales data. (Ibid, 118-119.)

Time horizon of the study is cross-sectional, meaning it will be conducted during a short period of time. However, the study could be considered as longitudinal, which means studies conducted during a longer timeframe, if the case company will continue the study in the future as well. As the study gives an action plan for marketing strategy and the implementation and future analysis will be left for the case company. Therefore, the case company can continue the research by using their own data or even experimental methods, which means for example sales promotion of a certain product and following up the results. (Ibid, 119, 129-130.)

4.1 Case study strategy

The strategy of the research is case study. This strategy often aims to answer questions how and why. Case study strategy can be defined as a method that investigates a contemporary phenomenon in a real-world context and there can be important contextual conditions relevant to the case (Yin 2018, 9, 15). As this methodology is used in real-life research, that investigates a particular topic, often multiple choice of evidence or data is used. The strategy is relevant for this study, as it is conducted for a particular company, referred as company X, and a particular market of the company. There are contextual conditions as the sales of the Polish market for company X is naturally only relevant for the case company. It is also difficult to copy the findings for any other company as such. Naturally, in case the company has direct competitors, they might be interested in the results, but usually there are some differences between competing companies as well. This case study aims to answer to the questions how. As multiple sources of evidence are often used in case studies, firstly the company's data of the Polish sales is studied. This followed by interviews with the company's intermediates selling for the Polish market these are tour operators and travel agencies. (Saunders & Lewis 2018, 121-122.)

4.2 Qualitative method and semi-structured interviews

The research technique used is qualitative method by conducting interviews with the company X's travel agency and tour operator partners. As some of the themes are quite complex, I considered a qualitative method with interviews more suitable than a quantitative method. In this way the participants have possibility to explain their opinions freely and in more detail. The intermediaries were chosen for the reason, that these participants have knowledge of the Polish outbound tourism market, they know the case company's products and field of business, and therefore have the expertise to provide the answers to the research questions. The interviews are designed by using semi-structured interview method. In this method, the interviewer will have list of topics and questions related to them, but the order and way of asking may differ according to the participants. In semi-structured interview, the aim is to seek answers to the list of topics, and also additional questions could be asked and the interviewer can ask further questions from the participants to make sure their answers are understood correctly. (Saunders & Lewis 2018, 158-159.) Especially, when there are a large number of questions and they can be complex or open ended, the semi-structured method is beneficial (Saunders, Lewis & Thornhill 2016,

394). The interview method is suitable for this study as the aim is to seek answers to certain themes and there are many questions that affect the area. The area can also be considered quite complex, as there are many factors that affect the tourism.

As the interviews are conducted in English language, which is not the mother tongue of either party, it can be relevant to double check that the answers are understood correctly. I know basics of Polish language and have travelled to Poland tens of times and have a good knowledge of the culture. As Luomakoski (2012, 81) argues, in addition to language knowledge, cultural knowledge can be considered as beneficial when conducting interviews. For example, in Polish spoken language, the word “no” can be used as stating “well” or “yes” and an English speaker could possibly interpret this as the English word “no”, meaning a negative answer. There is a difference in pronunciation and I noticed that even as the interview were conducted in English, sometimes the participants perhaps without noticing used this particular Polish spoken word.

When conducting semi-structured interviews, it is very important that the interviewer has sufficient knowledge of the field. Therefore, deductive research approach supports the selected interview method, as well as interviews with the case company’s representatives before the interviews with the participants. It is also very important that the interview questions are designed to be open-ended, meaning that the interviewees can answer them more descriptively. It is also good to avoid so called double barrel questions, where one question is actually having two questions, and to ask one question at the time. As important is that the interviewer will have no bias. The questions should be designed so, that they are not giving suggestions about the interviewers own opinions, as well as the interviewer should not comment the answers with their own opinions. (Ibid, 401-407.)

In semi-structured interviews, the amount of participants depends on the study. When the participants are from a homogeneous population sufficient amount of participants are between 4 and 12. Population means a set of group members and homogenous population means population that has similar background. (Saunders & Lewis 2018, 138, 142, 165.) As this study is conducted with participants from similar fields, in this case tour operators and travel agencies in Poland and selling for this market, the aim was to get 5 interviews in addition to interviews with the company’s representatives.

The interview was pilot tested before the actual ones, as this is good to do in order to see how much time it takes and if the questions are understandable. The interviews can be conducted face-to-face, by telephone or by using the internet and web conferencing ser-

vices such as Skype. As the interviewer and participants live in different countries, telephone or Skype interviews needed to be used. As semi-structured method is being used, interviewing with an email can be more time consuming and difficult, as this would be more suitable for a structured interview. (Ibid, 165-168.)

4.3 Analysing qualitative data

The interviews are recorded, when the participants allow it, and notes are written during the interview. The recordings are transcribed, meaning that a text version is written from the answers of the participants. As the event is better in the interviewer's memory directly after, it is best to transcribe as soon as possible, preferably in less than two days. Therefore, the aim is to transcribe the interviews directly after. (Saunders and Lewis 2018, 162, 182-183.)

The transcripts are written with a consistent manner, where it is easy to see who is speaking and when a question is being asked. Writing the transcripts in a consistent manner is a way of preparing the qualitative data for analysis. In this study the data is analysed manually. There are different types of software that are able to analyse qualitative data, but a manual method is mostly suitable as there is aim for 5 interviews. A software might be needed, if there would be tens of interviews. The results are analysed by checking if there are recurrences or patterns. The results are categorized to different categories and sub-categories. These categories can then be checked for testable propositions, which in this deductive study means that are the categories answering the research question. The literature used for the study and the research question indicates which categories are significant. It is possible that the analysis gives new unexpected ideas as well, which means that some research questions might need to be revised. (Ibid, 202-209.)

4.4 Interviews

The aimed amount of 5 interviews with different interviewees were conducted during late December 2018 and in January and February 2019. Two of the separate interviews were with representatives of the same company, and altogether there were 4 different intermediary companies interviewed. All of the intermediary companies have several years of experience working with the company X, varying from 5 years to 18 years. All except one of the interviewees had the correlating time of personal experience of working with the case

company. One of the interviewees had around a year of personal experience with the case company, but also previous experience in working in tourism field. This interviewee was the second one from the same company, as I firstly had an interview with the company's owner and founder. The second interview was, however, important as the participant is responsible for a different region in Poland. Some of them are representatives of tour operators, some travel agencies and one of an online travel agency. Part of them focus on groups or FIT, free independent travellers, only and some are selling both. Three of the interviewees were owners and founders of the intermediary, one a director and one responsible for sales.

One of the interviews was conducted face to face as I happened to be in Poland during that time. As otherwise I and the interviewees were living in a different country, rest of the interviews were done remotely. One of the interviews was via WhatsApp video call and 3 of them by using a regular phone call. I recorded all of the interviews with a recording program in my tablet and therefore the phone calls were also done with the speaker on.

Table 2. Conducted interviews

Interviewee	Company	Position	Way of interview
Participant 1	TO (same company)	Owner / Founder	Face to face
Participant 2	TO (same company)	Sales	Video call
Participant 3	TA	Owner / Founder	Phone
Participant 4	OTA	Director	Phone
Participant 5	TO	Owner / Founder	Phone

TO = Tour Operator, TA= Travel Agency, OTA= Online Travel Agency

The interviews lasted between 40 minutes to 1 hour. I transcribed all the interviews by using before mentioned consistent pattern. While transcribing the first interview, I experimented with an application that transcribes the texts automatically, but I soon noticed that the application made very many mistakes, and therefore it was easier to transcribe from the beginning by myself rather than correct the mistakes. The transcription of one interview took around 7-10 hours. All the interviewees were told that the interview is confidential. Due to the confidentiality, the transcriptions cannot be shared in this study. There are in total 62 pages of transcriptions from all of the interviews.

4.5 Validity and reliability

As Saunders, Lewis and Thornhill (2016) explain validity considers if the research techniques used give relevant results. Reliability in research means that are the results replicable and if they are consistent.

I consider the research methods used as valid for this case study. The interviewees are experts in tourism field and have worked with the company X for several years, some almost for few decades. Therefore, they know the special characteristics of the company and have experience in the selling their products. The research, however, does not solely rely on the interviews, but is also studying for example the case company's own sales data, tourism megatrends and Polish economy, which also support the results of the interviews. As Yin (2013) argues, when a case is studied closely as an in-depth analysis of a real world context, the results can be generalized. In this case study, they can be generalized for the case company and as multiple sources are used, the study can be considered to be conducted as an in-depth analysis.

I considered the semi-structured interview method most valid for this research, as it gives the interviewees more freedom to express their opinions than for example a survey method interview. The interview method also helped to direct the discussion as I had planned certain themes, which I wished to cover. Whereas an in-depth open interview could have led the conversation to much wider topics and derail the focus. In my opinion, introducing the tourism megatrends pictures was a very useful tool, as the discussion about the megatrends brought up many good ideas in the interviews. Some ideas might not have been otherwise mentioned.

However, Polish guests' motivation to travel to company X's facilities, can be difficult to find out by using a qualitative method with company X's intermediaries. Better results could be found out, when doing a research with Polish citizens themselves. When speaking about the whole population of Poland, this kind of a research can be quite difficult for a student to conduct, and would need a bigger research agency's resources. Doing a quantitative research with Polish travellers of company X could be one option, but as majority of the leisure segment bookings are done through company's intermediaries, the company does not have the end travellers contact details, only the contact details of travel agency's or tour operator's representatives. With European General Data Protection Regulation, GDPR, it is also stricter what kind of contact details can be given out and how they are used. There could also be a challenge with language, and it could be beneficial to have

such a survey in Polish. As I only know basics of Polish language there would be need for outside help. As the intermediaries are in contact with the end travellers and all who were interviewed are experienced in selling the company's products, I considered that they are experts in the field and have knowledge from feedbacks they have received from their customers, the end travellers, regarding their motivation to travel.

The selected interviewees are connected to the reliability of the study as well. As mentioned before the interviewees are all experts in the field. As Luomakoski (2012) explains in his case study as well, experts are seldom replaceable and they have knowledge of the field. The fact that I interviewed the case company's representatives as well, and gained knowledge of their intermediaries prior to the interviews, gave me good insight on the current situation of the company.

Reliability of the results depend on the fact that are the interviewees expressing their honest opinions. It is possible that some interviewees are not revealing all of their opinions, due to different reasons. For example, Luomakoski (2012) argues that if the answers could reflect on the interviewees somehow negatively, in his study, if the interviewees could have affected what happened with their own actions, they might not wish to reveal the whole truth. However, in this study I am quite confident that the participants were honest in their answers. I emphasized that the interviews are confidential and that the study itself also does not have the company's name. Some of the participants said that they would not mind, if their name is published. As the name of their company or the name of the participant could give indications of company X, I could not publish their names either. The sales growth of the Polish market can benefit both the intermediary and the case company, therefore it is also unlikely that the participants were not honest in their answers.

Company X would benefit from a larger scale study conducted with the Polish end travellers especially regarding their motivation to travel to Scandinavia and Baltic countries as well as to company X's facilities. However, some results about the motivation to travel to Finland can be also found in Visit Finland's travel surveys. The motivation to use company X's facilities could be studied more. Perhaps this kind of study could be done with the help of the intermediaries in the future, as the intermediaries could send out a survey for their guests in co-operation with company X.

5 Analysis

As mentioned in the previous chapter the transcribed interviews were analysed by identifying recurring themes and most relevant factors for the case company. Even though the semi-structured interview's first theme is motivation to travel, it is good to start by looking at the market segments, to understand who are travelling, and secondly looking at motivation, meaning why they are travelling. The chapter moves on to deeper understanding of guest's needs and the participants' ideas, which were inspired by the discussion of the tourism megatrends, and moving on to marketing concepts. As these themes are interconnected, the key findings are presented in strengths, weaknesses, opportunities and threats, SWOT, analysis. The future development suggestions, and a marketing plan for a potential new segment is lastly discussed.

5.1 Segments of Polish leisure guests

It is firstly important to understand, who are the Polish guests that are travelling to the case company's facilities and which segments could have the most potential to have increase in sales. All the interviewees explained that the variety of segments in leisure travel from Poland is very wide and there are very many different age groups that are visiting the case company through the intermediaries. The segments can be divided into group travel and free independent travel, FIT, but otherwise some participants had difficulty to determine specific segments that would have more potential than the other. Few of the interviewees stated that the product is good for many different segments.

When looking at the group travel, one segment is catalogue groups. A catalogue group means that there is a pre-planned program designed by the tour operator, which includes the company X's products. They can be traditional printed catalogues or available online. The groups usually travel by bus to company X's destinations. In catalogue group case, the guests don't usually know each other, but are buying a pre-planned package holiday through a tour operator.

Another segment is groups from companies, which could traditionally be categorized as incentive travel, but in Polish market case the intermediaries categorize and consider them more as leisure groups. Usually big companies in Poland have a social fund with which they can offer some culture activities to their employees or even some trips. The company will pay a part of the tour and the employee pay some part by themselves. This

could be traditionally considered as incentive travel, however as the employees are often bringing their family or partners with them, and as there is not usually an official program by the company, this could be considered as part of leisure travel and the company could be considered more as a party that is collecting the group. The guests of the group are coming to company X's facilities to enjoy a holiday.

School and student groups were also mentioned as a part of the group travel. Students can be university students that are coming for a leisure travel and school groups are usually also having a combined leisure trip around the cities of the Baltic sea.

FIT travellers who drive with own car or go by plane are different segments that should not be forgotten. They could be called self-fly and self-drive segments. However, it is hard to see from the case company's own data as well, which part of the direct FIT guests are leisure and which are coming to the destinations for work. As it is known that some part of Polish guests that travel to Finland or Sweden for example, are coming there to work. However, most of the participants stated that the FIT leisure travel segment could have even more potential in the future. One participant stated that only about 20% of Polish leisure travellers are part of group tours and the rest are FIT travellers.

One part of the FIT segment that was mentioned is the guests that are coming to the destinations for fishing. Three out of five participants mentioned this segment. When these tours are booked via a travel agency, it is easier to recognize this segment, as mostly the guests are telling the reason why they travel. However, if they book directly via the case company's online booking system or through an online travel agency, their travel motivation might not be documented. The fishing segment can be considered as part of FIT travel, as they are usually small groups of less than 10 persons. Most likely they are travelling with a car or van, which might have a trailer, as they have a lot of fishing equipment. One participant told that in some cases a part of the group is flying to the destination and one part is driving with the equipment.

One of the FIT segments that is becoming more popular especially among the middle class is travelling with camping cars and caravans. Three out of five mentioned the potential of this segment. The fact that company X's destinations are reachable with a vehicle from Poland supports the future potential of the camper segment.

Table 3. Segments of Polish leisure travel market

Groups	Free individual travel, FIT
Catalogue groups	Fishing
Company groups	Self-fly (future potential)
School groups	Self-drive (future potential)
Student groups	Camping / Caravanning (future potential)

The table above lists the different segments of Polish leisure travel market, which were identified based on the interviews with the case company's intermediaries. One common factor among almost all of the segments is that they mostly reach the company X's destinations with a vehicle. Usually all of the groups are travelling with a bus. At least part of the guests that are going fishing are travelling with a vehicle and naturally so are the self-drive and camping FIT guests. Only the self-fly FIT segment, which is one of the segments that could have more potential in the future, is certainly reaching the company X's destinations by an aeroplane. There can be a small part of the groups that are flying as well, but mostly the groups use a bus.

An additional small segment of the group travel, which was mentioned by one of the participants is pilgrims, meaning catholic church groups. The groups travel to company X's destinations to see some churches or places that have saints. They are travelling with a priest and often need a facility where they can perform a mass and pray. Company X has conference rooms that can be offered for these purposes as well.

As mentioned before, another segment of Polish guests are the ones that travel to the case company's destinations for work. It was also mentioned in few of the interviews that MICE; meeting, incentive, conference and event groups could be a growing segment from Poland in the future. However, as the study focuses on leisure tourism, the MICE segment is not studied in further detail. This segment and its potentiality for the company X's, could be researched more in other studies.

5.2 Motivation to travel

Secondly, it is important to understand the motivation to travel of the Polish guests, the reason why. The motivation was the most challenging part especially of the FIT guests that make bookings through online platforms.

The most repeated theme for the motivation to travel to Company X's destinations is that the destinations are new in Polish market. They have not been the most common places to visit as also seen on the appendix 1. Therefore, novelty and freshness of the product is a big part of the motivation. Important to note as well is, that the destinations are the leading factor to visit company X's facilities and not the facilities themselves.

One participant mentioned also that the fact that the tour packages can have a mixture of destinations is a part of the motivation to travel. The guests are able to see different cities and countries during the same tour.

The unique product of company X and the unique experience it offers was, however, mentioned as an important part of the travel motivation as well. This brings a novelty value and was said to be part of the travel motivation. Couple of participants said that the product is something that is seen as elegant and exclusive and with the help of the intermediaries' package tours, it is now something that is affordable for the Polish market as well.

Safety was mentioned in all of the interviews. In four out of five interviews it was mentioned as an important factor, when choosing the travel destination, meaning the safety in the destination. One interviewee mentioned the factor of safety concerns in way of travelling. Few participants explained the decrease in sales of holiday packages to Egypt and Tunisia for example, as there has been rising concern of safety in those countries in Poland. Increasing concern of safety when travelling and especially safety in destinations, might have had an effect in the rising popularity of Scandinavian countries as these are considered as safe places to travel to in Poland. One participant mentioned that Finland as a destination is also volatile due to the fact that some packages that include the country also continue to Russia. If there are political conflicts in Russia, these packages are cancelled and therefore Finland is also left out of the tours.

Nature in the destinations was mentioned in couple of the interviews as a big part of motivation when travelling to Scandinavia especially. The participants did not consider the destinations as major sightseeing attractions, but rather as having the unique nature as one of the most significant pull factors. In Visit Finland's (2019) travel survey for 2018, the most attractive matter in Finland, in general, was nature by 59%. Among Polish respondents 65% considered nature as the most attractive factor about Finland. The question was only asked from the leisure travellers. This also supports the comments from the interviews.

For the fishing segment nature, of course, plays an essential part and the main motivation is the places to go fishing. Although, it was mentioned that part of the fishing segment goes, for example, to Norway and are only driving through Finland. However, they are using company X's facilities when passing through.

One participant mentioned as well the slow travelling as they remembered their guest saying: "It's so nice to drive to the North, because we have enough of running through the cities of South Europe." Which also relates to the pull factor of that the Company X's destinations are reachable with a bus or a car, as this is shown as one major criteria in most of the segments of Polish market. The quoted sentence also relates to the novelty of destinations and cities, which was mentioned firstly. Interviewees also mentioned that the Polish guests who are travelling to the Nordic countries most likely have already been travelling in other parts of Europe and are looking for new destinations. Most likely Scandinavia and Baltic countries are not the places where they would travel to, when they are travelling for the first time.

Table 4. Push and pull factors of travel motivation of company X's Polish leisure guests

Push factors	Pull factors
Novelty	New destinations / cities
Prestige	Uniqueness and novelty of product
Affordability	Safety
	Nature in destinations
	Reachable by bus / car

The table above lists the interviewees' view of the motivation to travel by dividing them to push and pull factors, which are described at the chapter 3.1. It was much easier for the participants to determine pull factors rather than push factors and in order to fully understand the latter, it might be necessary to conduct a separate research with the end guests.

5.3 Needs of Polish leisure guests

Needs of the guests in tourism is also related to the motivation to travel, for example to Maslow's theory of hierarchy of needs, which is mentioned in chapter 3.1. Needs of the

guests and customers are also a fundamental part of marketing. As the first step in a marketing process is to understand the customers wants and needs as mentioned in chapter 3.2.2. as well.

Price was mentioned as the most important factor in travel decision making by all of the interviewees and especially affordable prices. As the destinations of company X are perceived as expensive ones, especially Scandinavian countries, the Polish guests might think it is not affordable. However, with the package tours made by the company X's intermediaries, who combine different cities, it is now affordable for the Polish guests, for example when they have shared accommodation.

However, even though affordable prices are important, the guest are looking for value for money. They are looking for products that offer them quality service with less money. The interviewees said that company X's products are able to offer this, and they consider the quality of service being in a high level. Few of the participants explained that Polish people are used to travelling to very cheap package holidays to Egypt for example, and getting very high level of service such as 5 star hotels with a budget price. As mentioned in the travel motivation, the popularity of those destinations have decreased in recent years in Poland due to safety concerns. As the product company X offers is quite unique and considered as quite prestige, and in general the destinations perceived expensive, perhaps the guests are not expecting such a cheap level of prices as in those package holidays.

Perhaps the Polish guests can save in accommodation costs, but the quality of service comes also through the entertainment and dining. According to the interviews, many of the group members like to dance at a disco after their dinner for example. They are happy with the level of entertainment that the case company offers and one participant said that they are very impressed with that.

Food is important for Polish guests and all of the interviewees, who sell group travel, mentioned that they like to have all-inclusive packages, where at least breakfast and dinner is included. They have noticed that the packages sell better this way. This may have connection to the fact that the guests value price, as when they know that their meals are pre-booked and they don't need to purchase them on top of transportation, excursions and accommodation, they might feel they have more money to spend during the tour. This was said to be proven as a successful way, especially in tours to the Scandinavian countries, which are perceived as expensive. Especially all you can eat buffets with alcoholic beverages included are popular. In terms of the food itself the Polish guests like to try local

foods and for example Scandinavian specialties, such as fish and seafood, when they are travelling to these destinations. In general, they don't wish to find Polish food for example.

Importantly quality of service also relates to stability of service. Three out of five participants mentioned this factor. One interviewee explained about the cheap airline Ryanair, and the fact that there can be many schedule changes. Another one explained about budget hotels and the fact that they have in the past experienced overbooking situations and complaints about the rooms not being similar as in the pictures. The participants told that they are happy about the company X's services and consider them as stable.

Language needs were spoken about in couple of the interviews. However, the interviewees did not see this as an issue. Usually the groups are travelling with a tour leader, who can help them with language, in case the group members don't speak English. Especially the younger travellers do usually speak good English, which is usually spoken quite well in company X's destinations too.

One need or future development wish, which three out of five interviewees mentioned, was a new product for company X in Poland as this would increase sales in the Polish market. The interviewees argued, that this would be something that is needed. For the guests from South of Poland especially, the drive to the current destinations is quite long and is a factor that hinders the sales growth.

As mentioned in chapter 3.2.1., Grönroos (2015, 495.) explains service marketing as keeping or exceeding promises to customers. The interviewees mentioned that often the feedback from groups who have travelled is that the service level of company X has exceeded their expectations and the guests are usually very happy about their tour.

5.4 Tourism megatrends in Polish market

Tourism megatrends were used in the interviews as a tool to inspire the interviewees for new ideas. The tourism megatrends picture, which is seen on the chapter 3.3. was shown to the participants and I shortly explained what each of the 10 images mean and what they relate to according to the article. The participants were asked to tell if they found any of the megatrends significant or relevant in terms of Polish market and company X. The megatrends are divided into five, which are related to demand, such as silver hair tourists, generation Y and Z, growing middle class, emerging destinations, and political issues and terrorism. Five megatrends are related to supply; technological revolution or evolution,

digital channels, loyalty programs, health and healthy lifestyle and sustainability. The demand and supply are linked to each other.

Silver hair tourists was mentioned by one of the interviewees as a potential future segment even before the megatrends image was introduced. All except one of the participants thought that the segment is surely growing in Poland as the population is ageing. One of the participants did not comment on this megatrend's relevance. Three out of five thought that the ageing population is currently growing and the elderly have time, but perhaps not much money to travel due to low pensions. One participant expressed that pensioners might be looking for cheaper packages and offers, but when they are at the destination they can be willing to spend. There is a challenge for silver hair tourists from South of Poland especially as they have lot of kilometres and hours to spend on the bus before reaching company X's destinations, as especially this segment is not used to travelling by plane. The segment is traditionally travelling by bus and in a group. Due to the inconsistency of the answers in the interviews, silver hair tourists from Poland, can have more potential in the future, but at the moment company X should focus the marketing efforts for the other segments that currently have more purchasing power.

Generation Y & Z, meaning the generation born in 1980's to 1990's and generation born between 1990's and 2010's was seen as a growing market in terms of tourism by most of the interviewees. One participant mentioned that 20-30 year olds have now more money in Poland. However, many mentioned that a part of the generation, such as students, don't have too much money to spend. Many interviewees mentioned that the younger generations are travelling much more and are looking for new destinations and new experiences. As mentioned previously students and school groups is one important segment from Polish market. One participant also mentioned that the parents have now more money and they can send their school children, youngest part of generation Z, for these kind of package trips. Of course the generations Y and Z are representing quite a wide age group as the millennials are already in their 30's or almost 40's depending on the definition. One common factor that the interviewees mentioned between these generations, is the fact that they are used to booking their trips online. They most likely will check for offers online and look for inspiration in social media. They usually know different languages, like English, better and are most likely travelling by themselves, and not part of a group tour.

Growing middle class was mentioned by all of the interviewees as a significant megatrend in terms of Polish market. The middle class is growing and people in Poland, especially the generation in work life, have now more money to spend. Middle class can also include

for example the above mentioned millennials. Naturally, as the middle class has more purchasing power and they are travelling more, it is a very important factor in the sales in the Polish market for company X. Few participants mentioned that majority of the middle class will be booking their trips on their own and not participating in group tours, and therefore online platforms are important. They would most likely be part of the free independent travel segment, FIT, and those who drive by themselves or fly to the destinations, in other words self-fly, self-drive FIT segments. The growing middle class relates also to the potentiality of meetings, incentive, conference and events, MICE, market.

One segment that was especially mentioned related to middle class is people going to holidays with a camping car or caravan. Three out of five interviewees mentioned this trend. Before in Poland camping cars were perhaps considered more for the people with not too much money to spend, but now the perception is reversed. The middle class in Poland, that has more purchasing power are now buying more camping cars. It is difficult to find statistics of the camping car market development, as for example Samar the institute of motor vehicle market research in Poland, has campers combined together with commercial vans and vehicles (Samar 2018). However, the fact that three out of five tourism experts in Poland mentioned this trend, gives a good indication of the segments potentiality.

In general megatrends of emerging destinations was not seen as relevant for this study. One participant said that Baltic countries are showing more popularity in the Polish market and they could be seen as emerging destinations. In the article itself the megatrend was more related to emerging destination in Asia, and perhaps therefore as well, it was not seen as the most relevant for this case study.

The global megatrend and threat of political issues and terrorism was mentioned by four out of five participants as strongly affecting the travel decisions of Polish guests. As mentioned in the previous chapters, this can be seen as part of the motivation to travel to Scandinavian countries, as they are perceived as more safe places to travel.

The participants thought that the megatrend related to supply, technological revolution and evolution mostly relates to the facilities of company X. One interviewee mentioned that this is an important factor as well, as new technologies in the facilities relate to the quality of service. This can be something to differentiate with from competitors. As mentioned in the previous chapter, value for money in terms of quality of service and the facilities was an important need of the Polish guests.

Digital channels were seen as a significant megatrend by all of the interviewees. These are strongly related to the FIT market and above mentioned generation Y & Z and middle class. The digital channels in tourism mean online booking portals and websites as well as social media. For example, online travel agencies are ones that don't have a physical office, but their product is available online to book through a website. The interviewees mentioned that the digital channels are becoming even more important in the future. As people are already using smartphones and are able to go online constantly, it will become even more important way to reach and target the travel guests in the future. Social media and its interactive nature was mentioned as something that especially the younger generations are using when looking for travel inspiration.

Loyalty programs were considered as something important only for FIT segment, as those who travel in groups, which are booked through tour operators are not usually using them. The interviewees thought that some of the Polish guests have for example airline loyalty cards and they use them, but there was not any further discussion about how to develop the loyalty programs for the FIT market of company X. It is possible that it is not relevant for those guests that are only visiting the destination once. One participant mentioned that in business to business B2B travel segment familiarization tours, also known as FAM tours, can be interpreted as a B2B loyalty program. In travel business it is common that the partners come for an inspection tour to the supplier's location, and the suppliers cover usually at least part of the costs. This way the buyers, meaning travel agencies and tour operators, can experience the product they are selling, or in some cases see a new product that they could possibly include in their portfolio. The suppliers of location or facilities can benefit from the FAM tours as well, when they possibly find new partners who will start selling the product and perhaps the existing ones can start to sell it more.

Health and healthy lifestyle was not considered in general as a significant megatrend for the Polish guests by any of the interviewees. There has been a trend of healthy living and fitness in Poland especially among the younger people, such as eating healthy and exercising, but this was not considered as relevant when thinking about a travel destinations or especially the case company.

Sustainability was not seen as an important factor by any of the participants either. Couple of the interviewees said that this might be something that has more significance in the future, but at the moment this is not influencing their choices of travelling. Even though, company X could have some unique selling propositions related to this field, according to the interviewees, it is not a reason why the Polish guests would choose a certain place or certain way of travelling.

Table 5. Most relevant megatrends for Company X in Polish market

Demand	Supply
Growing middle class	Digital channels
Generation Y & Z	Technological (r)evolution
Political issues and terrorism	

Table 5 lists the most relevant megatrends for company X in the Polish market, according to the interviews with the company's intermediaries. Growing middle class, generation Y & Z, and political issues and terrorism are the megatrends related to demand in Polish market. Digital channels and technological revolution and evolution are related to the supply, in this case the Company X.

5.5 Marketing strategy and marketing mix in Polish market

This chapter discusses the marketing strategy and marketing mix based on the interviews and when looking at the whole Polish market. In chapter 5.7. one segment of the Polish market is chosen for deeper analysis for a marketing plan.

Different segments of Polish leisure guests can be found on chapter 5.1, and listed at table 3.

Targeting the segments of group travel relies closely on the co-operation with the intermediaries. The Polish intermediaries know the language and they are doing the marketing for company X. The case company would not at the moment have resources to do this kind of marketing on its own. On the FIT segments the targeting should focus more on the digital channels, as these are where the guests are searching for the information according to the interviews. There could be more possibilities in utilization of social media. On the FIT segment company X also benefits from the co-operation with the intermediaries, for example, with online travel agencies.

Differentiation of the product is closely related to the unique product of company X and the high quality of service it offers, especially when compared to its closest competitors in local markets. In tourism field the competitors can however be other destinations and in

Polish market case especially destinations reachable by car, for example in South of Europe. As mentioned in previous chapters the novelty of the product company X offers and the destinations are an important part of the differentiation.

In Polish market the product can be positioned as more expensive and prestige, but with the help of the package tours offered by its intermediaries, it is now affordable. In other words, the product could be described as affordable luxury.

When looking at the marketing mix for the Polish market, product of company X cannot be further described due to business secrecy reasons, as earlier mentioned it has some unique aspects that bring a novelty value in the Polish market. Place or convenience of the product is positive for the Polish guests as the destinations can be reached with a car or by short flights. However, especially for the guests from South of Poland the distance to the destinations is quite longer than from the North of Poland. As the Polish guests are in general price sensitive, company X should focus on the products that are affordable in the marketing, and for example promote the seasons when there is less demand and where they can possibly offer lower prices. Promotion of the product at the moment closely relies on the co-operation with intermediaries, especially with the groups. It was mentioned in the interviews that it is very important in the Polish market to have nice pictures of the products and destinations in the promotion.

When speaking about service marketing people play an important role, but not only people of company X, but also the representatives of intermediaries. Therefore, it is essential that the co-operation is close and when necessary the partners are provided with product training and are informed about any updates or news. Process also means that the booking process through the intermediaries is smooth and they know the needed details of the facilities as well. Naturally, meaning also the processes of company X itself. Physical evidence in service marketing means the tangible part of the service, meaning the facilities, which the Polish guests are experiencing when they travel. As mentioned previously the Polish guests are in general very happy about the facilities.

In the interviews, lack of destination marketing was mentioned as a factor that hinders the Polish market sales. This is especially relevant when speaking about the FIT market sales. At the moment the intermediaries have to market the destinations themselves and cost for marketing to the FIT market is larger than cost of marketing to travel agency and tour operator groups, for example the company leisure groups. Few participants mentioned Iceland as an example of successful destination marketing, as the country has increased its tourism sector remarkably in the last years.

5.6 SWOT analysis

Strengths, weaknesses, opportunities and threats, SWOT, analysis was done before the research interviews with company X's representative of the Polish market. After the interviews with company X's intermediaries, I revisited the analysis and added few factors, that were raised during those conversations. The new factors are in bold text on the below table 6. Only few of the factors were not raised by the company X's representative, which also shows the close co-operation with the market.

Table 6. Revisited SWOT analysis of Polish market for Company X

Internal	Strengths	Weaknesses
	Unique and high quality product Unique destinations Location, reachable with car and good flight connections Strong co-operation with partners Destinations considered safe	Lack of destination marketing Language barriers Own resources for destination marketing, digital marketing and SOME in Polish
External	Opportunities	Threats
	Poland's economic growth Growth in outbound travel and outbound expenditure Close to company X's destinations FIT travel Camping car / caravanning segment	Other destinations reachable with car, South of Europe Competitors, lower prices on some products Safety concerns, political issues and terrorism

Internal strengths of the company X were nearly all explained by the company X's representative as well. Unique and high quality product was also mentioned in the interviews with the intermediaries. The unique destinations are also related to the fact that the destinations are new in Polish market and to the nature in the destinations. Location and especially the fact that the destinations are reachable by a car is a strength of company X, not

to forget the good and increasing flight connections from Poland to the destination countries. The biggest strength of Company X is its close co-operation with its partners in the Polish market, the tour operators and travel agencies.

Destinations are considered as safe places to travel to in Poland. However, the safety concerns can also be considered as external threat, as there is possibility that situations in the destination countries change even rapidly and the affects it may have on the Polish market are not known.

Weaknesses that hinder the sales growth are lack of destination marketing. The company and its intermediaries need to do own destinations marketing. Company X has limited resources to do the marketing at the moment. The digital channels and social media were mentioned in the interviews as important places to reach Polish guests, and there can be limited resources and language barriers in what the company X can do by themselves. However, in this as well, it benefits greatly on the strong co-operation with its partners.

Language barriers in company X's facilities can be seen as one weakness, however in the interviews this was not seen as a big issue. With new technologies there can be easier ways to tackle the language barriers as well.

External opportunities for company X is the economic growth in Poland and especially the growth in outbound travel and outbound expenditure. This is also related to the growing middle class, which was mentioned in all of the interviews. The location of Poland to the company X's destinations is an opportunity in the company's point of view.

Currently, the leisure market sales have focused on the group travel segments, but FIT travel segments and the camping car or caravanning segments were mentioned in the interviews as having future potential to grow in sales.

The external threats for company X are also other destinations and especially in the Polish market the ones that are reachable with a car, for example in South of Europe. As Polish guests are very price sensitive, company X's higher prices than its competitors in some of the products can be seen as a threat.

5.7 Marketing plan for a potential new segment

The company X should focus on and keep the close co-operation with its intermediaries, especially when speaking about the group travel segments. The company might not have resources to reach these travel segments directly as there can be for example language barriers. Therefore, it is essential that the case company is working closely with the intermediaries who are able to market and sell the company and its destinations in the business to business travel segment, for the company groups that are travelling for leisure, catalogue groups, school and student groups, and the potential new segment of meeting, incentive, conference and events, MICE, sector. As the current marketing plans are working with these existing group segments, the study focuses on giving ideas for a potential new segment in the free individual travel, FIT, market.

The FIT market includes those who drive with their own car or fly to the destinations. For all the FIT segments it was mentioned in the interviews that digital channels are important. People are looking for the trips online and booking the trips themselves online as well. A concern especially among the FIT market is the lack of destination marketing. Due to this it is difficult and costly for the company X and its intermediaries to reach the FIT guests, as they need to promote the destinations as well. However, some solutions can be found and sometimes the marketing efforts have to be more creative. For example, for those who are flying to company X's destinations, the company could try out cross-selling and cross-marketing campaigns with airlines.

An interesting segment that was brought up, is people travelling with camping cars, which will be called camper segment hereinafter. One main factor which was raised during all of the interviews was the growing middle class in Poland. The trend of travelling with a camping car, is especially among the middle class. Therefore, as the segment is part of middle class, they have more money to travel to company X's destinations.

According to Vilar (9 April 2019) the fastest growing search engine micro-brandtags for Finland are cities, camping and lakes. The micro-brandtags mean what people are searching about Finland in search engines. World-wide camping is one of the fastest growing micro-brandtags as well, and only in Europe it has grown with +23,9%, which shows that this is becoming a trend not only in Poland, but in other countries as well. However, compared to other Nordic countries, for example Norway and Sweden, Finland is still lower in the searches, which tells about the popularity of Norway and Sweden for

camping as well. As Sweden is one of company X's destinations, it is a positive sign that the searches about camping are high for the country as well.

When targeting a new segment, it is important to know that the segment is large enough, to ensure the resources are not shifted from another important segment to one that is very small. There is a challenge in this, as there are not specific statistics of the camping car or caravan sales in Poland. However, the trend was mentioned by 3 of the interviewees who are experts in Polish tourism field. The growing interest can be seen in several camping segment focused websites and associations in Poland as well. For example, the Camper and Caravan show (2019) in 2018 gathered 66 000 visitors.

Due to the special characteristics of company X's products, the company would benefit from targeting this segment.

The marketing plan gives suggestions on how to reach and target the camper segment. The implementation and marketing control is left for the case company to do and decide on. As it is also important to control the marketing plan, meaning measuring results and revising the plan if necessary.

The mission of the marketing plan is to increase the Polish camper segment sales of company X. The goal is to have an increase of sales by 10-20% after the first season when the marketing plans are implemented. The goals can be measured by investigating the company X's own sales data.

Competitor analysis is an important part of a marketing plan. As due to business secrecy reasons the case company's name and field cannot be revealed, the competitor analysis of company X's direct competitors, meaning the ones who have a similar product, is not published in this study. However, it is important to note that other destinations can be seen as competitors for the case company as well, especially destinations, which can be reached with a vehicle from Poland, for example in South of Europe.

Currently, company X does not do any marketing for this specific segment directly. In general, the marketing relies on the co-operation with intermediaries. However, the company's own data indicates growth in the camper segment as well.

The table 7 shows the strengths, weaknesses, opportunities and threats analysis, SWOT, only for the camper segments. Some of the factors are of course the same as on the

SWOT analysis for the whole Polish market, which is shown on table 6 on the previous chapter.

Table 7. SWOT analysis of Camper segment

Internal	Strengths	Weaknesses
	Location, reachable with a vehicle Unique and high quality product Unique destinations / nature Convenience of product Destinations considered safe	Lack of destination marketing Language barriers Own resources for destination marketing, digital marketing and SOME in Polish
External	Opportunities	Threats
	Camper travel, growing trend in Poland Growing middle class Trend of slow travelling Popularity of Norway, can drive through company X's destinations Novelty of Company X's destinations Moomin character in Finland	Other destinations reachable with vehicles, South of Europe Competitors, lower prices on some products Safety concerns, political issues and terrorism

It is of course especially significant for the camper segment that the company X's destinations are reachable with a vehicle. This strength also supports the potentiality of the new segment. The unique and high quality product as well as unique destinations and that fact that the destinations are considered safe in Poland, are also very relevant for this segment. The unique nature in the destinations is one of the most appealing strengths when considering the camper segment. As they mostly are looking for destinations where they can be closer to nature. Convenience of product relates to the company X's services.

Weaknesses are very much the same as on the table 6. The lack of destination marketing can be especially significant for the FIT segments as well as the camper segment. Language barriers and own resources of company X play an important role. However, as

mentioned on the previous chapter language barriers can also be solved with new technology. The marketing efforts can rely more on cross-selling and cross-marketing on the camper field, and should focus on digital channels.

The opportunity of the camper segment is naturally, as mentioned before, the growing trend of the travelling with camping cars. As mentioned before, the interviewees explained that this is especially a trend among the growing middle class in Poland. One of the interviewees mentioned the trend of slow travelling in Poland as well, which is highly related to the camper segment.

Rising popularity of Norway as a destination was also mentioned in the interviews, and one of the participants mentioned, that some part of the fishing segment's guests are going there, and only driving through Finland. Norway has of course some unique selling propositions that the company X's destinations can have difficulty to compete with, such as the fjords. Company X can, however, benefit from the popularity of Norway with the camper segment. For example, if they are driving through Finland and are using company X's facilities when passing by, or as well if they drive through Sweden and Estonia or Latvia.

It does not mean that the camper segment is only travelling to one country, as naturally they would also make some stops on the way, for example driving to North of Norway could mean driving through Finland or Sweden. The camper segment guests could also combine several countries, as one of the benefits of travelling with a camping car, is the possibility to move freely to other places when on holidays. Even if they would be travelling to see Norway, they could be spending some time in the Baltic countries and for example in Finland too. There is an opportunity with the company X's destinations as well, as these destinations are quite new to the Polish guests.

In Finland, the fact that Polish people know the Moomin character, which is originated from Finland and the Finnish-Swedish author Tove Jansson, can be seen as an opportunity. Few interviewees mentioned the Moomin or in Polish "Muminki" as an opportunity as well. For example, part of the camper segment, which is travelling with a family with children, could be stopping at Naantali Moomin world. It is only around a 20 to 30-minute drive from the Moomin world to Turku castle, which could also interest the Polish visitors as a Polish Princess lived in the castle in the 16th century.

Threats related to the camper segment are the same as the ones related to overall Polish market. The other destinations in South of Europe can be very attractive for the camper

segment, especially those from South of Poland. Even as the camper segment is mostly middle class, price of the product is important, and therefore offers on the lower demand periods could attract the segment as well. The safety concerns were mentioned by the interviewees as related to all the segments of Polish market.

Table 8. Service marketing mix, 7 P's of camper segment

Product	Few most suitable product options of Company X
Price	Value for money, offers on lower demand periods
Place	Digital channels
Promotion	Cross-marketing, camping car websites
People	Customer service training for company X's staff
Process	Booking process, online etc.
Physical evidence	Company X's facilities

The table above lists, how company X should address the service marketing 7 P's with the Polish camper segment. Product, process and physical evidence cannot be further described due to business secrecy reasons. There are few products that can be more suitable for this segment than others. The processes rely on the company X's existing ones and for example the booking process should focus on online reservations. Physical evidence means for example the company X's facilities, which the guests use when they are travelling. The offered product should reflect on the value for money, for example offers including something more, and the company can also make better offers for lower demand periods. The promotion should be focusing on cross-marketing for example on camping car websites, as the place should be focused on digital channels. According to the interviews as well, attractive images work best in Polish market. These should also have a focus on the destinations and not only company X's facilities. People mean for example customer service training for company X's employees, who work in the facilities, which the company already is doing.

Targeting the camper segment should focus on digital channels, as it was mentioned in the interviews, that the segment is most likely to search and book travel products online. The company X does have its own websites and online booking engine. The case company could also co-operate with its existing online travel agency, OTA, intermediaries and have sales campaigns together. This would be beneficial for the case company as the OTA's have their booking engines in Polish language and are able to produce the offers in Polish as well.

Search engine optimization, SEO, and search engine marketing, SEM, are important factors when targeting the segment through digital channels. As bigger global OTA's have usually bigger budgets in SEO and SEM, it is beneficial to co-operate with these intermediaries. The company X should, however, also look into its own SEO and SEM especially related to the camper segment.

Cross-marketing and cross-selling are important in marketing the product. As mentioned before, the Moomin world in Naantali, Finland could attract some Polish families who are travelling with camping cars. Company X could do some cross-selling and cross-marketing with the Moomin world tickets.

Not only OTA campaigns, but the company X should seek for co-operation with Polish camping car association websites, and find possibilities to do marketing on the websites, and sales campaigns as well.

Positioning of the case company's product in the international point of view should focus on the novelty factor of destinations and their nature. When thinking about the direct competitors the case company's positioning relies on quality and convenience of service. On the promotion campaigns the positioning should also focus on the value for money need of Polish guests. Especially with the camper segment the convenience plays an important role. There can be also offers in lower demand periods.

Differentiation of the product for the Polish camper segment relies closely on the unique destinations and the unique product of the company X. The company X's facilities and convenience of product are important, as well as the novelty of the destinations and the nature. As mentioned earlier, in Visit Finland's (2019) 2018 travel survey, 65% of Polish leisure guests found nature as the most attractive factor of Finland. This supports the Polish camper segment's potential for Finland as well.

In conclusion, marketing for the camper segment could start with co-operation with the OTA intermediaries. The company should also explore its own search engine optimization and marketing considering this segment, not to forget cross-selling and cross-marketing with attractions, such as the Moomin world, which could interest the Polish guests. As well as cross-selling and marketing on a Polish camping car association website. Positioning the product on the camper segment should also focus on the need of value for money as well as characteristics of company X's product and convenience of service. Differentiation relies on the quality of service as well.

The camper segments as well as the FIT segments have potential to grow, and there should be more focus on these segments in the future marketing of Company X. However, as mentioned before it should not be forgotten that the majority of Polish leisure guests are travelling with groups, and the importance of co-operation with intermediaries is essential to ensure growth in the group segments. Currently, the existing marketing plans with the intermediaries are most beneficial for the company X.

6 Discussion

As case company's name or field of business could not be revealed, some parts of the study can be difficult to understand. There are more reasons behind the theory part of the study, which could not be fully explained without revealing the case company. As well as, in the analysis section the whole process and details cannot be described fully. The results were presented to the case company as well, and with their representatives, they were of course discussed in more detail and more clearly.

When looking at the research questions, the main question of the study is, how to increase company X's sales in the Polish market. The conclusion of the research is that the company should still focus on the close co-operation with the intermediaries especially in the group travel segments and start to have more marketing efforts on the FIT travel segments. As the trend of travelling with a camping car is strong among the Polish middle class, the company X could start by targeting this segment.

The sub-questions of the research, about the main criteria when the Polish clients choose their travel destinations according to the intermediaries, can be defined as price and especially value for money as well as importance of safety needs, regarding the destinations.

The intermediaries see the company X's product in the market area as new and fresh, unique and something that is seen as prestige. With the package tours it is now affordable for the Polish guests.

The company X's products that the intermediaries see as most appealing for the Polish guests, are the ones reachable by car and the mixture of destinations.

The last sub-question of the study relates to the tourism megatrends and their impact on the Polish outbound travel market. The intermediaries considered, that the most relevant megatrends are increasing middle class, digital channels and the before mentioned safety needs.

In further studies, the case company could conduct surveys with the Polish guests in order to define the motivation to travel more, for example by using online surveys. The Polish meetings, incentive, conferences and events, MICE, segment and the potential of it to company X or its destinations, for example Finland, could be researched more as well.

The thesis topic was very interesting to me and even though writing a thesis with full time work is not always easy, the whole process has thought me a lot, and it has been fun as well. I have learned a lot about the Polish market, especially about its segments. Even though, I have studied marketing before as well, it has been very good to rehearse the marketing theories, and think about the marketing processes in context of a real case study. The megatrends were very interesting to me, and they brought up many good ideas in the interviews. Some that I thought, would not have been mentioned otherwise. All in all, the process has been educational and interesting for me.

Lastly, I wish to express my gratitude to everyone who have supported me, all the people who gave their time and gave me interviews for this study, from the case company and the intermediaries. Especially, I wish to thank all my colleagues at work and school for their support, my thesis tutor and my family and friends.

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Appendices

Appendix 1. Outbound Departures position of Company X's destination countries 2017 & 2018

XXX trips	2017 / 2018 position
United Kingdom	1
Russia	2
Italy	3
Ukraine	4
Germany	5
Slovakia	6
Croatia	7
Greece	8
Spain	9
Czech Republic	10
Belarus	11
Hungary	12
Portugal	13
France	14
Austria	15
Bulgaria	16
Sweden	17 / 17
Turkey	18
Romania	19
Norway	20
Egypt	21
Ireland	22
Netherlands	23
Lithuania	24

XXX trips	2017 / 2018 position
US	25
Denmark	26
United Arab Emirates	27
Belgium	28
Iceland	29
China	30
Slovenia	31
Thailand	32
Albania	33
Finland	34 / 36
Montenegro	35
Switzerland	36
Georgia	37
Cyprus	38
Latvia	39 / 32
Israel	40
Malta	41
Morocco	42
Japan	43
Canada	44
Estonia	45 / 43
Bosnia-Herzegovina	46
India	47
Serbia	48
Cuba	49
Moldova	50
Other Countries	51

(adapted from Euromonitor International 2017, Euromonitor International 2018)

Appendix 2. Overlap Matrix

Research topics	Theory (chapter)	Interview theme*	Results (chapter)
1. Main criteria when Polish guests choose their travel destination	3.1, 3.2.2, 3.2.4, 3.2.6	1, 2	5.2, 5.3, 5.5, 6
2. How product is seen in market area	3.1, 3.2.1, 3.2.3, 3.2.5	1, 2	5.2, 5.3, 5.5, 5.6, 6
3. Most appealing products for Polish guests	3.2.5, 3.2.6	2	5.5., 5.6, 5.7, 6
4. Tourism megatrends	3.3	3	5.4, 6

*interview themes are described in chapter 3.4