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Segmenting networking orientation in the hospitality industry: an empirical research on service bundling

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Abstract

This paper focuses on the topic of collaboration in tourism destinations. Collaboration represents a key to overcome the fragmentation of the tourism industry and to better satisfy the more and more experience-centric tourist. Tourism operators are increasingly involved in various types of collaborative partnerships. One among them is service bundling, i.e. the creation and the supply of tourism packages. The study analyzes the drivers underlying the development of service bundling and provides a segmentation of the hospitality industry according to operators' networking orientation. 164 hoteliers from a tourism-based region in Italy were interviewed through a survey. Four clusters of hoteliers were identified and profiled: the *Relational/Socials*, the *Opportunists*, the *Innovators* and the *Marketers*. Each of them shows a peculiar approach to collaboration and reveals different motivations to be engaged in a partnership. Some managerial implications and directions for policy makers are also provided.

Keywords: Service bundling; collaboration; tourism partnerships; hospitality industry; hoteliers; segmentation.

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1. Introduction

Tourism is the world's largest service industry in terms of gross revenue. International tourism has recovered faster than expected from the impacts of the global financial crisis and economic recession started in late 2008. From 2010 to 2011 international tourist arrivals have increased 4.6%, with a positive growth rate registered in all regions in the world. This trend is expected to continue in the next few years, but at a slower pace (UNWTO, 2011). According to the World Tourism Organization (UNWTO), the number of international travelers reached 982 million in 2010, increased by 105 million from 2009 and by 69 million from the pre-crisis 2008 peak level of 913 million. UNWTO (2011) forecasts that there will be 1.6 billion international trips by 2020, nearly three times the 592 million trips made in 1996. During the 21st century a higher percentage of the total population will travel for tourism, especially going on holidays more often and farther away from their home country.

From the economic point of view, one important characteristic of the tourism industry is that it has a great multiplier effect on other industries. It represents an effective means of wealth transfer, because in the place of visit, tourists spend money earned in their country of residence (Amalu, Ajake, Oba, &Ewa, 2012). Moreover, tourism accounted for 8% of worldwide global employment in 2010, providing 235 million jobs (WTTC, 2012). This is the reason why tourism is considered by government policies as one of the most important factors for the development of a country.

Italy stands at the 5th place of the tourism destinations' world ranking (UNWTO, 2011). The tourism industry represents 9.5 percent of the Italian GNP (Eurispes, 2011). Italy has an ancient vocation to tourism, thanks to its cultural, artistic, historical and natural heritage. Formica and Uysal (1996, p.324) define Italy as a "multi-opportunity tourism destination", because of the great attractiveness and the variety of its tourism supply. Italy offers a great variety of products and services that allows creating a unique tourism experience according to the different needs of tourists. Bonini (1993) pointed out that Italy is perceived all over the world as a destination that offers at the same time the main categories of tourism: historical, cultural (which includes food and wine tourism), artistic and religious, seaside tourism, mountain tourism, hot springs and spas. The tourism industry in Valle d'Aosta (VDA) represents a very interesting study site, since its geographical location, the presence of the highest mountain ranges in Europe and its landscapes make this region a very well-known resort, even beyond Italian borders. Despite its small size, VDA is characterized by the presence of thousands of SMEs operating in tourism and hospitality industry. SMEs constitute the "life blood of the travel and tourism industry world-wide" (Erkkila, 2004, p. 1) and they strongly influence the development of a local area as a destination.

The coexistence of a variety of different SMEs specialized in particular services in a destination context is a fundamental characteristic of the tourism industry (Grefe, 1994; Hjalager, 1999; Wanhill 1996, 2000; Pavlovich, 2003). Nevertheless, tourism supply fragmentation is more and more dealing with the need of "all-in-one experience" expressed by customers (d'Angella& Go, 2009).

Tourism literature has given a considerable attention to the experiential perspective, and has explored the emotional and hedonic side of a destination experience (Quan & Wang, 2004; Ritchie & Hudson, 2009; Ryan, 2010; Tung & Ritchie, 2011; Uriely, 2005; Walls, Okumus, & Wang, 2011; Walls, Okumus, Wang, & Kwun, 2011). Tourists are becoming experience-centric customers, and this evolution has led many operators to broaden their tourism offer, developing bundles of services and of products. Hospitality industry players are used to develop partnerships with other operators, and bundling has become more and more an established practice. Creating packages in tourism requires collaboration among several operators belonging to different industries. The emergence of this practice and the existence of a wide variety of operators that offer a broad range of services for the winter and the summer seasons make VDA an ideal laboratory to study operators' bundling orientation, i.e. their willingness to collaborate in developing bundles.

Several authors have explored the topic of collaborative relationships in tourism industry from a macro-level (Jamal & Getz, 1995; Selin & Chavez, 1995; Palmer & Bejou, 1995; Bramwell & Sharman, 1999; Watkins & Bell, 2002; Pavlovich, 2003; d'Angella & Go, 2009; Arnaboldi & Spiller, 2011; Beritelli, 2011; Selin, 1993, Hill & Shaw, 1995, Wong, Mistilis, & Dwyer, 2011a, 2011b) and from a micro-level perspective (Dev & Klein, 1993; Chathoth, 2004; Bramwell & Lane, 2000; Bramwell & Sherman, 1999; Hill & Shaw, 1995; Jamal & Getz, 1995; Palmer, 1998; Palmer & Bejou, 1995; Selin, 1993; Selin & Beason, 1991; Selin & Myers, 1998; Tremblay, 2000). In spite of the richness of literature on the topic, research on collaboration among SME's in the hospitality industry has been confined to a small number of contributions (Buick, Halcro, & Lynch, 1998; Lynch, 2000; Tinsley & Linch, 2001; Alonso, 2010).

This study proceeds from the findings of a previous research (Marcoz, Mauri, Maggioni, & Cantù, 2011) focused on the relationship between the perception of benefits achievable through service bundling and hoteliers' networking orientation. Authors identified different drivers of collaboration and investigated the role of trust as a mediator of the aforementioned relationship. Results show how trust represents a key collaboration enabler, due to the fact that it provides a general platform for operators' interaction. In this sense, trust among tourism operators acts as a bridge between benefits achievable through service bundling and hoteliers' networking orientation, particularly considering the relational side of bundling benefits.

This paper focuses on the drivers of collaboration, i.e. the motivations behind the development of a bundle, and it provides a segmentation of the approach to collaboration considering different types of accommodation facilities. The main objectives of this study are:

- (1) Identifying the most relevant drivers that enhance networking orientation among tourism operators;
- (2) Segmenting hoteliers according to their motivations to collaborate in developing bundles;
- (3) Profiling segments according to the operators' characteristics.

The paper is structured as follows. First, an extensive review of the literature on the topics of collaboration and bundling in the tourism industry is carried out (Paragraph 2). Paragraph 3 illustrates the methodological approach, describing the study site, the questionnaire, the scales used to measure the variables, and the sample. Data were analyzed through factor, cluster and CHAID analyses, and findings are presented in

Paragraph 4. In Paragraph 5 results are discussed, providing managerial implications and highlighting the limitations of the study as well as possible future research paths.

2. Collaboration and service bundling in the tourism industry: A literature review

2.1. Collaboration among SMEs in the tourism industry

Tourism is a highly fragmented industry, characterized by the coexistence of a variety of SMEs that compete in the same environment, providing complementary products to deliver a comprehensive tourist experience (Grefe, 1994; Hjalager, 1999; Wanhill 1996 and 2000; Pavlovich, 2003).

Although their formal independency, a key feature of tourism organizations operating within a destination is their interdependence (Palmer & Bejou, 1995). Co-location and the combined nature of the tourism product lead to the condition of unintentional co-opetition (Kylänen & Rusko, 2011), since the activities and the performance of tourism organizations are strongly dependent one each other. Many organizations within a destination are aware of this interdependence and they feel the need to collaborate, or at least co-ordinate their activities through partnerships or alliances with other organizations (Palmer & Bejou, 1995; Lemmentyinen, 2009). At the same time, these organizations are compelled to maintain their decisional and operational autonomy (Watkins & Bell, 2002).

Several authors studied in depth the paradoxical nature of business relationships in the tourism industry (Murphy, 1988; Hall, Jenkins, & Kearsley, 1997; Long, 1997; Goeldner, Ritchie, & MacIntosh, 2000). With reference to studies based on the network approach, the paradox is related to the ties to nodes in the network, which represent both a source of freedom and a potential for conflicts and for loss of control of some activities for the firm (d'Angella & Go, 2009). It can be stated that "the network simultaneously enables and restricts" an organization constraints (Ford, Gadde, Håkansson, & Snehota, 2003, p. 23; Gomes-Casseres, 1994).

Given the previous conditions, the development of collaborative relationships among firms at the same level of the value chain becomes increasingly determinant for the success of a destination as a whole. Outcomes of collaboration, such as cooperative branding, image enhancement, tourism product portfolio integration, increase the destination competitiveness (Bennet, 1999; Dywer, 2003; Hill & Shaw, 1995; Holder, 1992, Wang & Fesenmaier, 2007). Moreover, through collaboration tourism organizations set common goals and work within a formal structure, performing better than acting individually (Pearce, 1989). According to Gray (1985, in Jackson, Dinkar, & DeFranco, 2005, p.602), collaboration can be defined "the pooling of appreciations and/or tangible resources by two or more stakeholders to solve a set of problems that neither can solve individually". Watkins and Bell (2002, p.21) define collaboration as the "formalized arrangement between two or more complementary players for the purpose of securing a longer term business advantage". In their study on the relationship between collaborative destination marketing and destination marketing organization (DMO) performance, d'Angella and Go (2009, p.430) define collaboration as a "formal

institutionalized relationship among existing networks of institutions, interests and/or individual stakeholders”.

By collaborating, tourism operators can achieve collectively more than the sum of each individual’s own effort (Anderson & Narus, 1990). Collaboration can be developed through formal partnerships or alliances among firms, but also through informal relation-based collaboration. Informal relationships represent a distinctive way to cooperate in regions and communities in the tourism industry (Aas, Ladkin & Fletcher, 2005; Bardhan, 1993; Carpenter & Westphal, 2001; Denicolai, Cioccarelli & Zucchella, 2010; Timothy, 1998).

Considering co-marketing alliances, several theoretical paradigms were used by the literature to analyze the issues related to this topic. These approaches include strategic management theory (Porter, 1990; Prahalad & Hamel, 1990), transaction cost economics (Williamson, 1975), resource dependence theory (Pfeffer & Salanick, 1978) and networking theory (Gulati, 1998; Novelli, Schmitz, & Spencer, 2006; Lemmentynen & Go, 2009,2010; D’Angella & Go, 2009, Arnaboldi & Spiller, 2011). Wang and Fesenmaier (2007) extended the theory on marketing alliances to destination marketing, identifying four key issues for the development of collaboration among tourism organizations within a destination, i.e. preconditions, motivation, developmental stages and outcomes of a marketing alliance (Wang & Fesenmaier, 2005 and 2007).

According to the network approach, destinations are compared to clusters (Arnaboldi & Spiller, 2011; Novelli, Schmitz, & Spencer, 2006). Tourism clusters are the result of the co-location of firms that offer complementary products and services, but do not necessarily operate in the same sector. These firms may benefit from pre-existing collaboration dynamics and network membership (Novelli, Schmitz & Spencer, 2006). Focusing on the individual perspective, personal networks of small business owners play a critical role in developing collaboration. Personal networks help to maintain the right level of effort during the development of a business relationship and represent the ideal alternative to standing alone (Alizadeh, 2000; MacGregor, 2004).

Timur & Getz (2008) introduce the concept of sustainability in networks related to the crucial long-term development of a destination. The sustainable development of a destination can be achieved through the interactions between the numerous stakeholders operating in the location who should sharing common goals for the destination.

Literature on destination management has also widely investigated the topic of collaborative relationships among stakeholders from a macro level perspective, focusing on alliances and partnerships between public and private organizations (Jamal & Getz, 1995; Selin & Chavez, 1995; Palmer & Bejou, 1995; Bramwell & Sharman, 1999; Watkins & Bell, 2002; Pavlovich, 2003; d’Angella & Go, 2009; Arnaboldi & Spiller, 2011; Beritelli, 2011;) and on intergovernmental coalitions (Selin, 1993, Hill & Shaw, 1995, Wong, Mistilis, & Dwyer, 2011a, 2011b). Collaboration is considered as fundamental for destination management and planning (Jamal & Getz, 1995) and a key requirement for a sustainable development of the destination (Bramwell & Lane, 2000). In this sense Tremblay (1998) suggests that firms should intensify their activity through webs

of cooperative and competitive linkages. The need of coordination and integration of relationships within a destination is also emphasized by the literature (Godfrey, 1998; Lemmentynen, 2009). One of the main features of alliances and partnerships between public and private organizations in a destination context is the congruence of objectives between the actors involved, because the attraction of more tourists to the destination is beneficial both to tourism operators, to public institutions and to the whole local community (Palmer & Bejou, 1995).

Extending the research to the level of the individual organization, alliances and partnerships in the tourism industry and in particular in the hospitality industry are considered as “a logical method for growth” (Dev & Klein, 1993, p.42) and a facilitator for market and products development (Chathoth, 2004). However, it is possible that the single stakeholder may perceive little benefit from investing in an alliance or in a partnership, because he may attribute low potential to this type of relationship for tourism development. This is especially true when we consider honey-pot destinations, where operators do not perceive the need to attract visitors and therefore they do not get involved in any additional collaborative relationship (Palmer & Bejou, 1995).

Several authors focused their research on the formation of collaborative relationships among tourism operators, identifying many drivers that favor or restrict their development (Bramwell & Lane, 2000; Bramwell & Sherman, 1999; Hill & Shaw, 1995; Jamal & Getz, 1995; Palmer, 1998; Palmer & Bejou, 1995; Selin, 1993; Selin & Beason, 1991; Selin & Myers, 1998; Tremblay, 2000). Emphasis was placed on the analysis of factors that make a tourism alliance or a partnership successful. With reference to inter-organizational relationships between hoteliers and travel agents in the USA, Medina-Munoz and Garcia-Falcon (2000) identified as critical drivers trust, commitment, coordination, communication quality, information exchange, participation, usage of constructive resolution techniques. Pansiri (2008) investigated the strategic alliance partner and its characteristics, and concluded that alliances based on trust, less control level, commitment and compatibility between partners are more likely to be successful.

Another stream of research on collaboration in the tourism industry is related to the motivations underlying cooperative and collaborative behavior. Beritelli (2011, p.612) defines the condition under which cooperative behavior is convenient and worthwhile for a firm. “Cooperative behavior is worthwhile if there is a payoff based on strategy that maximizes advantages and it is also convenient if costs incurred over the whole process are minimized and the if the cooperative behavior takes place in a social context in which the actors strive to gain reputation and rewards”.

Literature identifies different reasons to enter an alliance or a partnership, i.e. the access to critical resources (Fyall, Oakley, & Weiss, 2000; Oliver, 1988; Pfeffer & Salanick, 1978), the reduction of risks, the overcoming of financial difficulties, the willingness to enter a new market rapidly (Fyall & Garrod, 2005; Lei & Slocum, 1992), the reaction to rapid technical changes (Bramwell & Lane, 2000; Hamel, 1991, Wang & Fesenmaier, 2007).

Different dimensions drive the cooperative and collaborative behavior of firms, such as mutual trust (Bardhan, 1993; Denicolai, Cioccarelli & Zucchella, 2010; Palmatier, Dant, Grewal & Evans, 2006), personal commitment (Morgan & Hunt, 1994; Mavondo & Rodrigo, 2001), understanding among actors (Saxena, 2006), effective communication (Aas, Ladkin, & Fletcher, 2005; Morgan & Hunt, 1994), social affinity and reciprocal sympathy (Beritelli, 2011), past experience (Scharpf, 1997; Rothstein, 2000; Beritelli, 2011), information exchange. Motivations to enter into a collaborative relationship vary considerably and embrace economic, strategic, social and learning objectives (Bramwell & Rawding, 1994). This is especially true for destination marketing, since competitive advantage is gained only through bringing together all the resources, including the knowledge and the expertise of tourism organizations operating in the location (Fyall & Garrod, 2005). Considering innovation, by collaborating it is possible to share the cost of innovation (Selin, 1993; Wang & Fesenmaier, 2007), to learn new skills and know-how (Ritchie & Brent Ritchie, 2002), to exploit synergies and complementarities between partners, with positive effects on knowledge transfer, preservation of community values and lifestyles' improvement (Novelli, Schmitz, & Spencer, 2006). Wang and Fesenmaier (2007) in their exploratory study on collaborative destination marketing provide a classification of the motivations to enter a collaborative relationship: strategy-related motivations, transaction cost-related motivations, learning-related motivations, cluster competitiveness and community responsibility.

Despite the variety of literature on the topic, the research on collaborative relationships among operators in the hospitality industry has been very limited, especially when we consider SMEs (Buick, Halcro, & Lynch, 1998; Lynch, 2000; Tinsley & Linch, 2001). Alonso (2010), with his explorative study on the importance of business relationships for small hoteliers, is one of the few contributions in this avenue. In his qualitative study he explores the importance of collaboration among local businesses, describing the "selfless" approach and symbiotic relationships. Collaboration among small local businesses is a fundamental part of their existence. Through the creation and the building of a well-knit network of businesses, collaboration allows providing a unique experience to visitors, promoting loyalty, positive word of mouth and improving the destination image.

2.2. Service bundling as a way to enhance collaboration in a destination

The tourism product is complex and includes both tangible and intangible dimensions (Palmer & Bejou, 1995). It can be considered as a bundle of different goods and services, such as transport, accommodation, sport facilities, cultural and artistic attractions, each of them managed and offered to tourists by formally independent organizations (Wang & Fesenmaier, 2007). Tourists derive utility from each one of the different elements that compose the tourism product, but their satisfaction is related to the quality and to the perception of value of the product considered as a whole (Rigall-I-Torrent & Fulvià, 2011; Thrane, 2005).

In a destination setting, consumer choices depend on the combination of private and public attributes which determinate the final tourism product (Rosen, 1974; Rigall-I-Torrent & Fulvià, 2011). Private attributes are

related to tourism firm's features (e.g. for a hotel they might include hotel category, room cleanliness, sport facilities, food quality, etc.). These characteristics can be determined and controlled by managers, who can decide about their embedding in the tourism product. Public attributes include environment preservation, cultural legacy, public safety, image, infrastructures, and also network externalities (Tirole, 1988) within the destination. According to this approach, the overall satisfaction of a tourist depends not only on the products and services offered by the firm, but also on the availability of complementary products offered by other tourism players operating in the same destination.

Customers are becoming more and more "experience-centric" (Prahalad & Ramaswamy, 2004), especially in tourism. Therefore the tourism industry is facing with a paradox related to the fragmentation on the supply side and to the demand of a "all-in-one experience" by customers (d'Angella & Go, 2009). As stated before, the tourism product can be considered as a composite product, therefore its production requires the contribution of a variety of tourism firms that are specialized in different activities (accommodation, transportation, entertainment, sport facilities, etc.). Sinclar and Stabler (1997, p. 58) argue that the tourism product must be considered as "a collection of industries". In fact all of its components are separate and independent, but at the same time they are linked and sequentially tied in a value-added chain structure, whose final product is a tourism experience delivered to the customer.

Nowak, Sylvain and Mondher (2010) explore the phenomena of the fragmentation of production in the tourism industry related to tourism packages. They assert that the tourism package is a product system that can be divided into many segments of production, each deeply different from the others, and so it requires particular skills, technologies and factors of production combined in different proportions (Nowak, Sylvain, & Mondher, 2010).

Considering the hospitality industry, partnerships are commonly developed to meet the increasingly complex needs, to satisfy the more and more demanding customer, and to provide to tourists a memorable holiday experience. According to Kandampully (2006), hospitality firms and other tourism operators work together in order to provide service bundles to customers that can enhance the image and the perceived value of the services offered by the hotel.

Literature provides several definitions of bundling. Yadav and Monroe (1993, p. 350) define bundling as "the selling of two or more products and/or services at a single price". Stremersch and Tellis (2002, p. 56) describe it as "the sale of two or more separate products in one package". Guiltinan (1987, p. 74) refers to bundling as "the practice of marketing two or more products and/or services in a single package for a special price".

Bundling was first analyzed by economics literature focusing on the issues arising from the point of view of the firm. Aims pursued by this stream of research are mainly related to the determination of the conditions under which a firm should offer a bundle of products rather than selling them separately (Adams & Yellen 1976; Bakos & Brynjolfsson 1999; Guiltinan 1987; Matutes & Regibeau 1992; Salinger 1995; Schmalensee, 1982). Harris (1997) studied the case of bundling a new product with an established one, showing its

positive effect on perceived quality and on lowering the market risk of the new product. Reinders, Frambach and Schoor (2010) studied how product bundling represents an effective marketing strategy to launch radical innovative products.

The more recent literature on bundling has shifted the focus to the analysis of the customer side (Gaeth, Levin, Chakraborty & Levin, 1991; Mazumdar & Jun, 1993; Yadav & Monroe, 1993; Johnson, Herrmann, & Bauer, 1999; Noone & Mattila, 2009). Several authors analyzed the impact of price, promotion, discounts and additional savings that customers can get from bundling (Yadav & Monroe, 1993; Bojanic & Calantone, 1990; Drumwright, 1992; Gaeth, Levin, Chakraborty & Levin, 1991; Kwon & Jang, 2011) and its effect on customers' and tourists' perceived value (Naylor & Frank, 2001). Rewtrakunphaiboon and Oppewal (2008), Mungerand Grewal (2001) and Oppewal and Holyoake (2004) investigated the role of information available for the bundle/package and its impact on the tourist's evaluation and purchase process. When products are offered in a bundle, customers evaluate these products differently from their separate selling (Rewtrakunphaiboon & Oppewal, 2008). Bundling product or services creates a new context of purchase for the customer, who is forced to evaluate each item of the bundle in relationship to the others (Harris, 1997).

As stated before, bundling represents an established practice in the tourism industry. The two more common forms of bundling in tourism are package holidays and package tours. The configuration of these types of bundling could be basic or all-inclusive (Wong & Kwong, 2004). An all-inclusive package is a planned trip, usually paid in advance, that includes transportation, accommodation, sightseeing, meals and at times a guide (Sheldon & Mak 1987; Morrison, 1989). A basic package usually provides accommodation and transportation (Mok & Armstrong, 1995). Packages are usually purchased by first-time tourist in a destination, whose lack knowledge of facilities, accommodations, etc. (Lai & Graefe, 2000) increases their perceived value of packages (Naylor & Frank, 2001).

Considering the previous theoretical insights, this study attempts to contribute to the research stream focused on collaboration among SMEs in the tourism industry. We investigate collaboration related to a particular partnership setting, i.e. the bundling practice. Through bundling, SMEs, and in particular hoteliers, can deliver an experience-driven tourism product to customers. Collaboration among tourism firms represents an essential feature for the creation and the supply of a bundle.

Considering that segmenting a market represents one of the major methodological approaches used in studies on the hospitality industry (Bowen & Sparks, 1998), the main purpose of this research is to provide a segmentation of the hospitality industry players according to their motivations to collaborate in creating service bundles.

3. Methodology of the study

3.1 Study site

The research field of this work is VDA, a mountainous semi-autonomous region located in the North-West of Italy. It is a small alpine region with an area of 3.263 Km² and a population of 130,000. VDA represents an interesting research field to study tourism phenomena, since the natural landscape and the copious snow in winter have allowed the development of a flourishing tourism industry, especially related to winter sports. Tourism is one of the strongest points of the Region's economy, with around 930,000 arrivals a year and 3,110,000 attendances.

Our research focus is the hospitality industry. In VDA there are 746 accommodation facilities: 411 hotels, 42 agritourism firms, 123 bed & breakfast, 66 touristic residences (apartment hotels, RTA), 104 guest houses and stopover locations. The added value of the hotels and restaurants sector represents 9 percent of regional total, much higher than the Italian average of 4 percent¹. These features make VDA an interesting site to investigate tourism dynamics in hospitality.

3.2 Measurement of drivers of collaboration and other relevant variables

Variables were measured using scales widely tested in marketing literature and adapted to the hospitality context, most of which are included in the 3rd edition of the *Handbook of Marketing Scales* (Bearden, Netemeyer & Haws, 2011). To measure hoteliers' orientation towards collaboration, we referred to the Alliance Orientation scale derived from Kandemir, Yaprak, & Cavusgil (2006), that includes three dimensions: (1) alliance scanning, (2) alliance coordination, and (3) alliance learning.

Benefits achievable through service bundling were analyzed using the scales proposed by Blomstermo, Eriksson, Lindstrand and Sharma (2004) and by Blindenbach-Driessen, Van Dalen and Van Den Ende (2010). To analyze trust we followed Kumar (1996), adapting the scale from Suh and Houston (2010), which splits the trust construct in two dimensions: (1) integrity and (2) benevolence. To analyze innovativeness, we adapted the scale from Calantone, Cavusgil and Zhao (2002), which was based on the previous work of Hurt, Joseph and Cook (1977), Hurt and Teigen (1977), and Hollenstein (1996). We study market orientation by adapting the scale of Narver and Slater (1990), validated in many following studies (Deshpandé & Farley, 1996) and also applied to surveys in the hospitality industry (Wang, Chen & Chen, 2012). We adapted the scale developed by Vella, Gountas & Walker (2009) to analyze the Service orientation construct. Customer orientation was studied adapting the scale proposed by Deshpandé, Farley and Webster (1993).

Personal interviews were conducted to some executives of ADAVA (a hoteliers' association) and to some hoteliers to further explore the drivers of collaboration in the hospitality industry and to properly adapt the scales taken from literature to the specific context, which represents a procedure often used in literature (Lee,

¹ The source of these data is Assessorato al Turismo Regione Valle d'Aosta. Data refer to the years 2010 and 2011.

Lee, Bernhard, Yoon, 2006; Cai, 2002). The scale items modifications included rewording some statements to suit the attributes of tourism industry (Al-Sabbahy, Ekinici, & Riley, 2002). These procedures yielded to a list of 52 items, which were measured using a 5-point Likert scale with a value range from 1 (strongly disagree) to 5 (strongly agree).

3.3 Sample, questionnaire, and data collection

Data was collected through a 52-items questionnaire applied to accommodation facilities in VDA during the month of October 2011. A list of 746 accommodations was drawn from the directory of accommodation facilities provided by the VDA's Regional Office of Tourism.

Key informants are accommodation owners and managers (hoteliers), who play a critical role in the tourism industry. Thanks to their close contact with tourists, hoteliers represent a reference point for them, a privileged position which allows them to better detect changes and new trends in tourism demand. Hence, they can be considered promoters or even initiators of potential partnerships among tourism operators (Labben & Mungall, 2007; D'Angella & Go, 2009).

Each accommodation facility of VDA received an e-mail invitation to participate in the web-based questionnaire, which was sent with the endorsement of ADAVA. Two weeks after this e-mail invitation, hoteliers were further contacted by telephone in order to solicit their participation in the survey. 164 hoteliers agreed to participate and actually responded to the survey. This yields to a net response rate of 22%, which is uncommon in marketing research, especially in B2B contexts (Gummesson, 2003). The main driver of such a high rate is the endorsement of ADAVA, a well-known and highly respected association, which solicited hoteliers' attention and interest. The submission period, as well, was mindfully chosen in order to get hoteliers' collaboration. The questionnaires were submitted during the month of October, a rather quiet time of the year which falls between the closed summer season and the beginning of the winter season.

The sample includes five different typologies of accommodations: hotels (55.5%), B&Bs (27.4%), agritourism firms (3.7%), apartment hotels (7.9%), guest houses and stopover locations (5.5%). Most of them are family businesses, owned and managed by one or more components of the same family (64.0%). On average, the organizations' age is approximately 14 years.

The questionnaire consisted of two main parts. The first part is focused on collaboration, and specifically on service bundling. After a brief introduction to the study, respondents were asked to rate 52 items on 5 point Likert scales. In the second section of the questionnaire, hoteliers were asked to answer questions about their business activity: age since the foundation, age of the actual ownership/management, category (number of stars) where applicable, number of rooms, governance type (family business or not), location and accommodation type (hotel, B&Bs, agritourism firms, apartment hotels, guest house, stopover location). These data are useful to profile the segments.

3.3 Data analysis

The fifty-two items were factor analyzed to identify a set of underlying dimensions for collaboration using the principal component method with Varimax rotation. All factors with eigenvalues greater than 1 were retained as being significant, while factors with eigenvalues less than 1 were discarded. The Kaiser-Meyer-Olkin (KMO) and Bartlett's tests are used to measure sampling adequacy and to examine the appropriateness of the factor analysis. These indexes show that the data set is suitable for factor analysis, with a value of .868 at the significance level of .000.

Cronbach's α was computed to check the internal consistency of the various items. All chosen factors have a Cronbach's α above 0.721, thus providing an adequate level of reliability (Nunnally, 1978).

The resulting factor scores were then used to identify clusters of respondents motivated to collaborate by similar drivers. Using K-means clustering procedure, hoteliers were classified into 4 mutually exclusive groups.

The Chi-Square Automatic Interaction (CHAID) analysis was finally used to profile the four clusters and to get further insights into their characteristics. Introduced in the 1970s by Kass (1975), it has been used also in the field of tourism research (Dinan & Sargeant, 2000; Vassiladis, 2008; Kemperman & Joh, 2003) for many purposes: to segment hotel customers and to identify hotel preferences (Chung, Oh, Kim, & Han, 2004), to analyze tourists' expenditures based on their demographics and travel patterns (Diaz-Perez, Bethencourt-Cejas & Alvarez-Gonzalez, 2005), to segment tourists according to their shopping preference and their intention to revisit a country (Kim, Timothy & Hwang, 2011).

To undertake the CHAID procedure, we defined as dependent variable hoteliers' cluster membership and as independent variables hoteliers' accommodation facility features: demographic variables such as size, age, number of rooms, category (number of stars, where applicable), and management variables such as type, previous experience with bundling, type of governance. The stopping rules for the CHAID analysis were a maximum tree depth of 3, a minimum of 2 cases for a given node, and significance level for splitting of 0.05.

4. Results

4.1 Results of factor analysis

The factor analysis of the fifty-two items measuring hoteliers' network orientation resulted in ten dimensions, shown in Table 1.

----- PLEASE INSERT TABLE 1 HERE -----

All ten dimensions have eigenvalues greater than 1 and account for 70 percent of the total variance. All have relatively high reliability coefficients, ranging from 0.722 to 0.928.

The first dimension is *Benefits achievable through bundling*, which explains 11.3 percent of the total variance with a reliability coefficient of 0.923 (see Table 1). Benefits represent a key driver for the creation

of partnerships, and are related both to the supply (knowledge increase, business activity increase) and to the demand-side (better satisfaction of customers' needs). Service bundles are perceived as innovations: *Hoteliers innovativeness*, the second dimension, accounts for 10.1 percent of the variance of networking orientation ($\alpha=0.912$). *Innovativeness* means trying out new ideas, being creative in methods of operation, being the first to market with new products, being alert to market developments to identify alliance opportunities. Then *Past experience in collaboration/networking* comes into play (9.3 percent of the variance explained, $\alpha=0.928$), which comprises six items related to the capability of coordinating activities and strategies, of transferring knowledge among partners, of conducting periodic reviews of the partnerships also to improve the procedures. *Information sharing*, the fourth dimension which explains 9.0 percent of the variance ($\alpha=0.911$), comprises seven items related to knowledge exchange, to the willingness to help other tourism operators, to the development of close relationship with people who can provide information. *Trust in integrity of other operators*, the fifth dimension (8.4 percent of the variance, $\alpha=0.819$), is loaded by items such as being confident that partners in the network tell the truth, are sincere, and are willing to give the best advice. Collaboration in service bundling is fostered by hoteliers' *Willingness to learn through collaboration*, the sixth dimension (5.5 percent of the variance, $\alpha=0.88$), which concerns the belief that collaboration in service bundling helps to increase knowledge among partners, to stimulate teamwork, to get new information from wide and diverse networks. *Customer orientation*, *Market orientation*, and *Service orientation* are the seventh, eighth and ninth dimension (5.1 percent, $\alpha=0.782$; 4.4 percent, $\alpha=0.729$; and 4.3 percent, $\alpha=0.722$ respectively). These three factors measure hoteliers' orientation to better satisfy customers' needs, to constantly track customer satisfaction (Customer), to respond fast to competitors' moves (Market), to use service as base of competitive advantage (Service). The final dimension, labeled *Benevolence towards other operators* (2.6 percent of the variance, $\alpha=0.761$), consists of three items related to the belief that partners in the network can count on each other on important issues, when circumstances change, and in the future.

Looking at the means of the factors (last column of table 1), the driver with the highest rate is *Customer orientation* (mean value 4.28), followed by *Benefits achievable through bundling* (mean value 3.95) and *Trust in the integrity of other operators* (mean value 3.927). This finding is consistent with previous studies (Gopalan & Narayan, 2005; Fyall & Garrod, 2005; Go & Appleman, 2001). Tourists are becoming more experienced and more discerning, and this leads to an increase in their expectations towards the tourism experience. The multifaceted nature of the tourism experience has stimulated operators to develop relationships with several stakeholders to provide a complete solution to customers' needs (Novelli, Schmitz, & Spencer, 2006).

4.2 Four clusters of hoteliers

A cluster analysis was operated to classify hoteliers into exclusive segments on the basis of their scores on the ten factors identified in the factor analysis. The K-means clustering algorithm resulted in a four-cluster solution, which appeared as the most appropriate. Table 2 shows the summary statistics of the four clusters.

----- PLEASE INSERT TABLE 2 HERE -----

The four clusters have rather different sizes. Cluster 1 is the biggest (66 hoteliers, 40 percent of the total) and includes hoteliers whose main drivers to cooperate are past experience in networking and trust in the integrity of the other operators. We have labeled this segment as *Relational/Socials* to signify their willingness to create new partnerships on the base of previous experience and with operators they really trust. Hoteliers belonging to the second cluster (n=37, 22.5 percent) are called *Opportunists* because they appear to be interested mainly in the benefits achievable through service bundling and in the possibility of counting on other operators' support when needed. The smallest cluster (n=17, 10.4 percent) includes the *Innovators*, hoteliers for whom service bundling is a way to pursue innovation. They are driven mainly by the search for innovation and seem to care less for trust and benevolence towards the other operators of the network. The final segment is cluster 4, the *Marketers/Market driven* (n=44, 26.8 percent), which includes hoteliers who tend to focus much more on external than on internal drivers. They consider service bundling as opportunities to learn through knowledge sharing, and look at customers and market trends as a source of new ideas.

4.3. Clusters' profiles

CHAID algorithm clearly shows which segmentation variables profile best the four segments of hoteliers. The resulting tree is shown in figure 1.

----- PLEASE INSERT FIGURE 1 HERE: Figure 1. CHAID tree of hoteliers -----

The first splitting variable is accommodation type ($\chi^2 = 13.372$, d.f.=3, p=0.05), which separates the small number of agritourism firms from all the other hoteliers. Almost all these operators belong to the segment of the Opportunistic operators, i.e. hoteliers mainly driven to collaborate by benefits achievable through bundling and by benevolence towards other operators.

A possible explanation of this phenomenon depends on start-up motivations and goals of both agritourism owners and their guests. Several authors discussed the topic of start-up motivations in rural tourism, most of them distinguishing between economic benefits and non-economic benefits such as personal, social or family benefits (Nickerson, Black, & McCool, 2001; Sharpley & Vass, 2006; Tew & Barbieri, 2012). According to Getz and Carlsen (2000), lifestyle goals are twice more frequent when considering rural businesses, while Ingram (2002) points out that another motivation is the opportunity to meet new people that share the

common interest for nature and tranquility, enjoying the rural lifestyle. Agritourism firms offer their guests a place to relax and to live an authentic rural experience, breaking out of the city routine. Agritourism customers look for simplicity, tradition and genuineness in their tourism experience. This is why agritourism firms approach the bundling practice only if it could represent a real economic benefit for their activity through the generation of additional revenues. Moreover, the typical agritourism guest is less demanding and used to concentrate its holidays on very short period. In fact the average length of stay is around 2.8 days in VDA (Data from Assessorato al Turismo Regione Autonoma Valle d'Aosta, 2011) and has significantly decreased in the last decade, registering a -20 percent from 1997 to 2006 (Istat, 2008). Thus the average length of staying at an agritourism accommodation is shorter than the one at other type of accommodations. The average length of stay in VdA is 3.24 days (3.12 days in hotels and 5.3 days in RTA). Another factor that impacts on this phenomenon is the great instability that characterizes the business activity in VDA agritourism sector. The number of agritourism firms has grown from 27 in 1991 to 42 in 2011 (Source: Assessorato al Turismo Regione Autonoma Valle d'Aosta, 2011), even if several openings and closings succeed one another each year: since 2000, 26 new agritourism firms have been created, 15 just in the last 5 years. Their birth has been more stimulated by the influence of regional laws (see also Pulina, Dettori, & Paba, 2006) and by public incentives offered to support the development of this type of activity than by tradition and experience in hospitality. As such, service bundling represents for agritourism firms a less critical competitive weapon, unless it leads to immediate economic benefits.

The second splitting variable is governance type ($\chi^2=15.067$, d.f.=3, $p=0.005$), which separates family businesses from managerial governance. Family businesses are the largest percentage of hoteliers in VDA: they represent 88 percent of all operators except agritourism firms, while if we include this accommodation typology the percentage rises to 91.5 percent. Family businesses are included in all the four clusters, representing more than $\frac{3}{4}$ of hoteliers in VDA; even if their presence is relative higher in the two clusters of the *Relational/Socials* and of the *Opportunists* (95 and 86 percent of the hoteliers are family businesses, respectively). Being a family-run business does not pair with a specific attitude towards networking orientation, which confirms that demographic variables are very poor a-priori segmentation variables also in service industries (Andereck & Caldwell, 1994). Of the 14 hoteliers characterized by managerial governance, 8 belong to the segment of the *Market driven*, and 4 to the segment of the *Innovators*. Being an hotelier with managerial governance makes the difference in terms of service bundling orientation: managers appear to be more outer-directed, more open to market stimuli; they are also more prone to innovate and consider service bundling as an opportunity to learn and as an effective tool for innovation to better satisfy their customers.

5. Conclusions and implications for tourism operators and stakeholders

One of the fundamental challenges that affect SMEs in the tourism industry is related to the paradox of supply fragmentation versus the demand of an all-in-one experience by tourists (d'Angella & Go, 2009).

More than ever, customers are becoming experience-centric in the tourism industry (Pine & Gilmore, 1999; Uriely, 2005; Ritchie & Hudson, 2009; Tung & Ritchie, 2011).

Collaboration among tourism operators represents a powerful tool to overcome the structural limitations of this industry and to create the perception of a whole destination in tourists mind (Dev & Klein, 1993; Chathoth, 2004). Several types of partnerships can be developed in a destination context. One among them is service bundling, which is becoming more and more common nowadays. The creation of tourism packages requires the development of collaborative skills among the operators involved in such a partnership, and is driven by different motivations.

In this study we explore service bundling considering the hoteliers' side and investigating the motivations behind their natural networking orientation. In general, networking orientation is a complex construct and several authors focused their research on factors that can contribute or obstacle the development of collaboration among tourism operators (Bramwell & Lane, 2000; Bramwell & Sherman, 1999; Hill & Shaw, 1995; Jamal & Getz, 1995; Palmer, 1998; Palmer & Bejou, 1995; Selin, 1993; Selin & Beason, 1991; Selin & Myers, 1998; Tremblay, 2000; Medina-Munoz & Garcia-Falcon, 2000; Pansiri, 2008; Beritelli, 2011).

The factor analysis operated on hoteliers' networking orientation confirms the multidimensionality of this construct when referred to the service bundling practice. We identify 10 factors that contribute to hoteliers' networking orientation, which include *functional benefits of bundling*, *hoteliers' innovativeness*, *willingness to share information among partners*, *willingness to learn from partners*, *trust in other operators*, *evaluation of previous collaborative experiences* and *openness to market stimuli*. *Customer orientation*, *benefits achievable through service bundling* and *trust in the integrity of other operators* are the factors with higher mean scores., and represent the foundation for the choice of getting involved in a package development.

Due to the variety of motivations underlying networking orientation, operators strongly differ in approaching the bundling practice. Through a cluster analysis and a subsequent profiling through a CHAID analysis, we define four different clusters of hoteliers: the *Relational-Socials*, the *Opportunists*, the *Innovators*, and the *Marketers*. The *Relational-Socials* is the largest cluster, with 40 percent of hoteliers. These hoteliers are naturally prone to the creation and development of relationships; they weight very high trust in the integrity of other operators and carefully evaluate the experience related to established and past relationships before getting involved into new collaborative partnerships. Another large cluster is that of the *Marketers* (27 percent of hoteliers). These hoteliers are the most open to outside stimuli, which they use to develop collaborative relationship to satisfy customers' needs. The cluster of the *Innovators* represents the less crowded, and includes hoteliers who look forward and interpret the service bundling practice as an innovation that allows them to be precursors in better satisfying their customers.

Our study offers some points of reflection on agritourism firms that were classified as *Opportunists*. The CHAID analysis clearly separates this type of accommodation from the others. Our analysis shows that agritourism owners are mainly driven by *benefits achievable through service bundling*, a result which could be a consequence of the motivations behind the start-up of an agritourism firm which, combined to a

legislative factor, explains at least partially the great instability of this sector (high number of new born activities and buried ones). Agritourism owners' attitude towards collaboration is driven by functional benefits and not by the opportunity to develop long term relationships with other operators in the destination. Because of this, it is difficult to predict their future orientation towards collaboration as they become older and more experienced.

The CHAID analysis underlines another important splitting variable, i.e. governance type. Most of businesses in VDA are family-run. This is a typical feature of the global tourism industry, and even more typical in the Italian economic system, which is highly based on SMEs. Considering their predominance as a governance type, family businesses are present in all four clusters, therefore their networking orientation is poorly explained by business and firm features. In the case of family businesses, networking orientation is more related to the personal characteristics of the owner(s), and strongly relies on his (their) personal network(s). On one side, the high density of family businesses is surely a source of competitive advantage because of the intimate relationship that is created and grows between customers and hoteliers, but on the other side the same density does not favor the adoption of an outward-looking perspective and innovation. It is symptomatic that all accommodations run by a managerial governance are much more outward-looking, and belong to the segment of the *Marketers* and to the segment of the *Innovators*.

Our study offers some interesting insights on networking orientation considering a small and winter tourism-based region such as VDA, in which the Public Administration (PA) plays a fundamental role for tourism promotion and destination development. PA usually represents a crucial stakeholder in a destination development (Jamal & Getz, 1995; Felsenstein & Fleischer, 2003; Dredge, 2006). Analyzing the different motivations that animate tourism operators, and in particular hoteliers, PA should develop policies that support and stimulate collaboration among tourism operators, providing incentives to joint initiatives and promoting this type of partnership to improve the tourism experience in a destination.

Our research has some limitations. Despite a good response rate (22%), our sample could be improved in terms of selection procedure. A quota sample could give an adequate representation to small but significant segments of hoteliers, such as managerial-governed businesses and agritourism, which show some distinguishing features.

To generalize these findings the study could be replicate in similar destinations such as Rhone Alps or South Tyrol, or in destinations characterized by different size, seasonality and culture. Another path for future research could be a longitudinal study aimed at tracking the change (or the stability) of hoteliers' networking orientation, and to test if this orientation changes with changes in the tourists' demand.

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Figures and Tables

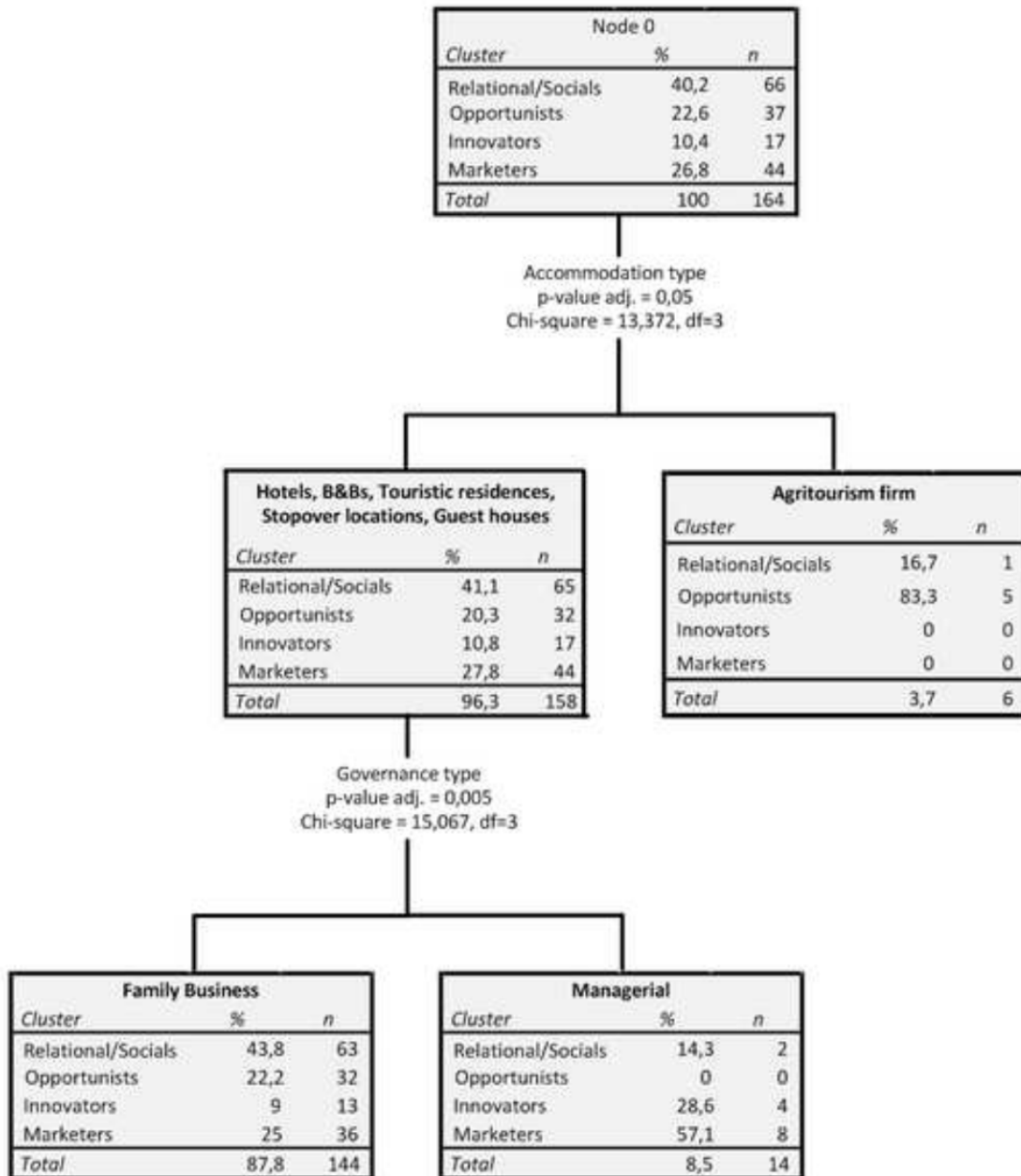


Figure 1. Cluster Number of Cases

Table 1. Results of factor analysis of hoteliers' networking orientation

Drivers of collaboration factors and items	Factor loading	Eigenvalue	Variance (%)	α	Mean
F1: Benefits achievable through bundling		15.259	11.296	.923	3.950
Service bundling leads to a significant growth of my activity	.788				3.829
Service bundling leads to knowledge increase	.807				4.073
Service bundling leads to business increase	.802				4.018
The reputation of our organization would increase, as a consequence of service bundling	.790				3.951
The knowledge and experienced gained by partners will be of large value for subsequent innovation projects	.667				3.860
Service bundling provides our firm a competitive advantage	.704				3.793
Service bundling satisfies the clients' needs	.734				4.012
Service bundling leads to higher quality	.747				4.067
F2: Hoteliers' innovativeness		4.834	10.096	.912	2.773
Our hotel frequently tries out new ideas	.770				2.732
Our hotel is creative in its methods of operation	.807				3.061
Our hotel is often the first to market with new products and services	.806				3.037
Innovation in our hotel is perceived as too risky and is resisted (reverse)	.747				2.579
Our new products/services introduction has increased over the last 5 years	.648				2.665
We actively monitor our environment to identify partnering opportunities	.597				2.463
We routinely gather information about prospective partners from various forums (e.g., trade shows, industry conventions, databases, publication, internet, etc.)	.544				3.030
We are alert to market developments that create potential alliance opportunities	.763				2.616
F3: Past experience in collaborating/networking		3.429	9.335	.928	2.522
Our activities across different alliances were well coordinated	.856				2.939
We systematically coordinated our strategies across different alliances	.782				2.396
We had processes to systematically transfer knowledge across alliance partners	.783				2.793
We conducted periodic reviews of our alliances to understand what we are doing right and where we are going wrong	.798				1.890
We periodically collected and analyzed field experience from our alliances	.843				2.287
We modified our alliance-related procedures as we learn from experience	.773				2.829

F4: Information sharing	2.914	9.011	.911	2.862
I believe that knowledge sharing among tourism operators can help establish my image as an expert	.733			2.213
Helping other tourism operators address work problems would make me feel happy and satisfied	.713			3.055
I enjoy exchanging knowledge and I don't ask for anything in return	.793			2.835
I am willing to use my spare time to help other tourism operators	.655			3.293
I would personally help other tourism operators regardless of whether or not they ask for my help	.786			2.628
I am willing to help other tourism operators	.728			2.933
I have close and good relationships with people that provide me with information	.521			3.079
F5: Trust in the integrity of other operators	2.450	8.354	.819	3.927
Even when the partner gives us a rather unlikely explanation, we are confident that it is telling the truth	.658			3.768
Only few times the partner has provided us information that has later proven to be inaccurate	.750			3.884
Whenever the partner gives us advice on our business operations, we know that he/she is sharing its best judgment	.709			4.287
Our organization can count on the partner to be sincere	.787			3.963
I trust people who give me information since I consider them highly qualified	.552			4.104
Though circumstances change, we believe that our partners will be ready and willing to offer us assistance and support	.609			3.555
F6: Willingness to learn through collaboration	2.092	5.451	.880	3.555
I am pleased to learn and share knowledge among different partners	.717			3.378
I believe that partners should help each other through collaboration to foster knowledge sharing	.571			3.890
Collaboration is useful to obtain information from friends and colleagues	.790			3.372
Collaboration is useful to obtain information from wide and diverse networks (attending fairs, exhibitions, associations, a wide range of forums, etc.)	.766			3.579
F7: Customer orientation	1.549	5.102	.782	4.280
We assess regularly the satisfaction of our customers	.789			4.122
The accomplishment of our goals is based on the satisfaction of our customers	.628			4.372
We regularly monitor and assess our commitment to customer satisfaction	.810			4.348
F8: Market orientation	1.488	4.364	.729	3.996
It takes us a short time to decide how to respond to our competitor's price changes	.734			3.659
We are fast to respond to changes in our customer's product or service needs	.586			4.311

If a major competitor launches a campaign to our customers, we implement a response immediately	.691				4.018
F9: Service orientation		1.304	4.328	.722	3.029
Our competitive advantage is based on understanding our customers' needs	.447				4.280
I enjoy being around customers	.582				2.561
I am concerned about what customers think of me	.800				3.024
I have the customer's best interests in mind	.680				2.250
F10: Benevolence towards other operators		1.034	2.571	.761	3.396
When we share our problems with partners, we know that it will respond with understanding	.550				3.957
In the future, we can count on partners to consider how his/her decisions and actions will affect us	.470				3.128
When it comes to things that are important to us, we can depend on the partners' support	.354				3.104
Total variance extracted (%)					69.909

Table 2. Cluster analysis outcome

	Cluster 1 (n=66)	Cluster 2 (n=37)	Cluster 3 (n=17)	Cluster 4 (n=44)	F value	Sig.
Benefits achievable	-.17391	.40537	-.46420	.09933	4.305	.006
Innovativeness	-.11317	-.64635	1.40014	.17231	24.241	.000
Past experience	.50090	-.01018	-.15792	-.68178	15.903	.000
Information sharing	.27954	-.40802	.30033	-.19224	5.198	.002
Integrity	.44441	-.43596	-1.01115	.09066	16.108	.000
Willingness to learn	-.07012	-.43102	-.01626	.47391	6.245	.000
Customer orientation	-.23369	-.08259	-.02111	.42815	4.212	.007
Market orientation	-.12297	-.29347	-.35824	.56965	7.734	.000
Service orientation	.23066	-.70574	-.44879	.42087	13.620	.000
Benevolence	-.20526	.48622	-.92390	.25598	11.504	.000
Cluster name	Relational/ Socials	Opportunists	Innovators	Marketers Market driven		

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