

Image of the multinational trade chains functioning in the Slovak food market

Imidž nadnárodných obchodných reťazcov pôsobiacich na slovenskom trhu potravín

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Abstract: The image of a shop is the perception of the attributes of trade chains which are stated by consumers or the target market. The part of the shop image can be the assortment, the production quality and price, services of the shop, organization, the location and atmosphere of the shop, advertising and the shop reputation. The basis for conceiving this paper was an assumption that the image of a shop is one of the determining factors of the shopping place choice. The individual attributes of a shop can affect the perception of a consumer and therefore affect his decision about the choice of a shop and buying goods. The image analysis of trade chains was processed on the basis of a 5-point scale which shows the respondents' attitude toward each and every of 29 attributes of the researched trade chains. The basic data were gained by the means of a questionnaire research in the field of Slovak consumers' behaviour and the results were analysed by the means of the semantic differential method. The shop image analysis hands out information which can be a starting point for understanding the importance of the attributes of the trade chains from the point of view of the consumer perception and attitude. Based on the image analysis of the foreign trade chains in the Slovak market, we can say that the consumers are satisfied with the opening hours, shops location, cleanliness and appearance of shops and the sufficient number of shopping trolleys. Minuses were noticed in the field of promotion activities and the waiting time at the registers.

Key words: image analysis, multinational trade chains, retail, wholesale, questionnaire research, customer attitudes, customer perception

Abstrakt: Imidž predajne predstavuje vnímanie atribútov obchodných sietí, ktoré sú dané spotrebiteľom alebo cieľovým trhom. Súčasťou imidžu predajne môže byť sortiment, kvalita tovaru, jeho cena, služby predajne, usporiadanie a lokalizácia predajne, atmosféra predajne, reklama a tiež povesť predajne. Základom pre koncipovanie príspevku bol predpoklad, že imidž predajne je jedným z rozhodujúcich faktorov výberu miesta nákupu. Jednotlivé atribúty predajne dokážu pôsobiť na vnímanie spotrebiteľa, a tým ovplyvniť jeho rozhodovanie nielen pri výbere predajne, ale aj jeho rozhodovanie pri kúpe tovaru. Analýza imidžu obchodných sietí bola vypracovaná na princípe 5-bodovej hodnotiacej škály, ktorá vyjadruje postoj respondentov ku každému z 29 atribútov skúmaných obchodných sietí. Podkladové údaje boli získané dotazníkovým prieskumom nákupného správania slovenských spotrebiteľov a výsledky prieskumu boli analyzované metódou sémantického diferenciálu. Analýza imidžu predajne poskytuje informácie, ktoré môžu byť východiskom pre pochopenie významu jednotlivých atribútov obchodných sietí z hľadiska vnímania a postojov spotrebiteľov. Na základe analýzy imidžu zahraničných obchodných sietí, pôsobiacich na slovenskom trhu, možno konštatovať spokojnosť respondentov s otváracou dobou predajní a dĺžkou predaja, lokalizáciou predajní, čistotou a vzhľadom predajní a dostatočným počtom nákupných vozíkov. Nedostatky boli vnímané v oblasti promočných aktivít a v dĺžke doby čakania pri pokladni.

Kľúčové slová: analýza imidžu, nadnárodné obchodné reťazce, maloobchod, veľkoobchod, dotazníkový prieskum, spotrebiteľský postoj, spotrebiteľské vnímanie

Marketing, trade and enterprising add to the creative business development in the competitive conditions of market economy, long-term sustainable and suc-

cessful of market position and sustainable flows of capital. Decisions on market strategy are supported by the knowledge of the marketing principles, searching

conditions in the external marketing environment and taking into consideration the most appropriate way how to use business resources. Marketing action has to be a flexible reaction to the actual situation in the market (Horská 2001).

Success and prosperity of trade chains depend on understanding of the factors which affect the consumer behaviour and on meeting the needs and requests of consumers in the quickly changing market environment. Trade chains should know the consumers reasons leading to buying and preferences of a certain food assortment – the time range when most of the shopping is being realized and the ways of shopping. Marketing decisions of business companies have to be consumer-oriented.

Retail outlets are trying to generate the marketing strategy which would form the outlines of uniqueness for their store, because the rareness and otherness are just the right means of attracting the customer. The overall sale strategy features complex of the exactly specified sphere of attended customers, the adequate assortment selection, and the range of the provided services and the psychological effect, which could be called the store atmosphere (Horáková 2001).

Store image is defined as the personality of shop, composed of many different factors. The design and the general image of the store is central to the perception of the goods displayed there. Store features, coupled with such consumer characteristics as shopping orientation, help to predict which shopping outlets people will prefer. Some of the important dimensions of the store's profile are location, the merchandise suitability and the knowledge and congeniality of the sales staff.

Consumers evaluate stores in terms of their specific attributes and the global evaluation of a store. Because the store image is now recognized as a very important aspect of the retailing mix, the attention is increasingly paid to the atmosphere (the use of space and physical features in the store design). The dimensions of the atmosphere include colours, scents and sounds (Solomon et al. 2002).

The store atmosphere is becoming a significant element of the retail dealer marketing strategy. The commercial environment affects buying behaviour in all types of retail outlets and together forms the store image and unique shopping experience (Turley, Chebat 2002).

The selections of product and shopping place have common features in terms of the customer decision-making process. In either event, the essence of decision-making comes out of the information process in which the information from the customer's long-term memory applies at first. A significant

information source is the store itself. In there, the factors bringing the information and consequently influencing the final purchase decision-making may modify the initial intent (Richterová 2003, Kretter et al. 2007).

Each business company has its own marketing mix associated with the sales strategy employing resources of competitive advantage – the exclusive products, lower prices, products positioning or the image. Smith (2000) incorporates among the elements of the final product setting the inner and outer store image, the store set-up, the customer flow, the coloured blocks and the product display at the retail place.

The perceived risk has traditionally been conceptualised as a multi-dimensional phenomenon being subdivided into various risks or losses, e.g. the physical, financial, psychological, social and time losses. The retail store performance risk refers to the concern that the chosen store might not “perform” as desired, i.e. it does not deliver the benefits expected. In case where a store fails to perform at the desired level, consumers face some of the other types of risks or losses. Financial risk includes concerns about how much a shopping trip will cost relative to an individual's financial resources. Paying more than necessary is a financial risk. Physical risk refers to the threats to the health or appearance of the consumer, which can be brought about by unsafe products or unsafe shopping experiences. Psychosocial risk results from the social embarrassment and the loss of social esteem resulting from friends or the family comparing the store's image with image they have of you, as well as the internal psychological disappointment connected with shopping at a store which is not consistent with one's self-image (i.e. losing self-esteem). Time/convenience risk refers to the amount of time required to find the store and to purchase a product and/or the time which can be needed to rectify a product failure

Attributes like range and variety, price, cleanliness, reputation of brands, speed of checkouts, quality of goods, convenient location, attractiveness of the store, size and layout were found to be the most important. The most frequently mentioned negative store attributes were “small number and variety of products”, “high prices” and “dirty store”. The research identified some attributes rarely mentioned by the previous studies such as paying for grocery bags, grocery carts with easy driving and depositing, the presence of child carts, having a trained staff, express checkout, small sizes of canned goods, the number of refrigerated units, the presence of toilets and telephones, the availability of self-selection, and having a lottery facility.

One implication of the research is to suggest that the store attributes affect the overall store image and therefore have strategic implications.

A slow, low-quality service and an unhelpful staff can have an immediate negative effect on the self-esteem, status, authority and prestige feelings of customers, making the consumers feel less special and important and decreasing the chance of them becoming store-loyal.

In response to the time and the convenience risks involved, some grocery retailers have opened smaller in-town units, providing 24-hour shopping and the customer-operated scanning systems to eliminate queuing, expanded into non-food ranges and a wider range of customer facilities in order to facilitate the one-stop shopping (Mitchell, Harris 2005).

Marketing communication in a shop plays an important role by gaining consumers and affecting their perception, attitudes and shopping decisions. The goal of the trade companies is to persuade the customer to buy foodstuffs and use the services of their and no other trade chain. Based on the positive experience with shopping, the satisfaction and trust of a consumer start their development and lead to the loyalty and fidelity of a customer.

The value of a retail product includes a number of different aspects, among them the perception of price, quality and image as well as the economic and social aspects of the consumer. Consumers of today have a far more information with which to make comparisons between the alternative offers. The perceptions will differ as they are based upon the available time the individuals have to carry out a comparison shopping. Some individuals have a wide network of acquaintances and may consult alternative information sources in making a decision about what offer delivers more value than another. A retailer or channel does not project a single image. It is likely to generate various images which differ according to a specific group, such as customers, employees, and shareholders, each of whom has a different type of experience with the company.

It is important to realize that the management cannot be effective unless it has some understanding of the way in which retail consumers make their decisions and act in relation to the consumption of the retail products. There is, therefore, a need to understand the different ways in which consumers choose and evaluate the alternative retail services.

The patronage of a retail outlet will be based upon certain common motives:

- (a) its convenience in the terms of the time required to reach the outlet, perhaps to park, walk around to find the product and then to pay,

- (b) the reputation of the retailer as judged by the self, friends and other retailers,
- (c) retail environment characteristics such as the ambience, decoration, displays, lighting, heating or air conditioning,
- (d) service encounter expectations of the friendliness of the staff, their knowledge, the return policy arrangements, the efficiency and courteousness of the transaction, the after sales service, the expectation of queues and other shoppers number,
- (e) expectations that the quality of the merchandise like the variety, the value for money, the quality and brands will fulfil the needs of the visit,
- (f) expectations of value, value for money through fair pricing, loyalty rewards, guarantees

If the retail outlet image, or service delivery policy, corresponds to the customer's need priority, then the improved loyalty is a likely result (Gilbert 2003).

THE PAPER OBJECTIVES, MATERIAL AND METHODS

The image of a shop is the perception of all trade chains attributes which are stated by either the consumer or the target market. It comprises the goods, the quality and price of goods, organization, location and atmosphere of the shop, advertising and reputation of the shop.

The objective of the paper was to point out the image of multinational trade chains which operate in the Slovak market at present. The objects of research were the following multinational trade chains with mainly foodstuffs assortment: Ahold Retail Slovakia (Netherlands), Billa (Austria), Kaufland SK (Germany), Lidl (Germany), Metro Cash & Carry Slovakia (Germany) and Tesco Stores SR (Great Britain). The objective of further research were Slovak consumers shopping in the mentioned multinational trade chains.

In reference to the fact that the stated objective requires detailed information about consumer preferences and customs, it was necessary to conduct a primary research in 2007 by the means of a personal questioning method using the prepared structured questionnaire. 425 respondents were chosen by the method of random choice without repeating. The data were processed and evaluated by the means of the MS Excel 2000 program. For the commercial chains image analysis, the program Statistica 6.0 was used. The research results were presented in the form of table and chart presentation.

Part of the questionnaire was formed by questions focused on the qualitative effects analysis. For their classification, a scale method (scale of attitudes)

can be used. It helps to transform the subjective expression of the quantitative appraisal, opinion and attitude toward into objective statistical data. The scales represent a group of questions which are used by the consumer to assign the researched problem on a chosen basis (continuum). This continuum can be expressed verbally (good, average, bad level of an effect), numerically (good level = 1, average level = 2, bad level = 3) and graphically (by the means of pictograms). Scales of direct evaluation are used mainly for researching the importance and influence of the criteria of the consumer behaviour.

By gaining data for the shop image analysis, the scale of meaning differences was used. This contains a range of contradicting adjectives located on the end of the scale with uneven numbers (five or seven points). The respondents evaluate the terms based on every attribute by marking this kind by a point in the scale which meets their opinions and feelings. The location of positive and negative terms on the scale is necessary to be changed from the left to the right in order to prevent one-way answers. The scale of the meaning differences can be used for creation of graphical profiles of the researched term. Based on the point scale is the Osgood method of the semantic differential applied by forecasts of consumer attitudes (Schiffman, Kanuk 2004).

The semantic differential represents an easy and direct tool for finding out about subjective attitudes. It is a scale technique which helps to quantitatively measure the subjective images that can be compared. The basis is the construction of bipolar scales and the result is a semantic differential in a form of a chart. The semantic differential method is used to compare the company image with the ideal state, to compare brands and services of the competition, to state the characteristics of the consumer attitudes toward production categories or brands and helps the advertising effectiveness analysis and other communication impulses for the change of the attitude. Data gained by the means of the semantic differential can be analysed in different ways. The most common technique is the profile analysis which uses the medium values (average, median). These medium values can be counted from the values given by all the respondents gained by the bipolar scale (contradicting adjectives), concerning a single object (Richterová 2006; Foret, Stávková 2003).

RESULTS AND DISCUSSION

In the middle of 90-ies of the last century, there were important changes in the Slovakia trade. The closed

market, purchasing power, undercapitalization and atomisation of domestic trade caused that multinational trade chains entered the Slovak market 3 months later compared to the Czech Republic and Hungary. A significant revival in trade came after the year 2000, when the European chains Metro, Kaufland, Carrefour, Hypernova and Lidl joined Tesco, Billa and Delvita. Continually, the Slovak trade was transformed, strong commercial chains were created represented by the cooperative Jednota COOP, Labas, s.r.o., alliances like the CBA SK and Slovpos, a.s., which gained the prominent places in the annual TOP 10 or TOP 50 trade companies. At the same time, there occurred a change in the consumer behaviour. The Slovak consumer respects the current trends, adjusts to new conditions and becomes an important player in the market. Therefore, the information of the shop image is important not only for the businessmen but also for the whole public.

Selection of the specific retail unit involves the comparison of alternative stores by the customer evaluative criteria. Kulčarová, Richterová (1996) describe the main selection factors for retail units which include store image, retail sales promotion and purchase orientation.

During the selection of the particular retailer, the consumers consider a number of aspects. The price established by the retailer is vital. There could be sentimental reasons for the consumer to prefer some retailers. Another aspect might be the convenience, option of choice, quality, shop assistance, image, honesty and fairness in the communication process and services offered (McCarty, Perreault 1995).

Consumers have revealed that the "Good Value for My Money" is now the most important factor in determining where they buy their groceries.

In a world where all retailers choose locations that are accessible and convenient to travel to in the terms of parking and the related amenities, the location ceases to be the only differentiator and is now less important than the "value for money" and the "selection of high quality products and brands".

Of those consumers who rated the "good value for my money" as a very or quite important point when deciding where to do their grocery shopping, three in four said it was important that a supermarket ran "a lot of promotions and regular price discounts" and seventy percent said it was important that the store had a "reputation for being cheaper than its competitors". In the third place, there were "prices published in the store's own leaflets", followed by "I research and compare prices across retailers", "price reductions offered through loyalty/store cards" and "stores that promised to have low prices every day" (AC Nielsen 2008).

The retail chain creates its own image through the tradename. Providing they know of the customer needs and satisfy them especially by the quality and low prices, they strengthen customer trust and loyalty, thus obtaining the company image, the bargain margin, a better position for supplier negotiations and differentiating themselves from the competition (Hlinková 1998).

The transfer of most of the operational decisions relating to product assortments, merchandising, store layout, pricing and promotion from the store or region to the corporate centre allows the retailers to develop a clear, consistent image and market position to the customer.

It is the retail tradename which is placed on the product and the "values" that customers attribute to that tradename which are transferred to the product. If the retailer wishes its retail brand product range to be perceived as a high quality alternative, comparable to the leading manufacturer brands, he must ensure that its tradename carries the appropriate "values" and that this image has been established coherently in the minds of the consumers via its stores. If the chain has a poor image, for example its stores are perceived as low quality ones with disinterested staff, low levels of customer service and failing to offer a pleasant shopping experience, these "values" will be transferred to the product (Burt 2000).

Nagyová (2001) divides the retail tradename into the classic retail tradename, the tradename identical with the name of the retail chain which is the bearers-medium-holders of the relevant chain, the discount trademarks aiming to highlight the product price and trademarks reserved for the particular retail chains.

Based on the results of the analysis and calculation of frequencies and chi-square, it can be concluded that the factors "Quality, Price, Action/discount price", "Habit" and "Product Attributes" showed a high degree of influence on the consumer behaviour of the respondents (Stávková et al. 2007).

The basic data enabling the multinational trade chains image analysis were gained by the means of a questionnaire research in the field of shopping behaviour, preferences and customs of Slovak consumers. We suppose that the image of a shop is one of the determining factors of the shop choice. Respondents had to express their opinion about the attributes of a foreign trade chain, in which they are shopping most frequently. The basis of the image analysis was the point evaluation of the atmosphere of the shop, the offered assortment and services, price level, shop personnel and the location of the shop.

Marketing research of trade chains image

The survey research carried out at the retail chains existing in Slovakia pointed out the following customer evaluated positive and negative activities:

Ahold Retail Slovakia – respondents expressed their satisfaction with the opening hours, closeness of the shop to the workplace/domicile, good accessibility by the means of local transportation, wide assortment range, and the sufficient number of shopping trolleys parking places. Respondents were uncertain in the matters of evaluating the waiting time at registers, personnel skills and the sufficient information needed for the choice of a product.

Billa – positives were in cleanliness, appearance, close location and availability of the shop, opening hours and the sufficient number of shopping trolleys. The negative evaluation concerned high prices of goods, a low number of activities for sale support, mainly tasting.

Kaufland – respondents expressed their satisfaction with opening hours, assortment, the sufficient number of shopping trolleys, high number of parking places and polite attitude of personnel. The dissatisfaction of respondents concerned the low number of tasting and support activities.

Lidl – the positive evaluation of the sufficient number of shopping trolleys, opening hours, high number of parking places, number of price actions, cleanliness and appearance of the shop, and a good accessibility by the means of local transportation. The negative evaluation regarded the low number of tasting and support activities. Respondents were uncertain about the quality of goods and the sufficient information for choice of a product.

Metro Cash & Carry – respondents expressed satisfaction over cleanliness and appearance of the shop, sufficient number of shopping trolleys, way of managing reclamations, number of parking spaces, assortment of goods and opening hours. Respondents were uncertain about the closeness and accessibility of the shop. However, Metro is a wholesale, there are certain limitations for the customers.

Tesco Stores Slovakia – a positive evaluation of opening hours, wide goods assortment, accessibility of the shop, a high number of parking places, the sufficient number of shopping trolleys, cleanliness and appearance of the shop. Slightly uncertain were the respondents about the waiting time at registers and the number of tasting and other supporting activities.

Figure 1 shows the average point evaluation of foreign trade chains what helps to compare better the image of the individual foreign trade chains based on the reached results (Tonkovičová 2008).

For the food trade field, we suggest the following recommendations which may help to improve the image of the trade chains:

– to offer the customers the required assortment providing its quality, to widen the private label assortment,

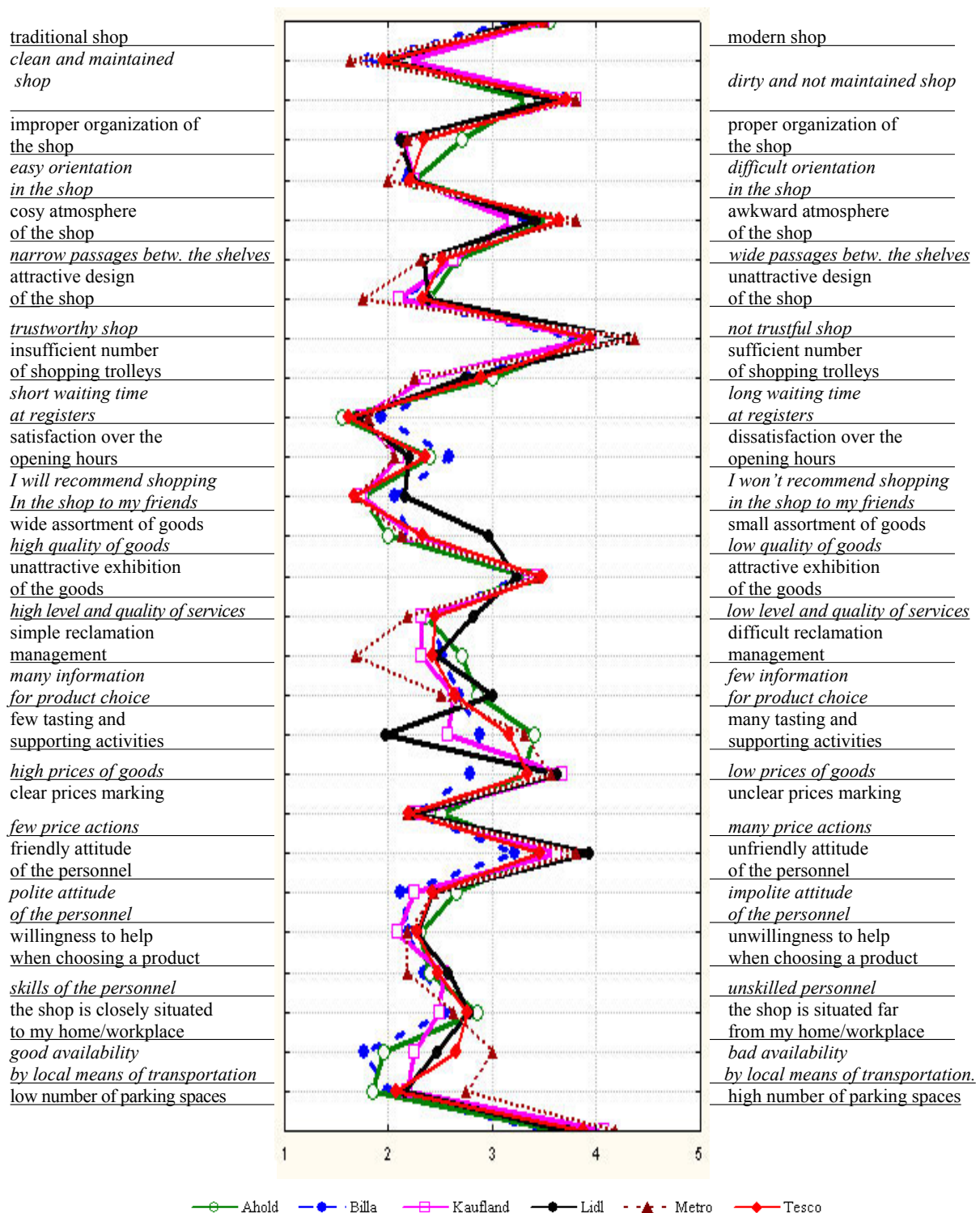


Figure 1. Comparison of foreign trade chains image operating on the Slovak market

Legend: 1 = strongly agrees, 2 = agrees, 3 = neither agrees, nor disagrees, 4 = disagrees, 5 = strongly disagrees

Source: own questionnaire research

- to increase the customers comfort when shopping by the means of the transparent organization of the shop, the optimal width of the passages, a sufficient number of shopping trolleys, the transparent and quickly available information about goods and their price, to shorten the waiting time at registers,
- approaching the customer by locating the shop closer to the town centre, cutting down the floor space,
- to affect the sensual perception of the customer by the means of in-store music, the colourful design of the shops exterior and interior, the intensity of light, smell, the means of presentation of goods in order to gain and maintain the customer's attention during shopping and raising the interest to visit the shop again,
- to develop new marketing communication tools, using new communication media (vertical banners on the shelves, advertising stickers on the floor, shelves with food with the spoken information, shopping trolleys with an advertising video screen, advertising on the trolley's handle "clip-on", commercials above the registers, advertising stickers on the belts and the divider of the purchased stuff, etc.) not only to support the sale, but also to strengthen the image of the trade chain.

CONCLUSION

The paper is focused on the customer attitude analysis when evaluating the chosen attributes. The multinational trade chains were compared and evaluated from the point of view of the offered assortment, price level, services, willingness and help of the personnel, shop atmosphere and the whole image of the shop.

Results of the conducted research of the shopping behaviour show that the consumer applies a two-level choice when deciding about shopping. In the first step, he/she decides about the shopping place, while this is affected by the information about the assortment, prices, services, locations, availability, being famous, and the frequency of visits and image of the shop. In the next step, the consumer decides about the content of the shopping basket, while the choice can be affected by the atmosphere of the shop, merchandising, prices, and the sale supporting tools in the shop.

In the image analysis of the foreign trade chains, the respondents evaluated positively the following criteria: opening hours, availability of the shop, assortment, cleanliness and the maintained appearance of the shop, a sufficient number of shopping trolleys

or baskets. The respondents expressed their dissatisfaction with the number of tasting and supporting activities, the width of the passages between the shelves and the waiting time at registers. The result of the conducted research of the shopping behavior confirm that 82% of the respondents perceive the communication tools of sale support in the shop positively as a motivation for purchase.

The basic communication objective of the commercial chains is to get the attention of the consumers, to persuade them to visit the shop and to motivate them to repeated shopping in this shop. The assumption for creating loyalty to the shop is existence of the positive image of the shop, which is built not only by the marketing communication tools but also by the atmosphere of the shop and quality of the offered services. The atmosphere of the shop comprises the space and appearance organization of the shop, intensity of light, colorful harmony, music background, smells and other elements which lead to strengthening of the shopping-consumption experience by affecting the emotions and consumer perception. Using these elements can affect a change in the consumer behavior not only in the positive, but also in the negative way and therefore affect the time spent in shopping (time spent in the shop).

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