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CUSTOMER BRAND ENGAGEMENT – BASIC ASSUMPTIONS, DEFINITIONS AND MODELS

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ABSTRACT

Customer engagement has emerged as a central concept in brand management, particularly in the context of the digital era. This paper conducts a comprehensive literature review of customer engagement by examining its key definitions, fundamental principles, and structural models. It explores the shift from transactional to relational and experiential marketing paradigms, focusing on how customer engagement has transitioned into virtual and social media environments. Various engagement models are analysed, highlighting dimensions such as cognitive, emotional, and behavioural aspects and their sub-dimensions, including sharing, learning, and endorsing. The paper emphasises the dual role of brands and consumer communities as objects of engagement and discusses the increasing relevance of content engagement. Additionally, the paper underscores the importance of measuring both positive and negative valence in consumer interactions and identifies significant antecedents, such as consumer involvement, participation, and self-expressive brand, as well as key outcomes like brand loyalty and word-of-mouth advocacy. By synthesising recent advances, this paper provides actionable insights for practitioners to harness engagement strategies that enhance customer loyalty and brand equity in the digital age.

Keywords: customer engagement, social media, brand engagement
JEL Classification: M31, M37, D91

INTRODUCTION

Considering the scientific literature on marketing and services, only a few articles employed terms related to customer engagement and brand engagement before 2005. At that point, the situation began to change significantly, with the number of articles increasing from five in 2005 to 65 by 2010 (Brodie, Ilić, Jurić, and Hollebeek, 2011). The Marketing Science Institute (MSI) highlighted the need for a better understanding of customer engagement as recently as 2016, and in its latest publication for the 2022–2024 period, identified customer engagement as one of its research priorities, raising several key questions: "Member firms also use the term "engagement" in several different ways: sometimes for momentary attention or longer-term involvement in a brand or a category, or for mental availability or ability to generate emotional responses. How can firms increase engagement with "good for you" categories where involvement is low, such as saving for retirement or taking prescription drugs?" (MSI, 2022, p. 7).

At the outset of a more detailed period of analysis in the works of various authors, customer engagement is viewed as a behavioural concept, where the factors driving it influence the customer's relationship with the company and the context in which it occurs (Van Doorn, Lemon, Mittal, Nab, Pick, Pirner, and Verhoef, 2010). Subsequently, engagement is considered from a behavioural perspective and cognitive, emotional, and social dimensions. It is suggested that engagement can be initiated by either companies or customers through various offerings or activities. Simultaneously, the impacts of engagement on trust, commitment, or brand loyalty are highlighted (e.g., Vivek et al., 2012; Hollebeek and Chen, 2014.), with increasing attention given to the influence of engagement on tangible sales outcomes (Pansari and Kumar, 2017).

Over time, consumer engagement has fully transitioned into the virtual world and subsequently onto social media platforms. Researchers have increasingly focused on studying engagement within digital environments (Hollebeek, Glynn, and Brodie, 2014; 2016; Vivek et al., 2014; Sigerson and Cheng, 2018), developing research methods to effectively measure consumer engagement on social media (Audy, 2021). Li et al. (2020) view consumer engagement as an integral component of social media marketing strategies, suggesting that engagement has become an essential part of tactical activities in managing users and content on social platforms by brands.

This paper tries to analyse the research approach to analysing customer engagement through a literature review, with a specific focus on different definitions, basic assumptions, measuring and structural models, and subjects of engagement in the digital environment.

THE MOST IMPORTANT DEFINITIONS OF CUSTOMER ENGAGEMENT

One of the earliest and most significant definitions of customer engagement is provided by Van Doorn et al. (2010, p. 254). They describe customer engagement as: "Behaviours that go beyond transactions and can be specifically defined as manifestations of customer behaviour directed towards a brand or firm, beyond purchase, driven by motivational factors."

A year earlier, Pham and Avnet (2009) defined engagement as "a motivational state associated with involvement and the absorption of attention" (Pham and Avnet, 2009, p. 6). Nevertheless, being engaged means having an interest in something or someone, participating in specific activities, and ultimately being mentally and physically immersed in the object of that interest (Higgins, 2006).

Similarly, Calder et al. (2009) examined engagement with a website, defining it as "a set of experiences that a user has with a website, where the experience reflects the confidence that the website integrates into the user's life" (Calder et al., 2009, p. 322).

In the following definition, customer engagement is: "The general tendency of certain consumers to incorporate their favourite brands into their self-concept" (Sprott et al., 2009, p. 101). According to them, consumers perceive themselves (referred to as brand engagement in self-concept) in a particular way and attempt to include specific brands that align with this perception. They developed a scale and demonstrated through measurement that engagement is linked to brand preference.

Consumer behaviour and the human need to use brands that align with their personal characteristics have become a focal point of customer brand engagement research. In line with this, Hollebeek et al. (2014) define consumer engagement as "cognitive, emotional, and behavioural activities of consumers that occur during brand-consumer interactions or are associated with the brand in some way, characterised by positive valence" (Hollebeek et al., 2014, p. 6). They emphasise that their concept centres exclusively on the consumer rather than on members of a brand-related community, making the definition applicable to various types of consumer activities on social media.

Brand involvement is inherent in the construct itself. The authors propose three dimensions of engagement that correspond to its cognitive, emotional, and behavioural nature: cognitive processing, affection, and activation (Hollebeek et al., 2014). In their view, consumer engagement is linked to the concept of customer involvement, which precedes engagement, and its outcomes include self-brand connection and brand usage intent. The research underpinning their conceptualisation was qualitative, which could be considered a limitation. Furthermore, the authors view engagement solely as a phenomenon with positive valence.

Fang et al. (2016) further expand this definition, arguing that, in addition to brand usage intent, the continuity of such intent (continuance intention) and repurchase intention should also be considered, as these aspects have not been sufficiently explored in the literature to date (Fang, 2016).

Kumar et al. (2010) and Pansari and Kumar (2017) introduce a definition of customer engagement that encompasses both transactional and non-transactional behaviours. They define customer engagement as: "A mechanism through which customers add value to a company via direct or indirect contributions" (Pansari and Kumar, 2017, p. 294). Direct contributions include purchasing products or consuming services, while indirect contributions consist of recommendations to other customers incentivised by the company, social media communications about the brand, and feedback or suggestions for improvements provided by customers (Pansari and Kumar, 2017). According to their claims, customer engagement is closely linked to other marketing constructs, including customer involvement, customer experience, customer satisfaction, customer loyalty, customer trust, customer commitment, and customer brand value. Their approach acts as a "bridge" towards the full commercialisation of customer engagement, focusing on its application almost exclusively in digital environments to enhance brand perception or achieve financial benefits for the company. However, such considerations were explored even earlier.

In this context, Algesheimer et al. (2005) conducted research on brand-related social communities and found that stronger identification of a member with a brand-related community leads to higher engagement within the community. "In our model, community engagement refers to the positive impact of identification with a brand-related community, which is defined as the intrinsic motivation a consumer has for interacting and collaborating with other community members. Higher community engagement indicates that members are more willing to help each other and voluntarily participate in joint activities that create additional value for all community members" (Algesheimer et al., 2005, p. 23). Although engagement within the community is not directly tied to transactions, it undoubtedly influences an increase in future transactions with the brand.

Brodie et al. (2011) also develop the concept of engagement as an activity involving mutual interactions among community members, a psychological element of identification, and the possibility of various other behaviours, including transactional exchanges. According to them: “Customer engagement is a psychologically interactive process of co-creating customer experiences with a focal agent/object in a service relationship. It generates varying levels of engagement depending on the context and the dynamics of the relationship” (Brodie et al., 2011, p. 260). The advantage of this definition lies in its comprehensiveness, as it encompasses all possible situations and participants. However, this also represents its main drawback, as the definition’s breadth makes it difficult to understand for individuals not deeply immersed in the subject. Moreover, it is particularly challenging to apply in everyday business operations.

Vivek et al. (2012) conducted qualitative research among consumers and marketing professionals to determine the nature and scope of customer engagement, which they regard as a key component of relationship marketing. They define customer engagement as “the level of personal connection with a business and the activities of customers in all of the business’s offerings and activities, regardless of whether they are initiated by the customer or the business” (Vivek et al., 2012, p. 133). The elements of engagement include cognitive, emotional, behavioural, and social dimensions. Participation and involvement of existing and new consumers precede engagement, while engagement outcomes include value, trust, commitment, word-of-mouth communication, loyalty, and involvement in brand-related communities (Vivek et al., 2012).

Recent definitions of customer engagement are largely tied to social media or digital platforms in general. Eigenraam, Eelen, van Lit, and Verlagh (2018) analyse the reasons that drive customers towards digital engagement and how they practise it. They define digital customer engagement as “digital engagement practices manifested through consumer behaviours and their engagement with the brand, going beyond the act of purchase” (Eigenraam et al., 2018, p. 103).

Today, customer engagement is almost exclusively associated with social media platforms. Martins Rebouças Nery, Alves Sincorá, and Janes (2021), aiming to simplify and unify the overwhelming number of definitions of customer engagement with brands, propose the following definition for customer engagement with brands on social media: “the relationship between customers and brands that unfolds through interactive activities centred on objects present on the social media platform (brand, community, customers, company), involving cognitive, emotional, and behavioural customer engagement with these objects, which may vary in direction (positive/negative) and intensity (low/high)” (Martins Rebouças et al., 2021, p. 13).

The last highlighted definition is not directly tied to social media but attempts to redefine the classic concept of customer engagement (Hollebeek et al., 2014), particularly in the context of positive and negative consumer behaviours. Obilo, Chefor, and Sales (2020) define customer engagement as: “positive and negative behavioural interactions of consumers with the brand and all its constituent elements (brand-related content, other consumers, etc.) that go beyond transactions and result in interest and commitment” (Obilo et al., 2020, p. 2).

These definitions can be categorised based on two main criteria. The first is whether transactions with the brand are considered, i.e., whether purchasing or using the brand is seen as a form of engagement. The second criterion is whether engagement with the brand is considered part of the customers' identity. Regarding the first criterion, it is debatable whether only transactional activities are linked to engagement, as some product or service categories (e.g., salt, public transport) are used by customers without significant levels of engagement, and therefore, such categories cannot form part of the customer's personal identity.

FUNDAMENTAL PRINCIPLES OF CUSTOMER ENGAGEMENT

The concept of customer engagement originates from various scientific disciplines, including sociology, psychology, political science, and organisational behaviour (Brodie et al., 2011). Within marketing, researchers often link customer engagement to two key approaches that examine the relationship between consumers and businesses. The first is relationship marketing, and the second is service-dominant logic (S-D Logic).

The definitions of relationship marketing emerged in the 1990s (e.g., Sheth and Parvatiyar, 1995; Ravald and Grönroos, 1996). At that time, it became evident that marketing activities should focus even more on consumers and their needs, although this should ideally be the foundation of all marketing efforts. Shani and Chalasani (1992) defined relationship marketing as “an effort to identify, maintain, and build a network with individual consumers that should be continuously strengthened to achieve mutual benefits through interactive and individualised relationships with added value over a longer period” (Shani and Chalasani, 1992, p. 59). This approach focuses on the relationship between the consumer and the company, excluding other participants. The only subjects of engagement are the consumers of the products or services, while the object of engagement is the brand.

Vargo and Lusch (2004) proposed a new marketing paradigm called service-dominant logic (S-D Logic) that positions service provision as the foundation of all economic exchange. Over time, the concept has evolved, incorporating assumptions about economic exchange, the service economy, co-created services by businesses and consumers, and a focus on relationships (Vargo and Lusch, 2008). The service-dominant logic extends beyond the transactional relationship between businesses and consumers, allowing for the involvement of additional participants not directly part of the relationship.

In marketing literature, the subject of engagement is most commonly considered to be the consumer (e.g., Bowden, 2009; Patterson, Yu, and de Ruyter, 2006; Azer and Alexander, 2020; Chi, Harrigan, and Xu, 2022). The objects of engagement include brands (Hoang, Wang, Ngo, and Chen, 2020) and companies (Hollebeek, Sharma, Pandey, Sanyal, and Clark, 2022). Within virtual brand communities, three primary objects of engagement emerge: the brand or company (Van Doorn, 2010; Gambeti, 2012, Hollebeek et al., 2014), community members themselves (Wirtz et al., 2013), brand-related content (Schivinski et al., 2020). However, the relationship between the subject and object of engagement is not yet fully defined or universally accepted. Thus, one prerequisite for any research is clearly delineating and determining the object and subject of engagement.

Customer engagement with a product or service brand represents the foundation of customer engagement research (e.g., Sprot, 2009; Van Doorn, 2010; Kumar, 2010; Hollebeek et al.). In the early stages of studying this process, it was exclusively considered as the relationship between the customer and the brand. The logical next step was to explore what else is in the focus of customer engagement during the development of the brand relationship and whether there are other objects of engagement beyond the brand itself. Consequently, researchers have examined engagement with various objects of engagement for some time. These may include brand-related communities, members of such communities, or content published about the brand on social media (e.g., Baldus et al., 2015; Dessart et al., 2016; Schivinski, 2016). In reality, customers simultaneously engage and form relationships with multiple objects of engagement (Dessart et al., 2016). It is rare for engagement to involve only one object, such as the brand, without minimal additional engagement with other parts of the engagement process or other objects. This perspective is supported by numerous studies that assert that engagement with other customers or members of brand-related communities is inevitably involved in the process of engaging with a brand (e.g., Marzocchi, Morandin, and Bergami, 2013; Baldus et al., 2015; Bowden et al., 2015). Customers are unlikely to connect exclusively with the brand but also with other aspects mentioned. However, such additional interaction would not occur without an initially established relationship with the brand. Subsequently, customers expand their connections to include other customers, forming specific relationships with them, ultimately leading to various forms of engagement with different objects (e.g., Hollebeek et al., 2016; Nauman et al., 2020; Carlson et al., 2021).

As user engagement in virtual communities began to gain serious attention in academic research at the beginning of this century, the initial focus was on forums and brand- or product-related websites (Muniz and O’Guinn, 2001; Algesheimer, 2005; Brodie et al., 2011). Later, with the emergence of new communication platforms, consumer communities—and consequently consumer engagement—shifted to social media, prompting researchers to study engagement in this new environment (e.g., Hollebeek et al., 2014; Dessart et al., 2016). Consumers initially engage with the object of their interest (e.g., a brand), and this relationship then develops into two-way communication with other members of the virtual community. Most of the communication within such communities revolves around prices, quality, performance (e.g., safety, perceived benefits), and personal experiences with specific brands (Brodie et al., 2011). Engagement begins when a customer recognises a need to solve a particular problem or satisfy a specific requirement. At this point, they start searching for a virtual community that can help them achieve their goals. The consumer actively engages with the community members by posting or commenting on an existing post. Engagement with community members is often analysed as simultaneous engagement with both the brand and the community members (Brodie, 2013; Dessart et al., 2016). Conceptual studies from the early period of examining these influences suggest that engagement with a community enhances levels of engagement with the brand (Wirtz et al., 2013). This assertion aligns with other studies of consumer communities (Schau, Muniz, and Arnould, 2009), which demonstrated the positive impact of community engagement on brand engagement, ultimately leading to increased brand loyalty (Dessart et al., 2016).

When consumer engagement focuses on brand-related content, it is referred to as content engagement. Content created by companies almost exclusively has positive valence; however, consumer reactions and content created independently by consumers do not always share this characteristic. Brand-related content that has the potential to engage users significantly determines the level and intensity of user engagement. This means that the more attractive the content is and the more users it attracts, the more frequently and actively they will engage with it. In their study on viral video advertising, Huang, Zhou, and Liu (2013) demonstrated that users' attitudes towards content are a key factor influencing the sharing of content on social media, and sharing is one of the dimensions of engagement (Huang et al., 2013). Similarly, Swani, Milne, and Brown (2013) found that consumers are more likely to engage with posts that are not exclusively commercial but also incorporate emotional values or content not directly related to the brand (Swani et al., 2013). User engagement with social media content is influenced by three key characteristics of the content: entertainment value, educational potential, and relevance to consumers (Barger, Pertier, and Schultz, 2016). The format and purpose of the content published by brands also affect consumer engagement. Content that is multisensory and interactive engages more users than posts lacking these elements (De Vries and Carlson, 2014). Kim, Ahn, Kwon, and Reid (2017) also found that posts featuring photos are more liked by consumers, receive more comments, and are shared more often on social media than simple text or article-based posts (Kim et al., 2017).

MODELS OF CUSTOMER ENGAGEMENT

Customers can simultaneously focus their engagement on multiple relationships, such as with a brand or with other community members. This simultaneous engagement focus is often overlooked during measurement, which can call into question the validity of the scales used for assessment. Concentrating on a single element, regardless of what it may be, is impractical from a practical perspective. For example, when consumers discuss new product features with one another on social media, they are engaged not only with each other but also with the brand, and the entire community can observe and respond to their comments.

In addition to determining the number and type of dimensions for measuring engagement, as well as the subject and object of engagement, valence has often been overlooked in models developed in previous studies. Some theorists have even defined engagement exclusively as an activity with positive valence (e.g., Hollebeek et al., 2014, 2016). Engagement with negative valence represents negative interactions between consumers and the object of engagement, encompassing cognitive, behavioural, and emotional aspects of the relationship (Bowden et al., 2017). Negative valence engagement can manifest as negative thoughts about the object of engagement (cognitive dimension), resentment or dislike towards the object (emotional dimension), and customers' willingness to engage in negative actions directed at the object (behavioural dimension) (Hollebeek and Chen, 2014).

Hollebeek (2011) initially considered engagement exclusively through the lens of positive valence but later highlighted the need to further study negative valence engagement. In collaboration with Chen, Hollebeek (2014) proposed six factors influencing engagement: brand activities, brand quality/performance, brand value, brand innovativeness, the brand's response to external influences, and the extent to which the brand fulfills its promises.

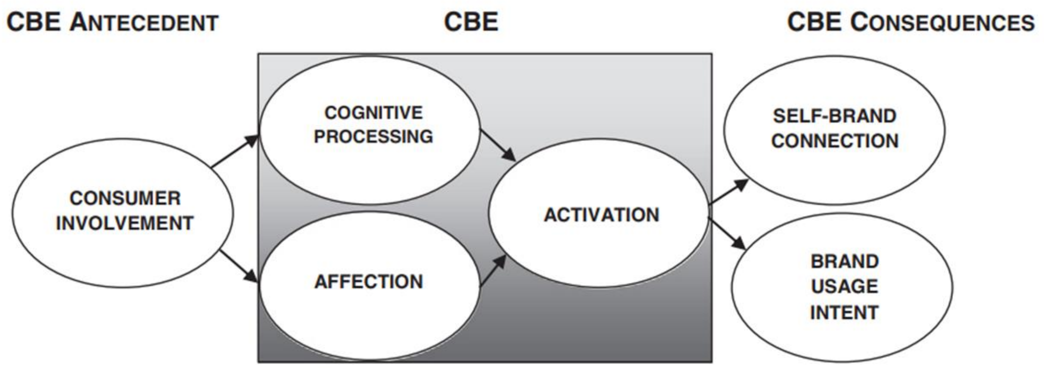
All these factors are part of the brand's or company's activities, none of which are under the control of consumers themselves. These factors are neither inherently positive nor negative but are considered as such depending on the context (Heinonen, 2017). This indicates that engagement has moved beyond the domain of exclusively positive valence, though engagement with negative valence has yet to receive the attention it requires.

There are numerous models and scales through which researchers have attempted to measure the impact of customer engagement on other variables. Below are some of the most significant ones, with a focus on more recent models. Highlighting these is important as most consider engagement measurement within customer communities on social media (e.g., Hollebeek, Green, and Brodie, 2014; Heinonen, 2017; Azer and Alexander, 2020; Do et al., 2019; Naumann et al., 2020).

The previously mentioned study by Hollebeek et al. (2014) validated a scale consisting of ten items, measuring engagement through cognitive processing, affection, and activation. The scale examines the impact of these dimensions on self-brand connection and brand usage intention.

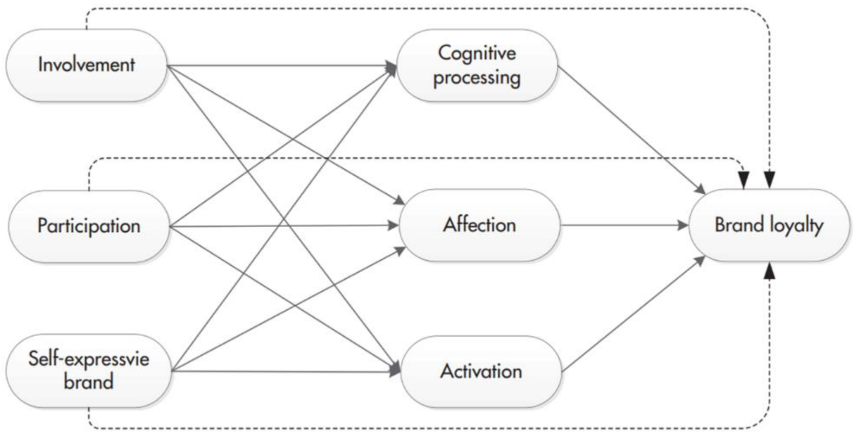
In Figure 1, the structural model of customer engagement is presented, along with the factors influencing engagement and its outcomes. The authors concluded that increasing consumer involvement through the three engagement factors directly impacts the enhancement of self-brand connection and brand usage intention.

Figure 1. | Alternative model of selected Customer brand engagement conceptual relationships



Source: Hollebeek, L.D., Glynn, M.S. i Brodie, R.J. (2014). Consumer Brand Engagement in Social Media: Conceptualization, Scale Development and Validation, Journal of Interactive Marketing, 28 (2), p. 9.

Figure 2. | Conceptual model of customer brand engagement



Source: Leckie, C., Nyadzayo, M.W. i Johnson, L.W. (2016). Antecedents of consumer brand engagement and brand loyalty, Journal of Marketing Management, 32 (5- 6), p. 560.

The following example is a study conducted by Leckie, Nyadzayo, and Johnson (2016), in which they propose a structural model where customer engagement is preceded by three activities: consumer involvement, consumer participation, and self-expressive brand. The engagement itself comprises three dimensions previously identified by some authors (e.g., Vivek et al., 2014): cognitive processing, affection, and activation (Leckie et al., 2016). Higher consumer engagement directly contributes to their loyalty to the brand. The research shows that the three mentioned activities positively affect mental processes, while engagement and identity expression through the brand enhance affection. Interestingly, identity expression through the brand can have a negative effect on activities, while the negative relationship between mental processes and brand loyalty attracted additional attention from researchers. Nevertheless, the authors ultimately conclude that "the dimensions of consumer engagement mediate the effects of consumer involvement and self-expressive brand on brand loyalty" (Leckie et al., 2016, p. 571). Figure 2 illustrates the model proposed by these authors.

Clearly defining the object of focus in engagement has always posed a challenge for researchers in this field. For instance, what happens if a customer responds to a negative comment from another customer about a brand within a brand-related consumer community on social media? Is this an example of engagement with the brand, the social community, the other customers, or perhaps with content related to the brand?

Dessart et al. (2015) developed a model that measures customer engagement with two focal objects: the brand and the customer community. They argue that examining the objects of engagement is essential for several reasons. First, because engagement almost consistently occurs in the virtual world. Second, the focus on one element can dominate or precede the other, influencing the consumer's relationship and engagement outcomes. Finally, the third reason is that different engagement focus can play varying roles in shaping the psychological processes occurring during customer engagement (Dessart et al., 2016). Therefore, they believed it was both necessary and important to develop a model capable of measuring engagement with different objects of focus.

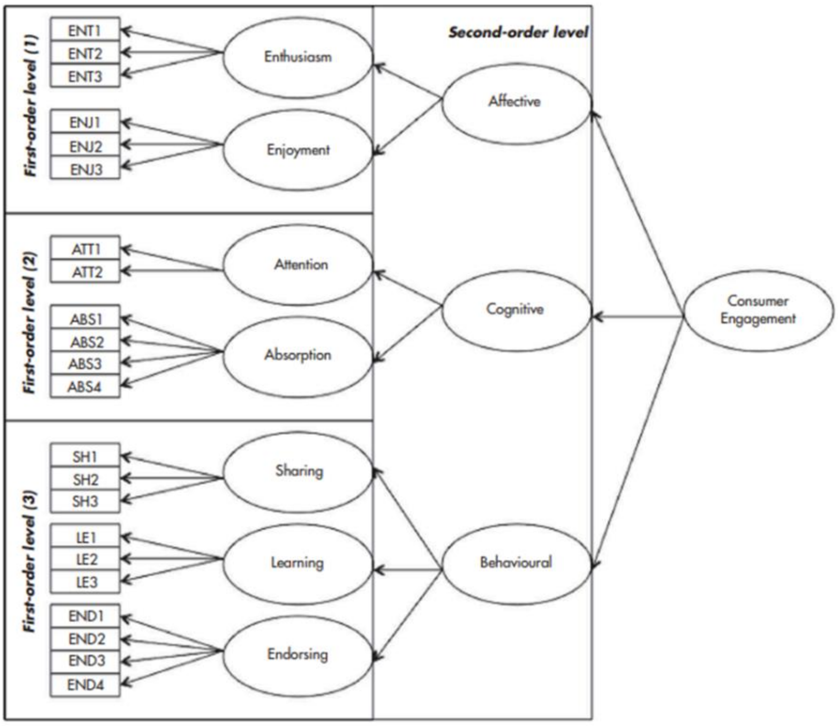
Their model proposes three main dimensions and seven sub-dimensions, using 22 items to measure engagement. The primary dimensions are those introduced by Hollebeek et al. (2014): cognitive, behavioural, and affective (emotional) dimensions. The sub-dimensions were developed based on their own research. The affective dimension is divided into enthusiasm and enjoyment. The cognitive dimension is split into attention and absorption, while the behavioural dimension is broken into sharing, learning, and endorsing (Dessart et al., 2016).

Introducing sub-dimensions to the commonly used three dimensions provides a more nuanced understanding of each dimension's impact, enabling more precise conclusions about what specifically increases or decreases customer engagement. Figure 3 illustrates the model developed by Dessart et al. (2016).

Shawky, Kubacki, Dietrich, and Weaven (2020) examine engagement on social media through the lens of a multi-actor ecosystem, which highlights the multiple relationships between various participants in the engagement process. Social media plays a critical role in user engagement and their connection with brands. However, the roles of individual participants are not fixed. For instance, brands can simultaneously act as subjects of engagement, objects of engagement, and entities leveraging social media data to influence the behaviour of other participants within this ecosystem.

The authors emphasise the importance of social media metrics and the mutual interactions among all ecosystem members (Shawky et al., 2020). Their model is straightforward, with connectivity highlighted as the central element of engagement. A key point they underscore is the impact of social media algorithms on consumer engagement, given their direct influence on the content displayed to users. This area is of significant importance but has not received sufficient attention in previous research (Figure 4).

Figure 3. | Customer brand engagement model with two focuses



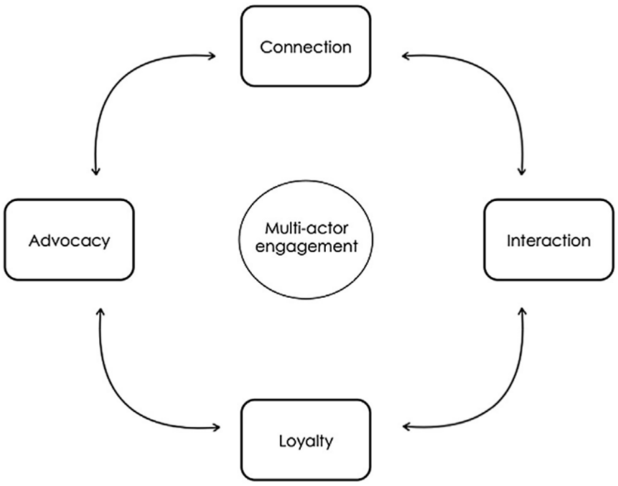
Source: Dessart L., Veloutsoub C., Morgan-Thomas A. (2016.). Capturing consumer engagement: duality, dimensionality and measurement, Journal of Marketing Management, p. 15.

Thakur (2019) developed a structural model of customer engagement that connects customer satisfaction and loyalty with four elements of customer engagement: "a sense of inner satisfaction, the value consumers derive from using a product or service, the experience with the product or service over a longer period, and the fulfilment of certain personal goals within society" (Thakur, 2019, p. 12). The author views loyalty through the lens of electronic word-of-mouth communication and continued purchase intention. In this model, engagement extends beyond the act of consumption; however, it overlooks a critical component of engagement, particularly on social media—content creation and the management or utilisation of that content. In today's digital landscape, this aspect cannot be ignored (Figure 5).

The diversity of models presented here highlights that there is still no consensus among researchers regarding the clear structure of customer engagement. Although the three fundamental dimensions—cognitive, emotional, and behavioural—are consistently featured across all models, their scope and sub-dimensions clearly indicate the need for further systematisation and classification of consumer engagement models in the future.

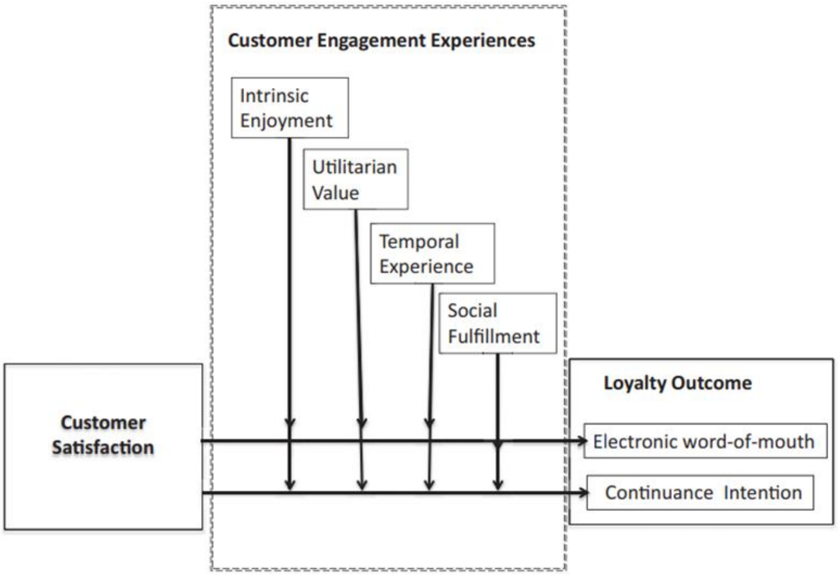
Additionally, it is challenging to distinguish between specific objects of engagement and assume that, during certain activities, a customer considers only one object of engagement while completely disregarding all others.

Figure 4. | The multi-actor engagement framework



Source: Shawky, S., Kubacki, K., Dietrich, T., & Weaven, S. (2020). A dynamic framework for managing customer engagement on social media. Journal of Business Research, 121, 567-577., p. 6.

Figure 5. | A model of satisfaction, loyalty outcomes and customer engagement experiences



Source: Thakur, R. (2019.). The moderating role of customer engagement experiences in customer satisfaction–loyalty relationship. European Journal of Marketing, 53(7), 1278-1310, p. 1290.

Below are several recent structural models characterised by different approaches to the precedes and outcomes of customer engagement with a brand.

Rather, Hollebeek and Rasoolimanesh (2022) developed a structural model focused on the tourism industry, examining how to encourage guests to revisit destinations. They concluded that the cognitive-emotional engagement of guests with a destination significantly increases the likelihood of a return visit. The components of their engagement model include: "affective engagement, cognitive engagement, behavioural engagement, and customer experience" (Rather et al., 2022, p. 12). Although the study is limited to a single destination, it clearly demonstrates that engagement can be a valuable tool for enhancing customer loyalty. This provides clear guidelines on how engagement should be utilised to foster loyalty, which, in most models, is an integral part of a brand's market value.

In addition to loyalty and some form of influence on the brand, researchers often examine the relationship and impact of engagement on consumer behaviour. Ahn and Back (2018) found a positive correlation between cognitive processing, affection, and activation—as elements of engagement—and behaviours that lead to purchase intent for the brand. Based on this, they suggest that brands must create experiences that enhance levels of engagement, thereby increasing the likelihood of purchasing the brand's products or services (Ahn and Back, 2018).

Bilal, Jianqu, and Ming (2021) propose a conceptual framework for a structural model examining the impact of consumer engagement on purchase intent. They focus on the brand as the object of engagement and measure engagement using the scale developed by Hollebeek et al. (2014). For engagement outcomes, they define four elements of consumer behaviour on social media. Among these, electronic word-of-mouth communication and trend-following significantly impact consumer engagement and purchase intent. By leveraging these pre-engagement activities, the intensity of engagement increases, and consumer attitudes towards the brand are influenced (Bilal, Jianqu, and Ming, 2021). Research indicates that sustained customer engagement, through the use of various engagement strategies before, during, and after the purchase transaction, can enhance positive interpersonal communication, consumer loyalty, and brand advocacy. Additionally, it can help ensure that consumers do not shift to competing brands over time. Furthermore, engagement provides significant opportunities for consumers to influence other consumers and potential future customers through the dimension of social connectivity, which is particularly emphasised in the digital environment (Vivek et al., 2014). The main drawback of their approach, however, is the focus solely on measuring positive valence.

CONCLUSION

Customer engagement has evolved into a multifaceted concept integral to modern brand strategies. This review highlights the progression from early transactional approaches to the contemporary emphasis on relational and experiential branding paradigms. The literature reveals a growing focus on understanding customer engagement within virtual and social media contexts, with researchers exploring how engagement impacts both consumer behaviour and brand performance.

The dynamics of customer engagement have transformed. Customers now engage not only with brands but also with other community members and brand-related content. This shift necessitates a broader understanding of engagement objects, as modern consumers simultaneously interact with multiple entities, such as brands, communities, and digital content.

The dimensions of customer engagement—cognitive, emotional, and behavioural—remain central to most models, yet recent studies have expanded these dimensions to include sub-categories like enthusiasm, attention, and sharing. These refinements enable a more precise measurement of engagement and its impact on outcomes like brand loyalty and advocacy. For instance, models such as those proposed by Dessart et al. (2016) and Leckie et al. (2016) highlight the mediating role of engagement dimensions in shaping consumer behaviour and loyalty.

Content engagement, particularly in the digital environment, plays an important role in enhancing customer interactions. Research demonstrates that the attractiveness and relevance of brand-related content significantly influence user behaviour. Posts incorporating emotional or non-commercial elements often outperform purely transactional content, driving higher levels of sharing and interaction. Additionally, integrating multimedia formats, such as images and videos, has proven effective in boosting customer engagement.

Another critical insight is the importance of valence in customer engagement. While much of the literature has traditionally focused on positive valence, recent studies underscore the need to consider negative valence. Negative interactions, such as criticism or dissatisfaction expressed on social media, can profoundly impact brand perceptions and community dynamics. Addressing both positive and negative aspects of engagement provides a more holistic understanding of consumer behaviour.

The paper also highlights the significance of measuring engagement accurately. Traditional unidimensional scales have given way to multidimensional approaches that capture the complexity of consumer interactions. For instance, the scale developed by Hollebeek et al. (2014) offers valuable insights into how cognitive, emotional, and behavioural dimensions contribute to brand connection and usage intent. Moreover, the frameworks proposed by Shawky et al. (2020) and Rather et al. (2022) emphasise the interconnectedness of various engagement actors within ecosystems and how these interactions drive loyalty and advocacy.

Practitioners can draw several implications from this review. First, brands must design engagement strategies that align with the multidimensional nature of customer interactions. This involves creating content that resonates emotionally, educates effectively, and entertains meaningfully. Second, leveraging the power of consumer communities can amplify engagement outcomes. Encouraging interactions among community members fosters a sense of belonging and strengthens brand connections. Third, monitoring and responding to negative engagement is vital for mitigating risks and maintaining brand reputation.

Future research should continue to explore the nuances of customer engagement, particularly in emerging digital environments. The role of artificial intelligence and machine learning in personalising engagement experiences warrants further investigation. Additionally, understanding the interplay between engagement and other marketing constructs, such as trust and co-creation, can provide deeper insights into consumer-brand relationships.

In conclusion, customer engagement is not merely a transactional phenomenon but a dynamic process encompassing cognitive, emotional, and behavioural dimensions. By adopting a holistic approach and leveraging the insights from this review, brands can foster deeper connections with consumers, enhance loyalty, and drive sustainable growth in the competitive digital landscape.

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THE EFFECT OF ADVERTISING ON SALES OF FAST-MOVING CONSUMER GOODS: A STUDY OF CADBURY NIGERIA PLC.

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ABSTRACT

The majority of customers need fast-moving consumer goods (FMCG) in their daily lives. In order to encourage consumers to make a purchase choice, the marketing of these products needs to be given more significant consideration. Advertising often serves to raise awareness and promote goods. This paper aims to explore the effect of advertising on sales of fast-moving consumer goods of Cadbury Nigeria Plc. A questionnaire was used to source data from 89 distributors of Cadbury Nigeria Plc. The study finds that radio, TV media, and print media advertising affect the sales of Cadbury Nigeria Plc. The study recommends that other factors which are crucial to increasing sales revenue and profitability, such as sales promotion and personal selling, should be considered while formulating promotion policies in the organisation, and also, management should use the right medium of advertising so that the message would reach the target customers with the right products. By doing so, a large number of consumers would be reached.

Keywords: FMCG, consumer, advertising, sales, buying behaviour, Nigeria
JEL Classification: M37, M31, L81

INTRODUCTION

The importance of sales promotion in the form of advertising in raising consumer awareness of products and services cannot be overstated. Advertisements give a forum for businesses to inform consumers about their products or services and how to get the most out of them. Olusegun (2017) said that all advertising must be truthful, adhere to ethical standards, and not be viewed as false by the target audience; otherwise, it might destroy a company's reputation and prevent it from developing strong brands. Therefore, for advertising to be effective, it must be appealing, command interest, inspire belief, and arouse curiosity (Frank, 2019). Similarly, Haruna (2018) argued that a compelling advertisement message should not be monotonous but rather represent the product's lifetime. He stated that advertising must be displayed on the appropriate media in order for organisations to reach the intended audience with the intended message.

Numerous researchers, including Herbert (2017), Leads and Shultz (2019), Frank (2019), and Meshach (2017), have demonstrated that advertising is an essential competitive instrument for building market position. Companies employ advertising to market and promote their products, fend off competitors, enhance their brands, and build a vintage point for their items among anticipated customers, purchasers, or clients. People, organisations, groups, government agencies, and other economic sectors utilise advertising to target the public with messages. This is due to the fact that a well-designed advertising program may be a cost-effective means of disseminating messages and establishing brand preferences.

As is the case globally, Nigerian businesses rely on sales marketing to tell their current and potential customers about their products and services. Advertising has been the most important and well-understood sales promotion tactic in Nigeria throughout the years, surpassing all other methods (Haruna, 2018). Therefore, it is not unexpected that Nigerian businesses' advertising budgets have skyrocketed over the years. According to research conducted by Akanbi and Adeyeye (2017), in Nigeria, advertising is more prevalent among manufacturing enterprises, particularly those in the food and beverage industry, because awareness of their products may reach customers more quickly through this channel. In addition, they suggested that the enterprises included in the food and beverage industry serve as a model for the quick use of advertising to reach customers.

Kingsley and Paul (2017) further argued that even though the use of advertising as a promotional tool is prevalent among manufacturing firms in Nigeria, such as food and beverage firms, investing large sums of money in advertising firms does not necessarily result in improved performance indices for the organisations. It has been suggested that even significant advertising does not automatically result in a sale because it is the culmination of a series of events (Abiodun, 2018).

The preceding discussion has demonstrated that advertising incurs expenses for the company. Thus, many believe that the acceptability or otherwise of advertising by companies in Nigeria could also be determined in relation to sales and the profits that advertising agencies ultimately reap. In light of this issue, it became imperative to evaluate the extent to which advertising expenditures impact the sales revenues and profitability of manufacturing companies in Nigeria.

LITERATURE REVIEW

Definition of advertising

It is impossible to determine the precise definition of advertising because it signifies different things to different people based on their opinions of what it is. According to Kotler (2014), advertising is any presentation and promotion of ideas, products, or services by a known sponsor that is not personal. Advertisers include not just corporations but museums, nonprofit groups, and government agencies whose messages are directed at the general population. Bennet (2016) defined advertising as any form of sponsored, non-personal communication about an organisation, its products, services, or ideas by a sponsor who is identifiable. Advertising is any sponsored message provided through multiple media, such as television, radio, magazines, newspapers, and billboards, by a recognisable source.

Researchers such as Sandage and Rotzoll (2018) have suggested that advertising is a cost-effective method for disseminating messages, such as establishing a brand preference for a product, educating people about government policies, or discouraging the use of hard drugs. Companies engage in advertising not only to sell their products and promote their wares but also to construct an effective defence against the actions of their competitors. Frank (2019) saw advertisements intended to induce consumers to purchase. Modern advertising is a product of the twentieth century, yet communication has been an integral aspect of the selling process ever since people began exchanging products (Kazimi, 2019). Modern commercial advertising is the persuasive force that seeks to alter consumer behaviour. This is significant because consumer desires and demands change as their economic circumstances improve and as they progress through various life phases. Therefore, it is desirable for advertisers to periodically evaluate the effect of advertising on the performance of their products (Kotler, 2014).

Shimp (2017), in support of Richards and Curran (2017), defined advertising as a paid, mediated form of communication from a recognisable source intended to convince the recipient to take some action now or in the future. Advertising appeals can be based on several rational objectives, such as convenience, economy, health, sensory benefits, quality, performance, comfort, reliability, durability, efficiency, and efficacy, to encourage consumers to purchase a product (Duncan,2018).

According to Adewale (2018), advertising is a non-personal communication directed at a specific audience through various media to present and promote products, services, and ideas. According to Hancock and Holloway (2019), advertising consists of marketing activities other than personal selling, publicity, and public relations that stimulate consumer purchasing and dealer effectiveness, such as displays, shows and exhibitions, demonstrations, and various one-time-only selling efforts. Advertising, according to Wright (2018), is a short-term inducement for merchants or customers to purchase a product. Engel (2019) further stressed that advertising informs consumers about and sells a product.

All preceding definitions of advertising made modest attempts to define it. Nonetheless, some of the definitions exhibit one or two inadequacies. The study adopts Bennet's (2019) definition of advertising as any paid non-personal communication about an organisation, its products, services, or ideas by a recognised sponsor because it is deemed superior. The definition appears suitable for the aim of the study, as it incorporates all the essential aspects of advertising, including product, brand recognition, and sales, among others.

Objectives of Advertising

According to Shimp (2017), the purpose of advertising is to stimulate purchase by temporarily increasing a brand's value. Advertising's primary purpose is to convert favourable attitudes into actual purchases, enhance brand attitudes, and always foster brand loyalty. Donald (2016), stated that regardless of the method utilised, advertising should strive to accomplish four key tasks:

1. Advertising objectives must be quantifiable and linked to the broader marketing strategy. This necessitates that the promotional tactics adequately define the marketing objectives.
2. Advertising, like other promotional formats, should capture the attention of the people it is intended to influence.
3. Advertising should typically encourage the target audience to place an order, i.e. to genuinely close the sale and perhaps presume the transaction has been completed.
4. There must be a clear connection between the advertising and the desire to purchase the product.

According to Adeleye (2019), advertising has three objectives:

i. Sales: Some businesses, particularly those engaged in direct response, might specify and measure their advertising objectives in terms of unit, Naira, or specific sales. According to Leads and Shultz (2015), establishing sales as the advertising target is the most accepted method for measuring advertising effectiveness.
ii. Behavioural effect: When the influence of an advertising campaign cannot be clearly measured in terms of final sales, certain aspects of customer behaviour may be employed as an alternative metric. For instance, some advertisers attempt to persuade their target audience to perform a non-purchasing activity, such as asking for additional information or visiting a retail location.
iii. Communication effect: Companies establish and measure their advertising objectives in terms of consumer awareness, knowledge, preference, and other mental effects. Adeleye (2019) hypothesised that most advertisers attempt to measure an advertisement's communication consequences, i.e., its possible effects on awareness, knowledge, or preference, in addition to its sales effect.

Functions of Advertising

Numerous products and services would surely stay unsold if not for promotional campaigns. Due to their high cost, only large companies can afford to produce advertising campaigns, and these corporations compete fiercely while using expensive media (East, 2017). According to Thomas (2020), one of the functions of advertising is to differentiate brands that are otherwise difficult to discern. Schmalensee (2017) states that established companies enjoy a considerable market advantage. This is due to the fact that their advertising efficacy and product appeal have increased as a result of both customer experience with the product and the sheer volume of competing advertising messages. Thus, established firms can impose higher advertising costs on new entrants by raising their own advertising barrier to entry, resulting in more market dominance and greater profits. This is true of the food and beverage companies in Nigeria based on consumer experience with their products and product appeal in the minds of their customers. This is an undeniable fact because major firms in the food and beverages industry, such as Cadbury Nigeria Plc, Nestle Nigeria Plc, NBC, and Seven-Up Companies, had eliminated other competitors from the market through advertising intensity and the commitment of vast advertising budgets to advertising programmes.

Advertising, according to Adewale (2018), performs the following functions: it informs the public or potential buyers about the existence of a product or service and where it can be obtained; it educates consumers about the proper use of the product; and it encourages the company to improve its product or service quality in order to remain competitive in the market. However, advertising helps convince consumers to purchase the products. Advertising generates employment possibilities for individuals; to remind consumers to continue purchasing items. Also, advertising serves to increase markets for certain goods and services, hence reducing prices; brand loyalty is formed; for instance, some individuals refuse to consume any sort of milk. It conveys a positive image of the company to the general audience. Advertising improves sales volume and, consequently, profits and gives information regarding price and quality adjustments.

Akanbi and Adeyeye (2017) found that advertising triggered a series of economic events. Why do consumers choose marketed brands in the same product category over unadvertised brands? Advertising is not required because marketed brands are superior, but it can add value to a brand in the consumer's view. While advertising may not directly address a product's quality, the image established by advertising can infer quality and add value to the product, making it more attractive. Additionally, advertising provides value by teaching consumers about their alternatives for selecting the desired value in the products or services they purchase. Additionally, advertising allows consumers to satisfy their mental or symbolic needs and desires by purchasing things and services. In a free market system, advertising promotes self-interest by providing value to products and services. Additionally, it promotes competition, which enhances the consumer's self-interest.

Following the research of Young (2018), Shimp (2017) asserts that many businesses and nonprofit organisations have faith in advertising primarily because it performs five essential communications functions: informing, influencing, reminding and increasing salience, adding value, and assisting other company efforts. Brand promotion is one of the most significant tasks of advertising (Ehrenberg et al., 2018). Advertising is an efficient form of communication that can reach mass audiences at a relatively low cost per contact; it facilitates the introduction of new brands and increases demand for existing brands, primarily by increasing consumers' top-of-mind awareness of established brands in matured product categories (Miller & Berry, 2018; Ehrenberg et al., 2018). Advertising serves the most valuable information role – both for the advertised brand and the consumer – by teaching new uses for current products and encouraging customers to demonstrate a propensity to purchase the advertised brand (Wansink & Ray, 2018). Scholars concurred that effective advertising influences a product's perceived quality and other perceptions, leading to an increase in market share and profits. Machleit et al. (2019) asserted that effective advertising increases the consumer's interest in mature brands and, consequently, the likelihood of purchasing brands that would not have been chosen otherwise. Similarly, they argued that advertising has demonstrated influence over brands with consumers who have not recently purchased a brand.

According to Abiraji (2020), advertising functions include influencing consumer behaviour by convincing them to purchase. Advertising is utilised to maintain sales and stabilise or grow levels of earnings. It can assist in altering perceptions that favour one firm's goods over another's. More often than not, it is used to bring new products and services to consumers' notice and foster goodwill between producers and consumers. According to Bisi (2016), advertising is used to dispel any misconceptions consumers may have about a product due to what they have heard from others. The authors on the role of advertising held similar views, namely that advertising is used to affect consumer behaviour by convincing consumers to purchase.

Types of Advertising

Advertising can be categorised in various ways. The most prevalent advertising typologies are based on media, sponsor, locality, audience, and the product's life cycle stage. According to Colley (2019), classification may be based on what is being advertised and the type of demand the advertisement is meant to excite or create; these classifications are summarised below:

i. Classification by media: The advertising medium is the conduit through which advertising is channelled; therefore, we may identify two main media, namely print advertising and electronic advertising.
   a. Print advertising: This type of advertising relies on printed words and is further separated into newspaper advertising and advertising in periodicals (weekly or monthly magazines). This also includes outdoor advertising, such as signboards, posters, and billboards displayed on important roadways.
   b. Electronic advertising: Advertising could also be distributed by electronic media such as radio, television, movie theatres, home video, etc.

ii. Classification by Sponsor: Manufacturer-producer advertisements are advertisements that are funded by the manufacturers or producers of a product. These are prevalent among producers and manufacturers of household goods, such as Unilever, PZ, and others. Cooperative advertising is a form of advertising that is sponsored by two companies in the same industrial industry. This may involve the collaborative funding of a marketing campaign by companies in various stages of manufacturing.

iii. Classification by Geographical Coverage: This form of advertising campaign typically targets a certain audience or clientele. This may drive advertisements targeting broader or more restricted geographic regions. Local and national advertising are involved. Local advertising is geographically localised advertising by local newspapers or radio stations, whereas national advertising uses national newspapers or radio stations to cover the entire country.

iv. Classification by Intended Audience: Depending on the product and principal purpose for which it is being used, advertising is frequently addressed at distinct target audiences. Curry and Penman (2018) stated that consumer advertising targets individuals and households who make non-commercial purchases. Industrial advertising, however, targets those who purchase for resale or manufacture of goods and services for resale. Trade and professional advertising, on the other hand, targets those who purchase products for resale and those who do not use the products themselves but promote them to others.

v. Classification by Product Cycle Phase: Lavidge and Steiner (2018) state that a product's lifespan consists of numerous stages. When a new product is launched to the market for the first time, it is through innovative advertising. Pioneering advertising is employed to announce a new product's arrival on the market, introduce it to potential users, and demonstrate its utility. As competitors produce new items, they strive to demonstrate the competitive superiority of their products over those of their rivals. In this stage of the product life cycle, competitive advertising is used to combat competitors in the marketplace and increase the company's market share. At the mature stage of the product's life cycle, the primary objective of advertising is to recapture the patronage of present customers.

Kotler (2014) identifies the following as the primary advertising methods:

1. Competitive: Advertising is when a company competes with rivals for customers by employing the most expensive media, such as television, and displaying its advertisements as frequently as possible.
2. Specialty: As a kind of advertising, a company creates little promotional items that are sent at no cost to potential customers. This could include pens, pencils, diaries, key chains, and a large selection of stickers.
3. Defensive: A company must advertise even if it had no intention of doing so. This can be considered forced advertising imposed on the company by rivals who desire to prevent it from gaining market share.

This is expensive, as businesses must move swiftly and promote to repel such attacks (Abiraji, 2020). Companies are urged to use the most effective channel for communicating their products to consumers. In order to reduce costs associated with their activities, companies must choose the most cost-effective mode of communication while picking the optimal mode. Additionally, their chosen communication method must be capable of reaching consumers at all times.

Measuring Advertising Effectiveness

Advertising is intended to increase brand awareness, foster brand loyalty, or generate favourable attitudes toward a product. Even if advertising does not directly influence a consumer's choice to make a purchase, advertising programs still be held accountable. Thus, the corporate advertiser must be able to quantify the outcome of present advertising in order to improve future advertising, as well as compare the success of advertising expenditures to those of other marketing plan aspects (Akanbi & Adeyeye, 2017).

According to Martin (2019), measuring the efficacy of advertising entails evaluating the impact of advertising on what intervenes between the advertising stimulus and the ensuing behaviour (purchase decision). According to the hypothesis, advertising can influence consciousness, knowledge, and other variables that lend themselves more readily to measurement. In essence, the advertiser seeks to evaluate the effectiveness of advertising in influencing the purchase decision process. It is easier, for instance, to estimate the effect of a new production machine than it is to predict the effect of increased advertising expenditures (Kamber, 2017). According to Kotler (2014), the success of advertising is contingent upon message content, medium use, product perception, and other elements that influence its effectiveness to varying degrees.

Measures of advertising effectiveness are necessary for effective planning and management of advertising. However, most advertising efficiency measurements focus on individual advertising campaigns. Agencies spend most of their budgets on pre-testing advertisements and considerably less on analysing their performance. The majority of advertisers attempt to quantify the communicative consequences of an advertisement, i.e., its potential impact on awareness, knowledge, or preference, as well as its sales effectiveness (Kotler, 2014). Forester (2019) and Russel (2017) argued that the sales effect of advertising is typically more difficult to assess than its communication effects. Numerous factors affect sales, including product characteristics, pricing, and availability, as well as the actions of competitors. They reasoned that the fewer or more controllable these additional variables are, the simpler it is to quantify their impact on sales. Sundarsan (2017) concluded that the sales impact of direct marketing and corporate image advertising is easier to measure. However, the present study has chosen to investigate the sales revenue and profitability of the companies under investigation.

According to Duncan (2018), businesses are generally interested in determining whether they are overspending or underspending on advertising. Researchers attempt to quantify the influence on sales by using either historical or experimental data.

Depending on the nature of the product and the promotional medium used, the efficiency of advertising can be judged by a variety of metrics. Most studies estimate the efficacy of advertising by focusing on its communicative effect (its effect on awareness, knowledge, or preference), while others measure it from the perspective of sales income relative to advertising campaign expenditures.

METHODOLOGY

The methodology is an overall plan that spells out the sources, types of data required, strategies for obtaining such data, and the appropriate analysis tools (Meshach, 2017). This study uses primary and secondary data collection sources to gather information. The primary data source was collected through the survey method, which used structured questionnaires. The study population consists of 121 staff members from Cadbury Nigeria Plc. Secondary data was gathered from journals, conference articles, internet sources, textbooks and unpublished works. A simple random sampling procedure was used to draw the required sample size for the study. This procedure was chosen to guarantee randomness and representativeness by giving respondents an equal chance of being chosen. The sample size used allows every respondent an equal chance of appearing in the selection. The questionnaire was designed in such a way that information from the respondents will be adequate to provide answers to the research questions and research hypotheses. Therefore, data on the research instrument was subjected to Cronbach alpha analysis to determine the reliability of the research instrument/measures. In addition to this, a linear regression was chosen as the method of statistical analysis. The linear regression was chosen because it works well with the Likert scale measurement style, which was used in designing the questionnaires. However, in determining the sample size for the respondents to the questionnaires, the researchers adopted Krejcie and Morgan's (1970) table for determining sample size. Therefore, in determining the sample size, the researcher used the estimated population of 92 in according to Krejcie and Morgan (1970).

DATA ANALYSIS

Descriptive and Demographic Data

The demographic information was grouped into two parts. The participants' bio data was presented before the description of variables raised in the hypotheses or research questions. A total of 89 participants took part in this study because 3 of the responses were not accepted due to incorrect questionnaire filling. The analysis of the gender distribution revealed that there were 57 males representing 64.0% and 32 females representing 36.0%. This indicates that there were more male participants than females. The age dispersion shows a range of 20 – 29 years, 30- 31years, 40-49years and 50 years and above. The participants between the ages of 20 and 29 were 12 respondents, representing 13.5%. Those within the range of 30-39 years were 55 respondents, representing 61.8%; those within the age of 40-49 years were 17 respondents, representing 19.1%; and those above 50 years were 5 respondents, representing 5.6%. The educational qualification distribution of the participants showed that 17 respondents, representing 19.1%, were ND/NCE holders, and those with HND/BSC holders were 48 respondents, representing 53.9%. 24 respondents, representing 26.9%, are those with MSc/MBA holders.

Hypotheses Testing and Results

Hypothesis One: Radio advertising does not affect the sales of Cadbury Nigeria Plc.

Table 1 | Model Summary [a. Predictors: (constant), Radio Advertising]

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.702	493	482	1.05582

Table 2 | ANOVA [a. Predictors: (constant), Radio Advertising; b. Dependent Variable: Sales]

Model	Sum of Squares	Df	Mean Square	F	Sig.
1. Regression	52.012	1	52.012	46.658	.000a
Residual	53.508	48	1.115		
Total	105.520	49			

Table 3 | Coefficients [a. Dependent Variable: Sales]

	Unstandardised Coefficients		Standardised Coefficients		
Model	B	Std. Error	Beta	T	Sig.
1. (Constant)	6,489	.312		20.797	.000
RA	. 874	.128	.702	6.831	.000

The model summary gives the R-square value of 0.493 (49.3%). The R-Square, also known as the coefficient of determination, measures the variability in radio advertising has been explained. The higher the R-Square, the more adequate the fitted model. The ANOVA tests for the significance or otherwise of the fitted model. From the table, the f – calculated is 46.658 with 1 and 48 degrees of freedom. The f-tabulated results were obtained from the statistical table at a 0.05 level of significance of 4.08. Since the f – calculated (46.658) is greater than the f – tabulated (4.08), the null hypothesis (Ho) is rejected, and we therefore accept (H1) that Radio advertising affects the sales of Cadbury Nigeria Plc. The coefficient table shows the relationship between Radio Advertising and Sales. From the table, the coefficient of sales is 0.874. Since the coefficient is positive, this implies that Radio advertising affects the sales of Cadbury Nigeria Plc.

Hypothesis Two: TV media advertising does not affect the sales of Cadbury Nigeria Plc.

Table 4 | Model Summary [a. Predictors: (constant) TVMA]

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.448	.200	.184	1.32583

Table 5 | ANOVA [a. Predictors: (constant), TVMA; b. Dependent Variable: Sales]

Model	Sum of Squares	Df	Means Square	F	Sig.
1. Regression	21.144	1	21.144	12.028	.001b
Residual	84.376	48	1.758		
Total	105.520	49			

Table 6 | Table 3 | Coefficients [a. Dependent Variable: Sales]

	Unstandardised Coefficients		Standardised Coefficients		
Model	B	Std.Error	Beta	t	Sig.
1. (Constant)	7.842	.756		7.791	.000
TVMA	.782	.225	.448	3.468	.001

The model summary gave the R-squared value of 0.200 (20%). The R-Square, also known as the coefficient of determination, measures the variability in TV media advertising and has been explained by sales. The higher the R-Square, the more adequate the fitted model. The ANOVA tests are used to analyse the significance or otherwise of the fitted model. From the table, the f – calculated is 12.028 with 1 and 48 degrees of freedom. The f-tabulated result obtained from the statistical table at 0.05 level of significance is 4.08. Since the f – calculated (12.028) is greater than the f – tabulated (4.08), the null hypothesis (Ho) is rejected, and we therefore conclude that TV media advertising affects the sales of Cadbury Nigeria Plc. The table of coefficients gives the nature of the relationship between TV media advertising and Sales is 0.782. Since the coefficient is positive, this implies TV media advertising affects the sales of Cadbury Nigeria Plc.

Hypothesis Three: Print media advertising does not affect the sales of Cadbury Nigeria Plc.

Table 7 | Model summary [a. Predictors: (constant) PMA]

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.293	.086	.067	1.41754

Table 8 | ANOVA [a. Predictors: (constant), PMA; b. Dependent Variable: Sales]

Model	Sum of Squares	Df	Mean Square	F	Sig.
1. Regression	9.068	1	9.068	4.513	.039c
Residual	96.452	48	2.009		
Total	105.520	49			

Table 9 | Coefficients [a. Dependent Variable: Sales]

	Unstandardised Coefficients		Standardised Coefficients		
Model	B	Std.Error	Beta	T	Sig.
1. (Constant)	7.033	.656		10.722	.000
Employee	.439	.207	.293	2.124	.039

The model summary gave the R-squared value of 0.086 (8.6%). The R-Square, also known as the coefficient of determination, measures the variability in print media advertising has been explained. The higher the R-Square, the more adequate the fitted model. The ANOVA tests for the significance or otherwise of the fitted model. From the table, the f – calculated is 4.513 with 1 and 48 degrees of freedom. The f-tabulated result obtained from the statistical table at 0.05 level of significance is 4.08. Since the f – calculated (4.513) is greater than the f – tabulated (4.08), the null hypothesis (Ho) is rejected, and we therefore conclude that Print media advertising affects the sales of Cadbury Nigeria Plc. The table of coefficients gives the nature of the relationship between print media advertising and sales. From the table, the coefficient of sales is 0.439 since the coefficient is positive, this implies that print media advertising affects the sales of Cadbury Nigeria Plc.

DISCUSSION

The regression analysis was conducted for three hypotheses. The result of the first hypothesis suggests that radio advertising affects the sales of Cadbury Nigeria Plc. with a p-value of 0.000 and a coefficient of 0.874. also, in the second hypothesis, it can be said that TV media advertising affects the sales of Cadbury Nigeria Plc. with a p-value of 0.001 and a coefficient of 0.782. Finally, the result for hypothesis three shows that Print media advertising affects the sales of Cadbury Nigeria Plc. with a p-value of 0.39 and a coefficient of 0.439.

CONCLUSION AND RECOMMENDATIONS

Advertising is a sort of persuasion that seeks to alter or reinforce an individual's prior attitude; it is not merely a means of informing customers about items but rather a process that impacts and persuades people to purchase. This study aimed to determine the extent to which advertising influences the sales of Cadbury Nigeria Plc's fast-moving consumer goods. It can, therefore, be concluded that radio advertising has a positive impact on Cadbury Nigeria Plc sales, it can also be concluded that TV advertising affects Cadbury Nigeria Plc sales positively, and lastly, it can be concluded that print media advertising positively affects Cadbury Nigeria Plc. sales. It might be stated that advertising is one of the most significant forms of communication, capable of impacting the company's success in multiple ways if used well. At the time of formulating any sales and profitability promotion policy, however, other aspects may have a more significant impact on its significance. To satiate consumers, marketers must produce inventive advertisements. Clear advertising messages are necessary so that regular consumers may easily understand them. The quality of these advertisements needs to be raised, and they cannot be used to falsely or intentionally mislead consumers. Advertising that surprises consumers, such as 'latest addition is coming shortly' is a great way to get people to buy. Convenient prices for FMCG goods entice customers to purchase goods. While creating the commercial message, marketers must regularly monitor the consumer. The commercial must be concerned with nature and have a natural ethics. The consumer's awareness of advertisements would be very beneficial in attracting their attention to the desired FMCG.

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AN OVERVIEW OF ARTIFICIAL INTELLIGENCE APPLICATIONS IN INTERNATIONAL TRADE

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ABSTRACT

Artificial intelligence (AI) technologies, increasingly prominent in our lives, are also widely applied in international trade. Effectively harnessing AI capabilities can yield significant benefits in planning, managing, and executing international trade. This study aims to analyse academic research on AI applications in international trade from the past to the present. To accomplish this, we have conducted an extensive literature review. Within the research scope, we have provided a general assessment of the focus areas of studies related to AI use in international trade and identified areas with gaps, aiming to pave the way for new research endeavours by proposing recommendations. AI applications, characterized by their expansive and intricate structure, represent a dynamic technology that continues to evolve with each passing day, unveiling new dimensions and capabilities. Consequently, identifying the specific domains within international trade where AI can be effectively harnessed is an imperative inquiry. The complexity and versatility of AI underscore the importance of discerning its potential applications across various facets of global commerce. By projecting the potential utility of AI within the realm of international trade, such investigations not only provide valuable insights but also serve as a catalyst for fostering innovation and addressing pertinent challenges. Moreover, shedding light on the areas within international trade that stand to benefit most from AI interventions can facilitate informed decision-making and strategic planning among stakeholders. Hence, this research not only seeks to explore the existing landscape of AI applications in international trade but also endeavours to lay the groundwork for future endeavours by identifying areas ripe for exploration and potential avenues for further investigation.

Keywords: technology, artificial intelligence, AI applications, international trade
JEL Classification: M15, O33, F13

INTRODUCTION

Artificial intelligence (AI) represents one of the most advanced technologies today, when the future is being built, and its use is becoming widespread in almost every aspect of life. One of these areas is international trade (IT) processes. IT processes are complex processes that include quite different stages and factors. In world trade where big data and variables are involved, the use of technologies such as AI that facilitate the analysis of complex processes and maximize efficiency is undoubtedly of great importance.

Since AI is a relatively new and constantly developing technology that most of us are not yet familiar with, its field of use is constantly evolving, and it is possible to talk about uncertainty in this field. For this reason, it is necessary to reveal in which IT processes AI applications are used and the potential of their usage areas.

This study was carried out to reveal which AI processes are used in IT processes. An analysis of academic studies on AI and IT processes from past to present has been made, and the aim of these studies is to reveal in which IT processes and in what way AI is mostly used.

AI will be used in almost every aspect of our lives in the future and will make life easier. It is possible that AI, which is also used effectively in IT processes, can be used in different ways in many more processes in the future, and by revealing the current situation in the study, there is also the opportunity to make a projection into the future.

FUNDAMENTALS OF ARTIFICIAL INTELLIGENCE

Nowadays, artificial intelligence technology appears in almost every aspect of our lives. AI technology, used in many areas from internet search engines to personal digital assistants, from smart home devices to the automotive industry, is defined as a branch of computer systems aimed at imitating and even exceeding human intelligence in some cases (Baronchelli, 2024). However, the science and mathematics behind developments in this field are often deep and complex. Therefore, understanding this complex topic can be challenging for those who want to learn about artificial intelligence (Czarnitzki et al., 2023).

AI combines many disciplines, such as mathematics, statistics, computer science, and engineering, to improve computers' ability to perform complex tasks. AI generally uses a set of algorithms and methods intended to resemble human intelligence in areas such as information processing, language understanding, problem-solving, learning, perception and decision-making. These algorithms and methods can be listed as follows:

Machine Learning: It is a sub-branch that enables computer systems to gain the ability to learn based on data. Machine learning involves learning from experience and discovering common patterns across data.

Deep Learning: It is a machine learning approach based on deep architectures such as artificial neural networks. Deep learning is used to solve complex problems based on large amounts of data and is often effective in areas such as image recognition, natural language processing and voice recognition.

Natural Language Processing: It is a field that allows computers to understand and process human language. Applications such as text analysis, language translation, and emotional analysis are carried out using natural language processing techniques.

Image Processing: It is a field that allows computers to understand and process images. Many applications such as object recognition, face recognition, image classification are carried out with image processing techniques (Jan et al., 2023, OpenAI, 2023).

AI has a wide range of applications in various industries, from automotive to healthcare, from finance to entertainment. For example, autonomous vehicles are being developed in the automotive industry, while artificial intelligence is used in healthcare for disease diagnosis and treatment. Therefore, AI is one of the most important technological developments today and affects many aspects of our lives.

ARTIFICIAL INTELLIGENCE AND INTERNATIONAL TRADE

AI enables more accurate decisions to be made by strengthening the prediction and analysis processes at IT. In particular, AI-based forecasting models can be used more effectively in supply chain management by being used in important functions such as demand forecasting and inventory management. Additionally, AI helps improve operational processes such as customs clearance, logistics and transportation. Customs procedures can be made faster and more efficient by using AI algorithms to analyse customs data. In addition, AI in logistics management can contribute to reducing logistics costs and improving delivery times by using it in areas such as routing optimization, transportation planning and fleet management. In this way, AI enables the emergence of more competitive and efficient businesses in international trade (Trefler and Sun, 2022; Czarnitzki et al., 2023; Meltzer, 2024).

According to Meltzer (2024), how AI impacts international trade will also depend on how it is regulated by law. In fact, AI regulations are already on the agenda in many countries and may become obstacles to international trade in the future.

THE IMPACT OF ARTIFICIAL INTELLIGENCE APPLICATIONS ON INTERNATIONAL TRADE

In the literature and extant applications, it has been seen that AI can be used in essential areas such as supply chain and logistics management, product and service development, marketing and customer services, risk management and security, financial forecasting and analysis and finally customs and border controls in the field of IT. On the other hand, AI can be used in every process of general business management, and this is also included in IT processes. In addition, since AI is a technology that constantly develops and continues its development exponentially, it is very difficult to predict in which areas it will be used in the future (Ferencz et al., 2022).

Supply Chain and Logistics Management

AI has a huge impact on supply chain and logistics management. It is especially used in demand forecasting, inventory management and logistics optimization. Big data analytics and machine learning algorithms help optimize stock levels and reduce logistics costs by analysing supply chain data (Avcı, 2022; Aylak et al., 2021). Because AI allows businesses to analyse large amounts of data and make accurate predictions, it can enable better forecasting of demand in third countries, optimizing production and logistics, and making more informed decisions about pricing, stock levels and market trends (Meltzer, 2024).

Product and Service Development

AI can also support product and service development processes in international trade. For example, analysis of customer feedback leads to identifying market needs and optimizing the product/service portfolio. Additionally, AI is a technology that has the potential to create game-changing products and services that will disrupt global trade patterns. Autonomous driving cars are a good example of this (Goldfarb and Trefler, 2018; Jayathilaka, 2022).

Marketing and Customer Services

AI is widely used in international marketing and customer service. For example, AI is widely used to create personalized marketing campaigns, better understand customer demands, and optimize customer service processes. AI makes great contributions to performance in both direct-to-customer and business-to-business (Paschen et al., 2020). Companies benefit from artificial intelligence by transforming big data into information and knowledge, which allows them to develop more effective marketing and sales strategies. This situation turns into a sustainable competitive advantage. Using decision support systems, marketers increase the efficiency of marketing plans by predicting net customer lifetime value from customers' purchasing behaviour, making full use of all available databases (Vlačić et al., 2021).

Risk Management and Security

Risk management and security are of great importance in the IT field. AI is used to identify potential risks in trading processes, prevent fraud and ensure data security (Meltzer, 2024, WCO/WTO, 2022). IT processes bring with them a number of risks, such as fraud, dishonesty and illegal activities. AI technologies help reduce these risks by increasing risk assessment and fraud detection capabilities. AI algorithms can broadly analyse transaction data, financial records, and shipping information to identify an occurrence of repeated suspicious transactions or anomalies that may indicate fraudulent activity. This enables customs authorities and businesses to take effective measures to prevent illegal trade and protect intellectual property rights (Digiampietri et al., 2008).

Financial Forecasting and Analysis

The accuracy of financial forecasts is of great importance in IT processes. AI is used to analyze financial data and predict future business trends. This is an important factor that helps make more informed trading decisions. In the world of finance, where there is a dynamic and variable process, taking advantage of AI's data analysis speed and high accuracy rates will take businesses one step forward in financial planning. On the other hand, the impact of AI on financial management is not limited to increasing efficiency but also includes a deep transformation in the way institutions manage risks, make choices and interact with the financial environment (Berdiyeva et al., 2021; Ahmed et al., 2022; Hidayat et al., 2024).

Customs and Border Controls

In customs and border controls, AI is used to speed up import and export processes, increase security and prevent possible fraud. Facial recognition technology, biometrics methods such as data analysis and big data analytics make customs and border controls more effective. It is seen that the contribution of AI is great in various areas, such as detection of suspicious activities, credit card fraud, telecommunication fraud, detection of terrorist activities, financial crime detection and computer intrusion detection, and the use of AI-supported technology in customs is increasing day by day (Digiampietri et al., 2008; Shubailat et al., 2024).

Business Administration

Artificial intelligence has a significant impact on business management. Businesses can optimize data analysis, forecasting and decision-making processes by using artificial intelligence technologies. Additionally, thanks to artificial intelligence-supported systems, businesses can increase efficiency, reduce costs and accelerate decision-making processes by automating (Ballamudi, 2019).

ARTIFICIAL INTELLIGENCE APPLICATIONS IN INTERNATIONAL TRADE IN THE LITERATURE

In recent years, many studies on AI applications have attracted attention in the academic literature. Since AI has penetrated almost every aspect of life, it is normal for there to be a lot of these studies, and it can be predicted that they will increase day by day. AI applications in IT processes are one of the topics that are increasingly covered in the literature. In this study, by searching the databases of Web of Science, Scopus and Google Scholar for the keywords "international trade processes" and "artificial intelligence applications" and different combinations of these terms in Turkish and English, remarkable academic studies on AI applications in IT processes have been revealed. Undoubtedly, AI is actively used in many areas of international business and trade. Since business functions are also a field of international trade, some studies in this field were also included in this review. Table 1 lists the studies in the literature that include AI applications in IT processes, the contents of these studies, and information about the IT process in which AI applications are used in each study.

Table 1 | Academic Studies on Artificial Intelligence Applications in International Trade Processes

AUTHORS	SUBJECT OF THE STUDY	UT PROCESS USING AI APPLICATION
Digiampietri et al. (2008)	Customs operations are one of the important fields of IT. It has been observed that AI applications have been actively used in customs operations in recent years. In this study, it is pointed out that high exports and imports on a global scale are used as a tool to hide crimes such as tax evasion, smuggling, money laundering and drug shipment. It is pointed out that preventing these attempts at customs is not possible with manpower and that increasing amounts of AI applications are used day by day, and these applications also yield positive results. The study mentions the outputs and success of artificial intelligence-supported customs enforcement procedures called HARPIA, which were developed by the Brazilian federal government in collaboration with universities. It is stated in the study that AI applications have a visible positive contribution to reducing risks at customs.	Customs and Border Controls
Goldfarb and Trefler (2018)	While the study draws attention to the fact that economies of scale and a knowledge-intensive sector will gain importance in the future, it is stated that trade models based on economies of scale and knowledge investment and dissemination will come to the fore in the impact of AI on IT processes. The study points out that how effective AI can be under IT depends on state regulations and emphasizes that artificial intelligence-focused trade policies will provide an advantage in IT.	Product and service development

AUTHORS	SUBJECT OF THE STUDY	UT PROCESS USING AI APPLICATION
Brynjolfsson et al. (2019)	The study states that AI is now superior to human performance in many areas. However, it is noted that there are very few studies in the literature on the economic effects of AI. In the research, a large e-commerce platform was taken as a sample, and it was investigated what kind of economic effects the use of AI causes on this platform. According to the research results, export capacity increased by 17.5 per cent with the effect of AI on this large e-commerce platform. It is noted in the study that AI is used for automatic translation on the e-commerce platform, and that the language barrier is a significant obstacle in UT processes, but as the data revealed in the study shows, AI-based translation opportunities visibly eliminate this language barrier, which has great economic efficiency. has been shown to increase significantly. The study is important in terms of showing the concrete contributions of the use of AI in IT processes.	Marketing and customer service
Civelek and Artar (2019)	Blockchain and AI technologies in IT processes will put an end to outdated trade methods and also suggest that widespread AI applications will lead to the establishment of balanced trade unions between countries. The study in question focuses on defining a new system known as the smart trade matrix and suggests that this system will enable exchange transactions between two countries without requiring any customs duties. It is claimed that in the smart trade matrix system, since blockchain technologies and AI will be used in trade between countries, the human element will be equalized, time will be saved, and trade will take place in an environment of trust independent of the central authority, and this system will also protect IT processes from foreign currency shortage and fluctuating exchange rate risks.	Financial forecasting and analysis
Ballamudi (2019)	This study focuses on the impact and contributions of AI to business management rather than IT processes. The study sought answers to the following questions: Is there sufficient information and studies on the effects of AI on management? What are the current predictions about the future of management in the emergence and development of AI? What impact will the rise of AI have on the roles of middle managers in the future? The study reveals a systematic literature review on these questions. As a result of the study, it has been concluded that AI is a necessary "evil" for the future of companies. What is meant by evil here is the risks of AI . According to the study, AI technology will perform managerial tasks and help solve management challenges. Managers and management therefore need to acquire new competencies and skills to reach new AI-based frontiers.	Business Administration
Nishant et al. (2020)	The study focuses on the areas of use of AI applications, especially in businesses' sustainability and environmental management, risk and security issues. The study argues that AI can support the derivation of culturally appropriate institutional processes and individual practices to reduce the natural resource and energy intensity of human activities. At this point, the limitations of AI are also mentioned , and it is emphasized that over-reliance on historical data in machine learning models, uncertain behavioral reactions of people to AI-based interventions, increasing cyber security risks, negative effects of AI applications and difficulties in measuring the effects of intervention strategies are the factors limiting AI .	Risk management and security

AUTHORS	SUBJECT OF THE STUDY	UT PROCESS USING AI APPLICATION
Savinov and Taranovskaja (2020)	The article examines the emergence and formation of a new segment in the innovative activities of scientific and industrial organizations in the global economy and the ongoing efforts resulting in the development of artificial intelligence. Promising key areas of AI development have been identified. The authors have assessed the impact of AI on international trade in general, focusing on its use in production and sales collaboration and global production chains, as well as in the creation and operation of digital commerce platforms. In addition, attention was drawn to the necessity of developing common standards and common approaches for the protection of intellectual property.	Product and service development Business Administration Marketing and customer service
Paschen et al. (2020)	The study emphasizes that the B2B sales process is undergoing significant transformations triggered by developments in information and communication technology, especially artificial intelligence (AI). According to the authors, AI serves to transform large amounts of data into knowledge for superior knowledge production and knowledge management in B2B sales. Accordingly, thanks to this feature of AI, the traditional human-oriented sales process can change significantly. In this study, how artificial intelligence affects the B2B sales process is examined. In the study, the specific contributions that AI can bring are explained, and the role that humans play in this process is also revealed. Managerial considerations for maximizing contributions from AI and humans in the context of B2B sales are also outlined.	Marketing and customer service
Ferreira et al. (2021)	The study provides a systematic review of the literature on AI applications in stock market investments, based on a sample of 2326 articles retrieved from the Scopus website between 1995 and 2019. In the study, AI applications in the stock market are divided into four categories: portfolio optimization, stock market forecasting using AI, AI and financial sentiment analysis, and combinations involving two or more approaches. As a result, it is stated that the relevant literature is becoming increasingly specific and comprehensive.	Financial forecasting and analysis
Vlačić et al. (2021)	This study aims to provide an overview of the course of marketing and AI research fields. Based on a review of 164 articles published in Web of Science and Scopus indexed journals, this article summarizes various research avenues related to the adoption, use and acceptance of AI technology in marketing, the role of data protection and ethics, the role of institutional support for AI marketing.	Marketing and customer service
Gupta and Kumar (2021)	This article presents a literature review of studies using machine learning techniques in predicting international trade trends. The findings reveal a growing interest in developing machine learning models for economic forecasting compared to traditional statistical methods.	Financial forecasting and analysis Business Administration Marketing and customer service
Berdiyeva et al. (2021)	The study focused on the application areas of AI in business accounting and finance processes. In the research, which stated that the adoption of AI applications can provide great benefits by reducing errors in the business and increasing the efficiency of accounting and finance processes, a meta-analysis was carried out on 150 research articles conducted between 1989 and 2020. According to the results of meta-analysis, most studies show that artificial intelligence systems have a positive impact on the accounting and finance process.	Financial forecasting and analysis Business Administration

AUTHORS	SUBJECT OF THE STUDY	UT PROCESS USING AI APPLICATION
Belu et al. (2021)	The article aims to reveal the effects of new technologies on specific activities related to international sales contracts (international logistics and international payments). The study is based on theoretical and empirical research aimed at investigating the impact of new technologies on IT processes and the development of international businesses. The findings confirm that these new technologies are developing and spreading rapidly and positively impacting the development of international trade relations and the environment. The survey results on the application of new technologies, such as AI, in the Romanian business environment show that employees are familiar with most of them. However, the percentage of actual use in companies is relatively small.	Supply chain and logistics management Business Administration Financial forecasting and analysis
Aylak et al. (2021)	According to the study, obtaining demand forecasts with high accuracy is a key factor for the success of all supply chain management processes. For this reason, the study proposed a forecasting model for the business using artificial neural networks, one of the statistical demand forecasting methods. In the study, a company operating in the textile sector was discussed. Sales data of the company operating in the textile industry between 2018 and 2021 were taken and included in the research. Training data and output data were compared. Error test results performed after the application showed that the predictions made by the model were reliable and consistent.	Supply chain and logistics management
Trefler and Sun (2022)	The study aims to obtain empirical data on the impact of AI applications on IT processes. Based on the theory of comparative advantage, the research predicts that countries with AI applications will gain a comparative advantage over others. It is stated that the use of AI applications increases mutual trade, doubles the number of exported AI applications, and increases the tendency to develop new applications and put an end to old ones, called creative destruction. Therefore, the comparison between 2014 and 2020 revealed that the countries increased their welfare by 2.5 to 10.6 per cent.	Marketing and customer service Product and service development
Jayathilaka (2022)	This study discusses different ways that technological advances in AI can improve global trade. The hypothesis was tested using a panel dataset of development and AI indices of 150 countries for 2018-2021. The results show that a nation's AI capability has a considerable positive impact on trade. The findings of this study recommend strengthening the country's artificial intelligence capacity to increase trade volume.	Product and service development Business Administration
Kouka and Magallanes (2022)	In the study, the literature review that discusses the relationship between technological developments and IT processes aims to build a bridge between the new opportunities brought by such developments and the potential impacts they will create. Despite the paucity of publications in this area, this article offers a thematic approach that discusses the benefits and barriers to optimizing global supply chains and creating new opportunities for countries.	Supply chain and logistics management Marketing and customer service
Ahmed et al. (2022)	In this study, AI and machine learning literature in the field of finance is reviewed. Scopus using a bibliometric approach The research conducted on 348 articles published in 2011-2021 from the journals indexed in the database revealed an upward trend in the publication trend starting from 2015. The study revealed that AI had been applied to bankruptcy prediction, stock price prediction, portfolio management, oil price prediction, anti-money laundering, behavioural finance, big data analytics and blockchain. The results provide practical guidance to market participants, especially fintech and financial companies, on how artificial intelligence and machine learning can be used in decision-making processes.	Financial forecasting and analysis

AUTHORS	SUBJECT OF THE STUDY	UT PROCESS USING AI APPLICATION
Vrontis et al. (2022)	This study aims to systematically examine academic studies on intelligent automation, including AI, and clarify its main contributions and challenges to human resources management. The results reveal that smart automation technologies create a new approach to managing employees and improving firm performance, thus presenting various opportunities for human resources management as well as significant challenges at technological and ethical levels.	Business Administration
Sestino and De Mauro (2022)	This study aims to clarify the phenomenon of commercial activation of AI through a comprehensive and systematic literature review to propose a clear definition of what AI is today. The study provides researchers and practitioners with a meaningful overview, showing that AI can be used as an effective enabler to increase business value.	Business Administration
Hasan (2021)	This study is a review of the application of AI in the field of accounting. In the study, interdisciplinary research in the field of AI in accounting was conducted. There is an emphasis on cooperation. On the other hand, it is stated that the broader application of AI in the accounting field will provide benefits such as greater efficiency, productivity and accuracy but will also be burdened with difficulties such as the disappearance of traditional jobs and unskilled labour.	Financial forecasting and analysis Business Administration
Avcı (2022)	This study examined blockchain and AI applications in logistics. According to the authors, countries that include AI applications in their logistics industry processes have become stronger and more advantageous in this field, and this advantage has provided these countries with a sustainable advantage in international competition. According to the study, blockchain and AI technologies also offer new technological infrastructure opportunities specifically for the logistics sector.	Supply chain and logistics management Financial forecasting and analysis
Czarnitzki et al. (2023)	The study examines the effects of AI applications on productivity. Researchers have found a direct and positive relationship between AI and company productivity by examining the productivity data of German companies that actively use AI applications.	Business Administration
Arzu and Bilgiç (2023)	The study examines the impact of AI technologies on trade from a political economy and global governance framework. According to the results, an increase in productivity was observed in the areas where AI technologies were applied, which positively affected trade volumes. The study emphasized that AI increases global competition and has a direct and indirect impact on countries' economic policies and stated that these results were achieved by interpreting qualitative data.	Business Administration Product and service development
Qi et al. (2023)	The study aims to increase the efficiency of logistics distribution in IT processes through logistics optimization of the e-commerce supply chain model. The research shows that AI applications increase logistics distribution efficiency in the current e-commerce environment and reveals the practical consequences of promoting the digital development of IT logistics.	Supply chain and logistics management
Goti et al. (2023)	The study reveals that the use of AI in business-to-customer e-commerce has increased in recent years. It examines the importance and impact of AI applications in e-commerce in the fashion industry. In this context, a literature review was conducted, and research gaps in the use of AI were identified.	Marketing and customer service
Chowdhury et al. (2023)	This article aims to conduct a systematic literature review to provide a comprehensive and objective understanding of the organizational resources required to develop AI capability in human resource management. The study's findings revealed that organizations need to look beyond technical resources and emphasize the development of non-technical resources such as human skills and competencies, leadership, team coordination, organizational culture and innovation mindset, governance strategy, and artificial intelligence—employee integration.	Business Administration

AUTHORS	SUBJECT OF THE STUDY	UT PROCESS USING AI APPLICATION
Israhadi (2023)	The subject of the study examines various aspects of IT law in the Industry 5.0 environment. Research results show that the Industry 5.0 era, including AI applications, has led to radical changes in IT regulations. According to the research, the most important of these changes is the need to regulate international trade regulations and compliance, intellectual property protection, e-commerce, logistics and transportation.	Supply chain and logistics management Business Administration Risk management and security
Jones (2023)	The study examines the reactions of trade policymakers to AI technologies and emphasizes the shortcomings of trade regulations regarding AI. Accordingly, trade rules contain significant deficiencies and risks, especially in matters such as competition policies, AI ethics, transparency and accountability, personal data protection, and exploitative use of algorithms in consumer and labour markets, and measures should be taken immediately.	Risk management and security
Belghachi (2023)	The article is a general evaluation of AI technology usage areas. According to the research, AI technologies offer benefits to businesses in many areas, such as financial risk assessments, regulatory compliance, customer services, and efficiency. The study also touches upon the ethical drawbacks of AI applications and emphasizes the importance of human supervision in AI applications.	Financial forecasting and analysis Business Administration Product and service development Risk management and security
Tüfenk (2023)	The article generally discusses the positive and negative aspects of using AI technologies in AI processes. The study emphasizes that AI will provide great benefits for the correct management of factors such as efficiency, quality, cost and logistics in international trade.	Product and service development Supply chain and logistics management Business Administration Marketing and customer service
Boşgelmez and Çengel (2023)	The study examines AI technologies' opportunities and contributions to IT processes. According to the study, AI technologies make great contributions, especially to supply chain management.	Supply chain and logistics management
Aktepe and Karakulle (2023)	The study investigated competitive advantage in mobile applications using AI technology. Using e-commerce sites as a case study, the paper revealed that mobile applications integrated with AI technology provide competitive advantages to businesses in customer services, marketing and sales, data analysis, human resources, and production and supply processes.	Business Administration Marketing and customer service Financial forecasting and analysis Product and service development Supply chain and logistics
Jan et al. (2023)	This article examines specific applications of AI in various industry sectors within the framework of Industry 4.0, exploring the issues and concerns encountered within and across different industry sectors. The study concluded that the solutions found to problems arising in certain industrial areas are specific to that industry and that it is not possible to transfer these solutions to different industries. Accordingly, it is emphasized that the way different industries adopt AI technologies should differ.	Business Administration
Meltzer (2024)	The study focuses on how AI technologies will affect IT processes. According to the author, how AI will affect IT directly depends on how states regulate it. Geopolitical realities are also decisive in this regard. According to the study, regulating the impact of AI on IT is becoming an increasing focus in free trade agreements.	Business Administration Financial forecasting and analysis Risk management and security Marketing and customer service Product and service development

AUTHORS	SUBJECT OF THE STUDY	UT PROCESS USING AI APPLICATION
Hidayat et al. (2024)	This study examines the impact of AI on financial control, exploring the application of AI technology in financial choice-making strategies, forecast analysis and hazard manipulation. Using a systematic literature review approach, this study covers the significant changes achieved through the use of AI in improving overall operational performance, providing deep insights into financial choice-making, and improving customer relationships in banking. This research also highlights ethical challenges, data security, risks, and the need for policy and regulatory regulation for the development of AI technology in the context of financial management.	Financial forecasting and analysis
Shubailat et al. (2024)	In this study carried out within the Jordanian Customs Department, the impact of customs intelligence and risk management on sustainable supply chain practices and their subsequent effects on customs department logistics were investigated. According to the study, combining digitalization, artificial intelligence, and other digital technologies in the field of customs intelligence brings with it the possibility of changing supply chains in terms of sustainability. The interaction of these factors can increase productivity, reduce negative environmental impacts, increase safety and provide financial gain. On the other hand, according to the study, it is crucial to collectively and strategically adopt these technologies to navigate the changing landscape of sustainable supply chain management.	Supply chain and logistics management Customs and Border Controls Risk management and security
Yan (2024)	This study focuses on the effects of developing an IT investment platform based on AI technology on IT. According to the study, the construction of IT and investment platforms facilitates exports from trading partner countries to the host country, indirectly increasing the home country's loss of productivity in exports.	Product and service development Marketing and customer service Financial forecasting and analysis

ARTIFICIAL INTELLIGENCE AND THE FUTURE OF COMMERCE

AI can significantly impact the future of IT. The most important effect is an increase in productivity. Artificial intelligence technologies can significantly improve businesses' data analysis, process automation, and decision-making processes. This can increase the efficiency of international trade by enabling businesses to operate faster and more effectively (Czarnitzki et al., 2023).

An important contribution of AI to the future of trade stems from its predictive power. By analysing large data sets, AI can predict future demand and trends more accurately and precisely. This allows businesses to better respond to demand and manage stock levels more effectively (Aylak et al., 2021).

Personalization is becoming increasingly important in marketing. AI can make enormous contributions to the development of personalized services. It can help businesses deliver personalized products and services by better understanding customers' preferences and behaviours, increasing customer satisfaction in international trade (Paschen et al., 2020).

AI also impacts risk reduction in IT processes. AI can be used in areas such as fraud detection, risk analysis, and security measures, helping businesses reduce risks. This enables more reliable and secure transactions in IT (Digiampietri et al., 2008).

AI is also very effective in increasing cooperation opportunities across borders. It enables businesses to collaborate more effectively across borders in areas such as language translation, cultural analysis, and global marketing, which can contribute to the expansion and growth of IT (Savinov and Taranovskaja, 2020).

At this point, when asked to make some futuristic predictions about the roles that AI can take in the future of IT processes, the ChatGPT (version 3.5)

AI program makes some interesting suggestions. One of these is AI-supported automatic agreements. IT processes with smart contracts and blockchain technologies may be able to execute and verify transactions automatically. This can make trading processes faster and more efficient. Another innovation predicted by AI is virtual trading assistants. Accordingly, advanced AI-supported virtual trade assistants can help businesses manage their IT processes more effectively. These assistants can provide businesses with real-time recommendations on topics such as demand forecasting, pricing strategies and market analysis. Another important future prediction is dispute resolution, which is frequently encountered in IT processes. Artificial intelligence could help resolve disputes arising in IT more quickly and fairly, according to a proposal for precision arbitration and dispute resolution. By integrating with machine learning and natural language processing techniques, dispute resolution processes can be more objective and effective (ChatGPT, 2024).

CONCLUSION AND RECOMMENDATIONS

As a result of the research conducted in the literature on IT processes and AI applications, it has been revealed that AI can be used effectively in specific AI processes and that its usage potential may be unlimited in proportion to the development of AI technologies. It has been understood that the AI applications discussed in the academic literature from past to present have been used in fundamental areas such as supply chain and logistics management of IT processes, product and service development, marketing and customer services, risk management and security, financial forecasting and analysis and finally customs and border controls.

Since AI is a developing technology and considering that great breakthroughs can sometimes be achieved in technological processes, even in a very short time, it is understood that limiting the use of AI to certain areas is impossible.

In our study, thirty-eight academic studies from hundreds of different studies in the literature were determined to be relevant to our subject. These studies were compiled, and it was revealed which IT process or processes the AI applications were predicted to be used in these studies. As a result of this review, Table 2 was revealed.

Table 2 | Areas of Use of Artificial Intelligence in International Trade Processes in Studies in the Literature

International Trade Process	Number of Studies Conducted
Supply Chain and Logistics	**10**
Product and Service Development	**10**
Marketing and Customer Services	**12**
Risk Management and Security	**6**
Financial Forecasting and Analysis	**13**
Customs and Border Controls	**2**
Business Administration	**18**

According to Table 2, AI applications are mostly used in general business management areas. On the other hand, it has been understood that AI can be used very efficiently in customs and border controls, but its use to the expected extent has not yet been the subject of research. The areas where AI is widely used are marketing and customer services, financial forecasting and analysis, and a considerable amount of work has also been found in supply chain and logistics and product and service development. It has become clear that more AI studies will need to be carried out in the field of risk management and security in the coming times.

Considering that the basis and first step of IT is export and that export can be done through target market research, it is noteworthy that AI applications are not used enough in target market research. Target market research is a complex process that requires compiling extensive data and analysing them in detail (Demirağ Çakıcı and Yılmaz, 2021). AI is an advanced technology that facilitates and accelerates information collection and big data analysis, making research processes highly efficient and accurate (OpenAI, 2023). In this regard, more intensive use of IT processes, especially in target market determination processes, will provide significant advantages to businesses in export processes.

The research reveals that IT companies are not yet fully aware of their AI potential. In this regard, further research and development studies on AI applications in IT processes are thought to contribute greatly to increasing IT efficiency in the future.

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ALIGNING CULINARY EDUCATION WITH INDUSTRY DEMANDS: STRENGTHENING ACADEMIA-INDUSTRY COLLABORATION

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ABSTRACT

This study investigated the alignment between culinary vocational education and industry requirements, specifically focusing on improving collaboration between academia and industry to enhance the quality and relevance of culinary training. The research addressed the growing disconnect between the skills taught in culinary schools and the practical demands of the culinary workforce. A qualitative approach was adopted by using open-ended interviews and surveys. Interviews were conducted with industry professionals and culinary students in Malta, providing insights into their experiences and perceptions of current educational practices. Surveys were administered to culinary students to gauge their experiences and the applicability of their education to industry standards. The data were analysed using content analysis, allowing for the identification of themes and patterns within the qualitative feedback. The results highlighted a significant gap between the curriculum offered by the culinary institution and the skills demanded by the industry. Key issues identified include the lack of modern technological training in educational settings and a curriculum that often remains theoretical, lacking the practical elements necessary for immediate application in professional kitchens. Despite these challenges, internships were found to play a crucial role in bridging these gaps, providing students with valuable hands-on experience and better preparation for their careers. The study concludes with recommendations for curriculum enhancements, including integrating modern culinary technologies and fostering more effective collaboration between educational institutions and industry leaders. These changes are proposed to ensure that culinary education meets the evolving needs of the hospitality industry, fostering a more competent and well-prepared workforce, reducing the skills gap, and improving employability among culinary graduates.

Keywords: culinary education, industry requirements, curriculum enhancement, internships, vocational training

JEL Classification: I25, M53, A23

INTRODUCTION

The primary goal for a culinary student enrolling in a culinary program is to become a fully qualified chef (Edens, 2016). The modules are designed to integrate academic and technical skills. Beyond producing food, the student's primary interest, modules are tailor-made to cover essential areas such as menu planning, food safety, accounting, and languages, specifically French (The Foodie Blog, 2011). Additionally, students gain experience through local internships in hotels and restaurants. However, these students also face significant challenges during their years at college, including long hours of work, study, and research.

The European Union has committed to becoming an intelligent community by integrating education and the economy with social inclusion (Tessaring and Wannan, 2010). Vocational Education and Training (VET) is an active learning situation that shapes individual identity transformation (Colley et al., 2003). VET provides high-quality skills and prepares individuals for the workforce. Although there is no universally accepted definition of vocational education, researcher Gavin Moodie (2002) describes it as a theory of Cartesian dualism, where dualism is a blend of body and mind, highlighting the gap between theory and practice. VET primarily involves on-the-job training to acquire the desired skills, employing cognitive processes (Moodie, 2002). It aims to combat unemployment, particularly among youth, and to enhance social well-being for those lagging in academic education. Today's labour market sees VET tackling the phenomenon known as skill bottleneck, indicating a lack of skilled individuals both academically and in job performance (Cedefop, 2017).

Malta hosts two major VET institutes, offering programs ranging from foundation level to degrees, such as the BA in Culinary Arts. Students benefit from academic tuition with foreign institutions and internships locally and abroad (Refernet Malta, 2018). These institutions are crucial in developing skilled workers ready to enter the workforce. A certificate, diploma, or degree in Culinary Arts is not essential for working as a chef. Still, it offers significant benefits if one has attended and graduated from a culinary institute, such as studying while working and receiving professional tuition and mentoring (Friedman, 2019). Conversely, unqualified individuals working as chefs must still dedicate time to researching and staying updated with the dynamic and demanding catering industry (Friedman, 2019).

Europe is renowned for its robust culinary education (Tarr, 2017), yet catering establishments struggle daily to retain their chefs. The primary reasons chefs leave the industry include long hours and low wages. Additionally, the demand for chefs exceeds the supply, creating significant challenges for employers. Five years of research on this topic have failed to resolve these issues.

The researcher has worked in the local catering industry for 20 years as a chef, and over the last five years, there has been an increase in the number of college graduates leaving the industry. A report by the European Commission lists the chef profession as the most significant job shortage in EU countries, including Malta (McGrath and Behan, 2018). In the United Kingdom, there is an anomaly where many students apply for culinary programs, yet a considerable chef shortage persists (Tarr, 2017). Simon Tarr (2017) noted that in 2017, the number of chef students tripled the industry's demand, yet few completed their culinary studies. The research identified two significant reasons for this crisis: students realising they were in the wrong course and negative internship experiences. A considerable gap between the tuition offered at catering colleges and the on-the-job reality creates a disconnection between the industry and educational institutions, leading to unrealistic expectations (Witts, 2017). This disconnect is exacerbated by the concern that hospitality institutions are not meeting industry demands (Riggs and Hughey, 2011). The researcher aims to determine if culinary students are adequately trained and prepared to work in the highly demanding catering industry.

REVIEW OF THE LITERATURE

The theoretical framework for integrating academia and industry in culinary education emphasises aligning educational programs with the dynamic needs of the industry, focusing on developing both practical skills and theoretical knowledge (Muller et al., 2008; Soeiro & Balasubramanian, 2018). It highlights the importance of incorporating modern technology into curricula to prepare students for technologically advanced workplaces (Cawley, 2011; International Culinary Centre, 2018) and underscores the role of internships in bridging the gap between academic learning and practical application, enhancing employability and career readiness (Zenobia, 2018; Kapareliotis et al., 2019). Additionally, the framework addresses the need for cultural and psychological adaptation in high-pressure kitchen environments, which influences student adaptation and creativity (Weiner, 2014; McCoy, 2015; Sweitzer & King, 2009). It also considers industry perceptions regarding the adequacy of culinary training, advocating for curricular updates that reflect evolving industry demands and improve graduate career prospects (Gersh, 2011; Traud, 2017). This framework guides the analysis of educational strategies to effectively prepare students for successful careers in the culinary field.

Culinary education forms the foundation for every student aspiring to become a qualified chef. Culinary institutes provide an additional boost to students, helping them achieve greater success upon graduating. A certificate, diploma, or degree demonstrates to prospective employers the student's passion for pursuing a chef's career (Muller et al., 2008). A 16-year-old student can enrol in a hospitality college immediately after secondary education (Pratten, 2003). This practice is also endorsed by Alison Wolf (2011), who mentions the same admission age for VET students in her report. In Malta, the exact mechanism applies to the admission of culinary students, including a maturity clause that grants automatic admission to students aged 23 (ITS, 2019). The chef's occupation is highly versatile, requiring training in food preparation, cooking methods, food safety, and plating techniques. Catering colleges enhance practice with academic subjects, dispelling the notion that chef training is solely hands-on (Horng & Lee, 2009). Culinary students are known to prefer practical sessions over theoretical ones (Soeiro & Balasubramanian, 2018). Culinary Arts, part of the constantly evolving hospitality industry, requires that culinary pedagogy adapts to meet consumer demands without being stuck in centuries-old practices (Mitchell et al., 2013). Hoteliers and restaurateurs seek chef graduates who are creative, problem solvers, critical thinkers, and possess technical skills. Mitchell and his team describe how Culinary Arts is taught from the entry-level to degree programs through a module descriptor format known as unit specs, which guide students in their studies.

Souvik (2015) describes academia as a community engaged in research and knowledge sharing, contrasting it with the industry, which he describes as producing services for the community. There is an ongoing debate about the need for academia and industry stakeholders to collaborate closely, as academia often lacks awareness of industry happenings and their demands (Souvik, 2015). Amy McKeever (2013) notes in her Eater magazine article that several graduate chefs stress the importance of attending a culinary institution. For instance, American chef Daniel Boulard emphasises that academic culinary studies are crucial for aspiring chefs, providing ample time to attend lectures and conduct research. However, he points out that traditional education often omits time-saving techniques used in the industry, known as shortcuts (McKeever, 2013). Another chef highlighted the benefits of the hands-on experience gained at culinary institutions, which made her more comfortable working in the industry. Conversely, another chef preferred the industry's excitement over school, suggesting that starting an apprenticeship immediately in a hotel or restaurant could be more advantageous than classroom learning.

While tuition maintains a certain standard, students must realise that a chef's career is not about fame and glamour. Media portrayals often mislead students into believing that being a chef resembles celebrity status (Palmer et al., 2010). Valerie Vinyard (2010) argues that the appeal of dining out has made the chef's career highly desirable, contributing to a "foodie" subculture. Yet, many new culinary graduates mistakenly believe they have sufficient knowledge to lead a kitchen and live a celebrity lifestyle upon completing their studies. David Edens (2013) identifies four critical factors for effective self-study engagement: bonding with the learning process, clearly understanding module content, engagement with learning outcomes, and hands-on training experience. These elements, if synergised properly, enhance student satisfaction and intrinsic motivation.

The culinary industry requires students to be proficient with technology. A sound pedagogical adaptation of technology can foster connections between the student, academia, and the industry, enhancing learning outcomes (Cawley, 2011). Dickfos et al. (2013) emphasise that vocational education should boost students' occupational abilities, with educators playing a significant role in shaping academic environments conducive to learning. Modern kitchen technologies such as combi ovens, smoking guns, nitrogen siphons, sous vide techniques, and thermos mixers are becoming standard, necessitating familiarity with these tools (International Culinary Centre, 2018).

Internships in a demanding and rigorous industry provide essential experiences that a classroom setting cannot offer, facilitating a smooth transition from academic life to real-world job experiences (Zenobia, 2018). Internships augment creativity, interpersonal skills, adaptability, and technical competencies (Kapareliotis et al., 2019). Zhao and KO (2018) note that a supportive work environment during internships can significantly enhance learning outcomes, with motivated students often securing employment through internship connections (Zhao & Liden, 2011).

However, not all internship experiences are positive. Some students struggle to integrate into workplace cultures or establish productive relationships with colleagues, leading to frustration and disengagement (Sweitzer & King, 2009). The right environment is crucial for fostering motivation, yet common complaints about hectic workspaces, lack of trust from supervisors, and exclusion from cliques can diminish productivity and enthusiasm. When students perceive these negative aspects, their intrinsic motivation may deteriorate, complicating their internship experience and future career aspirations (Sweitzer & King, 2009).

The kitchen environment, characterised by long hours, stress, and mental challenges, profoundly shapes a chef's professional identity and work ethic (Akhtar, 2016). The "Yes Chef" mentality, a form of strict kitchen discipline, has been both a traditional method of command and a source of controversy. While it may foster punctuality and cleanliness, it can also stifle creativity and motivation among young chefs (White, 2007; McCoy, 2015). However, this mentality is changing as new generations of chefs are educated and eager to express their creativity, challenge old norms, and seek to reshape kitchen culture.

As the world undergoes the fourth industrial revolution, the hospitality sector must evolve curricula to meet industry demands. Employers increasingly seek technically skilled graduates capable of productive and effective communication (Gersh, 2011). Celebrity chefs like Thomas Keller advocate for comprehensive culinary education, whereas others like David Chang criticise current educational approaches for not adequately preparing students for the industry (Traud, 2017).

Culinary arts education offers immense opportunities for school leavers to advance. However, the industry's fast pace and evolving technology require that educational programs adapt continually to prepare students effectively for these challenges. While practical skills are emphasised, theoretical knowledge remains crucial for understanding and applying culinary techniques effectively. The industry's critique of educational programs often centres around a perceived disconnect between textbook learning and practical industry demands. Therefore, curriculum developers must ensure that culinary education remains relevant and responsive to the industry's needs, equipping students with the knowledge and skills necessary to thrive in their careers.

RESEARCH METHODS AND DESIGN

Primary Data Collection

Primary data were collected through open-ended structured interviews, allowing for detailed and in-depth responses. These interviews employed exploratory questions typical of qualitative research, aimed at understanding the ontological experiences of chefs, focusing on their past experiences and current challenges (Adu, 2017). The interviews were conducted on a one-to-one basis and transcribed verbatim. The initial coding process was conducted to identify emergent themes, which were then analysed to form a cohesive discussion.

Table 1 | Participants Matrix

Participant	Age	Years at Culinary School	Certification	Industry Position
A	37	2000-2002	Certificate	Executive Chef
B	21	2013-2019	HND	Chef de Partie
C	39	2005-2009	Diploma	Sous Chef
D	47	1993-1997/ 2015-2018	Degree Level	Sous Chef
E	41	1996-2000	Diploma	Chef Tournant
F	23	2012-2019	Degree Level	Chef de Partie
G	41	2000-2004/2015/2018	Degree Level	Executive Chef

Sampling

Purposeful sampling was used to select participants, all of whom were chefs with varying years of experience and qualifications from a local culinary school. A total of seven chefs participated. The selection was intended to capture diverse experiences within the culinary industry. The process was halted after the seventh interview upon reaching data saturation, where no new information was emerging. Participants were anonymised and referred to by letters in all documentation to maintain confidentiality.

Student Surveys

Two surveys were conducted among different groups of culinary students to complement the interview data. The first survey targeted diploma culinary arts students with prior local internship experience at the certificate level. The second survey involved Higher National Diploma culinary arts students with both local and international internship experiences. All surveys were conducted in an anonymity format.

Ethics Procedure

Participants were initially contacted by phone to discuss the study's purpose and their potential involvement, ensuring informed consent. Follow-up communications and official participation invitations were emailed, including detailed study information and consent forms. Participation was voluntary, and privacy was strictly maintained throughout the process.

Strengths and Limitations

The study's strengths lay in the rich, diverse experiences of participants with significant industry tenure, providing depth to the findings. However, limitations included scheduling difficulties during busy periods and challenges in ensuring participants fully understood the questions. The small sample size in surveys might limit the generalizability of the findings.

ANALYSIS

Shocking Experience of the Internships.

All the interviewees expressed their concerns that huge differences exist when comparing what is being taught at the culinary school vis a vi when working hands-on in the industry. The participant pointed out that at the culinary school, the tuition is done by the book, but when they step for the first time in the industry, they realise that work is done the opposite way, which can be a shocking experience for the students. Participants D, E, J, and C all mentioned that when they were students and had their first internship, the use of shortcuts was almost the order of the day, and this is a similar scenario described by Mckeever (2013). Participant F said that the problem with using shortcuts is that in the industry, the kitchen staff is in a race against time, and shortcuts are used to beat time, which is one of the enemies in the kitchen. This can be an interpretation that academia is not fully aware of the industry demands, as mentioned by Souvik (2015).

The Reality of Internships Experienced by the Participants.

Mixed reactions surfaced when the participants were asked about the benefits of the internships as students. Participant A said that one of the main benefits of the local internship is acquiring hands-on experience, a similar situation mentioned by Zenobia (2018). Kapareliotis et al. (2019) mentioned that internships enhance skills. This fact was supported by participants B and F, who affirmed that the culinary school taught them basic skills and that the local internship was a boost to improve their skills. Participant J stated that he gained experience from internships and developed new ideas, a similarity described by Zenobia (2018).

One of the significant disadvantages of an internship, as a student, is the load of dirty jobs that the students perform. Participants A and E stated that they experienced this phenomenon. Participant C noted that he worked more hours as a student than a full-time employee. Participant F's main concern is that due to the demographics of Malta, an internship can cause reputational damage because if a student is still green on the job, a bad reputation can be created. Removing it when you live on a small island is not easy. Participants J and A pointed out that they benefitted from the internship because when they graduated, they obtained a full-time position where they used to work as students, a statement supported by Zhao and Linden (2011) that internship opens the door for employment. The advantages mentioned in all the interviews are that they had the opportunity to visualise new ingredients and to deal with and satisfy customer needs. Participant C concludes about internships in the same way as Zhao and Linden (2011), that the student must show an intrinsic and determined behaviour to succeed during the internship.

The Benefits of Training Abroad as a Student Chef

Working abroad as a student chef is deemed to be a unique opportunity, and all the participants confirmed this. The participants also stated that this experience was significant in their character formation. Participants D and J said that abroad, they could utilise unavailable ingredients and produce locally. Participant J stated that he acquired skills and knowledge by visualising the foreign chefs working hands-on, and Participant E said that abroad, he had the opportunity to work by the book, as taught at the culinary school. Participants B and F admitted that during their stay abroad, they had the chance to evaluate the difference between working locally and abroad. Both affirmed that abroad, there is respect and appreciation from the employer. A similarity to Zhao and Linden (2011) that surfaced about the foreign internship is that participants B, A, and J confirmed that they established a connection with the workplace where they worked; participant B, during the time of this dissertation writing, is considering moving again abroad to work within the same hotel, where he did the internship, due to a job offer.

Lack of Familiarity with Technology

Dickfos et al. (2013) explain that vocational education aims to enhance the student's occupational skills. However, training with the latest technology surfaced, and the culinary school lacked providing that training to the interviewed participants. All the participants expressed concern that modern equipment was minimal and very basic when they were students, so the students were unfamiliar with technology use. Participant F said that due to his keenness to learn and intrinsic behaviour, he bought some equipment to train in cooking with the latest equipment. Participant E affirmed that technology in the kitchen was covered only during theory sessions. Participant C emphasised that modern technology is tangible in industrial kitchens, and the students should have a sound knowledge of modern equipment. Crawley (2011) advised that modern equipment should be integrated into culinary modules to train culinary students on how to use it so it can be implemented in the industry, as Participant C said about the technology used in the industry.

The Preferences of Theory vs Practical Sessions.

A fascinating situation emerged when the participants were asked about their preference between theory or practical sessions. Participants A, B, C, D, F, and J all affirmed that practical sessions were their preferred lectures, a similar situation described by Soeiro and Balasubramanian (2018), in which they gave evidence that culinary students prefer practice over theory. On the other hand, participants E and J stated that they used to enjoy both theory and practical lectures. This perception changed with time; participants C, D, F, and J admitted that they now consider the theory lecturers as important as the practical ones. Participant J concluded that first, the student must have sound theoretical knowledge obtained from theory sessions to put it into practice.

Participants' Perception of Non-culinary Modules

There were mixed opinions when the participants were asked if all the modules, they studied during their student days were valid. The majority, participants B, C, D, and E, openly stated that a few subjects were not helpful for a chef's career, especially at the certificate level. Their main concern is that these modules repeat what they did at secondary school. Participant A commented that the perception of specific modules changes over time; all modules become helpful when the chef is in a managerial position. The same taught was shared by participants F and J.

The "Yes Chef" is an Actual Situation

All the participants admitted that the "Yes Chef" mentality was a tangible reality in the kitchen when they were students. The same situation was described by Weiner (2014). The participants said that when they were still students without industry experience, this environment was very intimidating, and they also said that working abroad as a student was the order of the day. Participant D stated that he experienced the untouchable mentality of the heads that ran the kitchen, as mentioned by McCoy (2015). Besides, participant D made the exact comparison as White (2007); he stated that when he experienced the "Yes Chef" mentality, he felt like he was in a robotic mode during his working hours in the kitchen.

Some participants (B, E, F) consider this mentality a sign of respect towards the head chef. Still, there was a consensus that this factuality created a demotivation situation, mainly when they worked abroad. From the participants' experience, it seems that this reality is felt much more abroad than working in local kitchens, as pointed out by participant B, who stated that the local internship is not as intimidating as the foreign one. Besides, all the participants agreed that, in the end, this situation is effective for character formation because a sense of responsibility and respect is nurtured in the student's personality.

The Media Influence: Not so Powerful as it Seems

Palmer et al. (2010) state that the media constantly influences students. The interviews showed the other way around. All the participants, except for participant B, vehemently denied that the media did not affect their choice to become chefs. Participant C said that the internet was not that popular during his time at the culinary school. Amateur cooks conducted the cooking programs aired on the local television stations and were not a source of inspiration or knowledge. Participant E said that professional cookery books were his inspiration. Participants A, C, and D affirmed that their mother was the real inspiration and ignited that passion for cooking; eventually, they enrolled in culinary school to become chefs. Participant J firmly said that the media's job is to portray the brightest side of a celebrity chef; usually, the real side is not shown. Participant B was the only person who was influenced by the media. His source of inspiration was the YouTube channel, where he watched celebrity chefs cooking and performing the art of plating.

The Benefits of Culinary School and Learning on the Job

The celebrity chef Daniel Boulard, as quoted by Mckeever (2013), said that culinary schools are essential for a student wanting to pursue a career in cooking. Another interviewee, Mckeever, supported this argument. Another interviewee, whom Mckeever again interviewed, expressed his feelings that he learned the trade by training directly on the job. In this situation, there were mixed reactions from the participants. Participants J, C, and D affirmed that they benefited from both the culinary school and working in the industry. Participant D admitted that if he did not obtain the necessary culinary education, he would be stuck in the same position for a lifetime, and education and industrial training helped him achieve his career goals. The same thoughts were supported by Participant J, who said that without culinary knowledge and work experience, he would be stuck in the same position. Working in the industry permitted him to work with the latest technological equipment. Participant C came up with fascinating thoughts: what you learn at school will remain with you forever, and the industry was the stepping stone to mastering his skills. The other participants said they benefitted the most from the industry. The main reason that surfaced was that from the industry, they obtained their skills; this argument is backed by Mitchell et al., 2013, who explains that employers want to employ chefs who possess the required technical skills. Participant F admitted that he benefitted the most from the working experience abroad; it was a unique experience in which he established contacts with the workplace and had the experience of working with commodities that are not found easily on the island. Participant A stated that the culinary school taught him basic skills, and he used to receive criticism from his coworkers that his skills were limited during his local internship. Participant E affirmed that he benefitted most from the industry, but he concluded that his culinary school years were vital to gaining the first basic skills.

The Actual Reality of the Kitchen Environment

There were mixed feelings when the participants were asked if the culinary school informed them about the harsh reality of the kitchen, which Aktar (2016) calls the dimmest side of the kitchen. The majority agreed that the reality of the kitchen was never tackled at school. When they stepped into the industry, they realised the reality of working in kitchens on an industrial scale. Only participants B and C said that particular lecturers briefed them about the situations that one will find when working in the kitchen, especially the long hours during the summer period. Participant

B concluded that by experience, his mind got accustomed to the natural working environment. Participant F admitted that a lecturer worried them about the harsh reality of the kitchen. Unfortunately, this led to some students to drop from the chef's course during the first semester.

The kitchen environment is harsh due to physical and mental challenges, and all the participants gave their authentic experiences of what they face daily. Participants C and J remark that this is a job against all odds because of the inhumane environment, which is hot, and the long working hours. Besides, participant J said that dealing with people who are not competent on the job is another challenge he faces regularly. Participant E supported this quote because he confirmed that he had to deal with all sorts of staff, and dealing with inexperienced staff is a headache when you are responsible for a kitchen department. Participants B and F said that to cope with these challenges, the chef should possess sound organisational and problem-solving skills, as mentioned by Mitchel et al., (2013), to ease the pressure that can mount during the day.

The Power of a Qualification in the Industry

A note from Muller et al. (2008) paper, in which they state that a degree (the physical certificate) is the key to opening the door for employment and progression opportunities, was supported by almost all the participants. Practically, they all hold a position in the kitchen because they have culinary qualifications. Participant J is the only one who disagrees with Muller et al., (2008) because he believes that a person who possesses many skills will eventually get promoted to the highest levels of the kitchen hierarchy over time. He also added that before promoting chefs to higher positions, he digs deep and observes what they can do on the job. Participant C came up with something exciting. He stated that a qualification is vital, and without it, you cannot progress; experience alone is not justified in today's scenario, so culinary education and experience are the right combinations to progress in a chef's career.

Satisfaction with Lectures

The participants were asked about their perception of knowledge delivery at the culinary school. Overall, they were happy with the style of teaching. Participant D remarked that during his time, they were a small group of students studying the culinary arts, which positively impacted the whole class because they had an objective in mind: to become chefs. This motive led them to be intrinsic and dedicated students. On the other hand, participants A and C stated that the lectures, especially the practical sessions, were elementary. Participant J said that during his period as a student, the theory lecturers were lecturer-centred, and students were not involved during the sessions; he suggests that students should be actively engaged so knowledge can be shared amongst all the students present during the lecture.

Overall Satisfaction at the Culinary School

The participants were asked to summarise their overall experience at the culinary institute. An overwhelmingly positive response was that it was a unique and satisfying experience. Participants B, C, and F are grateful to the school because it allowed them to work abroad, which benefited them in acquiring new skills, knowledge, and personality formation. Participant F's only disappointment is that, in his opinion, the culinary school is not appreciated by the industry, a similar situation described by Traud (2017), in which he states that academia is not preparing the students to face the industry.

Suggestions for Training Future Chefs

The participants provided several recommendations on how to effectively train culinary students for the industry. They emphasised the importance of the institute delivering a clear message about the industry's working conditions and challenging environment, as many students are not adequately informed about these aspects during their studies. A stronger focus on practical restaurant sessions was recommended to help students acquire more industry-relevant skills. The introduction of an apprenticeship program was suggested as a short compulsory module, allowing students to gain practical experience throughout the academic year, not just during the summer. It was also noted that a food and preparation lecturer should monitor students during their apprenticeships to ensure they are gaining the necessary skills.

The need for appropriate and knowledgeable lecturing staff was highlighted, stressing that students should be well-informed about the realities of the kitchen environment without being frightened. The participants recommended that students spend more time in the industry, such as dedicating one day per week to industry work during the academic year. Inviting guest chef speakers to discuss the realities of a chef's life and conducting thorough revisions of the modules, including incorporating more technology, were also suggested.

Training with high-quality ingredients was deemed essential, along with teaching students respect for the kitchen, ingredients, equipment, and each other. Enhanced training on new equipment and more practical sessions were suggested to increase student knowledge. Finally, the introduction of a comprehensive apprenticeship program was proposed, allowing students to balance theoretical studies with one year of hands-on industry experience. This system would include supervision by lecturers, providing students with the right environment and mentality for success. Additionally, it would help build a documented portfolio of activities, further aiding their professional development.

Analysis of the Student Survey

The majority of the students who took part in the first survey were enrolled in the culinary program at the age of 16, right after the completion of secondary school, seven of them to be exact, and this supports the research of Pratten (2003) and Wolf (2011) that at this age students are lured to enter the hospitality niche.

Soeiro and Balasubramanian (2018) are right about the practical sessions the students seek more because all the participants expressed their thoughts that they prefer practical sessions over theory lectures. Almost the same thing emerged from the open-ended question: Practical sessions at the culinary school are an opportunity to gain hands-on experience and more knowledge and skills.

Most participants (73%) believe that all the modules are essential to becoming a chef, a similar situation explained by Participants F and J in the discussion analysis. This can indicate that the student's perception of all the modules studied has changed over time, and now, every module counts this bonding with the learning process as described by Edens (2013).

The influence of the media, as described by Palmer et al. (2010), is not significant on the decisions of participants to pursue a chef career; 36% of the participants said that the media did not instigate them to start this career. Only 18% confirmed Palmer et al. (2010) 's ideas about media influence.

At the certificate level, 91% of the survey participants confirmed that the internship was beneficial for the progression of diploma students, as Zenobia (2018) described the benefits of internships. This point was supported by interviews with those who participated in the discussion analysis.

A very positive piece of information is that 92% of the students said they have acquired knowledge and skills from culinary school and working in the industry. The students' bond with the learning process flows, as Edens (2013) describes. Besides, the students are sending a message that internships are vital in their phase as culinary students, as Zenobia (2018) said.

When the students were asked about the internship experience, 98% replied that it was a very motivating experience. Besides, the "Yes Chef "situation was experienced by 58% of the students. This shows that this mentality still exists in local establishments. This situation is not changing in the kitchens, contrary to what McCoy (2015) said, which she stated that this mentality is changing because the younger generation does not support this kind of dictatorship rule. Most students who have experienced the "Yes Chef" experience have confirmed that this experience does not demotivate them. White (2007) proved wrong because he said it could demotivate students and young graduates.

To conclude, all the survey participants expressed feeling that they are pleased with their experience at the culinary school so far. The same feeling was described by the chefs who participated in the interview. This indicates that the four points of good self-study engagement mechanisms mentioned by Edans (2013) work smoothly in a culinary school.

CONCLUSION

This study did not aim to investigate the delivery of culinary arts programs or the appropriateness of lecture delivery by culinary lecturers. Instead, it focused on determining if the training provided by academia aligns with industry requirements, guiding students effectively toward becoming successful graduate chefs in their chosen careers.

Past and present students recognise that the theoretical and practical training at the culinary institute is adequate and of high standard. It emerged that skills are acquired both in culinary school and through industry training, as confirmed by all participants. However, a significant challenge is the stark contrast in food preparation methods between the institute and industry, which often confuses students about adopting the correct practices. The institute lacks modern equipment for practical sessions, a deficiency noted by past and current students. Additionally, the institute fails to accurately portray the working conditions and challenges that graduate chefs will face in the industry. The local and abroad internships are crucial for chef training and skill enhancement. Interestingly, the "Yes Chef" attitude does not demotivate students but contributes to their educational experience. Completing a culinary arts program is vital for career progression, as evidenced by all participants who now hold various positions within kitchen hierarchies.

A significant limitation encountered was during the construction of the literature review. Research on culinary education is scant, making it challenging to compile an adequate review. Gersh (2011) also noted this scarcity of research. Additionally, student participation in the surveys was minimal. Of all diploma students, only 12 participated, and 10 Higher National Diploma students took part, resulting in a sample size that was too small.

The practical training at the culinary institute should integrate more closely with industrial practices. Students need to be exposed to real-world scenarios in the industry, including shortcuts and industrial techniques, especially concerning equipment use. Although practical sessions are favoured, theory-based lectures remain crucial and should continue within the culinary arts program, as they provide essential knowledge that can be applied in practice. There is a strong need for an apprenticeship program to be introduced and implemented in the culinary arts curriculum. If aligned with industry standards, such a program would facilitate a smoother student transition into the workplace. Additionally, it should be overseen by a food preparation lecturer to provide guidance and address any uncertainties. The last recommendation is for the culinary institute to invest more in modern equipment, as interviewees and current students prominently highlighted the lack thereof. Modern equipment is essential, as it is part of everyday operations in industrial kitchens.

Culinary arts and vocational education have been instrumental in the career progression of the participants in this study. Moreover, the field has allowed these individuals to forge an identity for themselves, as described by Colley et al. (2003), highlighting the empowering nature of vocational education. This confirms that culinary institutions offer significant benefits to students who are committed to succeeding in a demanding industry, as supported by Friedman (2019).

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MUSEUM TRAVEL EXPERIENCE OF PHYSICALLY DISABLED INDIVIDUALS WITH VIRTUAL REALITY GLASSES: THE EXAMPLE OF MEVLANA MUSEUM

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ABSTRACT

The importance of studies on accessibility in tourism, a globally recognized social activity sector, is steadily increasing. With the ageing global population and a rise in disabilities caused by chronic illnesses, accidents, and other factors, the inclusion of disabled individuals in tourism activities has become a prominent issue. Accessible tourism aims to ensure that all individuals, including those with physical disabilities, can participate in travel and leisure activities without barriers. This study evaluates the travel experiences of physically disabled individuals at the Mevlana Museum through the use of virtual reality (VR) glasses. The research sample consisted of members of the Konya Disabled People Association who voluntarily agreed to participate. Two custom-designed tools were used for data collection: a demographic questionnaire and a set of semi-structured interview questions developed with expert input. Participants first viewed immersive VR representations of the Mevlana Museum, after which their insights were gathered through interviews. The collected data were analysed using the Citavi 6 and MAXQDA qualitative analysis programs, with themes created based on frequently expressed views. The results revealed significant barriers for physically disabled individuals in accessing museum tourism activities, including economic challenges, physical barriers, transportation issues, and the need for companions. Addressing these challenges can significantly enhance the ability of disabled individuals to engage in tourism activities, paving the way for a more inclusive tourism sector.

Keywords: accessibility, disability, accessible tourism, museum tourism, virtual reality glasses
JEL Classification: Z32, O33, J14

INTRODUCTION

Tourism is widely regarded as a quickly growing and evolving industry on a global scale. The global population's advancing age and the prevalence of chronic diseases contribute to a rise in both the quantity and frequency of disabilities worldwide (World Health Organisation, 2011). The World Tourism Organisation (UNWTO) emphasises the significance of formulating policies for accessibility and sustainability concerning these matters. The Turkish Language Association defines the term "disabled" as referring to individuals who have experienced a loss of physical, mental, spiritual, sensory, or social abilities to varying degrees, either from birth or as a result of external factors.

These individuals face challenges in adapting to social life and fulfilling their daily needs. To ensure the inclusion of disabled individuals in tourism activities, museums and ruins in popular holiday destinations must cater to their specific needs. This entails designing these attractions with disability accessibility in mind, providing designated parking spots for disabled individuals, and implementing suitable signage and markings (Arıcı, 2010). Individuals with disabilities constitute a significantly undervalued segment of the tourism industry, both in terms of their population size and economic contribution. The 2011 'World Impairment Report' from the World Health Organisation states that around 15% of the global population has at least one impairment (World Health Organisation, 2011). Turkiye has around 2 million individuals who are officially registered as disabled in the National Disability Data System.

Individuals with disabilities are unable to engage in social activities due to the challenges they encounter. Therefore, it is necessary to make specific provisions for those with disabilities. Furthermore, it is observed that both impaired individuals and healthy individuals occasionally have challenges when it comes to accessing social activities. Accessibility holds great significance in this situation (Evci, 2016). Accessibility refers to the condition where buildings, open spaces, transport and information services, as well as information and communication technology, can be safely and independently used by those with disabilities. This definition was provided by the Official Gazette in 2005 (Official Gazette, 2005). For individuals with disabilities to fully integrate into society and have their needs met, they must have both physical access to desired locations and the right to equitable access to those locations on par with other individuals. Like other individuals, people with special needs have the fundamental right to engage in social interactions and participate in tourism activities. Legal, environmental, and indoor accommodations are implemented in the tourism industry to cater to the needs of disabled individuals (Çizel, Sönmez & Akıncı, 2012).

The number of visitors to the Mevlana Museum in Konya is steadily growing, and it is among the top ten most visited sites (Güneş et al., 2019). However, the 2019 issue of Hürriyet newspaper did not include the Mevlana Museum in its list of the top 10 accessible museum areas on the Day of People with Disabilities.

It is believed that the Mevlana Museum lacks accommodations for individuals with disabilities; hence, virtual reality glasses would be beneficial. Virtual reality technology has diverse applications, particularly in entertainment, tourism, production, trade, architecture, medicine, and education. Individuals with physical disabilities may encounter limitations in pursuing their desired activities. At the same time, those burdened with demanding job schedules may struggle to find the time to engage in their preferred pursuits. Fineschi and Pozzebon (2015) constructed a virtual reality representation of the Santa Maria della Scala Museum in Siena, Italy, thereby creating a simulated travel experience. Çoruh (2011) utilised a virtual reality setting to create a model of the Süleymaniye Complex. This was achieved by including images of the complex, a three-dimensional computer model, panoramic and interactive image files, and a specialised three-dimensional game engine designed specifically for this purpose. The objective of this virtual reality environment is to provide participants with a unique virtual trip experience.

The most recent study that provides an estimate of the distribution of disabled individuals among cities in our country is the '2011 Population and Housing Survey'. Based on this research, it has been noted that Konya ranks low in terms of disability accessibility, indicating shortcomings in this area. As mentioned before, the Mevlana Museum was not included in the list of 10 accessible museum spaces compiled by Hürriyet newspaper on the Day of Persons with Disabilities in 2019 so it is believed that the Mevlana Museum lacks accommodations for impaired individuals, therefore virtual reality glasses would be beneficial. The objective of this research is to identify the challenges encountered by disabled individuals in the context of accessible tourism, propose solutions based on their perspectives, increase awareness among others regarding the obstacles faced by disabled individuals in terms of tourism accessibility, and promote the participation of disabled individuals in tourism to benefit the national economy.

DISABILITY TOURISM

Based on the report by the World Health Organisation (WHO) and the World Bank, it is projected that the population of impaired individuals will grow in the coming years (World Health Organisation, 2011). In Turkiye, despite the significant prevalence of disabled individuals, the existing organisations dedicated to improving their quality of life are deemed inadequate (Mülayim & Özşahin, 2010). Individuals with disabilities must have the ability to actively participate in society and be embraced by others. Nevertheless, the objective of receiving services gives rise to numerous challenges. One of the issues experienced is believed to be associated with their freedom of movement. Participating in touristic activities is considered a fundamental right for both disabled individuals and healthy ones. Therefore, legal provisions are established to enable individuals with special needs to engage in these activities (Çizel, Sönmez, & Akıncı, 2012). The World Tourism Organisation and Global Ethical Principles in Tourism highlight the need to allow persons to engage in tourism activities to promote their physical, spiritual, and social well-being (Bildir et al., 2014). While individuals with special needs have the right to participate in tourism activities, they often face challenges related to bookings, accommodations, and tours (Toker & Kaçmaz, 2015).

Yılmazdoğan and Temizkan (2014) classified the obstacles individuals with special needs encountered into personality, economic, environmental, and interconnected barriers. Due to the prevalence of disabled individuals in low-income nations, the primary obstacle to their participation in tourism activities is economic challenges (Uygun, 2010).

Examples of Disabled Tourism in Türkiye and in the World

For individuals, engaging in employment, engaging in shopping to fulfil their requirements, embarking on leisurely vacations, and undertaking travel for relaxation and inspiration hold equivalent significance in the conceptual realm and are accessible to individuals with disabilities. It is imperative to establish appropriate physical, social, and emotional provisions to facilitate the integration of disabled individuals into society and ensure they may lead lives free from obstacles, similar to their non-disabled counterparts. To promote inclusivity and equality, it is crucial for societies to establish comprehensive and easily accessible systems that cater to the needs of all individuals, regardless of their disabilities or unique characteristics (Çetin, 2022). Some governments worldwide implement investments and punishments for disability tourism based on their level of economic advancement.

ACT Access Centres Turkiye Panorama Park Hotel, located in Marmaris Icmeler, is now undergoing preparations to accommodate disabled individuals, in line with the principle of providing a "Barrier-Free Holiday for Everyone". According to Behramoğlu's study in 2007, hotels that provide services and activities for disabled individuals improve accessibility by offering vehicles specifically designed for impaired people for transportation. A study undertaken in our country assessed the feasibility of Çanakkale as a tourism destination for accessible tourism. The findings revealed that the attraction centres in Çanakkale present several hurdles and restricting features that hinder the mobility and participation of disabled individuals. The study found that visit centres lack signage for the disabled, accessible parking areas, and audio systems for deaf and hard-of-hearing people. Additionally, most hotels do not have rooms for people with disabilities, and accessible toilets, which are crucial facilities, are scarce (Tozlu, Mercan, & Atay, 2012).

A study was conducted to assess the architectural design requirements for making tourism structures accessible to individuals with disabilities. The study examined 10 five-star hotels in Istanbul, focusing on the hotel establishments, their surroundings, entrances, circulation areas, and bedrooms for disabled guests. The objective was to evaluate the existing hotel establishments in Turkiye for their suitability in accommodating disabled guests. Based on the assessment, it has been established that 3 hotels have car parks that are accessible for disabled guests, while 7 hotels do not. Additionally, 7 hotels have designated passenger loading and unloading areas that are acceptable for disabled guests, whereas 3 hotels do not. A study revealed that 90% of hotels have pedestrian lanes and sidewalks that are accessible for disabled visitors. However, it was also discovered that 50% of the hotels evaluated had ramps that were not acceptable for impaired customers. The research findings indicate that 90% of the restrooms, 100% of the corridors and interior doors, and 80% of the stairs are accessible to disabled guests. Furthermore, it was discovered that all of the guest rooms designated for disabled individuals in these hotels were arranged in a manner that accommodated customers who use wheelchairs. Based on this outcome, it is evident that hotel establishments fail to consider the many forms of disabilities when arranging accommodations for impaired guests. The research indicates that the provisions offered for individuals with disabilities are primarily driven by legal requirements and regulations (Yörük, 2003).

A study examining the flight experiences of visually impaired and wheelchair-crutch mobility-impaired individuals revealed that disabled individuals reported encountering challenges during the processes of boarding and disembarking. Specifically, researchers noted that individuals with disabilities who rely on wheelchairs had both physical and social obstacles, which had a detrimental impact on their psychological well-being (Poria et al., 2010). In the United Kingdom, the "Disability Discrimination Act" was enacted by the UK Parliament in 1995, making it unlawful to engage in discriminatory practices against those with impairments, including businesses that provide attractions and housing (Shaws & Coles, 2004).

Erfurt in Germany offers a range of trips specifically designed for individuals with vision and hearing impairments. The databases Baden-Wütümberg Barriere Erleben (Baden-Wütümberg) and MobiDat (Berlin) offer information regarding the various options.

Like Türkiye, train transport provides accessible amenities for individuals with disabilities (Baş, 2012). In Italy, in 2004, the Ministry and organisations collaborated to enable disabled individuals to visit natural areas. The aim was to provide personnel and technical assistance as needed. In addition, there are travel agencies in Italy that only cater to those with disabilities (Ünal Ankaya and Gülgün Aslan, 2020). Various regions across the globe are undertaking initiatives that adhere to legislation designed to facilitate disabled individuals' participation in tourism endeavours.

Studies are conducted through the collaborative efforts of associations and foundations. The research examined have shown that efforts in the field of disabled tourism have not fully achieved the goal of reaching the desired level worldwide (Ünal Ankaya & Gülgün Aslan, 2020; Baş, 2012; Shaws & Coles, 2004; Yörük, 2003; Tozlu, Mercan, & Atay, 2012; Behramoğlu, 2007).

METHODOLOGY

The study employed a qualitative research methodology. The population of the study was determined by the specific reality universe utilised in the phenomenological approach, which is one of the qualitative research methods (Yıldırım & Şimşek, 2016). The research focuses on a specific group of individuals who are physically challenged and visited the Konya Branch of the Turkish challenged People's Association during the period from 01 March 2023 to 15 April 2023. Qualitative studies do not have a predetermined sample size. Expert opinions often recommend using a sample size of 12-15 individuals for qualitative research. The researcher selected a sample size of 30 individuals, considering data saturation. The data-gathering process concluded after conducting extensive interviews with 30 individuals (Yıldırım & Şimşek, 2016).

Data Collection Tools

Personal Information Form: The personal information form prepared by the researcher was given to the participants before the interviews. The researcher prepared the form based on the literature and included questions such as age, gender, marital status, occupation, income level, and whether they are working or not.

Semi-structured Interview Form: The most ideal method for collecting qualitative research data is in-depth semi-structured interviews. Each participant who agreed to participate in the study was interviewed for an average of 8-10 minutes. In semi-structured interviews, the researcher asked open-ended questions about the subject. The following interview questions were prepared accordingly:

1. What do you understand when it comes to accessible tourism, what are your expectations from accessible tourism?
2. Have you had tourism experiences before? What are the tourism activities you have participated in the last 5 years?
3. What kind of obstacles are there in tourism for physically disabled individuals? Which obstacles have you encountered the most?
4. What do you think about the impact of disabled individuals on the tourism industry?
5. Which practices can be used to encourage disabled people to participate in tourism activities?
6. Have you ever had an activity with virtual reality glasses before?

7. What are the contributions of travelling to the Mevlana Museum with virtual reality glasses that you have experienced?
8. What are your suggestions for using virtual reality glasses in a different way at the Mevlana Museum?
9. Which travels can be planned with virtual reality glasses?

Data Analysis: From the interviews consisting of 8604 words and 68681 characters transferred to Microsoft Word, themes were created using Citavi 6 and MAXQDA programmes based on frequently used expressions. The expressions of the participants in the created themes were transferred back to the Microsoft Office programme via Citavi 6. For theme visuals, the themes determined through Citavi 6 were transferred to XMind programme and mind maps were created through XMind programme.

FINDINGS

As part of the study, 30 individuals with physical limitations were interviewed and their conversations were recorded and transcribed.

The interviews with 30 participants, consisting of 20 men and 10 women, were imported into the Citavi 6.3.0 software. Subsequently, themes and sub-themes were generated by analysing the most commonly used terms by the participants. During the interview, a total of four main topics were identified, and each subject was further explored through sub-themes. The text below visualises and transforms the four themes, which encompass the challenges faced by disabled individuals in their daily lives, their perspectives on tourism and holiday experiences, the strengths and weaknesses of virtual glasses experiences, and suggestions on how to overcome barriers for more effective and efficient participation in touristic activities.

Figure 1. | Themes Related to Qualitative Interviews

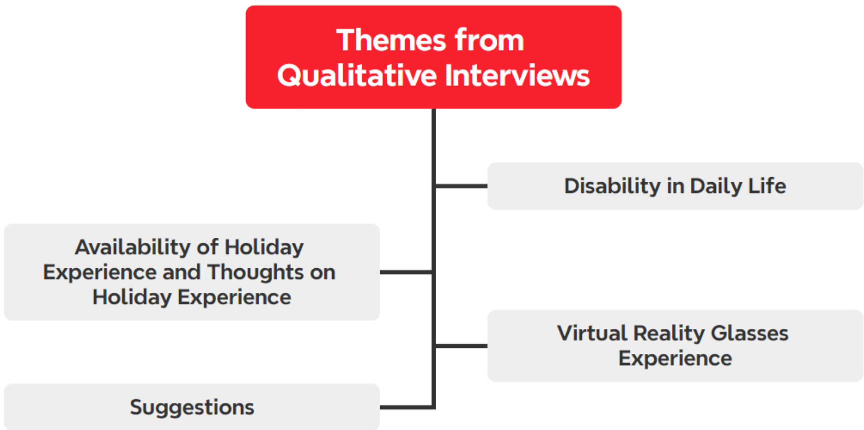

Figure 2. | **Sub-themes of the Theme of Disability in Everyday Life**

Disability in Everyday Life

The first theme that emerged in the interviews with the participants is the daily life caused by being disabled and where sociocultural dynamics are at the forefront. Accordingly, the participants stated that they experienced some difficulties regardless of touristic activities.

'The lack of disabled ramps and stairs hinder our transportation, for example, when going up to a high place, it is a big problem if there is no lift or ramp but there are stairs or going uphill, I need help.' (Participant 1, 28 years old, Female)

Participants emphasise that being out of the house can also pose various difficulties for those around them, stating that they often need help.

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This situation causes disabled people to experience hesitation when participating in an activity outside the house, such as going out on holiday. Thus, it is seen that the negative emotional state is reinforced by the difficulties of being disabled in daily life.

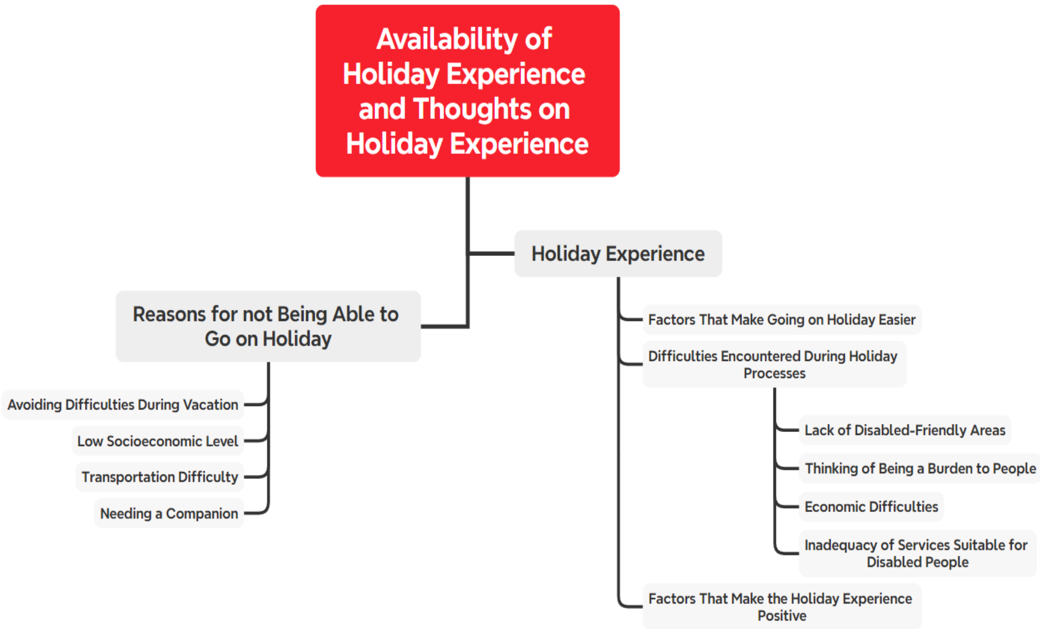
'I am not even allowed to go outside the door without my mum. I think my disabilities are not only physical but also cultural' (Participant 20, 21 years old, Female).

The fear of exclusion, the need for an accompanying person, and the obligation to disabled-friendly spaces are basically considered components of the sociocultural structure. As a matter of fact, the fact that family members do not support disabled people in participating in social activities points to the conservative nature of family dynamics at the micro level in this context, while it is also evaluated in relation to disability-friendly spaces in the macro framework and causes people with disabilities to have less visibility than they are in daily life.

Existence of Holiday Experience and Thoughts on Holiday Experience

In addition to the sociocultural problems encountered in daily life, some participants stated that there were various difficulties related to holiday experiences and a separate theme was created for the holiday phenomenon on this axis.

Figure 3. | Subthemes of the Theme of Availability of Holiday Experience and Thoughts on Holiday Experience



'When I think of accessibility, I think of being able to do the things I want to do freely without my mother. Being able to participate in tourism activities without a family member.' (Participant 7, 25 years old, Female)

In this section, where it is seen that the holiday phenomenon is primarily associated with the concept of "accessibility", it is observed that some characteristics of disabled individuals increase the experience of going on holiday quantitatively. On the other hand, the difficulties experienced during the holiday process and the contexts that contribute to the positive emotional state during the holiday experience were also mentioned, and in this framework, the holiday experience theme was elaborated in detail according to three sub-themes.

'Sometimes there are activities organised by our association and I try to participate in them, but we have not been able to go out of the city yet.' (Participant 29, 42 years old, Male)

'Since I am an active member of associations, I participate in tourism tours, I have been to Pamukkale and the ancient city of Ephesus.' (Participant 12, 39 years old, Male)

'Before I became an athlete, I could not go out so much because we were excluded. But now it is not like that, being an athlete has given us a reputation and I wish all disabled individuals to

gain reputation.' (Participant 14, 28 years old, Male)

'I had tourism experiences. Since I am an arm wrestler, I had the opportunity to visit almost many cities.' (Participant 3, 32 years old, Male)

Apart from such social actions, the relatively better economic situation of some participants may also increase their participation in the holiday. As a matter of fact, the fact that touristic activities are an important expense item corresponds to an area closely related to the favourable economic situation.

Individuals with disabilities did not always speak positively about their holiday experiences. The participants who mentioned that there were various difficulties during the holiday process stated that holiday activities could bring many disadvantages by mentioning the lack of disabled-friendly areas, thinking that it is a burden on people and economic difficulties.

'I have had tourism experience before. We went to Mersin. For the sea. I had a lot of trouble when we went. I could not go again. It was very difficult to walk my wheelchair on the sand.' (Participant 10, 48 years old, Male)

'If you want to go on a sea holiday, for example, it will be very simple, but you cannot go to the sunbeds made of sand, you cannot take the bus, you cannot enter the toilets.' (Participant 26, 24 years old, Female)

'There are too many obstacles. The lack of toilets, even if there is one, the lack of disabled ramps, economic inadequacies, narrow lifts, the lack of an application for the disabled in intercity buses. I experience obstacles mostly related to toilets.' (Participant 7, 25 years old, Female)

'In some hotels, eating places are outside the main building and there is no lift. For example, when I am looking for a hotel for a holiday, I especially need to call and ask.' (Participant 18, 29 years old, Male)

On the other hand, issues such as small hotel rooms, insufficient disabled ramps and lifts, and insufficient number of toilets suitable for disabled people can also negatively affect the holiday experiences of disabled people. Having such experiences can significantly reduce the motivation of disabled individuals to go on holiday again. The participants in the study mostly emphasised the difficulties of the holiday experience. On the other hand, it is also possible to mention that there are a few positive points.

'The list is quite long, but what I have the most difficulty with is the disabled person's path and disabled toilets, for example, even a handrail in the toilets makes me happy.' (Participant 12, 39 years old, Male)

According to this, when the participants encounter disabled-friendly areas, they leave their holiday experiences quite satisfied. Therefore, the presence of disabled-friendly areas corresponds to the most critical one among many potential positive factors for disabled people.

In addition to the fact that some participants had holiday experiences, some participants stated that they had never been on holiday. It was learned that there were various reasons for this situation, and the reasons why the participants could not go on holiday were detailed. In this section, which generally expresses the fear of the difficulties to be experienced, low socioeconomic level, transportation difficulties and needing someone, participant statements are detailed in accordance with the sub-themes.

A total of 33% of the participants stated that if they went on holiday, they would face various difficulties due to the lack of adequate arrangements in the hotels. Therefore, they did not go on holiday and did not participate in tourist activities.

'Obstacles related to transportation, obstacles related to financial impossibility, there are no arrangements for disabled people in most touristic places. There are no arrangements in toilets, hotel rooms.' (Participant 21, 53 years old, Female)

In this theme, where the business factor is mentioned, the participants stated that they can participate in touristic activities if there are sufficient regulations. This situation also underlines the necessity of macro regulations.

The previous theme elaborated on the fact that disabled people cannot go to these regions due to the lack of disabled-friendly areas and small rooms in many affordable hotels. On the other hand, the participants explained that they do not and cannot go on holiday due to the costs of hotels with disabled-friendly areas.

'In today's conditions, materialism is the biggest obstacle. Of course, it is also very difficult for those who are dependent on wheelchairs. Because I have difficulty getting on a minibus or a bus in this state. In fact, the society is so insensitive that there is not even a seat for the disabled and the elderly. People are afraid to go out after a while.' (Participant 11, 42 years old, Female)

'I have never had such a sea holiday experience. I really wanted to go, but I couldn't go due to lack of money.' (Participant 11, 42 years old, Female)

'I have never been on a trip like tourism before. I have children. My wife divorced me because I was already on crutches. I could not go anywhere due to financial impossibility.' Participant 11, 42 years old, Female)

'I have travelled to Muğla for touristic purposes before and that was five years ago. My budget is not suitable for a holiday right now.' (Participant 18, 29 years old, male)

'Firstly, we need to be in a good financial situation. After we are financially well-off, the hotels we will stay in should be suitable for disabled people.' (Participant 2, 35 Years old, Male)

''If my financial situation was good, maybe I could have access to tourism.' (Participant 5, 34 Years old, Male)

Low socioeconomic level, as the most frequently mentioned phenomenon by the participants, leads to the fact that although there is a demand to participate in touristic activities, this situation does not materialise. Among the costs of a holiday in socioeconomic terms, the accompanying person was also mentioned, and it was said that the potential fees to be paid for this reason were too high.

'I have never been on a touristic trip. Because I don't have money, because I must take people with me, because everything is so expensive now, we are grateful that we can feed ourselves.' (Participant 16, 26 Years old, Male)

The fact that disabled individuals need an accompanying person during the holiday process increases the expense, thus making the holiday less demandable. Participants in the research mentioned the difficulties they experienced in transportation as another reason for not going on holiday. The fact that transportation is more challenging for disabled individuals may prevent access to holiday resorts, thus limiting the holiday experiences of disabled individuals.

'For example, there should be a ticket discount for disabled people in intercity buses or there should be a facility to climb the stairs. There is a discount on trains, but you have to take a minibus to get there. There are problems with all kinds of transport.' (Participant 11, 42 Years old, Female)

'For example, if there are transfer vehicles with lifts and if these are available in some companies, the transportation problem may be solved a little bit.' (Participant 18, 29 Years old, Male)

'The most important obstacle is financial impossibility and being dependent on someone. I cannot even take a minibus without someone with me. I can hardly go to the tram. Transport is an important problem.' Participant 19, 50 Years old, Male)

In addition to the difficulty of accessing holiday regions, the fact that some touristic activities have various difficulties due to their nature may cause the demand for such activities to remain unrequited.

'The biggest obstacle is transport. Convenience and arrangements should be made in terms of transport. For example, I would like to do mountain tourism, but it would be challenging to do so with a wheelchair. It would be very nice if arrangements were made for this.' (Participant 8, 25 Years old, Male)

The lack of appropriate planning for disabled people, especially in mountain tourism, may limit holiday activities to a limited area, thus damaging accessibility.

The last theme of the disabled people's preference not to go on holiday is that the need for someone has a negative psychological impact on them. Underlining this problem, 43% of the participants stated that the fear of being a burden on a companion led them to choose not to go on holiday.

'I have never experienced tourism before. I wanted to go to Aziziye Mosque in Konya, but no one took me. Actually, there are many places I would like to go and see. For example, I have never seen the sea. Of course, we see it on television, but I have never listened to the sound of waves.' Participant 16, 26 Years old, Male)

'Naturally, I can't go anywhere now without someone with me.' (Participant 19, 50 Years old, Male)

'The most important obstacle is financial impossibility and being dependent on someone. I cannot even take a minibus without someone with me. I can hardly go to the tram. Transport is an important problem.' (Participant 19, 50 Years old, Male)

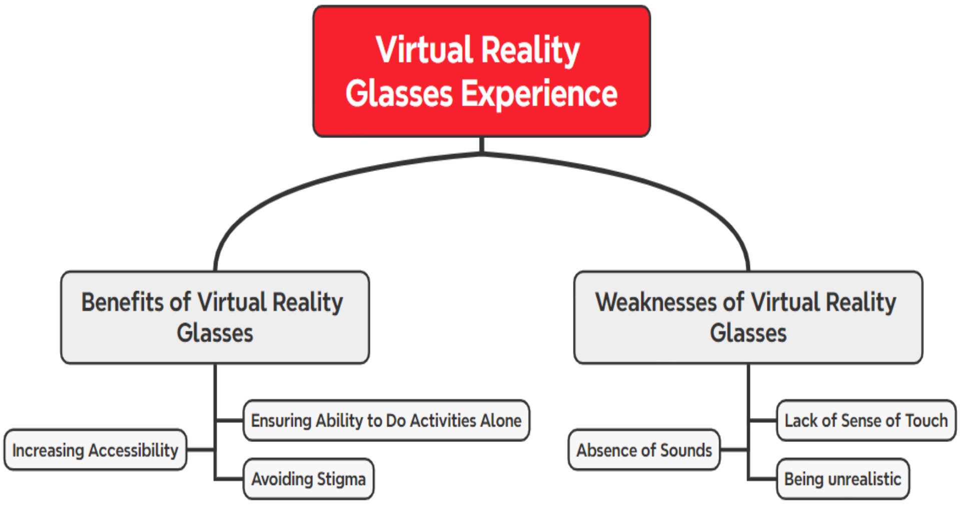
'For me, the biggest obstacle is being dependent on someone. Because I am addicted, no one usually wants to take me anywhere. After all, the people I am dependent on want to rest or make a programme for themselves. I don't want to go anywhere because I am dependent on someone. Even if I go, all eyes are on us. They behave as if we have no right.' (Participant 6, 30 Years old, Female)

The fact that the participants need a companion during their holiday processes is closely related to the lack of disabled-friendly areas. Thus, the need for an accompanying person increases, and the potential to participate in any touristic activity without an accompanying person decreases.

Virtual Reality Glasses Experience

During the research process, the participants were shown around the Mevlana Museum with virtual reality glasses, and statements related to how this development could affect participation in touristic activities and access capacity were brought together. Accordingly, the benefits and weaknesses of virtual reality glasses were referred to, and these two titles formed sub-themes.

Figure 4. | Subthemes of the Virtual Reality Goggle Experience Theme



80% of the participants were delighted with the virtual reality goggles experience. In the related theme, where the positive aspects of this experience were collected, the participants generally mentioned the ability to do activities alone, increasing accessibility and preventing stigmatisation.

It has been explained above that one of the most limiting factors for participants to participate in touristic activities is the need for an accompanying person. On the other hand, the fact that the most critical advantage of the virtual reality goggle experience is described as eliminating the need for a companion also reveals the need in this regard.

'It made me happy to be able to do an activity for the first time without someone by my side.'' (Participant 10, 48 Years old, Male)

'It was an application that made me feel free, happy, without the bad looks of people, and gave me self-confidence. Thank you for giving me the opportunity to try this technology.' (Participant 18, 29 Years old, Male)

'I was able to do it on my own. It was as if I was really inside the Mevlana Museum. I could touch it if I stretched out my hand. It's a very nice feeling.' (Participant 19, 50 Years old, Male)

'I felt good for the first time. I was able to see things without anyone near me. I thought I was free and happy.' (Participant 20, 21 Years old, Female)

The participants' mention of concepts closely related to psychological well-being, such as 'being free', 'being well', and 'feeling good' while discussing the VR goggles experience, is considered one of the most critical indicators that VR goggles can alleviate a significant disadvantage.

'It was very enjoyable. It made me happy to be able to do an activity for the first time without someone by my side. I also felt like I could really live that moment.' (Participant 9, 48 Years old, Male)

'I was very happy and felt free for the first time. It was nice to be able to do things on my own without a companion.' (Participant 8, 25 Years old, Male)

In addition, the fact that many participants state the lack of an accompanying person as an important advantage also reveals the need for disabled-friendly areas.

It has been mentioned above that 40% of the participants have never had a holiday experience and there are various reasons for this. The fact that virtual reality glasses facilitate the holiday experience has made it necessary to open a different title for accessibility within this framework.

'How advanced technology is. It is very beautiful, very nice. I was able to see the Mevlana Museum. I never had the chance to go there.' (Participant 11, 42 Years old, Female)

'I felt good for the first time. I was able to see things without anyone else with me. I thought I was free and happy.'(Participant 20, 21 Years old, Female)

The fact that the participants participated in a tourist activity without an accompanying person is considered a concept that provides accessibility to a great extent. In this context, participants identified virtual reality glasses with accessibility.

The participants' need for a companion and the fact that they face various difficulties outside the house results in discomfort from the surrounding gaze, which can have a negative psychological effect.

'Although it did not reflect the reality, it was a very nice event for those who could never go. It was nice to have the opportunity to travel comfortably without being stigmatised in society, without attracting all the glances.' (Participant 4, 36 Years old, Male)

With virtual reality glasses, it becomes possible for participants to participate in touristic activities on the one hand, and on the other hand, it can ensure that they are not exposed to stigmatisation processes. At this point, this issue, which the participants point out as a positive context, also points to an ambivalent area when combined with the reality that sociocultural dynamics cannot normalise the participation of disabled individuals in society.

In fact, the participants' mention of this aspect of virtual reality glasses by prioritising the factor of non-stigmatisation rather than being in physically relevant environments is considered to be directly related to exclusion.

Although the positive aspects of virtual reality goggles were mentioned in general terms, the participants were also asked about the strengthening aspects of virtual reality goggles, and in this context, three main weaknesses were revealed: the desire for tactile sensation and sounds and unrealistic. Although the participants (32%) stated that they liked the virtual reality glasses, they underlined that they still do not fully feel the pleasure of being physically there.

'When I went to visit years ago, it was very crowded, the tour with virtual goggles was very calm, I felt the spiritual atmosphere better, but

it would be much better if there was a sense of touch.' (Participant 12, 39 Years old, Male)

'Museums can be visited with virtual reality glasses. But I don't think it is very suitable for sea holidays.' (Participant 7, 25 Years old, Female)

The fact that various physical indicators that would be given by being there in person cannot be presented with virtual reality glasses does not give the feeling of a holiday by the sea, thus weakening the point of full adoption of virtual reality glasses by individuals with disabilities. 46% of the participants stated that this activity in virtual reality glasses should be supported with sound. In this context, they stated that the presence of sounds can create a more realistic environment.

'I think it would be better to have voices.' (Participant 13, 44 Years old, Male)

'I would like the sound of a ney in the background.' (Participant 15, 34 Years old, Male)

'I wish we could go and pray, listen to the sounds of the ney, it would be nice.' (Participant 9, 48 Years old, Male)

'It would be nice if there were reed flute sounds.' (Participant 8, 25 Years old, Male)

'It would be much better if it was with sound, it is very nice to visit so much, but it would be better to have a promotional sound in the background.' (Participant 24, 23 Years old, Male)

'It would be very nice if the ney sounds in Mevlana Museum were added.' (Participant 3, 32 Years old, Male)

On the other hand, counselling services also constitute a point demanded by the participants that cannot be offered with virtual reality glasses.

'I wish someone could narrate what I see with virtual reality glasses; we would have learned at the same time.' (Participant 18, 29 Years old, Male)

'Guidance and reed flute voices can be added.' (Participant 26, 24 Years old, Female)

Accordingly, the participants stated that the provision of guidance services in such a virtual touristic activity could make the process more advantageous for them. It is also possible to say that some participants were not satisfied with the virtual reality goggle experience.

'No, it wasn't, I experienced it for the first time, it seemed a bit fake to me.' (Participant 13, 44 Years old, Male)

'There are people from many countries who come from many countries to pray in the Mevlana museum, we cannot even go from the city we are in, I would prefer to see it on the spot, it seemed like a game to me.' (Participant ı 13, 44 Years old, Male)

'Actually, I have seen it before, although it is not as realistic as going there, it is still a very good application for those who have never been there.' (Participant 17, 31 years old, Female)

The participants who stated that the images in the virtual reality glasses were not entirely realistic explained that they did not get enough pleasure by stating that this aspect could be strengthened.

Suggestions

The participants interviewed during the research process were asked how their participation in touristic activities could be increased and what features could be strengthened in virtual reality glasses as an option in this framework. The collected responses led to the emergence of different suggestions, and all responses are explained in detail.

'For example, if there are transfer vehicles with lifts and if these are available in some companies, the transportation problem may be solved a little bit.' (Participant ı 18, 29 Years Old, Male)

Participants who stated that their participation in the activities could be facilitated especially with the availability of transfer vehicles with lifts stated that the transportation problem is one of the most critical points.

'Let us be supported financially first so that we can travel.' (Participant 11, 42 Years old, Female)

'When the salaries of the disabled reach a level that they can live on, then maybe touristic activities can be considered.' (Participant 5, 34 Years old, Male)

High hotel prices may limit the access of many disabled people to holiday opportunities. In this context, the potential welfare share in disability pensions may facilitate this process for them.

The fact that disabled people face various difficulties in accessing holiday opportunities and that it may take time to eliminate this process makes state support necessary in this context for people with disabilities.

'The state can provide tourism support for those who cannot participate in tourism activities in any way.' (Participant 3, 32 Years old, Male)

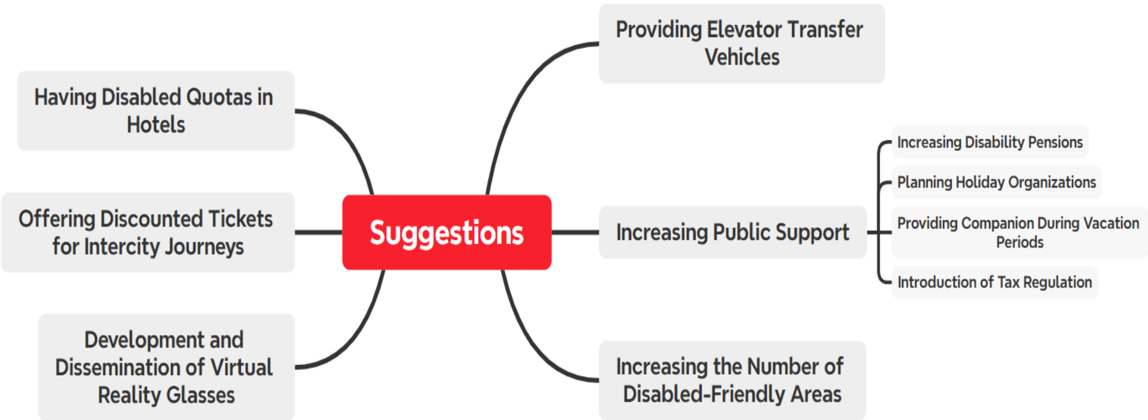
'The state gives us discounted public transport and free entry to many places, but they always ignore the accompanying person. No disabled person wants to go anywhere alone.' (Participant 13, 44 Years Old, Male)

'As long as we have a guide with us, we can go anywhere, even when a blind person has a dog guiding them, they can go a long way, so my only wish is to have a companion with government support.' (Participant 25, 18 Years Old, Female)

The fact that people with disabilities demand tax adjustments due to socioeconomic status is an important indicator that they have severe demands for holidays.

'Taxes can also be adjusted to meet the holiday needs of disabled individuals.' (Participant 10, 48 Years Old, Male)

Figure 5. | Sub-themes of the Suggestions Theme



Increasing the number of disabled-friendly areas in holiday resorts is one of the most critical recommendation topics. In this context, increasing the number of ramps and disabled lifts is the most demanded.

'A more comfortable road can be drawn for the disabled in tourism regions, disabled ramps can be installed more frequently.' (Participant 1, 28 Years Old, Female)

'Disabled lifts can be increased.' (Participant 1, 28 Years Old, Female)

'I think that lifts should be widespread, and disabled ramps should be increased, of course, state support should be increased…' (Participant 13, 44 Years old, Male)

'I think the lack of ramps and the fact that the lift cannot be applied everywhere is a big deficiency. I am in favour of increasing the number of ramps and disabled toilets or areas where the needs of the disabled can be met.' (Participant 15, 34 Years old, Male)

While many disabled participants stated that they were satisfied with the virtual reality glasses, they also underlined that these glasses have improvable aspects and that these glasses should be popularised.

'I don't think that virtual reality glasses are endless, you can easily visit places like the Eiffel Tower or the Maiden's Tower without going there, I think it should be put into our lives more. (Participant 1, 28 Years Old, Female)

'Actually, if they were travelling abroad, it could be as beautiful as the mountains of Norway.' (Participant 10, 48 Years Old, Male)

'I would prefer it to be used in difficult and expensive places to travel to.' (Participant 15, 34 Years Old, Male)

'We can also see the Kaaba.' (Participant 6, 30 Years old, Female)

'In the past, our relatives coming from pilgrimage used to bring a camera with pictures of the Kaaba, and I likened this device to it, and I can watch the Kaaba one day.' (Participant 29, 42 Years old, Male)

The fact that the participants stated that the virtual reality glasses, which they stated that presentations about different parts of the world could also be in question, could reduce their holiday needs to some extent with the widespread use of such applications shows that the process has a critical importance.

'It would be nice if we could get information about the artefacts we saw with a guide.' (Participant 6, 30 Years old, Female)

'There may be museums abroad. Of course, with a guide in Turkish.' (Participant 4, 36 Years old, Male)

'Guidance service can be provided in virtual reality glasses, and a documentary-like visit can be made.' (Participant 22, 55 Years old, Male)

'I know because I went to the Mevlana Museum years ago, but if we think of people who have never been there, a guide narration would be nice while watching.' (Participant 28, 39 Years old, Female)

It has been learnt that the participants need discounted tickets to alleviate their economic difficulties.

'For example, there should be a ticket discount for disabled people on intercity buses or a facility for climbing the stairs. There is a discount on trains, but you have to take a minibus to get there. There are problems with all kinds of transport.' (Participant 11, 42 Years old, Male)

The availability of special quotas for disabled people in hotels is another issue mentioned by the participants.

'For example, quotas should be created for disabled people in hotels.' (Participant 16, 26 Years old, Male)

'Quotas reserved for disabled people in hotels can be increased.' (Participant 18, 29 Years old, Male)

'First, the prices of tourist places should be affordable. After the price is appropriate, necessary applications should be made for people with disabilities.' (Participant 4, 36 Years old, Male)

The participants stated that it should be mandatory for hotels to have a few rooms suitable for disabled people so that disabled people can access holiday opportunities more effectively. This situation has the potential to increase disabled access.

DISCUSSION

An in-depth examination was conducted on the contributions of virtual reality to museum tourism after disabled individuals visited the Mevlana Museum using virtual reality goggles. The examination included eight research questions developed in collaboration with experts, as well as an analysis of the participants' previous tourism experiences, the challenges they faced during these experiences, their proposed solutions to these challenges, and their opinions on the potential benefits of virtual reality in museum tourism. The study included individuals with physical disabilities who attended the Konya Branch of the Turkish Disabled People's Association.

The perspectives of individuals with physical disabilities regarding accessibility and their anticipated requirements for accessible tourism are expressed. The study conducted by Akıncı and Sönmez (2015) highlights the challenges faced by disabled individuals, including their limited mobility, the lack of accessible hotels, and the problems encountered in transportation for tourism-related activities. Our study's findings align closely with this. Furthermore, apart from these tasks, such as gardening and organising hotel rooms, it is imperative that families do not permit their members to venture out unaccompanied, particularly considering prevailing economic challenges. ENAT, the European Network for Accessible Tourism, is renowned for its efficacy in promoting accessible tourism. The report published by ENAT on the accessibility of physical conditions is believed to enhance access to the Mevlana Museum. The study presents the holiday experiences of individuals with physical disabilities and their perspectives on the accessibility of these activities.

Physically challenged individuals in our study reported avoiding tourism activities due to challenges with transportation, limited socioeconomic position, the requirement for a partner, and the anticipated difficulties they would have while on vacation. In their study on the accessibility of Göreme Museum, Evci and Şahin (2017) found several areas that require improvement. They recommended reorganising the entrance and exit areas, addressing the disrepair of the only available toilet, widening the disabled ramps, reducing the steepness of the slopes, and making necessary adjustments to the unsuitable stair floors. The study's findings align with the challenges encountered by individuals with physical disabilities in our research. Due to their typical design for non-disabled individuals, museum tourism activities pose challenges for individuals with physical disabilities regarding accessibility.

Nevertheless, tourism activities must be equitable and readily available to all individuals. Our research revealed that physically challenged individuals have challenges in their holiday experiences. Additionally, we found that the activities conducted by non-governmental organisations and the vehicles designed for individuals with physical disabilities play a crucial role in facilitating tourism for this group. Although individuals with physical disabilities generally prefer their own vehicles for accessing tourism activities, high-speed trains, which are already prevalent in our country and are more accommodating for disabled individuals, also offer an alternative in terms of accessibility.

This study aimed to enhance accessibility for those with physical limitations by providing them with virtual reality glasses. This experience empowered those with physical limitations to engage in activities independently, mitigate stigmatisation, and enhance accessibility. Tussyadiah et al. (2018) asserted that virtual reality is enjoyable, fosters social contact, is easily accessible, serves as a source of motivation, and is intriguing. In his study, Erdem (2022) found that Konya province, despite being classified as a smart city, does not utilise virtual reality, thus making it an unsuitable choice for a smart destination.

Kabadayı (2020) stated that the implementation of virtual reality in hotels enhances the hotel's reputation, simplifies the marketing process, and serves as an excellent means for disabled individuals to assess the hotel's accessibility. According to Kulakoğlu Dilek and İstanbullu Dinçer (2020), virtual reality applications can facilitate the participation of individuals with physical limitations in tourism activities, including transportation, accommodation, and entertainment. The results of this research are consistent with our investigation. Despite the positive feedback from physically disabled participants regarding the potential of virtual reality glasses to enhance their freedom and enable them to visit the Mevlana museum, it was determined that this was not feasible due to the absence of tactile sensations and *ney* sounds in virtual reality.

The input was sought from individuals with physical disabilities regarding measures to ensure accessibility in tourism activities. Disabled individuals propose the implementation of transfer vehicles equipped with lifts to facilitate transportation to and from the city. They also recommend increasing public support, expanding disabled-friendly areas, raising the quotas for disabled individuals in accommodation centres, and utilising virtual reality technology in more museums and historical sites. Akın (2018) asserted that accommodation rooms should possess ample space to ensure the comfort of physically disabled individuals. The room floor should be equipped with plush and cushioned carpets, while the toilets should be adapted to accommodate disabled people. Furthermore, the room bathrooms should be configured with bathtubs or showers suitable for individuals with disabilities. Hotel receptions should be designed to facilitate wheelchair access, and the front office of hotels should be equipped with alarm systems and telephones.

Karacaoğlu (2012) discovered that while places such as the car park, lobby, lift, and front office are specifically built to accommodate disabled users, there are no provisions made for the utilisation of facilities such as the sauna/hammam, public restrooms, pool, beach, sunbathing areas, and entertainment centres. Within the same study, individuals with physical disabilities expressed their desire to access the pool but encountered significant challenges due to the absence of a pool lift. They also highlighted the need for wooden pathways from the sandy area to the sea, as wheelchair access to the beach was impossible. Additionally, they suggested that tables near the buffet in restaurants should be designated for individuals with physical disabilities. The research findings align closely with our findings. Non-governmental organisations advocating for individuals with disabilities should have a central role in the decision-making process for all decisions and activities. For disabled individuals to fully access the advantages of tourism activities, it is imperative to enforce legislation pertaining to disability rights. It is believed that this approach will encourage greater participation of those with disabilities in tourism activities.

CONCLUSION

Technological advancements have significantly gained importance in human lives in recent years. The presence of the internet enables convenient access to information at all times. Virtual reality is created and accessed via the internet, providing individuals with an enjoyable experience. Virtual reality technology finds applications in various sectors like tourism, marketing, medicine, education, entertainment, transportation, architecture, military, food and beverage, repair, décor, and cinema. This study aims to identify the challenges encountered by individuals with disabilities in relation to accessible tourism. It aims to generate potential solutions by incorporating their perspectives on these issues. Additionally, it seeks to increase public awareness regarding the accessibility of disabled individuals in the context of tourism. Ultimately, it aims to promote the participation of disabled individuals in the tourism sector, thereby making a positive contribution to the national economy. In order to achieve this objective, individuals with physical disabilities were interviewed using an interview technique. Theme analysis resulted in the formation of four primary themes. The text discusses the concepts of accessibility, challenges faced in tourism activities, potential solutions, and utilising virtual reality.

The designs of museums, both inside and outside, should be altered to accommodate those with disabilities. Museums ought to collaborate with local governments, municipalities, and commercial institutions to implement diverse initiatives to enhance the awareness and inclusivity of disabled individuals. By enhancing virtual reality software, museums, archaeological sites, and other touristic activities can transcend the limitations of time and place. This research is considered to be a valuable resource for conducting qualitative research on accessibility. It is believed that new initiatives would be established to address the challenges faced by disabled individuals in engaging in tourism activities. It is particularly important for tourism firms catering to disabled individuals to adhere to and utilise social media and other interactive platforms. Tourist companies should keep up with technological advancements and incorporate appropriate technologies for the accessible tourist sector. During this critical moment, when information holds great significance, all tourism establishments must train their staff in accessible tourism. Given the rise of virtual reality technologies, tourist intermediaries in the accessible tourism industry should strive to maintain the highest standard of service by leveraging digital opportunities.

Accommodation providers should provide services that align with tourists' evolving and developing preferences while also ensuring accessibility. Tourism firms catering to those with special needs should prioritise keeping up with technological advancements that cater to their specific needs rather than falling behind.

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MARKETING CAPABILITIES, PERFORMANCE AND METRICS FROM THE PERSPECTIVE OF CROATIAN MARKETING MANAGERS

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ABSTRACT

This paper explores the key factors that influence marketing performance, with a special emphasis on the role of marketing capabilities and the use of marketing metrics such as brand strength. In today's dynamic business environment, marketing performance is not only a matter of achieving financial goals but also implies the capability to manage a brand and emotionally connect with consumers. This research aimed to analyse how Croatian marketers define performance, what metrics they use to evaluate marketing activities, which marketing capabilities and skills they consider crucial now and in the future, and what they consider to be the characteristics of a strong brand. The research was conducted through semi-structured, in-depth interviews with 15 marketers from different industries, where concepts such as marketing capabilities, brand management and key performance indicators were analysed. The data collected includes responses from experts detailing the role of marketing capabilities in achieving performance, including the importance of consistent communication, building trust, and emotional connection with consumers. The results and insights resulting from the analysis of the conducted interviews shed light on the role of marketing capabilities and brought an overview of the most commonly used metrics in the marketing practice of Croatian managers. The key findings of the research indicate that brand performance is not only a result of marketing activities but also the ability of marketers to identify and use relevant metrics to track the market dynamics and brand strength of the brands they manage. At the same time, using indicators such as Ipsos' BRANDscore enables a better understanding of the market position and long-term performance of the brand. This paper contributes to marketing theory by expanding the understanding of the role of marketing capabilities in achieving marketing performance and provides marketers with practical guidance for building strong brands. Limitations of research include its qualitative nature, limited number of respondents, and focus on specific industries, which may limit the generalisation of findings to other industries. Future research could broaden the sample of respondents and industries and apply quantitative approaches to further validate the findings.

Keywords: marketing capabilities, marketing performance, marketing metrics, brand strength
JEL Classification: M31, M37, M39

INTRODUCTION

In today's business environment, which is marked by globalisation, digitalisation and rapid technological change, marketing has become a key factor in the success of many organisations. Companies are facing challenges arising from an increasingly competitive market, the requirement for greater personalisation of products and services and their communication, and the need to accurately measure the performance of marketing activities. Traditional approaches to marketing, which relied on universal marketing strategies and mass media, are increasingly giving way to more sophisticated, data-driven methods that allow for a better understanding of consumer behaviour and more effective targeting of specific market segments.

In the context of these changes, developing and implementing strategies that attract new customers and build long-term, emotional connections with existing consumers is becoming a key competency. A strong brand is no longer just a symbol of quality or recognition in the market, but is the foundation for building trust and loyalty among users. In this sense, marketing strategies today must be flexible, dynamic and based on a deep understanding of market trends, competition and consumer needs.

One of the key challenges marketers face is accurately measuring the performance of marketing activities. Given the large number of metrics and indicators available, each of which can provide different insights into the effectiveness and efficiency of marketing efforts, choosing the right metrics becomes crucial for making informed decisions. In addition, in the era of digitalisation, measuring performance has become even more complex, as marketing activities are often carried out across multiple communication channels and in different formats, from traditional media to digital platforms and social networks.

This paper explores the key capabilities and skills that are necessary for the successful management of marketing activities in the modern business environment, with a special emphasis on the importance of digital transformation and the application of new technologies in marketing. It will analyse how marketing managers adapt to new challenges and how they use advanced analytical tools and strategies to optimise marketing campaigns. A special focus will be on brand strength indicators, allowing for precise market perception and long-term brand performance monitoring. Through the analysis of theoretical approaches and practical examples, the paper will provide insight into how an emphasis on certain marketing capabilities and skills can contribute to marketing and business performance.

LITERATURE REVIEW

In this part, the concept of marketing capabilities is explained, along with their key characteristics and role in creating a sustainable competitive advantage. Different classifications of marketing capabilities are also presented. Marketing performance is also explained, and a theoretical framework for performance evaluation is presented, with different performance measures and a special focus on brand strength.

Marketing capabilities

The term capability in the scientific literature refers to an organisation's ability to carry out a coordinated set of tasks using organisational resources to achieve a specific goal (Helfat et al., 2003). It is composed of knowledge that has been accumulated over time through a repetitive process of organisational learning (Tollin and Jones, 2009). Below, this term is defined in the context of the functional area of marketing.

Definition of Marketing Capabilities

When it comes to marketing capabilities, there are a plethora of different definitions. Day (1994, p. 38) refers to this term, in the context of market-driven organisations, as "complex bundles of skills and accumulated knowledge, exercised through organisational processes, that enable firms to coordinate activities and make use of their assets." Vorhies and Morgan (2003, p. 103) point out that it is a "business's ability to perform common marketing work routines through which available resources are transformed into valuable outputs". Morgan et al. (2018, p. 63) state that these are " the processes that a firm uses to define, develop, communicate, and deliver value to its target customers by combining, transforming, and deploying its available resources." Common to these definitions is the observation of marketing capabilities as the process by which companies combine and use available resources to create market offerings that customers perceive as valuable (Morgan and Feng, 2024).

The value of marketing capabilities lies in their role in combining available resources to deliver superior value to customers, thereby enabling business performance and gaining and maintaining a competitive advantage (Day, 2011; Martin et al., 2020; Morgan and Feng, 2024). The mechanisms of achieving this goal differ depending on the authors' theoretical approaches. For example, Day (1994) points out that specific marketing capabilities enable companies to become and remain market-driven and thus create value and achieve superior results, while Morgan et al. (2009) look at marketing capabilities as tools that enable more efficient use of a company's assets and deliver value to customers in a way that is difficult for competitors to imitate.

The ability to implement marketing mix elements is limited by its functional and tactical nature. Therefore, it is possible to take a broader, strategic perspective of marketing as the responsibility of top management and include additional capabilities aimed at creating value for customers (Day and Moorman, 2010). Within this perspective, four elements have been identified as strategic imperatives for businesses (Day, 2011):

- being a customer value leader through a clear and convincing offer for the target customers – this includes carefully selecting the value offered, determining the optimal ways of delivering it and aligning short-term and long-term activities,
- innovation and creation of new value – this implies turning innovations into valuable organisational assets,
- capitalising on the customer as an asset – this includes strategies for selecting, attracting, developing and retaining loyal customers, while ensuring protection against competitive threats,
- capitalising on the brand as an asset – this implies continuous strengthening of the brand through consistent investments, protection against dilution and erosion, and maximising its potential to capture new business opportunities.

The implementation of these strategic imperatives requires the timely detection of market trends and relies on establishing and maintaining key connections with customers and marketing channels. It also includes the development and integration of capabilities that go beyond the purely marketing function and encompass a wider range of organisational activities and resources within the company (Day, 2011).

The Nature of Marketing Capabilities

Analysis of marketing literature reveals two key characteristics of marketing capabilities: their dynamism and hierarchical nature. Although Day (1994) did not explicitly emphasise their dynamic character in his initial conceptualisation of marketing capabilities, it is logical to conclude that in a changing market environment, in which a company seeks to maintain market orientation, marketing capabilities must also evolve in accordance with new market requirements (Morgan and Feng, 2024).

The resource-advantage theory also implies the dynamic nature of the capability. According to this theory, the achievement of superior financial results by a company is conditioned by the development of a comparative advantage in resources, which allows for the improvement of effectiveness and efficiency in creating value for consumers (Hunt and Morgan, 1995; 1996). Given the dynamics of the market and competitive competition, it is logical to conclude that capabilities, which are supposed to ensure the satisfaction of changing consumer needs, must also possess dynamic properties (Morgan and Feng, 2024).

The dynamic nature of marketing capabilities is explicitly addressed within the concept of dynamic capabilities, which emerged in response to criticism of the static nature of resource-based theory and the difficulty in explaining the sustainability of business performance over time (Teece et al., 1997; Teece, 2009; Leemann and Kanbach, 2022; Morgan and Feng, 2024). According to Teece's concept (Teece, 2009), in order to achieve a sustainable competitive advantage, it is not enough to simply possess a significant amount of unique and rare resources that are difficult to imitate or substitute. The key role is played precisely by the capabilities that enable the efficient development and application of these resources in accordance with changing market conditions.

Another significant characteristic of marketing capabilities relates to their hierarchical nature. Collis (1994) has already pointed out the distinction between basic capabilities, which enable the performance of functional activities, and dynamic capabilities, which aim to improve these activities. In the concept of dynamic capabilities, the latter are explicitly characterised as higher-order capabilities (Teece et al., 1997).

Other researchers have also embraced and integrated this hierarchical logic into their conceptualisations. Vorhies et al. (2011), therefore, distinguish between specialised "lower-order" marketing capabilities, such as brand management and customer relationship management, and "higher-order" marketing capabilities, such as marketing exploration and marketing exploitation, the purpose of which is to develop and improve the aforementioned abilities. In his revised concept of the capabilities of market-driven organisations, Day (2011) identifies three categories of capabilities:

- *Static capabilities*: include specialised (functional) and cross-functional capabilities, characterised by stability and focus on routinised processes and internal efficiency.
- *Dynamic capabilities*: these refer, for example, to the ability to reconfigure and improve existing marketing capabilities, with a focus on effectiveness.
- *Adaptive capabilities*: they are related to marketing learning through experimentation and active interaction with network partners, allowing anticipation of future market conditions.

Morgan (2012) considers brand management to be a cross-functional capability of a "higher order" given that it encompasses and integrates resources from different functional areas. In a later paper (Morgan et al., 2022), the different levels at which abilities exist were further elaborated: individual, group, organisational and interorganizational.

Therefore, dynamism and hierarchical nature can be identified as two key characteristics of marketing capabilities. In earlier theoretical reflections on marketing capabilities, dynamism was implicitly assumed, while within the concept of dynamic capabilities, it was explicitly articulated. Furthermore, certain marketing capabilities, such as marketing exploration and marketing exploitation, can be classified as "higher-order" capabilities since they allow for the development of specialised "lower-order" marketing capabilities.

Classification of marketing capabilities

In the marketing literature, there are several approaches to classifying marketing capabilities (Morgan and Feng, 2024). Starting from the concept of market orientation (Kohli and Jaworski, 1990; Narver and Slater, 1990), Day was among the first to offer a framework for classifying marketing capabilities according to their focus within or outside the company, regardless of the functional area or organisational unit in which they are located. Analysing at the tactical and operational level the specific processes needed to build relationships with customers, develop new products, set prices, etc., he classifies marketing capabilities into three categories (Day, 1994):

- *inside-out capabilities* – these capabilities are triggered based on market demands, competitive challenges and external opportunities, and examples include production, logistics and human resources management,
- *outside-in capabilities* – these capabilities are focused almost exclusively on the external environment of the company, their purpose is to connect the processes that define other organisational capabilities with the external environment and enable the company to compete by anticipating market requirements faster than competitors and building long-term relationships with clients, suppliers and other participants in marketing channels,
- *spanning capabilities* – these capabilities are necessary to integrate capabilities from the first two categories, and examples include strategy development, new product/service development, pricing, customer order fulfilment, etc.

As key "outside-in" capabilities for market-driven organisations, Day emphasises market sensing capability and customer linking capability. In the revised conceptualisation, Day also introduces the previously mentioned adaptive marketing capabilities as an additional category (Day, 2011).

Using a different approach, Vorhies and Morgan (2003; 2005) and Vorhies et al. (2009) made further contributions to the classification of marketing capabilities by distinguishing between two categories:

- *Specialised capabilities*: they refer to functionally oriented processes and routines related to the marketing mix (e.g. advertising, distribution channel management, pricing).
- *Architectural capabilities*: they encompass processes and routines that orchestrate and coordinate specialised marketing capabilities and related resources, for example, the capability to plan and implement a marketing strategy.

Morgan (2012) expanded this classification by adding cross-functional and dynamic marketing capabilities (Figure 1).

Figure 1. | **Classification of marketing capabilities**

Source: adapted from Morgan (2012), p. 104.

In accordance with this classification, in addition to specialised (managing marketing mix elements) and architectural (strategic market planning and marketing strategy implementation), there are also cross-functional marketing capabilities (new product development, customer relationship management and brand management) and dynamic marketing capabilities (market learning, resource reconfiguration and capability enhancement). When the different hierarchical levels at which capabilities are developed are also included (individual, group, company), an even more comprehensive framework for understanding marketing capabilities is obtained (Morgan et al., 2022; Morgan and Feng, 2024). Consideration of hierarchical levels emphasises the importance of aligning the individual capabilities and skills of marketers with team and organisational processes in order to maximise the impact of marketing activities and achieve a competitive advantage.

Thus, there are several different classifications of marketing capabilities, the most comprehensive being this one by Morgan, which divides them into four main groups: specialised, architectural, cross-functional and dynamic capabilities (Morgan, 2012). Below, the concept of marketing performance will be clarified with a list of various metrics used in marketing practice.

Marketing performance

Marketing performance is a multifaceted and complex concept and represents a significant challenge for marketing managers (Rust et al., 2004; Liang and Gao, 2020). According to Gama (2011), from an organisational perspective, marketing performance is measurable, dynamic (the choice of indicators is not static but evolves), relative (depends on the temporal and spatial context and the comparison of what is planned and achieved) and multidimensional (includes a number of indicators used in marketing practice). Due to the increasingly pronounced requirements for proving the contribution of marketing to business results and strengthening its role in defining business strategy, marketing managers have focused on identifying and selecting marketing metrics (Ambler et al., 2004).

Morgan et al. (2002) define marketing performance as a construct consisting of the following three dimensions:

- *effectiveness*: this dimension refers to the degree to which organisational objectives are achieved; according to Drucker's definition (2007), being effective means "doing the right things." In the context of marketing, this means focusing efforts and resources on activities that will lead to the achievement of marketing objectives, such as increasing sales, market share, brand awareness or customer satisfaction.
- *efficiency*: this dimension focuses on the relationship between the outcomes (outputs) and the inputs (investments) needed to achieve them; according to Drucker's definition (2007), being efficient means "doing things the right way". In a marketing context, this means optimising the use of

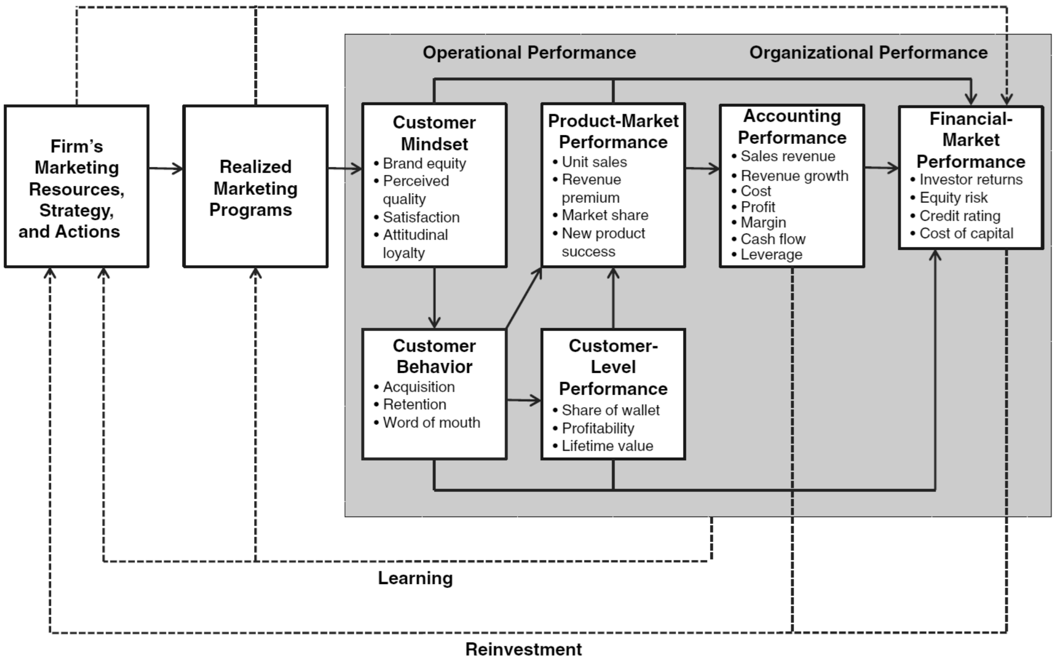
resources (time, money, human resources) to achieve the desired results at minimal cost,

- *adaptability*: this dimension refers to the ability of a company to adapt to changes in the environment and to innovate (Walker and Ruekert, 1987). In a dynamic market environment, it is important that marketing strategies and tactics are flexible and can quickly adapt to new trends, technologies, customer preferences and competitors' activities.

Although Frösén et al. (2013) suggest the universal applicability of these dimensions, it is important to consider that their relative significance and method of measurement may vary depending on the specific context of the business, including the type of industry, the size of the company, the stage of the life cycle, and the marketing objectives set.

The complexity and multidimensionality of this concept is best illustrated by the theoretically based performance evaluation framework developed by a group of authors by analysing 998 empirical studies published in the 15 most relevant scientific journals in the period from 1981 to 2014 (Katsikeas et al., 2016). By depicting the "marketing performance chain", this framework provides an understanding of how different aspects of marketing activities contribute to overall business results. This is crucial for making informed marketing decisions and optimising marketing strategies. Examples of the different measures used in specific parts of the "marketing performance chain" are shown in Figure 2.

Figure 2. | The Marketing–Performance Outcome Chain and Exemplar Measures



Source: Katsikeas et al. (2016), pp. 3.

The authors divide marketing performance into organisational performance, which includes accounting and financial categories such as revenue, profit, margin, credit rating, cost of capital, etc., and operational, in which they list groups of indicators related to customer mindset and behaviour (e.g. brand equity, perceived quality, satisfaction, retention) and product-market performance (e.g. sales, market share, new product success).

In marketing practice, different approaches are used to measure performance. There is no universally applicable set of indicators for all companies and situations, but the choice of marketing metrics depends on a number of external and internal factors (Gama, 2011).

External factors are the combined influence of the following forces (Morgan et al., 2002; Rust et al., 2004):

- competitive intensity: this refers to the level of rivalry between competitors in the industry; high competitive intensity is characterised by a large number of competitors, aggressive marketing strategies and frequent changes in market shares,
- industrial dynamics: this refers to the speed and extent of change within a particular industry, particularly in terms of customer preferences; high industrial dynamics are characterised by rapid changes in demand, the emergence of new products and technologies, and changes in consumer behaviour.
- environmental uncertainty: this refers to the degree of predictability of future business conditions; the high uncertainty of the environment is characterised by rapid and unpredictable changes in market conditions, technologies and consumer preferences.

The selection and successful use of marketing metrics within an organisation also depends on several key internal factors (Spitzer, 2007; Gama, 2011):

- integrated measurement system: individual metrics are more effective when used as part of a complete system that connects different aspects of performance.
- organisational context: an atmosphere of openness, trust and cooperation in relation to performance measurement is important;
- focus: focus on those metrics that have the greatest impact on the achievement of objectives, instead of monitoring too many indicators,
- continuous learning and improvement: a performance evaluation system should encourage learning from data and continuous improvement of marketing activities.

In marketing practice, the combination and interaction of external (external) and internal (internal) factors determines which marketing metrics will be used. Proper selection of metrics is crucial because managing and improving something is based on measurement, and also, what is measured is managed. Thus, the way performance is measured affects the performance achieved (Gama, 2011).

METHODOLOGY

For qualitative research purposes, data were collected through in-depth semi-structured interviews with fifteen marketing managers with experience in various industries. To ensure the largest possible sample, both methods of interviewing were used: in person ("face-to-face") and online. Nine women and six men participated in the study, all with more than ten years of work experience (some over 20 years). All respondents have held the position of marketing director during their careers, and they came from various industries, including food (different categories of food and beverages), cosmetics, chemicals, pharmaceuticals, telecommunications, financial and retail.

The main purpose of this research was to analyse how marketing professionals in Croatia define performance in marketing, what metrics they use to evaluate marketing activities, which marketing capabilities and skills they consider crucial today and, in the future, and how they describe the characteristics of a strong brand. Using the prepared interview guide, the respondents were asked about the marketing capabilities that they consider essential for the implementation of marketing plans and programs. Special emphasis was placed on the new capabilities and skills that marketing managers need to develop in order to stay relevant, and on the metrics/indicators they use to set objectives and evaluate the results of marketing activities.

After the interviews were transcribed and all the data were collected into a single file, content analysis was conducted to draw conclusions about the attitudes and behaviours of respondents, i.e. marketing managers, regarding marketing capabilities, performance, and metrics. The goal of content analysis was to reduce and organise the collected data into a meaningful and manageable form, enable comparison, identify trends and assess connections and interrelationships, and confirm certain assumptions or conclusions (Greene, 2007).

The analysis of the collected qualitative data, i.e. interview transcripts, was carried out according to the methodology proposed by Green et al. (2007). This process consisted of four main phases:

- data immersion: carefully and repeatedly reading transcripts to gain in-depth insight into the content and identify initial patterns and ideas,
- coding: marking parts of text (words, phrases, sentences, paragraphs) with codes that represent key concepts, ideas, or themes.
- creating categories: grouping similar codes into broader categories that represent more abstract topics or concepts.
- identifying themes: identification of dominant themes that are present in the data and connect different categories, providing a deeper understanding of the phenomenon being studied.

A combination of deductive and inductive approaches was used in the coding process:

- deductive (top-down) approach: some codes were predefined based on existing theoretical knowledge from the marketing literature, especially classifications of marketing capabilities and metrics,
- inductive (bottom-up) approach: other codes came from the respondents' responses themselves, i.e. from repetitive phrases and key concepts in the transcripts; this made it possible to discover new, unexpected topics and patterns that were not provided for by the theoretical framework.

Thus, the analysis was carried out by combining predefined theoretical concepts with insights derived from the data, with the aim of a deeper understanding of the phenomenon through thematic analysis of latent content. This approach allowed for a comprehensive and nuanced analysis of the collected data.

RESULTS AND DISCUSSION

In this part the key results of the conducted qualitative research, i.e. findings, interpretations and conclusions derived from the analysis of data collected through semi-structured interviews are presented.

Respondent profile, importance and impact of the marketing function and activities in marketing practice

The analysis of the answers to the introductory questions, which were related to the workplace, responsibilities, professional development in marketing, the importance of the marketing function and the areas and activities that the respondents are primarily engaged in, generated several relevant insights:

- *Diverse professional profiles within the marketing profession*: The research showed significant experience of respondents in the field of marketing, with the simultaneous heterogeneity of their career paths. Some respondents have specialised knowledge within specific industries, such as consumer goods, the financial sector, and telecommunications, while others have experience working in different economic sectors during their careers.
- *Recognised importance of the marketing function in business*: The majority of respondents emphasise the key role of the marketing function within their companies. This finding points to a widespread understanding of marketing as an essential factor for achieving business performance, as well as the importance of the role of marketing managers in achieving the strategic goals of the organisation. Specifically, the respondent employed in a large company in the food industry states her "intensive involvement in all development projects of the company, development and improvement of brands, and positioning in the retail and HoReCa sector".
- *Dominant marketing activities and responsibilities*: The analysis showed that market research, strategic planning, budgeting, team management, communication, marketing campaign development and product development stand out among the most frequently mentioned marketing activities and responsibilities.
- *Pronounced dynamism of marketing work*: Respondents emphasise the pronounced dynamism and intensity of work in marketing, emphasising the need to make quick decisions and continuously adapt to

changing market conditions. One of the respondents describes this state of affairs with the following words: "Marketing is quite a dynamic discipline without fixed working hours. When you come home after work, your brain is still working frantically, you are rethinking your decisions, strategies, communication for every possible campaign, from the smallest ones for two items that are "stuck" in the warehouse to selling out the entire stock of laptops."

- *Continuous improvement and adaptation*: In the descriptions of their development paths, many respondents emphasise the imperative of continuous improvement, which points to the key importance of acquiring new knowledge, skills and technologies and adapting to recent trends in marketing.
- *Differences in marketing approaches between large and small companies*: In small companies, marketing activities are often primarily focused on sales and communication strategies that strive to achieve immediate business results and a quick return on investment. On the other hand, larger companies have greater financial resources, which allow them to implement a wider range of marketing and communication activities, including longer-term strategies.

Key Marketing capabilities

In the respondents' responses to the question about the key marketing capabilities needed to implement marketing plans and programs, a diversity of opinions is observed that reflects the heterogeneous business contexts and industries in which they operate as marketing managers. By analysing the responses, it is possible to identify several key thematic areas that managers have highlighted as essential for the successful implementation of marketing activities and present relevant insights:

- *Complementarity, balanced approach and contextual relevance of capabilities*: Most respondents prefer a holistic approach, believing that the successful implementation of marketing plans requires the synergy of all relevant marketing capabilities. Taking into account Morgan's classification of marketing capabilities (Morgan, 2012), the analysis shows that respondents primarily emphasise the importance of specialised, then dynamic, and then cross-functional and architectural capabilities. It is important to note that the answers vary depending on the industry in which the respondents operate; For example, those operating in technologically and market-dynamic industries especially emphasise the importance of dynamic capabilities.
- *Understanding the Consumer and the Market*: An in-depth understanding of consumer insights and a thorough knowledge of the market and available sales channels (*route-to-market*) are recognised as key elements for the successful design and implementation of marketing campaigns.
- *Brand management*: this is a key cross-functional marketing capability that respondents most often refer to in their answers, considering it fundamental to build and maintain a strong market position.
- *Marketing and sales integration and cross-functional collaboration*: respondents emphasise the essential role of synergy between marketing and sales teams and the need to align and implement common goals and strategies. They believe that overcoming organisational silos, i.e. strengthening cross-departmental cooperation, is key to improving marketing capabilities and achieving "commercial excellence". A respondent from the food industry vividly describes this connection, pointing out that "the beauty of marketing is manifested in the dynamism and synergy of all functions – marketing is the "brain" of strategy and operations, while sales acts as a "muscle" and strength in the field."
- *Strategic planning and execution – synergy of concept and implementation*: some respondents emphasise the importance of conceptualisation and strategic planning, with the simultaneous necessity of efficient implementation and realisation of plans. For example, a respondent with extensive experience in the fast-moving consumer goods industry (FMCG), paraphrasing the concept of Procter & Gamble, states that "the store shelf is the (first) moment of truth", thus emphasising the crucial

importance of precise execution and good visibility at the point of sale. A respondent with similar professional experience also adds the imperative of quick action (*speed-to-market*), expressing it in the words: "it is better to be the first on the market than to come up with the perfect project".

- *Adaptability and continuous learning as an imperative in a dynamic business environment*: given the pronounced dynamism of the modern business environment and the ubiquitous digital transformation, respondents emphasise the importance of digital skills and an "agile way of working", i.e. the ability to quickly adapt to market fluctuations. In the context of marketing communication, "marketing automation, personalisation, and real-time communication" are emphasised. Furthermore, the respondents emphasise the importance of "continuous learning, improving competencies and flexible adaptation of resources".

The identified topics and quotes of the respondents indicate their perception of the diversity and complexity of the marketing function and the recognition of the need to integrate different marketing capabilities in order to achieve business goals. Furthermore, the analysed responses show that marketing managers are increasingly expected to be ready for change and develop dynamic capabilities in order to adapt to the rapid evolution of the market.

New capabilities and skills

The next topic of discussion was focused on the necessary capabilities and skills that marketing managers need to develop to maintain competitiveness in a dynamic environment. The respondents' answers initially identify the key trends that will determine the context of marketing management:

- *The imperative of an individualised approach*: marketing managers will need to be primarily focused on modern consumers and adapt marketing activities to their individual needs and preferences, extracting relevant insights from big data. To illustrate, one of the respondents stated: "It all has to do with big data and CRM because things are individualised. Every consumer expects a brand to approach them as a unique person, not as part of the masses, and I think the future of marketing is in that because the era of mass marketing is over."
- *Expansion of digital technologies and online commerce*: respondents predict the continuous development of digital technologies in the marketing sector and the further growth of the share of e-commerce in total trade.
- *Channel integration*: respondents emphasise the need for an integrated and coherent use of different marketing channels, with the aim of achieving a synergy effect and consistent communication with the target audience.
- *Collaboration of marketing and sales teams*: respondents emphasise the crucial importance of synergy and close cooperation between marketing and sales teams to create superior offers and provide greater value to consumers.
- *The ubiquitous role of AI in the transformation of marketing activities*: respondents predict an exponential growth in the application of artificial intelligence (AI) in all aspects of marketing activities, especially in the context of personalisation and automation, and highlight its profound and transformative impact on the future of marketing as a whole. One of the respondents stated: "The biggest change will be brought by AI in marketing itself, but also in other activities and parts of human life. If AI will do the selection of various products for us, then marketing activities will cease to exist because artificial intelligence will make rational decisions for us. On the other hand, it is likely that tactical decisions for managing the marketing mix will also be made by AI."

After analysing the identified trends, it is possible to synthesise the most frequently mentioned capabilities and skills that will be crucial for marketing managers in the future:

- *Empathy and understanding consumers*: this is a key prerequisite for successful marketing strategies; given the central role of consumers in modern marketing strategies, respondents emphasise the utmost importance of an in-depth

understanding of consumer behaviour, as well as the ability to create personalised experiences that respond to their individual needs, desires and preferences, with the ultimate goal of building long-term and quality relationships.
- *Digital skills*: respondents highlighted the importance of continuously monitoring and understanding digital technologies and new communication formats, while emphasising specific skills related to digital marketing, such as customer journey mapping, creating buyer personas, skilful use of tools for managing online campaigns, effective management of social media profiles, search engine optimisation (SEO), search engine marketing (SEM) and the like. This category of skills also includes analytical competencies, i.e. the ability to analyse large amounts of data and extract relevant insights from them.
- *Propensity for continuous learning, openness to innovation and a holistic approach*: in the context of rapid technological progress and constant changes in the business environment, respondents emphasise the critical importance of lifelong learning and the acquisition of new skills. In addition, openness to innovative ideas and concepts and the ability to see the bigger picture, i.e. a holistic approach to business, are emphasised. One of the respondents sums it up succinctly with the words: "A broad view. I think marketing managers need to think like general managers."
- *Soft skills*: some respondents emphasised the exceptional importance of soft skills, especially leadership skills. The role of the marketing manager will increasingly transform into the role of a leader who motivates, inspires and directs his team. In addition to leadership skills, communication skills, the ability to work in a team, critical thinking and problem-solving skills are also listed as key soft skills.
- *Agility and adaptability*: respondents emphasise the importance of the qualities that are traditionally associated with an agile approach to business, such as speed of reaction, operational simplicity, cost efficiency and, above all, the ability to identify business opportunities in a timely manner and quickly adapt to new situations and market fluctuations.

The analysis suggests that in the future, marketing managers will be expected to prioritise ongoing professional development and continuously develop a wide range of capabilities and skills, with a special emphasis on digital transformation and consumer-focused strategies. Key competencies include understanding and applying digital technologies, effective management of big data, leadership and motivation skills for teams, and the ability to engage in critical thinking and solve problems effectively. Therefore, the future success of marketing managers will largely depend on their ability to quickly adapt to dynamic changes in the technological environment and consumer behaviour.

Marketing performance

Due to the extreme diversity of approaches to measuring performance in marketing, present both in the professional literature and in practice, respondents were asked to define their own understanding of marketing performance. Their answers reveal that they see performance in marketing as a complex and multidimensional concept that encompasses brand strength, consumer behaviour, and achieved market and financial results. All the marketing performance indicators they listed can be classified into two basic categories:

- *Brand-related indicators* (from a consumer's perspective): awareness, consideration, image, loyalty, propensity to buy, net promotor score, brand strength, brand equity.
- *Financial and market indicators*: sales (volume and value), revenue, profit, margin, return on investment (ROI), market share, and market penetration.

This understanding of marketing performance is most succinctly illustrated by the following statements of the respondents: "A change in brand perception that leads to an increase in sales" and "a high market share as a consequence of the appropriate level of brand parameters". From the above, it can be concluded that there is a cause-and-effect relationship in the achievement of marketing performance, similar to the one described by Katsikeas et al. (2016) in their research. According to this model, after marketing and communication activities and invested resources, there are initial changes in the brand's performance indicators, which are consequently reflected in sales growth and an increase in market share.

Some respondents define marketing performance as "achieving the set objectives", regardless of their specificity, and a favourable relationship between the invested resources and the results achieved. This, according to them, manifests itself as "a quality ratio of invested financial resources and strategic and tactical marketing efforts, and the obtained result measurable primarily through maintaining brand strength, propensity to buy and the final sales result." On the other hand, for some respondents, being successful in marketing means "being recognised in the market", "being synonymous with the category", "having numbers behind you" and "having a stable income".

Respondents emphasise the importance of defining realistic short-term and long-term goals tailored to industry and market specificities and selecting relevant key performance indicators (KPIs) to evaluate the results after marketing activities are implemented. Monitoring these indicators is crucial for assessing progress, adjusting marketing strategies, and optimising tactical activities.

There is a high degree of agreement that building a strong and recognisable brand is key to achieving long-term performance in marketing, with "long-term growth in brand value" often cited as one of the key success criteria. The importance *of storytelling* in brand communication is also emphasised, and this is reflected in the ability to create engaging marketing messages and establish an emotional connection with consumers, which is summarised in the statement about the "success of telling the stories that sell".

Characteristics of a strong brand

Respondents were asked to describe the characteristics of a strong brand and highlight the factors that distinguish it from competing brands on the market. An analysis of their responses identifies several key elements that define a strong brand:

- *Originality and differentiation*: a strong brand stands out with unique values, attributes and positioning that clearly differentiate it from the competition. Respondents emphasised that the key to success is a brand's ability to find a unique position in the minds and hearts of consumers: "When a brand finds a unique position in the minds and hearts of consumers that distinguishes it from the competition, then that brand can say for itself that it is a strong brand."
- *Clear positioning and consistent communication*: according to respondents' responses, a strong brand occupies a clearly defined position in the minds of consumers, with recognisable and consistent communication. One of the respondents summed it up by saying: "A strong brand has a long-term strategy based on clear values and positioning. It always sends consumers a clear picture of itself: what it looks like, what it represents, and what and how it communicates."
- *Strong connection with consumers*: A strong brand is characterised by a strong connection with consumers, which results from positive perceptions, consistent fulfilment of promises and a high degree of trust. One of the respondents described this relationship with the following words: "Consumers with such a brand feel an emotional connection, and often a real attachment, almost love." Such a brand successfully adapts to the needs and preferences of its target group, whereby it "has a high level of integration into the consumer's lifestyle" and allows consumers to identify with it.
- *Trust and Delivering on Promises*: Survey participants highlight the crucial role of trust and delivering on promises in building a strong brand. In their opinion, trust implies reliability and consistent fulfilment of the promise that a brand makes to its consumers. To illustrate this claim, one of the respondents quotes the words of Muhtar Kent, former CEO of the Coca-Cola Company, who stated: "A brand is a promise. A good brand is a promise kept."

- *Financial success and growth*: according to the respondents, a strong brand is characterised by high market penetration and usage level, presence in different markets, innovation, a clearly defined vision of development and ensuring stable revenues and profitable business for the company.
- *Impact on consumers and society*: participants in the research emphasise that a strong brand not only ensures the survival of a company, but also has a significant impact on consumers and society as a whole. In line with Simon Sinek's "Start with Why" concept, one of the respondents points out that an authentic and strong brand clearly communicates its mission that goes beyond the product or service it offers. Such a brand is driven by inspiration and motivation to make a positive difference in the world and in the lives of its consumers.

The responses from the research participants indicate that strong brands are distinguished by originality and differentiation from the competition. Thanks to recognisable and consistent communication, these brands occupy a clearly defined place in the minds of consumers and fulfil the promises made. In addition to the aforementioned connection with consumers, some of the participants also highlight financial performance indicators and the wider social impact that brands achieve in the community in which they operate.

Marketing metrics

After describing the key characteristics of a strong brand, the respondents shared their views on the measures and indicators they most often use to define objectives and evaluate the results of marketing activities. Their answers vary depending on the specifics of the industry, the type of activities carried out, the communication channels used and the objectives set. Nevertheless, it is possible to identify several main categories of indicators:

- *financial indicators*: revenue, gross margin, profit, return on marketing investment (ROMI)
- *sales and market indicators*: sales volume and value, volume and value market share, penetration, distribution index, repeat purchases, *sell in* and *sell out*
- *brand-related indicators*: brand awareness, consideration, usage, propensity to buy, purchase intent, brand loyalty, user satisfaction, brand trust, brand net promoter score, brand image, brand strength, brand equity, brand value creator
- *ad/campaign effectiveness indicators*: awareness, liking and purchase intent
- *online communication metrics*: impressions, reach, ad clicks, Click-Through Rate (CTR), Cost-Per-Click (CPC), conversions, engagement, website visits, interaction on social networks (likes, comments, shares, tags, mentions, downloads, reviews...*),* email open rate
- *database indicators*: number of new customers, number of repeat customers, reactivations, acquisitions, customer engagement, net promoter score (NPS), customer retention rate, customer churn rate
- *other metrics*: number of calls, number of closed calls, *retail footfall* (number of people who entered the store), *real internal growth*.

A comprehensive analysis of respondents' responses points to the crucial importance of monitoring various metrics in order to obtain a complete and precise picture of the efficiency and effectiveness of marketing activities. These indicators encompass a wide range, including sales, market, and financial indicators, as well as communication metrics and individual or aggregated indicators of brand strength and value.

Different industries attach special importance to certain metrics that are specific to their field of business. For example, in the banking industry, customer satisfaction is often measured, both in the overall sense and by different touchpoints, compared to the competition. On the other hand, a respondent from the e-commerce sector emphasises the crucial importance of metrics such as the number of clicks: "Click is the mother of everything".

The choice of metrics should also be aligned with the specific goals of each marketing activity. For example, the success of a campaign to launch a new product in the food industry will be mainly measured by the sales volume and value, as well as the percentage of market share won. On the other hand, in a campaign aimed at improving the brand image, the key metrics include the level of brand recognition and change in the perception of its main attributes.

Brand strength indicators

The last question in the interviews was about indicators that reflect the perception of a brand in the minds of consumers, and all respondents recognised them as a key group of marketing performance indicators. Respondents were asked whether they use aggregated indicators of brand strength in their marketing practice, such as the BRANDscore of the research company Ipsos.

All respondents recognise the importance of monitoring indicators that reflect the perception of a brand in the minds of consumers. For example, one respondent points out that these indicators are "extremely important because they indicate the long-term health of the brand and provide a signal to key indicators of its use." Using these metrics is the foundation for effective brand management and making informed marketing decisions.

Respondents who operate or have operated in the consumer goods industry confirmed that they use indicators of brand strength, with the majority of them using Ipsos' BRANDscore. One respondent pointed out: "When we set objectives, there is, of course, the BRANDscore, as well as some of the indicators from the BRANDpulse that are important for the observed category. This is absolutely part of the key performance indicators, and in the same table, which includes the development of sales, net sales, gross margin, market share, etc., we also have BRANDscore over the period as an equivalent criterion for measuring business performance." A smaller number of respondents stated that they use other aggregated indicators from Ipsos or other research agencies (*Brand Value Creator*, *Brand Strength Index* and *Brand Health Check*), while only one respondent noted that in her company "they use a number of separate brand KPIs, which are not consolidated into a single metric".

CONCLUSION

The aim of this research was to analyse the key factors that shape marketing performance, with special emphasis on marketing capabilities and skills and the use of various metrics in the modern marketing environment. Through the analysis of the responses of marketing experts from various industries, the research pointed to the key role of marketing capabilities in shaping the long-term performance of a brand.

The main findings of this research confirm that marketing performance is not only the result of financial and sales indicators, but also the ability of marketers to correctly interpret market conditions, understand consumer behaviour and make strategic decisions that shape brand perception. Marketing capabilities, such as the ability to create consistent communications, build trust, and connect emotionally with consumers, are essential for achieving long-term brand strength. Respondents pointed out that marketing performance largely depends on the team's ability to develop and implement strategies based on a clear brand position and its values. These strategies are continuously adjusted in accordance with changes in market conditions and consumer needs.

The use of aggregated brand strength indicators, such as Ipsos' BRANDscore, has also become crucial for brand management and informed decision-making. These metrics allow marketers to better understand long-term changes in brand perception and identify potential threats and opportunities in the market. Marketing capabilities in the analysis and use of these metrics, therefore, become the basis for making timely and precise decisions that affect the brand's competitive position.

While the research results have provided valuable insights into marketers' approaches and metrics, there are some limitations. The research was conducted on a relatively small sample of respondents, and future research should encompass a wider sample to gain additional insights into the specific marketing capabilities that are most important in different industries. Also, the research primarily relied on qualitative data, while quantitative research could provide additional insights into the connection between specific marketing capabilities and market performance.

For future research, it is recommended to further explore the role of marketing capabilities in the context of digital transformation and the use of new technologies, such as artificial intelligence and data analytics, in optimising marketing strategies. Exploring how marketing capabilities can improve real-time decision-making processes and enable faster adaptation to changing market conditions is also important.

Ultimately, the results of this research confirm that marketing performance depends not only on technical or operational aspects, but also on the ability of marketers to correctly interpret market changes, create relevant marketing strategies and successfully manage brands. In the context of accelerated changes in the market, marketing capabilities become essential for building long-term market strength, maintaining a competitive advantage, and ensuring stable brand growth.

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MARKETINŠKE SPOSOBNOSTI, USPJEŠNOST I METRIKE IZ PERSPEKTIVE HRVATSKIH MARKETINŠKIH MENADŽERA[i]

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SAŽETAK

U ovom radu istražuju se ključni čimbenici koji utječu na marketinšku uspješnost, s posebnim naglaskom na ulogu marketinških sposobnosti i primjenu marketinških metrika poput tržišne snage marke. U današnjem dinamičnom poslovnom okruženju, marketinška uspješnost nije samo pitanje postizanja financijskih ciljeva, već podrazumijeva i sposobnost upravljanja markom, i emocionalnog povezivanja s potrošačima. Cilj ovog istraživanja bio je analizirati kako hrvatski marketinški stručnjaci definiraju uspješnost, koje metrike koriste za evaluaciju marketinških aktivnosti, koje marketinške sposobnosti i vještine smatraju ključnima sada i u budućnosti te što smatraju karakteristikama snažne marke. Istraživanje je provedeno putem polustrukturiranih dubinskih intervjua s 15 marketinških stručnjaka iz različitih industrija, pri čemu su analizirani koncepti kao što su marketinške sposobnosti, upravljanje markom i ključni pokazatelji uspjeha. Prikupljeni podaci obuhvaćaju odgovore stručnjaka koji detaljno opisuju ulogu marketinških sposobnosti u postizanju uspjeha, uključujući važnost dosljedne komunikacije, izgradnje povjerenja i emocionalne povezanosti s potrošačima. Rezultati i uvidi proizašli iz analize provedenih intervjua osvijetlili su ulogu marketinških sposobnosti i donijeli pregled najčešće korištenih metrika u marketinškoj praksi hrvatskih menadžera. Ključni nalazi istraživanja ukazuju na to da uspjeh marke nije samo rezultat marketinških aktivnosti, već i sposobnosti marketinških stručnjaka da prepoznaju i koriste relevantne metrike za praćenje tržišne dinamike i snage marki kojima upravljaju. Pritom korištenje pokazatelja poput Ipsosovog BRANDscorea omogućava bolje razumijevanje tržišne pozicije i dugoročnog uspjeha marke. Ovaj rad doprinosi teoriji marketinga proširujući razumijevanje uloge marketinških sposobnosti u postizanju marketinškog uspjeha te pruža marketinškim stručnjacima praktične smjernice za izgradnju snažnih marki. Ograničenja istraživanja uključuju njegovu kvalitativnu prirodu, ograničen broj ispitanika i fokus na određene industrije, što može ograničiti generalizaciju nalaza na druge industrije. Buduća istraživanja mogla bi proširiti uzorak ispitanika i industrija te primijeniti kvantitativne pristupe za daljnje potvrđivanje nalaza.

Ključne riječi: marketing capabilities, marketing performance, marketing metrics, brand strength
JEL klasifikacija: M31, M37, M39

UVOD

U današnjem poslovnom okruženju, koje je obilježeno globalizacijom, digitalizacijom i brzim tehnološkim promjenama, marketing je postao ključnim faktorom uspjeha mnogih organizacija. Poslovni subjekti suočavaju se s izazovima koji proizlaze iz sve konkurentnijeg tržišta, zahtjeva za većom personalizacijom proizvoda i usluga i njihove komunikacije, te potreba za preciznim mjerenjem uspjeha marketinških aktivnosti. Tradicionalni pristupi marketingu, koji su se oslanjali na univerzalne marketinške strategije i masovne medije, sve više ustupaju mjesto sofisticiranijim metodama na temelju podataka koje omogućuju bolje razumijevanje ponašanja potrošača i učinkovitije ciljanje specifičnih tržišnih segmenata.

U kontekstu ovih promjena, ključna kompetencija marketinških menadžera postaje sposobnost razvoja i implementacije strategija koje ne samo da privlače nove kupce, već i grade dugoročne, emocionalne veze s postojećim potrošačima. Snažna marka više nije samo simbol kvalitete ili prepoznatljivosti na tržištu, već predstavlja temelj za izgradnju povjerenja i lojalnosti među korisnicima. U tom smislu, marketinške strategije danas moraju biti fleksibilne, dinamične i temeljenje na dubokom razumijevanju tržišnih trendova, konkurencije i potreba potrošača.

Jedan od ključnih izazova s kojima se suočavaju marketinški stručnjaci jest precizno mjerenje uspjeha marketinških aktivnosti. S obzirom na veliki broj dostupnih metrika i pokazatelja, od kojih svaki može pružiti različite uvide u efektivnost i učinkovitost marketinških napora, odabir pravih pokazatelja postaje presudan za donošenje informiranih odluka. Osim toga, u eri digitalizacije mjerenje uspjeha postalo je još složenije jer se marketinške aktivnosti često provode u više komunikacijskih kanala i u različitim formatima, od tradicionalnih medija do digitalnih platformi i društvenih mreža.

U ovom radu istražuju se ključne vještine i sposobnosti koje su nužne za uspješno upravljanje marketinškim aktivnostima u suvremenom poslovnom okruženju, s posebnim naglaskom na značaj digitalne transformacije i primjene novih tehnologija u marketingu. Analizirat će se kako se marketinški menadžeri prilagođavaju novim izazovima i kako koriste napredne analitičke alate i strategije za optimizaciju marketinških kampanja. Poseban fokus bit će na pokazateljima snage marke, koji omogućuju precizno praćenje tržišne percepcije i dugoročnog uspjeha marke. Pomoću analize teorijskih pristupa i praktičnih primjera rad će pružiti uvid u to kako naglasak na određenim marketinškim sposobnostima i vještinama može pridonijeti marketinškom i poslovnom uspjehu.

PREGLED LITERATURE

U ovom dijelu pojašnjen je pojam marketinških sposobnosti, opisana su njihova ključna obilježja i uloga u kreiranju održive konkurentske prednosti. Prikazane su i različite klasifikacije marketinških sposobnosti. Također je objašnjena marketinška uspješnost i predstavljen je teorijski okvir za evaluaciju uspješnosti s različitim mjerama uspjeha i posebnim fokusom na tržišnoj snazi marke.

Marketinške sposobnosti

Pojam sposobnosti u znanstvenoj literaturi odnosi se na vještinu poslovnog subjekta da provede koordinirani niz zadataka koristeći organizacijske resurse kako bi postigao određeni cilj (Helfat et al., 2003), odnosno to je znanje akumulirano tijekom vremena pomoću ponavljajućeg procesa organizacijskog učenja (Tollin i Jones, 2009). U nastavku se ovaj pojam definira u kontekstu funkcionalnog područja marketinga.

Definicija marketinških sposobnosti

Kad su u pitanju marketinške sposobnosti, postoji mnoštvo različitih definicija. Day (1994, p. 38) pod ovim pojmom, u kontekstu tržišno vođenih organizacija, smatra „složene skupove vještina i akumuliranog znanja koji se implementiraju pomoću organizacijskih procesa i koji poslovnim subjektima omogućuju koordinaciju aktivnosti i iskorištavanje njihove imovine“. Vorhies i Morgan (2003, p. 103) ističu da je to „sposobnost poslovnog subjekta da provodi uobičajene marketinške radne rutine pomoću kojih se dostupni resursi pretvaraju u vrijedne outpute“. Morgan i suradnici (2018, p. 63) navode da su to „procesi koje poslovni subjekt koristi za definiranje, razvoj, komunikaciju i isporuku vrijednosti svojim ciljanim kupcima kombiniranjem, transformacijom i stavljanjem u uporabu svojih dostupnih resursa“. Zajedničko ovim definicijama jest promatranje marketinških sposobnosti kao procesa pomoću kojih poslovni subjekti kombiniraju i koriste raspoložive resurse kako bi oblikovali tržišne ponude koje kupci percipiraju kao vrijedne (Morgan i Feng, 2024).

Vrijednost marketinških sposobnosti leži u njihovoj ulozi u kombiniranju dostupnih resursa kako bi se kupcima isporučila superiorna vrijednost, čime se omogućuje poslovni uspjeh te stjecanje i održavanje konkurentske prednosti (Day, 2011; Martin et al., 2020; Morgan i Feng, 2024). Mehanizmi ostvarivanja ovog cilja razlikuju se ovisno o teorijskim pristupima autora. Primjerice, Day (1994) ističe da specifične marketinške sposobnosti omogućuju poslovnim subjektima da postanu i ostanu tržišno usmjereni (engl. *market-driven*) i tako kreiraju vrijednost i ostvaruju superiorne rezultate, dok Morgan i suradnici (2009) promatraju marketinške sposobnosti kao alate koji omogućuju učinkovitije korištenje imovine poslovnog subjekta i isporuku vrijednosti kupcima na način koji je konkurentima teško oponašati.

Sposobnosti implementacije elemenata marketinškog miksa ograničene su svojom funkcionalnom i taktičkom prirodom. Stoga je moguće zauzeti širu, stratešku perspektivu marketinga kao odgovornosti top menadžmenata i uključiti dodatne sposobnosti usmjerene na stvaranje vrijednosti za kupce (Day i Moorman, 2010). U okviru ove perspektive četiri elementa identificirana su kao strateški imperativi za poslovne subjekte (Day, 2011):

- predvodništvo u isporuci vrijednosti kroz jasnu i uvjerljivu ponudu za ciljane kupce – ovo uključuje pažljiv odabir vrijednosti koja se nudi, određivanje optimalnih načina njene isporuke i usklađivanje kratkoročnih i dugoročnih aktivnosti,
- inovativnost i stvaranje nove vrijednosti – ovo podrazumijeva pretvaranje inovacija u vrijednu organizacijsku imovinu,
- kapitalizacija kupaca kao imovine – ovo obuhvaća strategije odabira, privlačenja, razvoja i zadržavanja lojalnih kupaca, uz istovremeno osiguranje zaštite od konkurentskih prijetnji,
- kapitalizacija marke kao imovine – ovo podrazumijeva kontinuirano jačanje marke pomoću dosljednih ulaganja, zaštite od razvodnjavanja i erozije te maksimalnog iskorištavanja njenog potencijala za stvaranje novih poslovnih prilika.

Provedba ovih strateških imperativa zahtijeva pravovremeno otkrivanje tržišnih trendova i oslanja se na uspostavljanje i održavanje ključnih veza s kupcima i marketinškim kanalima. Također, uključuje razvoj i integraciju sposobnosti koje nadilaze isključivo marketinšku funkciju te obuhvaćaju širi spektar organizacijskih aktivnosti i resursa unutar poslovnog subjekta (Day, 2011).

Priroda marketinških sposobnosti

Analiza marketinške literature otkriva dvije ključne karakteristike marketinških sposobnosti: njihovu dinamičnost i hijerarhijsku prirodu. Iako Day (1994) u svojoj inicijalnoj konceptualizaciji marketinških sposobnosti nije eksplicitno istaknuo njihov dinamični karakter, logično je zaključiti da u promjenjivom tržišnom okruženju, u kojem poslovni subjekt nastoji održati tržišnu orijentaciju, i marketinške sposobnosti moraju evoluirati u skladu s novim zahtjevima tržišta (Morgan i Feng, 2024).

Resursna teorija konkurentske prednosti (engl. *resource-advantage theory*) također implicitno podrazumijeva dinamičku prirodu sposobnosti. Prema ovoj teoriji, postizanje superiornih financijskih rezultata od strane poslovnog subjekta uvjetovano je razvojem komparativne prednosti u resursima, koja omogućuje poboljšanje efektivnosti i efikasnosti u kreiranju vrijednosti za potrošače (Hunt i Morgan, 1995; 1996). S obzirom na dinamičnost tržišta i konkurentskog nadmetanja, logičan je zaključak da i sposobnosti, koje trebaju osigurati zadovoljenje promjenjivih potreba potrošača, moraju posjedovati dinamička svojstva (Morgan i Feng, 2024).

Dinamička priroda marketinških sposobnosti eksplicitno je adresirana u okviru koncepta dinamičkih sposobnosti, koji je nastao kao odgovor na kritike o statičnosti resursne teorije strategije te poteškoće u objašnjavanju održivosti poslovne uspješnosti kroz vrijeme (Teece et al., 1997; Teece, 2009; Leemann i Kanbach, 2022; Morgan i Feng, 2024). Prema Teeceovom konceptu (Teece, 2009), za postizanje održive konkurentske prednosti nije dovoljno isključivo posjedovanje značajne količine jedinstvenih i rijetkih resursa koje je teško imitirati ili supstituirati. Ključnu ulogu imaju upravo sposobnosti koje omogućuju učinkovit razvoj i primjenu tih resursa u skladu s promjenjivim tržišnim uvjetima.

Druga značajna karakteristika marketinških sposobnosti odnosi se na njihovu hijerarhijsku strukturu. Collis (1994) je već istaknuo distinkciju između temeljnih sposobnosti, koje omogućuju obavljanje funkcionalnih aktivnosti, i dinamičkih sposobnosti, čija je svrha unaprjeđenje tih aktivnosti. U konceptu dinamičkih sposobnosti, potonje su izričito okarakterizirane kao sposobnosti višeg reda (Teece et al., 1997).

I drugi su istraživači prihvatili i integrirali ovu hijerarhijsku logiku u svoje konceptualizacije. Vorhies i suradnici (2011) stoga razlikuju specijalizirane marketinške sposobnosti „nižeg reda“, poput upravljanja markom i upravljanja odnosima s klijentima, te marketinške sposobnosti „višeg reda“, kao što su marketinška eksploracija i marketinška eksploatacija, čija je svrha razvoj i unaprjeđenje prethodno navedenih sposobnosti. U svom revidiranom konceptu sposobnosti tržišno orijentiranih organizacija, Day (2011) identificira tri kategorije sposobnosti:

- *statičke marketinške sposobnosti*: obuhvaćaju specijalizirane (funkcionalne) i kros-funkcionalne sposobnosti, odlikuju se stabilnošću i fokusom na rutiniziranim procesima i internoj efikasnosti,
- *dinamične marketinške sposobnosti*: odnose se, primjerice, na sposobnost rekonfiguracije i unaprjeđenja postojećih marketinških sposobnosti, s naglaskom na efektivnost,
- *adaptivne marketinške sposobnosti*: povezane su s marketinškim učenjem putem eksperimentiranja i aktivne interakcije s mrežnim partnerima, omogućujući anticipaciju budućih tržišnih uvjeta.

Morgan (2012) smatra upravljanje markom kros-funkcionalnom sposobnošću „višeg reda“ s obzirom na to da obuhvaća i integrira resurse iz različitih funkcionalnih područja. U kasnijem radu (Morgan et al., 2022) dodatno su elaborirane različite razine na kojima sposobnosti egzistiraju: individualna, grupna, organizacijska i interorganizacijska.

Prema tome, dinamičnost i hijerarhijska struktura mogu identificirati kao dvije ključne karakteristike marketinških sposobnosti. U ranijim teorijskim promišljanjima o marketinškim sposobnostima, dinamičnost se implicitno pretpostavljala, dok je u okviru koncepta dinamičkih sposobnosti ona eksplicitno artikulirana. Nadalje, određene marketinške sposobnosti, poput marketinške eksploracije i marketinške eksploatacije, mogu se klasificirati kao sposobnosti „višeg reda“ budući da omogućuju razvoj specijaliziranih marketinških sposobnosti „nižeg reda“.

Klasifikacija marketinških sposobnosti

U marketinškoj literaturi postoji nekoliko pristupa klasifikaciji marketinških sposobnosti (Morgan i Feng, 2024). Polazeći od koncepta tržišne orijentacije (Kohli i Jaworski, 1990; Narver i Slater, 1990), Day je među prvima ponudio okvir za klasifikaciju marketinških sposobnosti prema njihovu fokusu unutar ili izvan poslovnog subjekta, neovisno o funkcionalnom području ili organizacijskoj jedinici u kojoj se nalaze. Analizirajući na taktičkoj i operativnoj razini specifične procese potrebne za izgradnju odnosa s klijentima, razvoj novih proizvoda, određivanje cijena itd., on marketinške sposobnosti razvrstava u tri kategorije (Day, 1994):

- sposobnosti *„iznutra prema van“* (engl. *inside-out capabilities*) – ove sposobnosti pokreću se na temelju tržišnih zahtjeva, konkurentskih izazova i vanjskih prilika, a primjeri uključuju proizvodnju, logistiku i upravljanje ljudskim potencijalima,
- sposobnosti *„izvana prema unutra“* (engl. *outside-in capabilities*) – ove su sposobnosti usmjerene gotovo isključivo na vanjsko okruženje poslovnog subjekta, njihova je svrha povezivanje procesa koji definiraju ostale organizacijske sposobnosti s vanjskom okolinom te omogućavanje poslovnom subjektu da se natječe anticipirajući tržišne zahtjeve brže od konkurenata i gradeći dugoročne odnose s klijentima, dobavljačima i ostalim sudionicima u marketinškim kanalima,
- *„povezujuće“* sposobnosti (engl. *spanning capabilities*) – ove su sposobnosti nužne za integraciju sposobnosti iz prve dvije kategorije, a primjeri uključuju razvoj strategije, razvoj novih proizvoda i usluga te ispunjavanje narudžbi kupaca itd.

Kao ključne sposobnosti „izvana prema unutra“ za tržišno orijentirane poslovne subjekte, Day ističe sposobnost tržišnog opažanja (engl. market sensing capability) i sposobnost povezivanja s klijentima (engl. customer linking capability). U revidiranoj konceptualizaciji, Day uvodi i prethodno spomenute adaptivne marketinške sposobnosti kao dodatnu kategoriju (Day, 2011).

Koristeći drugačiji pristup, Vorhies i Morgan (2003; 2005) te Vorhies i suradnici (2009) dali su daljnji doprinos klasifikaciji marketinških sposobnosti razlikujući dvije kategorije:

- *specijalizirane sposobnosti*: odnose se na funkcionalno usmjerene procese i rutine povezane s marketinškim miksom (npr. oglašavanje, upravljanje distribucijskim kanalima, određivanje cijena)
- *arhitekturalne sposobnosti*: obuhvaćaju procese i rutine koje orkestriraju i koordiniraju specijalizirane marketinške sposobnosti i povezane resurse, primjerice, sposobnost planiranja i implementacije marketinške strategije.

Morgan (2012) je proširio ovu klasifikaciju dodajući kros-funkcionalne i dinamičke marketinške sposobnosti (Slika 1).

Slika 1 | Klasifikacija marketinških sposobnosti

MARKETINŠKE SPOSOBNOSTI

SPECIJALIZIRANE
- Istraživanje tržišta
- Upravljanje proizvodima
- Upravljanje cijenama
- Upravljanje marketinškim kanalima
- Marketinške komunikacije
- Prodavanje

ARHITEKTURALNE
- Strateško tržišno planiranje
- Implementacija marketinške strategije

KROSFUNKCIONALNE
- Razvoj novih proizvoda
- Upravljanje odnosom s kupcima
- Upravljanje markom

DINAMIČKE
- Tržišno učenje
- Preoblikovanje resursne baze
- Poboljšanje sposobnosti

Izvor: prilagođeno prema Morgan (2012), p. 104.

Sukladno ovoj podjeli, uz specijalizirane (upravljanje elementima marketinškog miksa) i arhitekturalne (strateško tržišno planiranje i implementacija marketinške strategije), postoje i kros-funkcionalne marketinške sposobnosti (razvoj novih proizvoda, upravljanje odnosom s klijentima i upravljanje markom) i dinamičke marketinške sposobnosti (tržišno učenje, preoblikovanje resursne baze i poboljšanje sposobnosti). Kad se još uključe različite hijerarhijske razine na kojima se razvijaju sposobnosti (pojedinac, grupa, poslovni subjekt), dobiva se još opsežniji okvir za razumijevanje marketinških sposobnosti (Morgan et al., 2022; Morgan i Feng, 2024). Razmatranje hijerarhijskih razina naglašava važnost usklađivanja individualnih sposobnosti i vještina marketinških stručnjaka s timskim i organizacijskim procesima kako bi se maksimizirao učinak marketinških aktivnosti i ostvarila konkurentska prednost.

Dakle, postoji nekoliko različitih klasifikacija marketinških sposobnosti, a najopsežnija je ova Morganova koja ih dijeli u četiri glavne skupine: specijalizirane, arhitekturalne, kros-funkcionalne i dinamičke sposobnosti (Morgan, 2012). U nastavku će se pojasniti pojam marketinške uspješnosti uz navođenje različitih metrika koje se koriste u marketinškoj praksi.

Marketinška uspješnost

Marketinška uspješnost višeznačan je i kompleksan pojam te predstavlja značajan izazov za marketinške menadžere (Rust et al., 2004; Liang i Gao, 2020). Prema Gami (2011), iz organizacijske perspektive, marketinška uspješnost je mjerljiva, dinamična (izbor pokazatelja nije statičan, već se razvija), relativna (ovisi o vremenskom i prostornom kontekstu te usporedbi planiranog i ostvarenog) i multidimenzionalna (obuhvaća niz pokazatelja koji se koriste u marketinškoj praksi). Uslijed sve izraženijih zahtjeva za dokazivanjem doprinosa marketinga poslovnim rezultatima i jačanjem njegove uloge u definiranju poslovne strategije, marketinški menadžeri usmjerili su se na identifikaciju i odabir marketinških metrika (Ambler et al., 2004).

Morgan i suradnici (2002) definiraju marketinšku uspješnost kao konstrukt koji se sastoji od sljedeće tri dimenzije:

- *efektivnost*: ova dimenzija odnosi se na stupanj u kojem su ostvareni organizacijski ciljevi; prema Druckerovoj definiciji (2007), biti efektivan znači "činiti prave stvari". U kontekstu marketinga, to znači usmjeriti napore i resurse na aktivnosti koje će dovesti do ostvarenja marketinških ciljeva, kao što su povećanje prodaje, tržišnog udjela, svijesti o marki ili zadovoljstva kupaca,

- *efikasnost*: ova dimenzija usmjerena je na odnos između ishoda (outputa) i inputa (ulaganja) potrebnih za njihovo ostvarivanje; prema Druckerovoj definiciji (2007), biti efikasan znači "činiti stvari na pravi način". U marketinškom kontekstu, to znači optimizirati korištenje resursa (vrijeme, novac, ljudski resursi) kako bi se postigli željeni rezultati uz minimalne troškove,
- *prilagodljivost*: ova dimenzija odnosi se na sposobnost poslovnog subjekta da se prilagodi promjenama u okolini i da inovira (Walker i Ruekert, 1987). U dinamičnom tržišnom okruženju, važno je da marketinške strategije i taktike budu fleksibilne i da se mogu brzo prilagoditi novim trendovima, tehnologijama, preferencijama kupaca i aktivnostima konkurencije.

Iako Frösén i suradnici (2013) sugeriraju univerzalnu primjenjivost ovih dimenzija, važno je uzeti u obzir da njihov relativni značaj i način mjerenja mogu varirati ovisno o specifičnom kontekstu poslovanja, uključujući vrstu industrije, veličinu poslovnog subjekta, fazu životnog ciklusa i postavljene marketinške ciljeve.

Složenost i multidimenzionalnost ovog pojma najbolje ilustrira teorijski utemeljen okvir za evaluaciju uspješnosti koji je razvila skupina autora analiziravši prethodno 998 empirijskih studija objavljenih u 15 najrelevantnijih znanstvenih časopisa u razdoblju od 1981. do 2014. godine (Katsikeas et al., 2016). Prikazujući "lanac marketinške uspješnosti", ovaj okvir omogućuje razumijevanje kako različiti aspekti marketinških aktivnosti doprinose ukupnim poslovnim rezultatima. Ovo je ključno za donošenje informiranih marketinških odluka i optimizaciju marketinških strategija. Primjeri različitih mjera koje se koriste u pojedinim dijelovima „lanca marketinške uspješnosti“ prikazani su na Slici 2.

Sukladno ovoj podjeli, uz specijalizirane (upravljanje elementima marketinškog miksa) i arhitekturalne (strateško tržišno planiranje i implementacija marketinške strategije), postoje i kros-funkcionalne marketinške sposobnosti (razvoj novih proizvoda, upravljanje odnosom s klijentima i upravljanje markom) i dinamičke marketinške sposobnosti (tržišno učenje, preoblikovanje resursne baze i poboljšanje sposobnosti). Kad se još uključe različite hijerarhijske razine na kojima se razvijaju sposobnosti (pojedinac, grupa, poslovni subjekt), dobiva se još opsežniji okvir za razumijevanje marketinških sposobnosti (Morgan et al., 2022; Morgan i Feng, 2024). Razmatranje hijerarhijskih razina naglašava važnost usklađivanja individualnih sposobnosti i vještina marketinških stručnjaka s timskim i organizacijskim procesima kako bi se maksimizirao učinak marketinških aktivnosti i ostvarila konkurentska prednost.

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Iako Frösén i suradnici (2013) sugeriraju univerzalnu primjenjivost ovih dimenzija, važno je uzeti u obzir da njihov relativni značaj i način mjerenja mogu varirati ovisno o specifičnom kontekstu poslovanja, uključujući vrstu industrije, veličinu poslovnog subjekta, fazu životnog ciklusa i postavljene marketinške ciljeve.

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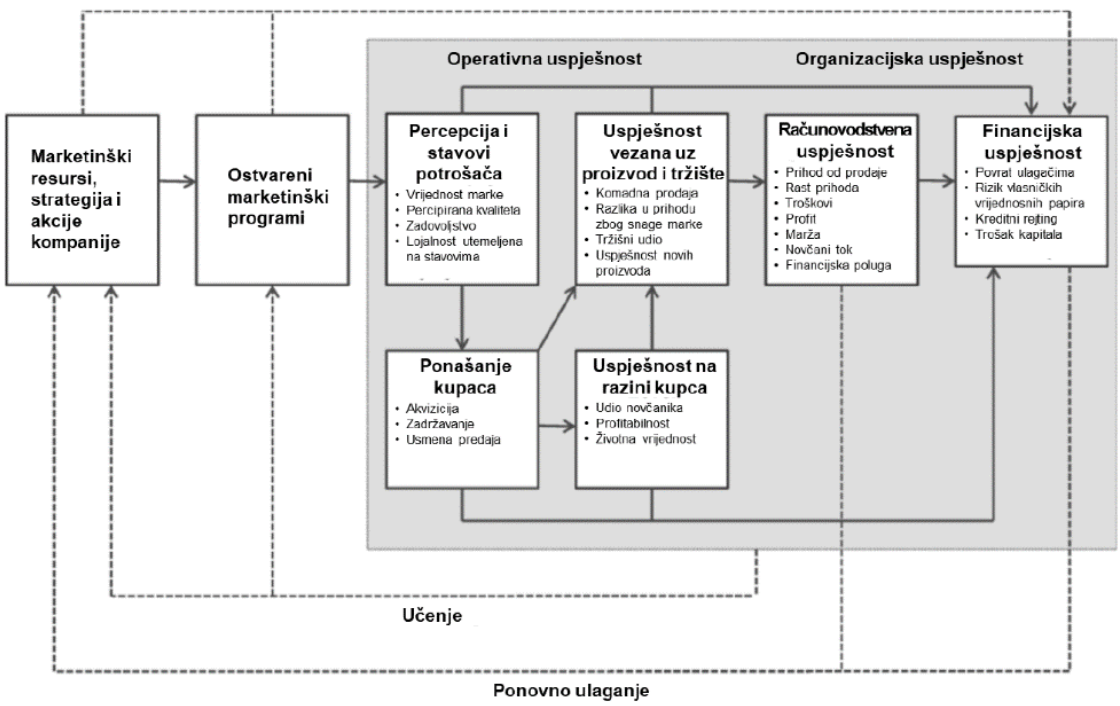
Slika 2 | Lanac „Marketing – rezultati uspješnosti" i primjeri mjera



Izvor: prilagođeno prema Katsikeas et al. (2016), pp. 3.

Autori dijele marketinšku uspješnost na organizacijsku, koja obuhvaća računovodstvene i financijske kategorije kao što su prihod, profit, marža, kreditni rejting, trošak kapitala i drugo, te operativnu, kod koje navode skupine pokazatelja vezane uz stavove i ponašanja potrošača (vrijednost marke, percipirana kvaliteta, zadovoljstvo, retencija...) te uspjeh proizvoda na tržištu (prodaja, tržišni udjel, uspjeh novih proizvoda...).

U marketinškoj praksi koriste se različiti pristupi mjerenju uspješnosti. Ne postoji univerzalno primjenjiv skup pokazatelja za sve poslovne subjekte i situacije, već odabir marketinških metrika ovisi o nizu eksternih i internih čimbenika (Gama, 2011).

Eksterne čimbenike čini kombinirani utjecaj sljedećih sila (Morgan et al., 2002; Rust et al., 2004):

- konkurentski intenzitet: ovo se odnosi na razinu suparništva među konkurentima u industriji; visok konkurentski intenzitet karakterizira velik broj konkurenata, agresivne marketinške strategije i česte promjene u tržišnim udjelima,
- industrijska dinamika: ovo se odnosi na brzinu i opseg promjena unutar određene industrije, posebice u pogledu preferencija kupaca; visoka industrijska dinamika karakterizirana je brzim promjenama u potražnji, pojavom novih proizvoda i tehnologija te promjenama u ponašanju potrošača,
- neizvjesnost okoline: ovo se odnosi na stupanj predvidljivosti budućih uvjeta poslovanja; visoka neizvjesnost okoline karakterizirana je brzim i nepredvidivim promjenama u tržišnim uvjetima, tehnologijama i preferencijama potrošača.

Odabir i uspješna primjena marketinških metrika unutar organizacije ovisi i o nekoliko ključnih internih faktora (Spitzer, 2007; Gama, 2011):

- integrirani sustav mjerenja: pojedinačne metrike su učinkovitije kada se koriste u sklopu cjelovitog sustava koji povezuje različite aspekte uspješnosti,
- organizacijski kontekst: važna je atmosfera otvorenosti, povjerenja i suradnje u vezi s mjerenjem uspješnosti,
- fokus: potrebno je usmjeriti se na one metrike koje najviše utječu na ostvarenje ciljeva, umjesto praćenja prevelikog broja pokazatelja,
- kontinuirano učenje i poboljšavanje: sustav evaluacije uspješnosti treba poticati učenje iz podataka i stalno unaprjeđivanje marketinških aktivnosti.

U marketinškoj praksi, kombinacija i interakcija vanjskih (eksternih) i unutarnjih (internih) čimbenika određuje koje će se marketinške metrike koristiti. Pravilan odabir metrika ključan je jer se upravljanje i poboljšanje nečega temelji na mjerenju, a isto tako, ono što se mjeri, time se i upravlja. Dakle, način mjerenja uspjeha utječe na postignuti uspjeh (Gama, 2011).

METODOLOGIJA

Za potrebe kvalitativnog istraživanja, podaci su prikupljeni putem dubinskih polustrukturiranih intervjua s petnaest marketinških menadžera s iskustvom u različitim industrijama. Kako bi se osigurao što veći uzorak, korištene su obje metode intervjuiranja: osobno ("licem u lice") i online. U istraživanju je sudjelovalo devet žena i šest muškaraca, svi s više od deset godina radnog iskustva (neki i preko 20 godina). Svi ispitanici su tijekom svoje karijere bili na poziciji direktora marketinga, a dolazili su iz različitih industrija, uključujući prehrambenu (različite kategorije hrane i pića), kozmetičku, kemijsku, farmaceutsku, telekomunikacijsku, financijsku i trgovinu.

Glavna svrha ovog istraživanja bila je analizirati kako marketinški stručnjaci u Hrvatskoj definiraju uspjeh u marketingu, koje metrike koriste za procjenu marketinških aktivnosti, koje marketinške vještine i sposobnosti smatraju ključnima danas i u budućnosti, te kako opisuju karakteristike snažne marke. Koristeći pripremljeni vodič, s ispitanicima se razgovaralo o marketinškim sposobnostima koje smatraju ključnima za provedbu marketinških planova i programa. Poseban naglasak stavljen je na nove vještine i sposobnosti koje marketinški menadžeri trebaju razviti kako bi ostali relevantni, te na metrike/pokazatelje koje koriste za postavljanje ciljeva i ocjenu rezultata marketinških aktivnosti.

Nakon što su intervjui transkribirani i svi podaci sakupljeni u jednu datoteku, provedena je analiza sadržaja kako bi se izvukli zaključci o stavovima i ponašanju ispitanika, odnosno marketinških menadžera, u vezi s marketinškim sposobnostima, uspjehom i metrikama. Cilj analize sadržaja bio je reducirati i organizirati prikupljene podatke u smislen i upravljiv oblik, omogućiti usporedbu, identificirati trendove i procijeniti povezanosti i međuodnose, te potvrditi određene pretpostavke, odnosno zaključke (Greene, 2007).

Analiza prikupljenih kvalitativnih podataka, odnosno transkripata intervjua, provedena je prema metodologiji koju su predložili Green i suradnici (2007). Taj proces obuhvaćao je četiri glavne faze:

- uranjanje u podatke: pažljivo i višekratno čitanje transkripata kako bi se stekao dubinski uvid u sadržaj i prepoznali prvi obrasci i ideje,
- kodiranje: označavanje dijelova teksta (riječi, fraza, rečenica, odlomaka) kodovima koji predstavljaju ključne koncepte, ideje ili teme,
- stvaranje kategorija: grupiranje sličnih kodova u šire kategorije koje predstavljaju apstraktnije teme ili koncepte,
- prepoznavanje tema: identifikacija dominantnih tema koje se provlače kroz podatke i povezuju različite kategorije, pružajući dublje razumijevanje istraživanog fenomena.

U procesu kodiranja korištena je kombinacija deduktivnog i induktivnog pristupa:

- deduktivni (*top-down*) pristup: dio kodova bio je unaprijed definiran na temelju postojećih teorijskih spoznaja iz marketinške literature, posebice klasifikacija marketinških sposobnosti i metrika,
- Induktivni (*bottom-up*) pristup: drugi dio kodova proizašao je iz samih odgovora ispitanika, odnosno iz ponavljajućih fraza i ključnih koncepata u transkriptima; ovo je omogućilo otkrivanje novih, neočekivanih tema i obrazaca koji nisu bili predviđeni teorijskim okvirom.

Dakle, analiza je provedena kombiniranjem unaprijed definiranih teorijskih koncepata s uvidima koji su proizašli iz samih podataka, s ciljem dubljeg razumijevanja fenomena putem tematske analize latentnog sadržaja. Ovaj pristup omogućio je sveobuhvatnu i nijansiranu analizu prikupljenih podataka.

REZULTATI I DISKUSIJA

U nastavku se izlažu ključni rezultati provedenog kvalitativnog istraživanja, odnosno nalazi, interpretacije i zaključci proizašli iz analize podataka prikupljenih putem polustrukturiranih intervjua.

Profil ispitanika, važnost i utjecaj marketinške funkcije i aktivnosti u marketinškoj praksi

Analiza odgovora na uvodna pitanja, koja su se odnosila na radno mjesto, odgovornosti, profesionalni razvoj u marketingu, značaj marketinške funkcije te područja i aktivnosti kojima se ispitanici primarno bave, generirala je nekoliko relevantnih spoznaja:

- *Raznoliki profesionalni profili unutar marketinške struke*: istraživanje je pokazalo značajno iskustvo ispitanika u području marketinga, uz istovremenu heterogenost njihovih karijernih puteva. Dio ispitanika posjeduje specijalizirano znanje unutar specifičnih industrijskih grana, kao što su roba široke potrošnje, financijski sektor i telekomunikacije, dok su drugi iskusili rad u različitim gospodarskim sektorima tijekom svoje karijere.
- *Prepoznat značaj marketinške funkcije u poslovanju*: većina ispitanika naglašava ključnu ulogu marketinške funkcije unutar svojih poslovnih subjekata. Ovaj nalaz upućuje na široko rasprostranjeno shvaćanje marketinga kao esencijalnog čimbenika za postizanje poslovnog uspjeha, kao i na važnost uloge marketinških menadžera u ostvarivanju strateških ciljeva organizacije. Konkretno, ispitanica zaposlena u velikom poslovnom subjektu u prehrambenoj industriji navodi svoju „intenzivnu uključenost u sve razvojne projekte kompanije, razvoj i unapređenje brendova, te pozicioniranje u retail i HoReCa sektoru“.
- *Dominantne marketinške aktivnosti i odgovornosti*: Analiza je pokazala da se među najčešće spominjanim marketinškim aktivnostima i odgovornostima ističu istraživanje tržišta, strateško planiranje, određivanje proračuna, upravljanje timovima, komunikacija, razvoj marketinških kampanja te razvoj proizvoda.
- *Izražena dinamičnost marketinškog posla*: Ispitanici naglašavaju izraženu dinamičnost i intenzitet rada u marketingu, ističući potrebu za donošenjem brzih odluka i kontinuiranom prilagodbom promjenjivim tržišnim uvjetima. Jedan od ispitanika opisuje to stanje riječima: „Marketing je dosta dinamična disciplina bez nekog fiksnog radnog vremena. Kad dođete kući

nakon posla, mozak još radi 300 na sat, preispitujete svoje odluke, strategije, komunikaciju za svaku moguću kampanju, od onih najmanjih za dva artikla koja su „zapela“ na skladištu do toga da rasprodamo cijeli lager laptopa.“

- *Kontinuirano usavršavanje i prilagodba*: U opisima svojih razvojnih puteva, brojni ispitanici naglašavaju imperativ kontinuiranog usavršavanja, što upućuje na ključnu važnost stjecanja novih znanja, vještina i tehnologija te prilagodbe recentnim trendovima u marketingu.
- *Razlike u marketinškim pristupima između velikih i malih poslovnih subjekata*: u malim poslovnim subjektima, marketinške aktivnosti često su primarno usmjerene na prodaju i komunikacijske strategije koje teže ostvarivanju neposrednih poslovnih rezultata i brzom povratu investicija. S druge strane, veći poslovni subjekti raspolažu s većim financijskim resursima, što im omogućuje implementaciju šireg spektra marketinških i komunikacijskih aktivnosti, uključujući i dugoročnije strategije.

Ključne marketinške sposobnosti

U odgovorima ispitanika na pitanje o ključnim marketinškim sposobnostima potrebnim za implementaciju marketinških planova i programa, uočava se raznolikost mišljenja koja odražava heterogene poslovne kontekste i industrije u kojima oni djeluju kao marketinški menadžeri. Analizom odgovora moguće je identificirati nekoliko ključnih tematskih područja koje su menadžeri istaknuli kao esencijalne za uspješno provođenje marketinških aktivnosti te iznijeti relevantne uvide:

- *Komplementarnost, uravnotežen pristup i kontekstualna relevantnost sposobnosti*: Većina ispitanika preferira holistički pristup, smatrajući da uspješna implementacija marketinških planova zahtijeva sinergiju svih relevantnih marketinških sposobnosti. Uzimajući u obzir Morganovu klasifikaciju marketinških sposobnosti (Morgan, 2012), analiza pokazuje da ispitanici primarno ističu važnost specijaliziranih, zatim dinamičkih, a potom kros-funkcionalnih i arhitekturalnih sposobnosti. Važno je napomenuti da se odgovori razlikuju ovisno o industriji u kojoj ispitanici djeluju; primjerice, oni koji posluju u tehnološki i tržišno dinamičnijim industrijama posebno naglašavaju značaj dinamičkih sposobnosti.
- *Razumijevanje potrošača i tržišta*: dubinsko razumijevanje ponašanja potrošača (engl. *consumer insights*) te temeljito poznavanje tržišta i dostupnih prodajnih kanala (engl. *route-to-market*) prepoznati su kao ključni elementi za uspješno osmišljavanje i provedbu marketinških kampanja.
- *Upravljanje markom*: ovo je ključna kros-funkcionalna marketinška sposobnost na koju se ispitanici najčešće referiraju u svojim odgovorima, smatrajući je fundamentalnom za izgradnju i održavanje snažne tržišne pozicije.
- *Integracija marketinga i prodaje i kros-funkcionalna suradnja*: ispitanici naglašavaju esencijalnu ulogu sinergije između marketinških i prodajnih timova te potrebu za usklađivanjem i implementacijom zajedničkih ciljeva i strategija. Smatraju da je prevladavanje organizacijskih silosa, odnosno jačanje međuodjelne suradnje, ključno za unaprjeđenje marketinških sposobnosti i postizanje „komercijalne izvrsnosti“. Ispitanica iz prehrambene industrije slikovito opisuje ovu povezanost, ističući da se „ljepota marketinga očituje u dinamičnosti i sinergiji svih funkcija – marketing predstavlja „mozak“ strategije i operacija, dok prodaja djeluje kao „mišić“ i snaga na terenu.“
- *Strateško planiranje i egzekucija – sinergija koncepta i provedbe*: dio ispitanika naglašava važnost konceptualizacije i strateškog planiranja, uz istovremenu nužnost efikasne implementacije i realizacije planova. Primjerice, ispitanik s bogatim iskustvom u industriji robe široke potrošnje (engl. Fast Moving Consumer Goods – FMCG), parafrazirajući koncept kompanije Procter & Gamble, navodi da je „trgovačka polica trenutak istine“, čime ističe presudnu važnost precizne egzekucije i kvalitetne prisutnosti na prodajnom mjestu. Ispitanik sa sličnim profesionalnim iskustvom dodaje i element brzine, odnosno imperativ brzog djelovanja (engl. *speed-to-market*), izražavajući to riječima: „bolje je

biti prvi na tržištu nego doći sa savršenim projektom".

- *Prilagodljivost i kontinuirano učenje kao imperativ u dinamičnom poslovnom okruženju*: s obzirom na izraženu dinamičnost suvremenog poslovnog okruženja i sveprisutnu digitalnu transformaciju, ispitanici ističu važnost digitalnih vještina i „agilnog načina rada", odnosno sposobnost brze adaptacije na tržišne fluktuacije. U kontekstu marketinške komunikacije, naglašavaju se „marketinška automatizacija, personalizacija i komunikacija u realnom vremenu". Nadalje, ispitanici apostrofiraju značaj „kontinuiranog učenja, jačanja kompetencija i fleksibilne prilagodbe resursa".

Identificirane teme i citati ispitanika upućuju na njihovu percepciju raznolikosti i kompleksnosti marketinške funkcije te prepoznavanje potrebe za integracijom različitih marketinških sposobnosti u svrhu ostvarivanja poslovnih ciljeva. Nadalje, iz analiziranih odgovora proizlazi da se od marketinških menadžera sve više očekuje spremnost na promjene i razvoj dinamičkih sposobnosti radi adaptacije na rapidnu evoluciju tržišta.

Nove vještine i sposobnosti

Sljedeća tema razgovara bila je usmjerena na nužne vještine i sposobnosti koje marketinški menadžeri trebaju razviti kako bi održali konkurentnost u dinamičnom okruženju. Odgovori ispitanika inicijalno identificiraju ključne trendove koji će determinirati kontekst upravljanja marketingom:

- *Imperativ individualiziranog pristupa*: marketinški menadžeri morat će primarno biti usmjereni na suvremene potrošače i adaptirati marketinške aktivnosti njihovim individualnim potrebama i preferencijama, izvlačeći relevantne uvide iz analize velike količine podataka (engl. *big data*). Ilustrativno, jedan od ispitanika je izjavio: „Sve to ima veze s big datom i CRM-om jer stvari se individualiziraju; svaki potrošač očekuje da mu brend pristupi kao jedinstvenoj osobi, a ne kao dijelu mase, i smatram da se budućnost marketinga u tome jer je era masovnog marketinga prošlost."
- *Ekspanzija digitalnih tehnologija i online trgovine*: ispitanici predviđaju kontinuirani razvoj digitalnih tehnologija u marketinškom sektoru te daljnji rast udjela elektroničke trgovine (*e-commerce*) u ukupnoj trgovini.
- *Integracija kanala*: ispitanici naglašavaju potrebu za integriranom i koherentnom primjenom različitih marketinških kanala, s ciljem postizanja sinergijskog efekta i konzistentne komunikacije s ciljnom publikom.
- *Kolaboracija marketinških i prodajnih timova*: ispitanici ističu ključnu važnost sinergije i bliske suradnje između marketinških i prodajnih timova s ciljem kreiranja superiornih ponuda i pružanja veće vrijednosti potrošačima.
- *Sveprisutna uloga umjetne inteligencije u transformaciji marketinških aktivnosti*: ispitanici predviđaju eksponencijalni rast primjene umjetne inteligencije (UI) u svim aspektima marketinških aktivnosti, posebice u kontekstu personalizacije i automatizacije, te naglašavaju njezin duboki i transformativni utjecaj na budućnost marketinga u cjelini. Jedan od ispitanika je izjavio: „Najveću promjenu će unijeti UI u samome marketingu, ali i u drugim djelatnostima i dijelovima ljudskog života. Ako će UI umjesto nas raditi izbor raznih proizvoda onda će marketinške aktivnosti prestati postojati jer će umjetna inteligencija donositi racionalne odluke umjesto nas. S druge strane, vjerojatno će taktičke odluke za upravljanje marketinškim miksom također donositi AI".

Nakon analize identificiranih trendova, moguće je sintetizirati najčešće spominjane vještine i sposobnosti koje će biti ključne za marketinške menadžere u budućnosti:

- *Empatija i razumijevanje potrošača*: ovo je ključni preduvjet uspješnih marketinških strategija; obzirom na središnju ulogu potrošača u suvremenim marketinškim strategijama, ispitanici naglašavaju iznimnu važnost dubinskog razumijevanja ponašanja potrošača, kao i sposobnost kreiranja personaliziranih iskustava koja odgovaraju njihovim individualnim potrebama, željama i preferencijama, s krajnjim ciljem izgradnje dugoročnih i kvalitetnih odnosa.

- *Digitalne vještine*: ispitanici su istaknuli važnost kontinuiranog praćenja i razumijevanja digitalnih tehnologija te novih komunikacijskih formata, naglašavajući pritom specifične vještine povezane s digitalnim marketingom, kao što su mapiranje putovanja kupca (engl. *customer journey mapping*), kreiranje profila idealnog kupca (engl. *buyer persona*), vješto korištenje alata za upravljanje online kampanjama, efikasno vođenje profila na društvenim mrežama, optimizacija za tražilice (SEO), SEM i slično. Ova kategorija vještina obuhvaća i analitičke kompetencije, odnosno sposobnost analize velikih količina podataka i izvlačenja relevantnih uvida iz njih.
- *Sklonost kontinuiranom učenju, otvorenost inovacijama i holistički pristup*: u kontekstu rapidnog tehnološkog napretka i neprestanih promjena u poslovnom okruženju, ispitanici naglašavaju kritičnu važnost cjeloživotnog učenja i stjecanja novih vještina. Dodatno, ističu se otvorenost prema inovativnim idejama i konceptima te sposobnost sagledavanja šire slike, odnosno holistički pristup poslovanju. Jedan od ispitanika to jezgrovito sažima riječima: „Širina. Smatram da marketinški menadžeri moraju razmišljati kao generalni menadžeri".
- *„Meke vještine"* (engl. *soft skills*): dio ispitanika naglasio je iznimnu važnost „mekih vještina", posebice vještina vođenja (engl. *leadership*), ističući da će se uloga marketinškog menadžera sve više transformirati u ulogu lidera koji motivira, inspirira i usmjerava svoj tim. Uz vještine vođenja, kao ključne „meke vještine" navode se i komunikacijske vještine, sposobnost timskog rada, kritičko promišljanje i vještine rješavanja problema.
- *Agilnost i prilagodljivost*: ispitanici ističu važnost osobina koje se tradicionalno povezuju s agilnim pristupom poslovanju, a to su brzina reakcije, operativna jednostavnost, troškovna učinkovitost te, ponajviše, sposobnost pravovremenog prepoznavanja poslovnih prilika i brze prilagodbe novonastalim situacijama i fluktuacijama na tržištu.

Iz navedenog proizlazi da će se od marketinških menadžera u budućnosti očekivati kontinuirano profesionalno usavršavanje i razvoj širokog spektra vještina i sposobnosti, s posebnim naglaskom na digitalnu transformaciju i strategije usmjerene na potrošača. Ključne kompetencije obuhvaćaju razumijevanje i primjenu digitalnih tehnologija, efikasno upravljanje velikim količinama podataka, vještine vođenja i motivacije timova te sposobnost kritičkog promišljanja i učinkovitog rješavanja problema. Stoga će budući uspjeh marketinških menadžera uvelike ovisiti o njihovoj sposobnosti brze prilagodbe dinamičnim promjenama u tehnološkom okruženju i ponašanju potrošača.

Marketinška uspješnost

Zbog izrazite raznolikosti pristupa mjerenju uspjeha u marketingu, prisutne kako u stručnoj literaturi tako i u praksi, od ispitanika se tražilo da definiraju vlastito shvaćanje marketinške uspješnosti. Njihovi odgovori otkrivaju da oni uspjeh u marketingu vide kao kompleksan i višedimenzionalan koncept koji obuhvaća snagu marke, ponašanje potrošača te ostvarene tržišne i financijske rezultate. Svi pokazatelji marketinške uspješnosti koje su naveli mogu se svrstati u dvije osnovne kategorije:

- *Pokazatelji vezani uz marku* (iz perspektive potrošača): poznatost, razmatranje, imidž, lojalnost, sklonost/namjera kupnje (engl. *Propensity to buy*), sklonost preporuke (engl. *Net Promotor Score*), snaga marke, vrijednost marke.

- *Financijski i tržišni pokazatelji*: prodaja (količinska i vrijednosna), prihod, profit, marža, povrat na ulaganje (engl. *Return on Investment* – ROI), tržišni udio, tržišna penetracija.

Ovakvo shvaćanje marketinške uspješnosti najsažetije ilustriraju sljedeće izjave ispitanika: „Promjena u percepciji brenda koja vodi povećanju prodaje" te „visok tržišni udio kao posljedica odgovarajuće razine brend parametara". Iz navedenog se može zaključiti postojanje uzročno-posljedične veze u ostvarivanju marketinške uspješnosti, slične onoj koju su u svom istraživanju opisali Katsikeas i suradnici (2016). Prema tom modelu, nakon provedenih marketinških i komunikacijskih aktivnosti te uloženih resursa, inicijalno dolazi do promjena u pokazateljima uspješnosti marke, što se posljedično reflektira i na rast prodaje te povećanje tržišnog udjela.

Pojedini ispitanici definiraju marketinšku uspješnost kao „postizanje postavljenih ciljeva“, bez obzira na njihovu specifičnost, i povoljan odnos između uloženih resursa i ostvarenih rezultata. To se, prema njihovim riječima, očituje kao „kvalitetan omjer uloženih financijskih sredstava i strateških i taktičkih marketinških napora te dobivenog rezultata mjerljivog primarno kroz održavanje snage brenda, sklonosti kupnji i finalnog prodajnog rezultata.“ S druge strane, za dio ispitanika biti marketinški uspješan znači „biti prepoznat na tržištu“, „biti sinonim za kategoriju“, „imati brojke iza sebe“ i „imati stabilan prihod“.

Ispitanici naglašavaju značaj definiranja realističnih kratkoročnih i dugoročnih ciljeva, prilagođenih specifičnostima industrije i tržišta, kao i odabira relevantnih ključnih pokazatelja uspjeha (engl. *Key Performance Indicators* – KPIs) koji će služiti za evaluaciju rezultata nakon provedbe marketinških aktivnosti. Praćenje ovih pokazatelja od presudne je važnosti za procjenu napretka, prilagodbu marketinških strategija te optimizaciju taktičkih aktivnosti.

Postoji visok stupanj slaganja oko toga da je izgradnja snažne i prepoznatljive marke ključna za postizanje dugoročnog uspjeha u marketingu, pri čemu se „dugoročan rast vrijednosti marke“ često navodi kao jedan od ključnih kriterija uspješnosti. Važnost *storytellinga* u komunikaciji marke također je naglašena, a to se ogleda u sposobnosti stvaranja privlačnih marketinških poruka i uspostavljanja emocionalne povezanosti s potrošačima, što je sažeto u izjavi o „uspješnosti pričanja priča koje prodaju“.

Karakteristike snažne marke

Ispitanicima je postavljeno pitanje da opišu obilježja snažne marke te istaknu čimbenike koji je razlikuju od konkurentskih marki na tržištu. Analiza njihovih odgovora identificira nekoliko ključnih elemenata koji definiraju snažnu marku:

- *Originalnost i diferencijacija*: snažna marka ističe se jedinstvenim vrijednostima, atributima i pozicioniranjem koje je jasno razlikuju od konkurencije. Ispitanici su naglasili da je ključ uspjeha sposobnost marke da pronađe jedinstvenu poziciju u svijesti i srcima potrošača: „Kad brend pronađe jedinstvenu poziciju u glavama i srcima potrošača koja ga razlikuje od konkurencije, onda taj brend za sebe može reći da je jak brend.“
- *Jasno pozicioniranje i konzistentna komunikacija*: prema odgovorima ispitanika, snažna marka zauzima jasno definiranu poziciju u svijesti potrošača, uz prepoznatljivu i dosljednu komunikaciju. Jedan od ispitanika to je sažeo riječima: „Snažan brend ima dugoročnu strategiju temeljenu na jasnim vrijednostima i pozicioniranju. Potrošačima uvijek šalje jasnu sliku o sebi: kako izgleda, što predstavlja te što i kako komunicira.“
- *Čvrsta veza s potrošačim***a**: snažnu marku karakterizira čvrsta povezanost s potrošačima, koja proizlazi iz pozitivne percepcije, dosljednog ispunjavanja obećanja i visokog stupnja povjerenja. Jedan od ispitanika opisao je ovu vezu riječima: „Potrošači s takvim brendom osjećaju emocionalnu povezanost, a nerijetko i pravu privrženost, gotovo ljubav.“ Takva marka uspješno se prilagođava potrebama i preferencijama svoje ciljne skupine, pri čemu „ima visoku integraciju u potrošačev lifestyle“ i omogućuje potrošačima da se s njom identificiraju.
- *Povjerenje i ispunjavanje obećanja*: sudionici istraživanja ističu ključnu ulogu povjerenja i ispunjavanja obećanja u izgradnji snažne marke. Prema njihovom mišljenju, povjerenje podrazumijeva pouzdanost i dosljedno ispunjavanje obećanja koje brend daje svojim potrošačima. Kako bi ilustrirao ovu tvrdnju, jedan od ispitanika citira riječi Muhtara Kenta, bivšeg izvršnog direktora tvrtke Coca-Cola, koji je izjavio: „Brend je obećanje. Dobar brend je ispunjeno obećanje.“
- *Financijski uspjeh i rast*: prema mišljenju ispitanika snažnu marku odlikuje visoka tržišna penetracija i razina korištenja, prisutnost na različitim tržištima, inovativnost, jasno definirana vizija razvoja te osiguravanje stabilnih prihoda i profitabilnog poslovanja za poslovni subjekt..

- *Utjecaj na potrošače i društvo*: sudionici istraživanja naglašavaju da snažna marka ne osigurava samo opstojnost poslovnog subjekta, već ostvaruje i značajan utjecaj na potrošače i društvo u cjelini. Pozivajući se na koncept Simona Sineka „Počni sa zašto“ (engl. *Start with why*), jedan od ispitanika ističe da autentična i snažna marka jasno komunicira svoju misiju, odnosno svrhu postojanja koja nadilazi sam proizvod ili uslugu koju nudi. Takva je marka vođena inspiracijom i motivacijom da ostvari pozitivne promjene u svijetu i u životima svojih potrošača.

Iz odgovora sudionika istraživanja proizlazi da se snažne marke odlikuju originalnošću i diferencijacijom u odnosu na konkurenciju. Zahvaljujući prepoznatljivoj i dosljednoj komunikaciji, ove marke zauzimaju jasno definirano mjesto u svijesti potrošača te ispunjavaju dana obećanja. Uz navedenu povezanost s potrošačima, dio sudionika ističe i financijske pokazatelje uspjeha te širi društveni utjecaj koji marke ostvaruju u zajednici u kojoj djeluju.

Marketinške metrike

Nakon što su opisali ključne karakteristike snažne marke, ispitanici su podijelili svoja iskustva o mjerama i pokazateljima koje najčešće koriste za definiranje ciljeva i evaluaciju rezultata marketinških aktivnosti. Njihovi odgovori variraju ovisno o specifičnostima industrije, vrsti provedenih aktivnosti, korištenim komunikacijskim kanalima te postavljenim ciljevima. Ipak, moguće je identificirati nekoliko glavnih kategorija pokazatelja:

- *financijski pokazatelji*: prihod, bruto marža, profit, povrat marketinškog ulaganja (engl. *Return on Marketing Investment* - ROMI)
- *prodajni i tržišni pokazatelji*: količinska i vrijednosna prodaja, količinski i vrijednosni tržišni udio, penetracija, indeks distribucije, ponovljena kupnja, *sell in* i *sell out* (prodaja prema trgovcima i izlazi s trgovačkih blagajni)
- *pokazatelji vezani uz marku*: svijest o marki (engl. *Brand Awareness*), razmatranje (engl. *Consideration*), korištenje (engl. *Usage*), sklonost kupnji (engl. *Propensity to buy*), namjera kupnje marke (engl. *Purchase Intent*), lojalnost marki (engl. *Brand Loyalty*), zadovoljstvo korisnika (engl. *User Satisfaction*), povjerenje u marku (engl. *Brand Trust*), vjerojatnost preporuke marke – Brand NPS, imidž marke (engl. Brand Image), tržišna snaga marke (engl. *Brand Strength*), vrijednost marke (engl. *Brand Equity*), *Brand Value Creator* (BVC)
- *pokazatelji efektivnosti oglasa/kampanje*: zapaženost, sviđanje i namjera kupnje
- *metrike u online komunikaciji*: impresije, doseg (engl. *Reach*), klikovi na oglas, *Click-Through* Rate (CTR), *Cost-Per-Click* (CPC), konverzije, angažman, posjećenost web-sjedišta, interakcija na društvenim mrežama (*likes, comments, shares*, *tags, mentions, downloads, reviews*...), stopa otvaranja emaila (engl. *Email Open Rate*)
- *pokazatelji vezani uz baze podataka*: broj novih kupaca, broj ponovnih kupaca, reaktivacije, akvizicije, angažman kupca (engl. *Customer Engagement*), *Net Promotor Score* (NPS), stopa zadržavanja kupaca (engl. *Customer Retention Rate*), stopa izgubljenih kupaca (engl. *Customer Churn Rate*)
- *ostale metrike*: broj poziva, broj zaključenih poziva, *Retail Footfall* (broj ljudi koji su ušli u trgovački objekt), *Real Internal Growth*.

Sveobuhvatna analiza odgovora ispitanika ukazuje na ključnu važnost praćenja različitih metrika kako bi se dobila potpuna i precizna slika o učinkovitosti i efektivnosti marketinških aktivnosti. Ovi pokazatelji obuhvaćaju širok raspon, uključujući prodajne, tržišne i financijske pokazatelje, kao i komunikacijske metrike te pojedinačne ili agregirane indikatore snage i vrijednosti marke.

Različite industrije pridaju posebnu važnost određenim metrikama koje su specifične za njihov područje poslovanja. Na primjer, u bankarskoj industriji često se mjeri zadovoljstvo klijenata, kako u ukupnom smislu, tako i po različitim dodirnim točkama, uz usporedbu s konkurencijom. S druge strane, ispitanik iz sektora e-trgovine naglašava ključnu važnost metrika poput broja klikova: "Klik je majka svega".

Izbor metrika također treba biti usklađen sa specifičnim ciljevima svake marketinške aktivnosti. Na primjer, uspješnost kampanje za lansiranje novog proizvoda u prehrambenoj industriji uglavnom će se mjeriti obujmom i vrijednošću prodaje, kao i postotkom osvojenog tržišnog udjela. S druge strane, u kampanji usmjerenoj na poboljšanje imidža marke, ključne metrike uključuju razinu prepoznatljivosti marke i promjene u percepciji njezinih glavnih atributa.

Pokazatelji snage marke

Posljednje pitanje u intervjuima odnosilo se na pokazatelje koji odražavaju percepciju marke u svijesti potrošača, a svi ispitanici su ih prepoznali kao ključnu skupinu pokazatelja marketinške uspješnosti. Ispitanici su upitani koriste li u svojoj marketinškoj praksi agregirane pokazatelje tržišne snage marke, poput BRANDscorea istraživačke kuće Ipsos.

Svi ispitanici prepoznaju značaj praćenja pokazatelja koji odražavaju percepciju marke u svijesti potrošača. Na primjer, jedna ispitanica ističe da su ovi pokazatelji „izuzetno važni jer ukazuju na dugoročno zdravlje brenda i pružaju signal prema ključnim pokazateljima njegovog korištenja“. Korištenje ovih pokazatelja predstavlja temelj za učinkovito upravljanje markom i donošenje informiranih marketinških odluka.

Ispitanici koji djeluju ili su djelovali u industriji robe široke potrošnje potvrdili su da koriste pokazatelje tržišne snage marke, pri čemu većina njih koristi Ipsosov BRANDscore. Jedan ispitanik istaknuo je: „Kad postavljamo ciljeve, uvijek je tu, naravno, BRANDscore, kao i neki od indikatora iz BRANDpulsa koji su važni za promatranu kategoriju. To je apsolutno dio ključnih pokazatelja uspjeha, a u istoj tablici, koja uključuje razvoj prodaje, neto prodaje, bruto marže, tržišnog udjela itd., imamo i BRANDscore kroz razdoblje kao jednakovrijedan kriterij za mjerenje uspješnosti poslovanja.“ Manji broj ispitanika naveo je da koriste druge agregirane pokazatelje od Ipsosa ili drugih istraživačkih agencija (*Brand Value Creator*, *Brand Strength Index* i *Brand Health Check*), dok je samo jedna ispitanica napomenula da u njenom poslovnom subjektu „koriste niz zasebnih brend KPI-eva, koji se ne agregiraju u jedan zajednički“.

ZAKLJUČAK

Cilj ovog istraživanja bio je analizirati ključne čimbenike koji oblikuju marketinšku uspješnost, s posebnim naglaskom na marketinške sposobnosti i vještine i primjenu različitih metrika u suvremenom marketinškom okruženju. Kroz analizu odgovora marketinških stručnjaka iz različitih industrija, istraživanje je ukazalo na ključnu ulogu marketinških sposobnosti u oblikovanju dugoročne uspješnosti marke.

Glavni nalazi ovog istraživanja potvrđuju da marketinška uspješnost nije samo rezultat financijskih i prodajnih pokazatelja, već i sposobnosti marketinških stručnjaka da pravilno interpretiraju tržišne uvjete, razumiju ponašanje potrošača i donose strateške odluke koje oblikuju percepciju marke. Marketinške sposobnosti, kao što su sposobnost kreiranja dosljedne komunikacije, izgradnje povjerenja i emocionalne povezanosti s potrošačima, ključne su za ostvarivanje dugoročne tržišne snage. Ispitanici su istaknuli da marketinški uspjeh uvelike ovisi o sposobnosti tima da razvije i implementira strategije koje se temelje na jasnoj poziciji marke i njenim vrijednostima, te da te strategije kontinuirano prilagođavaju u skladu s promjenama u tržišnim uvjetima i potrebama potrošača.

Korištenje agregiranih pokazatelja tržišne snage marke, poput Ipsosovog BRANDscorea, također je postalo ključno za upravljanje markom i donošenje informiranih odluka. Ovi pokazatelji omogućuju marketinškim stručnjacima da bolje razumiju dugoročne promjene u percepciji marke, što im omogućava da prepoznaju potencijalne prijetnje i prilike na tržištu. Marketinške sposobnosti u analizi i primjeni tih metrika stoga postaju temelj za donošenje pravovremenih i preciznih odluka koje utječu na konkurentsku poziciju marke.

Iako su rezultati istraživanja dali vrijedne uvide u pristupe i metrike koje marketinški stručnjaci koriste, postoje određena ograničenja. Istraživanje je provedeno na ograničenom uzorku ispitanika, a buduća istraživanja trebala bi obuhvatiti širi uzorak kako bi se dobili dodatni uvidi u specifične marketinške sposobnosti koje su najvažnije u različitim industrijama. Također, istraživanje se primarno oslonilo na kvalitativne podatke, dok bi kvantitativna istraživanja mogla pružiti dodatne uvide u povezanost između specifičnih marketinških sposobnosti i uspjeha na tržištu.

Za buduća istraživanja preporučuje se daljnje istraživanje uloge marketinških sposobnosti u kontekstu digitalne transformacije i korištenja novih tehnologija, kao što su umjetna inteligencija i podatkovna analitika, u optimizaciji marketinških strategija. Također, važno je istražiti kako marketinške sposobnosti mogu unaprijediti procese donošenja odluka u realnom vremenu i omogućiti brže prilagodbe na promjenjive tržišne uvjete.

U konačnici, rezultati ovog istraživanja potvrđuju da marketinška uspješnost ne ovisi samo o tehničkim ili operativnim aspektima, već i o sposobnosti marketinških stručnjaka da pravilno interpretiraju tržišne promjene, kreiraju relevantne marketinške strategije i uspješno upravljaju markama. U kontekstu ubrzanih promjena na tržištu, marketinške sposobnosti postaju ključne za izgradnju dugoročne tržišne snage, održavanje konkurentske prednosti i osiguranje stabilnog rasta marke.

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[i] This Croatian version of the article has been additionally reviewed by two Croatian speaking reviewers.