



Relationship marketing strategies in the container shipping industry: A qualitative approach

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Abstract

Recently, technological advancements, globalization, ongoing mergers and acquisitions, and intense competition have dominated the container shipping industry. This situation has led to the formation of major container shipping lines with similar technologies, offering the same service. In such an environment, a strategic competitive advantage is no longer entirely dependent on the basic features of the service provided and customer relationships, which is more difficult to replicate, has gained importance. Container shipping lines must develop customer-centric relationship marketing strategies that cover the whole organization and marketing activities to survive, and maintain their profitability, in the current competitive environment of the industry. However, these strategies and their implementation are not precisely defined in the container shipping industry. Therefore, this study explores the relationship marketing strategies that are practiced in the container shipping industry. Data is collected via 22 semi-structured interviews with container shipping partners (i.e. container shipping lines and freight forwarders). Loyalty programs and relationship pricing are the most often mentioned relationship marketing strategies that foster customer loyalty in these interviews.

Introduction

To survive and remain competitive in the container shipping industry's current competitive climate, businesses must build long-term close relationships with their partners. Relationship marketing is an approach based on developing long-term relationships with partners and it can guide businesses in this regard. In a marketing environment, where it is clear that a strategic competitive advantage cannot be attained solely on fundamental product qualities, it has gained attention (Barnes, 1994, p. 562). The

focus of marketing has shifted from attracting customers to activities related to acquiring and engaging with customers (Ravald & Grönroos, 1996, p. 19). Berry (Berry, 1983) used the term 'relationship marketing' to describe this paradigm change in marketing. He described relationship marketing as attracting, maintaining, and – in multi-service organizations – enhancing customer relationships. The social nature of service, active and frequent face-to-face interactions between the service provider and the customer, circumvents the difficulty of evaluating service quality, and actual memberships (e.g.

contractual relationships) that connect the customer and service provider all contribute to the importance of 'relationships' in service businesses (Czepiel, 1990, p. 17). The essence of relationship marketing is sustaining ties between the company and micro-environmental players such as suppliers, market intermediaries, the public and, most importantly, the customer (Ravald & Grönroos, 1996).

Businesses must design strategies that foster customer loyalty, do research on the value created by the service offered to the customer, and possess the necessary internal competency to maintain a long-term relationship with the customer (Sanzo & Vázquez, 2011). Relationship marketing is focused above all on creating customer loyalty to develop a stable, mutually profitable, and long-term relationships (Ravald & Grönroos, 1996). Previously, customer loyalty was not a top priority for most business manager and marketing scholars (Berry, 1995). However, it is now recognized that building stronger relationships with existing customers is the way to ensure that companies survive in turbulent and/or competitive market conditions (Webster, 1992; Chaston, Badger & Sadler-Smith, 2000). Several marketing researchers consider value, and value exchanges, as the most important element of relationship marketing (Ravald & Grönroos, 1996; Grönroos, 1997; Ballantyne, Christopher & Payne, 2003; Sanzo & Vázquez, 2011).

In the supply chain context, Ballantyne (Ballantyne, 1994, p. 3) defined relationship marketing as an emerging disciplinary framework for creating, developing, and sustaining value exchanges between parties. The key issue in the exchange of values is not what service the company offers but how the company maintains a relationship (Ravald & Grönroos, 1996). Therefore, container shipping lines should explore the value that the customer gains from the shipping service, to prevent service failures, continuously improve the service, and provide better relationship customization. To gain customer loyalty and search the value received by the customer from the service supplied, the business must possess many competences. To accomplish its goals, the business must develop both technological/procedural and human capabilities, as well as establish, develop, and assess a customer database (Grönroos, 1995). Due to customers' ever-increasing expectations for service quality and the unique needs of each individual customer, it is challenging to keep current customers loyal. Following globalization, businesses must deal with copious amounts of customer data. Because of the complexity in handling such data, customer

relationship management (CRM) has taken over all of the work that companies do (Ding, 2012). CRM is a critical factor in developing relationships with the customer, as it allows an organization to customize products and services for each customer. It is a customer-focused business strategy for increasing customer satisfaction and loyalty through a more responsive and tailored service (Yang & Nguyen, 2011). Businesses should design their organizational structure and procedures flexibly in order to be more service-oriented, and to analyze the root causes of customer desertions (Sanzo & Vázquez, 2011) and customer dissatisfaction. Human interactions are important sources of businesses in service industry. Service quality is highly influenced by the personnel's capabilities and work attitudes (Berry, 2002). In the context of container shipping, human resource management is an important capability dimension (Lu, 2007). Employees' attitude and behavior in meeting customers' requirements, quick response to customers' inquiries, and knowledge of customers' requirements are important elements that affect maritime transportation service quality (Thai, 2008) and, therefore, the relationships between container shipping partners.

Long-term close relationships provide many benefits for both container shipping lines and freight forwarders. Container shipping lines provide consistent, trustworthy, frequent, and cost-effective service. Unused vessel capacities cannot be kept for further use because of the nature of the services. This situation pushes container shipping lines to operate fully and leads to long-term contracts with shippers and freight forwarders to ensure the volume of cargo (Notteboom, 2004, p. 88). The services provided by freight forwarders make them dependent on the physical and knowledge resources of the container shipping lines. A higher level of dependency, according to resource dependence theory, typically leads to a stronger inter-organizational relationship (Chu & Wang, 2012). Another benefit of the long-term relationship with the container shipping line is the financial convenience provided to loyal freight forwarders. Low freight and price flexibility are the most important carrier selection criteria for freight forwarders (Kannan, Bose & Kannan, 2011). To build a mutually beneficial business relationship, it is critical for container shipping partners to recognize changes in their relationship, and act together, protecting their mutual interests. Customer-oriented relationship marketing strategies can guide container shipping lines to establish mutually beneficial relationships with their customers. However, relatively

little research has examined a firm's applications of such relationship marketing strategies in the container shipping industry (e.g. Balci, Caliskan & Yuen, 2019; Caliskan, 2019; Caliskan & Esmer, 2017, 2020). To fill this gap, this study explores container shipping lines' customer-oriented relationship marketing strategies that cover a firm's primary and supportive activities from the value chain perspective. The current study points out that successfully implemented customer-oriented relationship marketing strategies ensure mutual benefit by establishing a long-term close relationship with the customer.

Literature review

Container shipping is a standardized business-to-business service market, in which container shipping lines must maintain a customer-centric mindset to succeed (Balci & Cetin, 2017). Thus, the fact that few studies in the literature relate to relationship marketing strategies in container shipping, which is the motivation of this study, has meant that the limited amount of service industry literature on the subject is straightforward to search.

Relationship marketing strategies in service industry

Relationship marketing strategies focus on building long-term relationships, rather than acquiring large numbers of new customers (Kumar, 2014, p. 1045). Reichheld and Sasser (Reichheld & Sasser, 1990) have shown, in various service sectors, that when a business successfully lowered customer defect rates, profits increased significantly. By devoting marketing resources to developing relationships with existing customers, service businesses gain two important benefits: expanding relationships and reducing customer defections (Berry, 1995, p. 244). Realizing these benefits, businesses began creating relationship marketing programs and developing strategies to build long-term close relationships with the most profitable customers (Camarero Izquierdo, Gutiérrez Cillán & San Martín Gutiérrez, 2005).

In 1983, Berry made the first attempt to propose relationship marketing strategies. To achieve long-term customer loyalty, he recommended the following five relationship marketing strategies: core service strategy, service augmentation, relationship customization, relationship pricing, and internal marketing. Berry (Berry, 1995) then offered three application levels for relationship marketing based on the type of bond produced by the relationship: financial bond, social bond, and structural bond. Level

one marketing methods include financial marketing techniques (e.g. price incentives to ensure customer loyalty). Relationship marketing at the second level is concerned with social relationships and it tries to establish social linkages between parties. Given that many service encounters are also social encounters, it is evident how critical these activities are to the relationship's continuation. Relationship marketing at the third level is based on the concept of developing a more formal relationship with customers by developing structural solutions to their needs. These solutions consist of customer-specific services that customers consider difficult and/or expensive to find (Balci, Caliskan & Yuen, 2019).

Chaston (Chaston, 1998) and Chaston et al. (Chaston, Badger & Sadler-Smith, 2000) focused on customer needs and problem solving, while proposing the relationship marketing strategies scale. Their scale includes the following six items: repeat sales by developing long-term close relationships, in-depth understanding of customer needs, new and improved products, tailored quality standards to meet the needs of individual customers, staff strongly committed to meet the needs of those inside and outside the organization, and the interaction of staff at all levels with the customer to solve identified problems. Camarero Izquierdo et al. (Camarero Izquierdo, Gutiérrez Cillán & San Martín Gutiérrez, 2005) conducted research to reveal the impact of relationship marketing strategies on the market and economic performance of the businesses in the service industry. They proposed two relationship marketing programs: attraction activities and loyalty and interaction programs. Attraction activities consist of the quality of service (e.g. high service quality and advanced technology) and commercial activities (e.g. broad business hours and a professional layout). Loyalty and interaction programs include the following practices: bonus (e.g. price reductions and gifts or free services), customer satisfaction (the effort to meet deadlines and budgets and, thus, achieve satisfied customer), complaints (the effort to answer and minimize customer's complaints) and contact with customers. Their findings show that the effect of attraction and loyalty programs on market performance is greater than the effect on economic performance. Ndubisi (Ndubisi, 2012) examined the impact of relationship marketing strategies on relationship quality. By drawing from the mindfulness theory, he investigated the relationship marketing strategy implementation of small healthcare businesses. He proposed three main mindfulness-based relationship marketing strategies: customer

orientation (understanding customer needs, response to their requirements, and investigating sources of potential service failure and dissatisfaction), communication (timely and reliable information flow to the customer and customer information flow at an expert-level service), and competence (expertise, professionalism, and technical skills of the service provider).

Sanzo and Vazques (Sanzo & Vazques, 2011) investigated the potential influence of a firm's customer relationship marketing strategies on the relationship with suppliers, from the supply chain context. They classified former relationship marketing dimensions into three groups as follows: enhancing customer loyalty, obtaining personal customer information, and internal capability of service provider to support these two strategies. The first dimension focuses on the firm's perspective on customer relationships and practices that foster customer loyalty, such as keeping promises, providing value-added services, and offering loyalty programs. The second dimension emphasizes the importance of obtaining personalized information about each customer to conduct in-depth customer value and profitability analyzes. The third dimension focuses on the technological (CRM), procedural (service-oriented organization), and human-related capabilities required to implement the previous dimensions. In this research, these three dimensions are considered as the main categories of the content analysis because they include the dimensions proposed in previous studies, and they deal with the issues from the perspective of a business-to-business service, including container transportation.

Relationship marketing strategies in the container shipping industry

Customer value can be briefly defined as the impact of the service or product offered by the supplier on the customer's own value chain. This offer must improve the customer's performance and provide significant benefits at a low cost. To meet customer expectations, suppliers should assess what they will provide the customer, the market structure, and customer needs while developing their relationship marketing strategies. This could be called a value proposition or "*how to intend to create value for customers*" (Peck et al., 1999, p. 421). To create value in supplier-customer relationships, the supplier must focus on resources (personnel, technologies, knowledge and information, customer time, and the customer themselves) and their ability to acquire and

manage them (Grönroos, 1997, p. 417). Information technology, such as the internet and business intelligence, can enable shipping companies to focus more deeply on their customers and provide products and sales services at levels that are necessary to retain customers (Durvasula, Lysonski & Mehta, 2004). The customer oriented relationship marketing strategies are critical for customer retention, as they entail offering financial and social benefits to customers in addition to structural relationships (Kumar, 2014, p. 1047). Thus, the customer receives a high level of customer value because of the supplier's offer. The factors affecting the customer value in container shipping relate to how well the product, service, and information flow between the parties in the maritime logistics system is provided, and how well the customer needs are met.

The rising complexity and diversity of shippers' and customers' expectations, as well as the continuously changing role of ports in supply and logistics chains, have created maritime logistics as a valuable emerging field (Panayides & Song, 2013, p. 295). Maritime logistics, which is an important part of the supply chain, is referred to as a set of maritime transport processes involved in logistics flows (Lee & Song, 2010). Maritime logistics processes consist of planning, implementing, and managing the movement of goods and information involved in ocean transportation (Lee, Nam & Song, 2012). The value created in this system is related to how successfully the flow of goods, services and information is managed throughout all the processes and how well customer demands are met (Lee & Song, 2010). Therefore, container shipping partners must design their primary and secondary activities to meet changing customer needs and expectations. The strategies to meet these needs and expectations help provide better maritime logistics value. In the context of container shipping, value exchange occurs between ports, container shipping lines, freight forwarders, and shippers. They work collaboratively to produce maritime logistics value within the maritime value system in which they operate. Container shipping lines operate on a regular and scheduled timetable between pre-set ports, transporting a diverse range of commodities from various sectors (Balci & Cetin, 2017). Freight forwarders, on the other hand, have long been regarded as critical logistical intermediaries in the facilitation of cross-border trade (Murphy & Daley, 2001). Researchers argue that more than 80% of container traffic in the global container shipping market comes from freight forwarders (Chen, Chang & Lai, 2009; Ho et al., 2017). Therefore, we

consider freight forwarders the primary customer of container shipping lines by considering the large cargo volumes that they handle. Due to the freight forwarder's intermediate role between container shipping lines and shippers, container shipping lines' relationship marketing strategies applied to freight forwarders also affect freight forwarders' value proposition and, as a result, shippers' perceived value. According to the maritime logistics system, the value creation process starts with shippers (Lee & Song, 2010). From this vantage point, freight forwarders must consider the needs of shippers, while establishing relationships with shipping lines. Thus, it is critical to investigate the issue from the perspective of freight forwarder companies to accurately reflect the expectations of the shipper.

Numerous academics have examined several dimensions of relationship marketing in the context of container shipping. Besson (Besson, 2018) examined relationships between container terminals and container shipping lines, as well as the many motivations (e.g. economic, strategic and social) for relationship development. Yuen et al. (Yuen et al., 2018) analyzed the role of perceived value, trust, and transaction cost in mediating the influence of sustainable shipping practices on the loyalty of shippers and freight forwarders. Shin et al. (Shin et al., 2017) conducted an empirical study with shippers, freight forwarders and third-party logistics service providers to determine the effect of corporate sustainable management activities on customer satisfaction, word-of-mouth intention, and repurchase intention. Shin et al. (Shin, Thai & Yuen, 2018) explored whether the level of supply chain relationship quality (SCRQ) varies according to a firm's characteristics, such as firm type and ownership type, by using the sample of container shipping lines, shippers, and freight forwarders. Additionally, they examined the effect of SCRQ on supply chain performance.

However, relatively little research has been conducted on how relationship marketing strategies are defined and attributed in container shipping industry as a service sector. In one of these studies, Caliskan and Esmer (Caliskan & Esmer, 2017) adapted Berry's three level relationship marketing applications to search port-related relationship marketing tactics in Turkey. They grouped the practiced relationship marketing tactics under three categories: financial relationship marketing tactics (e.g. discount and deferred payment), social relationship marketing tactics (e.g. regular visits, gift giving and hosting a lunch or dinner), and structural relationship marketing tactics (e.g. contracts, service enhancement,

information and communication systems, and investment). Then, Caliskan (Caliskan, 2019) investigated the impact of personality trait types on relationship marketing practices. The proposed relationship marketing practices scale consists of financial relationship marketing (e.g. discount and payment easiness), social relationship marketing (e.g. preferential treatment and personal warmth), and structural relationship marketing (e.g. on location service and customizing the service). Caliskan and Esmer (Caliskan & Esmer, 2020) examined the influence of port investments on customer relationship performance indicators in the port industry, using the same three relationship marketing strategy characteristics. They found that relationship marketing strategies can have positive effects on customer loyalty, satisfaction, and word of mouth. In another study, Balci, Caliskan, and Yuen (Balci, Caliskan & Yuen, 2019) examined the impact of relationship marketing strategies on the satisfaction and loyalty of customers in container shipping. They determined that financial bonding strategies (e.g. deferred payment, discount and local expenses) have the most significant direct effects on customer satisfaction and the strongest total effects on customer loyalty. Another finding of the study implies that social bonding strategies (e.g. celebrations, gifts, and dinners) have the strongest direct impact on customer loyalty. They also found that structural bonding strategies, including intermodal (e.g. door-to-door service and value added service) and basic operations (e.g. empty container and special equipment), are found to have equal total effects on customer loyalty. To the best of our knowledge, there is no research on relationship marketing strategies in the maritime logistics industry outside of these studies, which were prepared while considering the relationship marketing application level proposed by Berry. Therefore, our study fills this gap by exploring relationship marketing strategies practiced by container shipping lines operating in Turkey.

Methodology

A qualitative approach is applied in this study because of its explorative nature. Since it is realized that there is no comprehensive study on relationship marketing strategies practiced by container shipping lines in the relevant literature, a qualitative research design is suitable for the study. Among the numerous qualitative research methodologies available, this study adopts a small-scale survey (using exploratory interviews). By allowing researchers to collect data,

in which selected participants freely express their ideas, opinions, and views about existing research problems, exploratory interview methods are frequently used to investigate little-known issues and find relevant patterns emerging in the field (Collis & Hussey, 2014). We explored the relationship marketing strategies practiced in the Turkish container shipping industry by using a semi-structured interview, which is a typical data collection method in qualitative research. Open-ended questions are highly suitable for respondents to express their views and experiences on the issues clearly (Foddy, 1994). To this aim, a questionnaire form consisting of four open-ended questions is directed to the container shipping lines and freight forwarders, which create reflections on their subjective opinions of the subject.

The region of focus in this research is the Turkish container shipping industry, since the geographic and strategic relevance of the industry, as a key logistics center between Europe and Asia, has expanded recently. Turkey has a well-established container shipping network since it is a country that trades various industrial and agricultural products with countries worldwide and a total trade volume of approximately 390 billion USD by 2020 is anticipated (Balci, 2021). The world's leading container lines, including MSC, Maersk, CMA CGM, COSCO, Hapag Lloyd, ONE, Evergreen, etc. operate actively in Turkey. Global logistics and forwarding companies such as DHL, Kuehne-Nagel, DB Schenker, Nippon Express, Ceva, DSV, and Geodis offer forwarding services for shippers in the Turkish container shipping market. Thus, the qualitative research that is targeted at the Turkish container shipping industry can derive meaningful strategic implications in maritime logistics research.

In this study, data was collected by using a multistage purposeful random technique. The sample selection process for the interviews was conducted carefully. First, the list of container shipping lines engaged in active business in Turkey was created. The list of major freight forwarders was created by selecting from the members of Association of International Forwarding and Logistics Service Providers (UTIKAD). Second, to ensure the geographic representation of the sample, the shipping lines and freight forwarders selected for interviews cover organizations in all the main trade regions of Turkey. Additionally, both container shipping lines and freight forwarders in the sample set have a worldwide presence and a multi-national structure. Since we only focused on container shipping lines'

customer relationships, the respondents from the container shipping lines should be aware of customer relations. Therefore, we have explicitly requested that the respondents have job specifications that hold direct contact with freight forwarders, or they are to be a manager/owner of the company. We also requested that the freight forwarder respondents have job specifications that hold direct contact with container shipping lines, or they are to be a manager/owner of the company. The interviewees are intimately familiar with their organizations' interaction with container shipping lines/freight forwarders because they are members of top management or personnel who have direct contact with personnel of other parties. As a result, they can deliver outstanding responses to interview questions and can address the relevant research topics, while providing a broad variety of insight into the relationships in the Turkish container shipping industry. Before the interviews, a list of potential interviewees was prepared in various organizations, and each of these interviewees was called by phone or e-mailed to participate in the interviews. A total of 22 interviewees from 12 container shipping lines and 10 freight forwarders participated in the study (Table 1). They varied in terms of job position and work experience in their sector. The questionnaire form, in a html format, was sent to those who agreed to participate in the interview. This type of interview was chosen because of the time constraints of interviewees and Covid-19 pandemic restrictions.

We used a content analysis technique and deductive approach to analyze the interview transcripts. Content analysis is described as any technique that infers meaning by systematically and objectively identifying special characteristics of messages (Holsti, 1969, p. 608). Depending on the research objective and the data, a deductive approach can be highlighted by referring to priori categories that were used in previously relevant research (Berg, 2009; Mackey, 2013). Manifest and latent themes can be used in the coding process. Researcher's assessment of the meaning of the words, phrases, and passages is reflected in latent content, as opposed to the manifest coding that focuses on the existence of certain communication features identified in the communication (Mackey, 2013). We examined deep structural meaning (latent content) found within the interview transcripts. Interview transcripts were read many times and we interpreted the expressions frequently emphasized by the participants, based on patterns and themes relevant to the literature on relationship marketing in service business. We used code to

Table 1. Profile of interviewees

| Company | The position of the interviewee | Total work experience in the sector | Company | The position of the interviewee | Total work experience in the sector |
|---------|---------------------------------|-------------------------------------|---------|---------------------------------|-------------------------------------|
| CSL1 | Agency trade manager | 10 | FF1 | Branch manager | 27 |
| CSL2 | Country sales manager | 22 | FF2 | Operations specialist | 10 |
| CSL3 | Senior trade manager | 17 | FF3 | Operations specialist | 21 |
| CSL4 | Line manager | 20 | FF4 | Sales manager | 10 |
| CSL5 | Customer service manager | 25 | FF5 | General manager | 12 |
| CSL6 | Regional manager | 21 | FF6 | Operation manager | 15 |
| CSL7 | Customer service manager | 10 | FF7 | Sales representative | 10 |
| CSL8 | CEO | 31 | FF8 | Sales representative | 10 |
| CSL9 | Sales representative | 12 | FF9 | Sales representative | 12 |
| CSL10 | Sales representative | 10 | FF10 | Sales representative | 14 |
| CSL11 | Sales representative | 10 | | | |
| CSL12 | General manager | 24 | | | |

identify each organization's interviewee; CSL means container shipping line and FF denotes freight forwarder in the following text and Table 1.

Findings

Analysis of the findings, according to the themes emerging from the interview data conducted in line with the purpose of the study, is presented in the following subsections.

The benefits of long-term relationships

The first step in developing a relationship marketing strategy, and making it a corporate culture, is the understanding that a long-term relationship with customers will produce beneficial results for the company. So, we asked the participants of CSLs if they care about developing long-term relationships with freight forwarders and what are the benefits of such a relationship for their business. Long-term relationships also have significant effects on freight forwarders' business. Therefore, the same question was directed to the freight forwarder professionals as follows "Do you care about developing long-term

relationships with container shipping lines? What are the benefits of such a relationship for your business?" The analysis revealed that both container shipping lines and freight forwarder value long-term relationships and mutually benefit from them (Table 2).

Most of the interviewees agree that long-term relationships allow long-term planning by reducing uncertainty. Another common output of long-term relationships is its impact on business volume. CSLs assert that creating long-term relationships with customers increases their business volume, whereas FFs assert that developing long-term relationships with CSLs increases their business volume with shippers. Additionally, CSL benefit from the ability to engage in this relationship, which promotes mutual interest, increases customer commitment, and diversifies cargo. The second important output of long-term relationships for FFs is its impact on decreasing dependency on suppliers. Eight FFs highlighted that long-term relationships decrease the dependency of FF on CSL. Other benefits the FFs stated is that it enables regular shipment for their regular cargoes contracted with shippers and allows cooperation that improves maritime logistics value.

Table 2. The benefits of long-term relationships

| CSL | Frequency/Percentage | FF | Frequency/Percentage |
|--------------------------|----------------------|--------------------------|----------------------|
| Allow long-term planning | 12/100 | Allow long-term planning | 8/80 |
| Increase business volume | 3/25 | Decrease dependency | 8/80 |
| Relationship investment | 2/16.6 | Regular shipment | 6/60 |
| Mutual interests | 1/8.3 | Cooperation | 3/30 |
| Customer commitment | 1/8.3 | Increase business volume | 3/30 |
| Cargo diversity | 1/8.3 | | |

Customer loyalty strategies

Table 3 presents all the customer-oriented relationship marketing strategies, categorized under customer loyalty strategies. The most expressed strategies, addressed under customer loyalty strategies, are

relationship pricing and customer loyalty programs. According to the answers of the CSLs, the most performed strategies for attaining customer loyalty is relationship pricing (discounts on freight rates, deferred payment, and flexibility in demurrage free time) and loyalty programs (priority in shipment,

Table 3. Customer-oriented relationship marketing strategies of the container shipping lines

| # | Main category | Sub-category | Items | Frequency/Percentage | | |
|----|---|-------------------------------|--|---|---------|--------|
| | | | | CSL | FF | |
| 1 | Customer loyalty strategies | Relationship pricing | Discounts on freight rates | 9/75 | 8/80 | |
| 2 | | | Deferred payment | 5/41.6 | 8/80 | |
| 3 | | | Flexibility in demurrage free time | 1/8.3 | 2/20 | |
| 4 | | Loyalty programs | Priority in shipment | 6/50 | 10/100 | |
| 5 | | | Availability of equipment | 3/25 | 10/100 | |
| 6 | | | Prompt response to customer requirements | 3/25 | –/– | |
| 7 | | | Global customer department | 1/8.3 | –/– | |
| 8 | | | Relationship investment | 1/8.3 | –/– | |
| 9 | | | Logistics service capability | Intermodal service (door-to-door service) | 6/50 | –/– |
| 10 | | Communication | Timely and reliable information flow | 3/25 | 3/30 | |
| 11 | | | Celebration of special days together | 1/8.3 | –/– | |
| 12 | | Core service | Reliability of service | 3/25 | –/– | |
| 13 | | | Geographical coverage | 1/8.3 | –/– | |
| 14 | Customer value research | Information gathering/sharing | Personal and direct contacts (Sales representative) | 12/100 | 10/100 | |
| 15 | | | Customer database | 12/100 | –/– | |
| 16 | | | Online Meeting | 3/25 | 1/10 | |
| 17 | | Use of information | Understanding customer needs | 12/100 | –/– | |
| 18 | | | Prompt response to operational and commercial demands | 2/16.6 | 10/100 | |
| 19 | | | Customer value analysis | 6/50 | –/– | |
| 20 | | | Customer profitability | 4/33.3 | –/– | |
| 21 | | Internal capability | Technological capability | Cooperation | –/– | 3/30 |
| 22 | | | | Service recovery | –/– | 1/10 |
| 23 | | | | CRM | 12/100 | –/– |
| 24 | Internal capability | Technological capability | Online services | 2/16.6 | 5/50 | |
| 25 | | | EDI and problem-solving applications | 2/16.6 | 4/40 | |
| 26 | | | Communication technologies | 1/8.3 | 1/10 | |
| 27 | | Procedural capability | Annual satisfaction survey | 8/66.6 | 10/100 | |
| 28 | | | Customer visits after survey feedback | 8/66.6 | 8/80 | |
| 29 | | | Feedback after each shipment-service satisfaction survey | 2/16.6 | 5/50 | |
| 30 | | | Service excellence | 1/8.3 | 1/10 | |
| 31 | | Internal capability | Human capability | Customer desertion | 1/8.3 | –/– |
| 32 | | | | Knowledge of employee | 11/91.6 | 10/100 |
| 33 | | | | Prompt response to customer requirements | 8/66.6 | 9/90 |
| 34 | Understanding customer needs | | | 10/83.3 | –/– | |
| 35 | Staff stability | | | 6/50 | –/– | |
| 36 | Employee trainee (in and out training course) | | | 5/41.6 | –/– | |
| 37 | Operational capability | | | –/– | 5/50 | |
| 38 | Attitude of employee | | | 1/8.3 | 3/30 | |
| 39 | Employee satisfaction | | | 2/16.6 | –/– | |
| 40 | | Willingness to help customer | –/– | 2/20 | | |

availability of equipment, prompt response to customer requirements, etc.). The other implemented customer loyalty strategies expressed by the CSLs are as follows, in order of frequency: communication, logistics service capability, and core service strategy.

When the answers given by the FFs are examined, it is observed that the most mentioned customer loyalty strategies are loyalty programs. All the FFs stated that CSLs perform loyalty programs, including the priority given to find empty containers (availability of equipment) and spaces on board (priority in shipment). The second important customer loyalty strategy stated by the FFs is relationship pricing (e.g. discounts on freight rates, deferred payment, and flexibility in demurrage free time). According to the answers of the FFs, the other customer loyalty strategy performed by CSLs is communication (timely and reliable information flow). However, none of the freight forwarders mentioned the logistics service capability and core service strategy among the strategies that ensure customer loyalty.

Customer value research

How customer information is collected, and for what purposes this information is used, are given under the main category of customer value research in Table 3. According to the responses, all the CSLs participating in the study collected customer information directly from customers via sales representatives and held it in a customer database in order to ascertain customer needs and create specific relationships. Some CSLs stated that they obtained customer information during the global coronavirus pandemic by arranging online meetings. All the CSLs stated that information gathering helps to understand customer needs. The other areas that use customer information are customer value analysis, customer profitability analysis, and systems that enable a prompt response to operational and commercial demands of FFs.

All the FFs interviewed reported that CSLs contact them directly on a periodic basis via sales representatives. A FF indicated that they held online meetings with CSLs because of the global coronavirus pandemic. The viewpoint of all the FFs interviewed is that information sharing enables a prompt response to their operational and commercial demands. The second important output of information sharing is revealed as cooperation with CSLs. A FF indicated that information sharing with CSLs helps recovery on shipping services.

Internal capability of the container shipping lines

The internal capability of CSLs is examined under three sub-categories: technological capability, procedural capability, and human capability (as presented in Table 3). In terms of technological capability, all the CSLs stated that they use the CRM system in their relationship with customers. This system enables customer segmentation, reporting past meetings with customers, a viewing of current and past shipment details of customers, and freight rate offers etc. (CSL7). According to the answers of the CSLs, the other practices that show the technological capability of the CSLs are online services, electronic data interchange (EDI) and problem-solving applications (Salesforce, Palantir, etc.), and communication technologies. Based on replies from the freight forwarders, online service capabilities – such as an operational/documentation process, online reservation, online pricing, online vessel program, and container tracking service – are indicators of technological capabilities of CSLs. The other indicators of technological capability of CSLs, expressed by the interviewed FFs, are electronic data interchange (EDI) and problem-solving applications, and communication technologies. An interviewee from the FFs stated that the use of communication technologies should be increased for accurate and timely communication during shipment operations and service negotiations.

In terms of business procedures, the most performed practices by the interviewed CSLs are the supply of annual satisfaction surveys to customers and a provision for customer visits after survey feedback. Most interviewed CSLs stated that they conduct annual satisfaction surveys and visit shippers in response to survey comments. The other procedural practices stated by interviewed CSLs are service satisfaction survey after each shipment, service excellence, and customer desertion procedures. All the interviewed FFs reported that CSLs undertake an annual satisfaction survey to assess the operational, commercial, financial, and documentation processes' performance. The second most emphasized procedural practice by the interviewed FFs is customer visits after survey feedback. The other procedural practice the interviewed FFs stressed was the feedback on the service that they received following each shipment, in terms of service enhancements and solutions to service failures. According to the answers of the FFs, another procedure that CSL applies to freight forwarders is the procedure of service excellence.

The other internal capability of businesses, maybe the most important, is human capability. The most expressed human capability factors are employees' knowledge and a prompt response to customer requirements. Most of the interviewed CSLs stated that employees' knowledge is a key factor in CSL-FF relationships. Understanding customer needs and a prompt response to customer requirements are the other two most expressed human capabilities by the interviewed CSLs in their relationship with freight forwarders. Other human capability factors stated by the interviewed CSLs are staff stability, employee training, employee satisfaction, and the attitudes of employees. In terms of the interviewed FFs, employees' knowledge and a prompt response to freight forwarder's requirements are the most important human capability factors in their relationships with CSLs. From the interviewed FFs side, other important criteria are the operational capability of employees, the attitude of the employees, and the willingness to help.

Conclusion and discussion

Today, in the container shipping industry, a long-term relationship with the customer is a critical strategy that affects the sustained competitive advantage of CSLs. Effective implementation of relationship marketing strategies has a positive impact on long-term close relationships with the customers. Most of the interviewees highlighted that a long-term relationship with a partner allows for long-term planning by reducing uncertainty and increasing their business volume. A CSL expressed this benefit as follows: "...we absolutely care about establishing long-term relationships with customers. In times of uncertainty when the trade volume is affected by various factors, our ability to maintain our business volume and make long-term planning depends on long-term relationships. Other times, working with our customers for a long time ensures that our business volume and cargo diversity are constantly increasing. This means an increase in our commercial power in the sector. Our ability to cooperate with other container shipping lines develops in conjunction with our commercial power."

This result shares the view of Gummesson (Gummesson, 1987), who stated that building and maintaining relationships have important long-term implications and, therefore, affects the strategic and long-term planning of a firm's marketing. Additionally, long-term relationships with container shipping lines decrease the dependency of FFs on

CSLs. A FF highlighted this benefit as follows: "...in the container shipping industry, our shipping line alternatives have decreased considerably, especially after mergers in the last 5 years. If we do not establish a long-term relationship in the almost-monopolized market, this would be a huge disaster for all freight forwarder companies. It is essential to establish long-term relationships with container shipping lines for the continuity of the service we provide to our customers. Since such a relationship will provide us with some priorities in the service we receive, our dependence on the shipping line will be reduced." The results also provide empirical evidence to support the conclusion of Chu and Wang (Chu & Wang, 2012) that long-term close relationships with supplier enables a managed dependence.

As a result of our research, we found that the relationship marketing practices that create customer loyalty consisted of the following five dimensions, in order of expressed frequency: loyalty programs, relationship pricing, communication, logistics service capability, and core service strategy. This finding is consistent with the literature, as these dimensions and their factors are determined as relationship marketing strategies in various earlier studies, such as in Berry (Berry, 1983; 1995; 2002), Caliskan and Esmer (Caliskan & Esmer, 2017), Caliskan (Caliskan, 2019), Balci, Caliskan & Yuen (Balci, Caliskan & Yuen, 2019), Camarero Izquierdo et al. (Camarero Izquierdo, Gutiérrez Cillán & San Martín Gutiérrez, 2005), Ndubisi (Ndubisi, 2012), Chaston (Chaston, 1998), Chaston, Badger and Sadler-Smith, (Chaston, Badger & Sadler-Smith, 2000), and Sanzo and Vazques (Sanzo & Vazques, 2011). Among these dimensions, loyalty programs and relationship pricing are most often expressed as the strategies that have influence on customer loyalty. The results confirm the findings of previous research that show that financial bonding strategies of CSLs, including deferred payment opportunities and discount on freight rate, have the largest total effect on FFs' loyalty compared to other relationship marketing strategies' dimensions (Balci, Caliskan & Yuen, 2019). This finding is also consistent with that of Kannan, Bose and Kannan (Kannan, Bose & Kannan, 2011), who indicated that low freight and pricing flexibility are ranked as the most important criterion in carrier selection criteria of shippers.

There is a need for personalized information about each customer to understand their needs, enabling a prompt response to their operational and commercial requirements, and a deep customer value

analysis and customer profitability analysis. According to Sanzo and Vazques (Sanzo & Vazques, 2011), obtaining personalized information is the main mechanism for ensuring customer loyalty. Customer information can be attained through regular and direct contact with customers and effective usage of the customer database. According to the answer of interviewees, CSLs have direct contact with FFs via their sales representatives. The results confirm the findings of previous research that show that the ratings of marketing/sales representatives had the strongest impact on the overall satisfaction of shipping managers (Durvasula, Lysonski & Mehta, 2002). Storing customers' information is also quite necessary to customize the relationship. The result is also consistent with the perspective that service businesses can more precisely customize the service to the current situation, after learning the specific characteristics and needs of individual customers by collecting their data (Berry, 2002).

The internal capability of CSLs have been examined under three categories: technological capability, procedural capability, and human capability. In terms of technological capability, the interviewed CSLs use CRM systems to develop special relationships with customers and, thus, create a competitive advantage. The result is consistent with those seen in some previous studies (Durvasula, Lysonski & Mehta, 2004; Sanzo & Vázquez, 2011; Yang & Nguyen, 2011). Customer-oriented container shipping lines must develop a set of company procedures, such as a procedure to search for reasons why customer desert their business. In the container shipping industry, the interviewed CSLs stated that they supply annual satisfaction surveys to allow feedback to be taken on their performance in terms of the operational, commercial, financial, and documentational processes. After the feedback is received, interviewed CSLs visit the customer to help evaluate the results of the survey and to investigate the cause of any possible dissatisfaction. Thus, they try to eliminate customer desertion. This finding is consistent with the argument of Sanzo and Vazques (Sanzo & Vazques, 2011) that businesses must implement a procedure to discover why customers desert. As in all service industries, the key factor in the container shipping industry is human interactions. The capabilities – such as employees' knowledge, understandings of customer needs, and prompt response to customer requirements – are important human resource competences that have a considerable impact on customer loyalty. This finding is again consistent with the literature, as

these factors are indicated as important service attributes of container shipping lines in various earlier studies, such as in Kannan et al. (Kannan, Bose & Kannan, 2011) and Thai (Thai, 2008). The results also confirm the findings of previous research that human resource management is an important capability dimension in the context of container shipping (Lu, 2007).

Investigating the relationship marketing strategies applied to the container shipping industry provides several contributions to industry and the relationship marketing literature. From a general perspective, the study extends the knowledge of relationship marketing strategies and presents a new path from the perspective of the container shipping partners. Focusing on the maritime logistics value, the study explores long-term oriented and customer-centric relationship marketing strategies that are applied by container shipping lines. As stated in earlier sections, little work has been done to investigate the performed relationship marketing strategies in the container shipping industry. Therefore, this study fills the gap in the literature in this regard.

The management of container shipping lines face difficulties in setting up a successful relationship marketing strategy and practice. Our research findings recommend that practitioners segment their customers according to their profitability and develop a tailored relationship marketing program for each customer. Since the explored relationship marketing strategies also reflect the views of freight forwarders, who play an intermediary role between the shippers and the container shipping lines, these relationship marketing strategies will have a considerable effect on the maritime supply chain performance, if implemented by the practitioners.

Although this study contributes to the literature by exploring the relationship marketing strategies and reveals important managerial implications, it consists of some limitations; these shortcomings indicate directions for future research. First, given the exploratory nature of the study, it is important to test the findings in an empirical study with a large sample. Second, this study examined the relationship marketing strategies from the container shipping lines and freight forwarders' perspective. Examining the subject from the perspective of direct shippers will reveal different relationship marketing strategy dimensions. Third, its generalizability is limited to the container shipping lines that are active in Turkey. The applicability of the explored relationship marketing strategies should also be tested in different countries.

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Appendix

Semi-Structured Interview Questionnaire

Questions directed to the Container Shipping Lines

1. Do you care about developing long-term relationships with freight forwarders? What are the benefits of such a relationship for your business?
2. What relationship marketing practices (e.g. value added services) do container shipping lines perform for freight forwarders to achieve their long-term loyalty?
3. How do you obtain information from freight forwarders and where do you use this information (e.g. customer value analysis)?
4. What does your company do to improve relationships with freight forwarders, considering the organisational capabilities stated below?
 - Technological Capabilities
 - Procedural Capabilities
 - Human Capabilities

Questions directed to the Freight Forwarders

1. Do you care about developing long-term relationships with container shipping lines? What are the benefits of such a relationship for your business?
2. What relationship marketing practices (e.g. value added services) do container shipping lines you have long-term relationships perform to your business?
3. How do container shipping lines obtain your business' information (personal, shipment etc.)? What are the benefits of sharing information with container shipping lines for your business?
4. Considering the organizational capabilities of container shipping lines stated below, what does container shipping lines perform to improve relationships with your business?
 - Technological Capabilities
 - Procedural Capabilities
 - Human Capabilities

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