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KAZALO

18. AKADEMIJI MM NA POT

A PREFACE TO THE 18TH AKADEMIJA MM

18. številka Akademije MM ne izraža polnoletnosti le po številki, ampak tudi po odraščajoči sporočilnosti prispevkov. Trženje je resna stroka in trženjska misel ima znanstveno domeno. Tega verjetno ni potrebno preveč poudarjati, čeprav se zavedamo, da jih še vedno veliko dvomi o tem. Resnost in pomembnost trženjskih strategij in taktik sta namreč spet pred veliko preizkušnjo, hkrati pa imata priložnost dokazati svoj pravi pomen. Zunanji dejavniki in številne notranje dimenzije krize oz. recesije so se namreč zajedli v kupca oz. odjemalca, tako da je ta vse bolj preudaren pri tem, kaj je njegova potreba in kaj le navidezna ali impulzivna želja. Vse težje ga prepričamo s površinskostjo in preveč podobnimi dražljaji ponudnikov. Kupec se namreč zaveda svoje kupne moči drugače kot nekoč, v svoj DNK pa zapisuje vse nakupne izkušnje. Zato je treba članke, ki so pred nami, brati s skrbnostjo trženjskega raziskovalca, realnostjo zaznav turbulentnega okolja in izzivi prihodnosti posameznika in družbe, za katere ne vemo ravno najbolje, kakšni so (bodo). Odstiranje področja univerzalnosti kupcev, tudi mednarodno, merjenje trženjskega delovanja velikih, družbena odgovornost do potrošnika in skozi njegove oči, odnos do cenovnih in necenovnih dejavnikov porabnikov električne energije ter do lesa in neizkoriščenosti njegovega potenciala v Sloveniji ilustrativno nakazujejo, kako pomembno je, da znamo v trženju povezovati sociološke, psihološke in

Akademija MM came of age with this 18th volume. Moreover, its articles have matured. Marketing is a serious profession and thinking marketing is thinking like a scientist. We probably don't need to repeat this anymore, although we are aware that there are still a lot of those who question us. The seriousness and significance of marketing strategies and tactics are yet again put to the test. On the other hand, there are opportunities to demonstrate their true meaning. External factors and a number of internal dimensions of the crisis/recession have deeply penetrated consumers; they are becoming increasingly prudent and they think twice about what they really need and what they only seemingly or impulsively desire. It is becoming increasingly harder to persuade them with superficial messages and with too similar stimuli. Buyers are more aware of their purchasing power than ever before, and they log their purchasing experience successfully. Therefore, the articles in this issue should be read carefully from a perspective of a marketing scholar, whilst being aware of the realities of the turbulent environment and considering individual and societal future challenges for which we do not know well, what they are (will be). Exploring the universality of customers, even internationally, marketing performance measurement of large companies, corporate social responsibility focused on consumers and as perceived by them, household electricity consumers and their ekonomske vsebine in se vračati k njegovemu prvobitnemu namenu. Trženje je bilo (in bo) vedno odraz stanja v družbi in njenem ekonomskem razvoju, hkrati pa tudi njen razvojni pobudnik – v dobrem in slabem. Zato je njegova naloga razumeti »novega« kupca, hkrati pa vzpostavljati svet realnih menjalnih odnosov in zadoščanja (dejanskih) potreb, v teh negotovih časih še toliko bolj pomembna.

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attitude towards price and non-price factors, our attitude toward timber and missed opportunities within the timber industry in Slovenia; all of the above illustrates how important it is to connect sociological, psychological and economic dimensions in marketing and in this way return to its initial intentions. Marketing has always (and it will always) reflected conditions in society and its economic development. At the same time it drives its development – for better or for worse. Therefore, marketing has to understand "new" consumers, establish a world of real exchange relations and satisfy (real) needs; in these uncertain times this is imperative.

Prof. dr. **Maja Makovec Brenčič**
SMA President

UVODNIK

EDITORIAL

V 18. številki Akademije MM je pet prispevkov s področja slovenske marketinške znanosti. Z znanstvenimi revijami sem sodeloval že večkrat, v vlogi avtorja prispevkov in recenzenta, tokrat pa sem se prvič znašel v vlogi urednika. Priznati moram, da je bila to nadvse zanimiva, odgovorna in poučna izkušnja. Urednik namreč ni zgolj tisti, ki se odloča, kateri prispevki bodo objavljeni, ampak je tudi tisti, ki motivira avtorje, recenzente pa spodbuja k takim recenzijam, ki ne poudarjajo le šibkih točk prispevkov, temveč svetujejo, kako jih izboljšati.

Recenzenti so pomembni za pripravo in objavo kakovostnih znanstvenih del, toda kakovost teh je odvisna predvsem od avtorjev samih. Ugotavljam, da jim največ težav povzročata definiranje raziskovalnega problema in pisanje sklepov raziskave. Za znanstvene prispevke je izjemno pomembna definicija problema oziroma argumentacija. Kot recenzent pogosto opažam, da avtorji, čeprav pripravijo relevantno in inovativno raziskavo, ne prepoznajo in posledično tudi ne znajo ustrezno in jasno predstaviti svojega prispevka. Dobra argumentacija raziskave je koristna tudi za avtorja samega, saj ga v procesu ustvarjanja članka usmerja, tako da vključi relevantne podatke in hipoteze ter izključi irelevantne. Poleg tega ustrezno pozicioniran članek olajša delo uredniku in recenzentom.

Če v uvodu znanstvenega članka prikažemo, kaj bralcu želimo povedati, mu v sklepnem delu to dejansko razjasnimo, zato ne smemo pozabiti,

In this, 18th volume of Akademija MM, there are five contributions by the Slovenian marketing science. I was actively involved with academic journals many times before; as an author and as a reviewer. This is however my first time as an editor. I must admit that for me this was a very interesting, engaged and learning experience. An editor does not only decide which studies to publish, but he/she also motivates the authors and encourages the reviewers to not only highlight the articles' weaknesses, but to also give useful advice how to improve it.

Reviewers play a key role in producing quality scientific work, however, the quality of an article depends largely on its author(s). I have noticed that authors are most often faced with how to develop a good research question and write conclusions. Published research feeds on a well-defined research problem. As a reviewer, I often notice that authors come up with relevant and innovative research. They, however, do not know how to adequately and clearly present their study. Clear and logical argumentation benefits the author; it guides him/her to include relevant data and hypotheses and exclude the irrelevant. Last but not least, a well-written article makes the editor's and reviewers' job easier.

The introduction should introduce your research, whereas the concluding chapter should explain your initial research intentions and final results;

da podatki pogosto ne govorijo sami zase. A niso vedno pomembne le ugotovitve, ampak tudi v okviru kakšnih omejitev so nastale. Omejitve in morebitne pristranskosti raziskovalca so pomembne predvsem za tiste, ki uporabljajo rezultate raziskav. Kažejo namreč, kakšne so možnosti napačnih interpretacij rezultatov. Prav zaradi tega so jasne razlage izvedbe raziskav in omejitev, v okviru katerih so bile raziskave izvedene, ključne za njihovo kritično vrednotenje in v pomoč drugim raziskovalcem, ki skušajo ponoviti, nadgraditi ali dopolniti raziskave.

Končen izdelek recenzentov in urednika mora biti do avtorja pošten in zanj koristen. Le tako lahko zagotavljamo ustrezno verodostojnost znanstvene revije. Prav zaradi tega smo skupaj z recenzenti avtorjem skušali pokazati, kje so šibke točke njihovih prispevkov, in jih nato voditi predvsem v smeri izboljšav. Za znanstveno revijo je ključnega pomena, da potencialni avtorji prepoznajo poštenost in koristnost recenzijskega postopka, saj bodo le v tem primeru pripravljeni svoje raziskave vnovič poslati v objavo. Iskreno upam, da so bila ta moja prizadevanja in prizadevanja recenzentov 18. številke Akademije MM uspešna.

Prva objavljena prispevka se nanašata na vedenje mladih odjemalcev in na vedenje gospodinjstev. *Matevž Rašković* se v svojem prispevku ukvarja s problematiko odločitvenega procesa mladih odjemalcev in odgovarja na raziskovalno vprašanje, ali je možno pri tej ciljni skupini govoriti o »univerzalni kulturi«. Problematiko empirično proučuje na vzorcu mladih odjemalcev iz Slovenije, Turčije, Malezije in Kazahstana. Ugotavlja, da sta najpomembnejša odločitvena dejavnika pri mladih odjemalcih cena in kakovost. Za oba velja, da se glede na kulturne značilnosti raziskovanih segmentov ne razlikujeta veliko, medtem ko tega ne moremo trditi za zaznavanje znamke. Iz tega izhaja pomembna ugotovitev raziskave, da mora znamka, namenjena mladim, vsebovati sporočilo o ustreznem razmerju med ceno in kakovostjo ter imeti regionalno prilagojeno »osebnost«. *Petra Došenović Bonča, Anja Milenković Kramer, Maks Tajnikar in Nina Ponikvar* z namenom priprave ustrezne osnove za razvoj strategij slovenskih distributerjev električne energije proučujejo preference slovenskih gospodinjstev – porabnikov električne energije. Posebej se osredotočajo na pripravljenost gospodinjstev za nakup in plačilo izdelkov in storitev, ki jih distribucijska podjetja za električno energijo doslej niso ponujala. Pri tem največji poudarek dajejo storitvama spletnega dostopa in popravilom električnih aparatov. Osnovno spoznanje raziskave je, da so slovenski porabniki električne energije občutljivi na cenovne in nece-

we must never forget that data often do not speak for themselves. Moreover, conclusions are not always enough, we have to explain the limitations of our study. The limitations and potential research bias are particularly important to those who intend to employ research results; they imply potential consequences for their false interpretation. Therefore, a clear discussion of research process and its limitations is necessary for its critical review and it may be of great assistance to other scholars who would like to replicate or build upon the research question.

The final product by reviewers and the editor must be fair to the author and helpful to him/her. It is the only way to ensure credibility of an academic journal. That is why we, the reviewers and I, tried to assist the authors by pointing out weaknesses in their discussions and by advising them how to improve them. Potential authors must believe that peer review is an honest and useful process; this guarantees more submisions for publication later on. I sincerely hope that my efforts and those of the reviewers have paid off.

First two studies explore the behaviour of young adult consumers and households. *Matevž Rašković* examines the decision-making process of young adult consumers: do young adult consumers hold a “common culture”? This is an empirical study based on a sample of young adult consumers from Slovenia, Turkey, Malaysia and Kazakhstan. The results show that factors price and quality, are the most significant purchasing decision-making factors, even when cultural differences are taken into account. On the other hand, this does not apply to brand awareness. Therefore, a brand aimed at young adults must include a message about a balanced relationship between a price and the quality and it must have a regionally adapted “personality”. To develop a platform for new marketing strategies of electricity distribution companies in Slovenia, *Peter Došenović Bonča, Anja Milenković Kramer, Maks Tajnikar*, and *Nina Ponikvar*, examine electricity consumers’ preferences. The study is limited to household customers. The study is focused on their willingness to purchase and pay for additional products and services that have not been provided by electricity distribution companies yet, especially the Internet access and electrical appliances repair. Research shows that Slovenian electricity consumers are sensitive to price and non-price factors and they are willing to purchase some additional products and services that have not been provided by electricity distribution companies yet.

novne dejavnike ponudbe ter so pripravljeni za nakup nekaterih izdelkov in storitev, ki jih distributerji električne energije doslej še niso ponujali.

Tretji izvirni znanstveni članek se loteva merjenja marketinškega delovanja, ki je v podjetjih mnogokrat prezrto. *Špela Petraš* in *Urša Golob* v okviru kvalitativne raziskave na manjšem vzorcu velikih slovenskih podjetjih ugotavljata, da je sistematičnost merjenja marketinškega delovanja med preučevanimi podjetji že precej razvito in da takšna podjetja sledijo trendom podjetij, ki poslujejo na razvitih trgih. Prispevek ima pomembno težo, saj avtorici podrobneje razjasnita vlogo in pomen merjenja marketinškega delovanja, problematike pa se lotevata na način, ki prispeva k večji transparentnosti in razumevanju najpogosteje uporabljenih metrik marketinškega delovanja.

Špela Juhart in *Urša Golob* s kritičnim pogledom na družbeno odgovornost, ki je teoretično in raziskovalno usmerjeno le v podjetja, njihove ugodnosti in težave, prispevata k razširjenemu pojmovanju omenjenega koncepta. Njuno raziskovanje je usmerjeno k potrošniku in njegovi konstrukciji družbene odgovornosti ter k procesom ustvarjanja pomenov družbene odgovornosti. V svoje raziskovanje vključujeta koncept ustvarjanja smisla, ki je lahko dobra podlaga za razvoj novih komunikacijskih pristopov družbeno odgovornih podjetij.

Barbara Mörec se sprašuje, kakšni so razlogi za veliko zmanjšanje izvoza slovenskih lesnih izdelkov, čeprav se slovenske zaloge lesa večajo. Čeprav je lahko eden izmed razlogov za to svetovna gospodarska kriza, so še bolj pomembni razlogi razdrobljeno lastništvo in pomanjkanje tržne naravnanosti ter interesov lastnikov. Avtorica daje pomembne predloge predvsem na področju povečanja učinkovitosti vrednostne verige, v smislu spodbujanja marketinga povezav med lastniki gozdov in v smislu procesa certificiranja, ki omogoča večjo konkurenčnost na globalnih trgih.

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The third contribution addresses systematic marketing performance measurement which is often overlooked by Slovenian companies. *Špela Petraš* and *Urša Golob* through qualitative research based on a small sample of large Slovenian companies conclude that systematic marketing performance measurement is well developed and that such companies follow the trends of the companies that operate in the developed markets. This is an especially worthwhile analysis; the authors clarify the role and significance of the marketing performance measurement. They have approached the issue in a way that contributes to greater transparency and understanding of commonly applied metrics of marketing performance.

Špela Juhart in *Urša Golob* contribute a critical view of corporate social responsibility (CSR); the latter is theoretically and empirically focused on companies, their benefits and challenges. Thus the authors contribute to an extended understanding of CSR. Their research is directed towards consumers and their notion of CSR and to the process of creating meanings of CSR. Research includes a sense-making approach – a great foundation for the development of new communication approaches to socially responsible companies.

Barbara Mörec asks, what the reasons for a large decrease in export of Slovenian wood products are, even though the Slovenian wood stock has been increasing. Some of this downturn is clearly attributed to global economic crisis. However, overly fragmented forest property combined with inadequate market awareness or even lack of interest by Slovenian private forest owners bears most of the fault. The author offers important suggestions particularly related to better efficiency of the value chain by promoting marketing relations between forest owners and including the process of certification, which allows for greater competitiveness on the global markets.

Ass. prof. dr. **Borut Milfelner**

PURCHASING DECISION-MAKING FACTORS OF YOUNG ADULT CONSUMERS: A MULTICOUNTRY CROSS-CULTURAL PERSPECTIVE*

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Abstract: Young adult consumers (15-30 years old) represent a unique population segment that is believed to be more homogenous across countries and cultures, compared to other population segments. Thus, young adult consumers are thought to hold a *"common culture"*, as being *"global citizens"*. This paper employs Fan & Xiao's (1998) five factor consumer decision-making model and examines the importance of *brands*, *quality, price, time* and *information* in a multicountry study of young adult consumers across Slovenia, Turkey, Malaysia and Kazakhstan. The analysis also looks at the issue of universality vs. cultural contingency of these factors, applying both *partial eta square* and *Cohen's d* coefficient tests. The results show that factors *price* and *quality* are significant both between all four countries, as well as only among Muslim countries, giving some support for the contingency perspective.

Keywords: *Young adult consumers, purchasing decision-making factors, culture, effect size measures*

DEJAVNIKI NAKUPNEGA ODLOČANJA MLADIH PORABNIKOV: MEDKULTURNA PRIMERJAVA VEČ DRŽAV

Povzetek: Mladi porabniki (stari od 15 do 30 let) so edinstven segment porabnikov, za katerega velja, da je globalno bolj homogen od drugih segmentov. Tako naj bi bili mladi porabniki nekakšni *"globalni državljani*,*"* ki jih povezuje *"skupna kultura"* ne glede na posamezno nacionalno okolje, iz katerega prihajajo. Ta prispevek testira stopnjo univerzalnosti dejavnikov nakupnega odločanja mladih porabnikov iz Slovenije, Turčije, Malezije in Kazahstana ob pomoči modela petih dejavnikov (*blagovna znamka, kakovost, cena,* pomen *časa* in vloga *informacij*) avtorjev Fan in Xiao (1998). Stopnjo univerzalnosti pomembnosti omenjenih dejavnikov ocenjujem s t. i. ocenami *velikosti učinkov* (angl. *effect size measures*), pri tem pa uporabljam *delni Eta kvadrat* test in *Cohenov d*

Izvirni znanstveni članek

koeficient. Rezultati primerjav kažejo značilne razlike v pomembnosti dejavnikov *cene* in *kakovosti* med posameznimi nacionalnimi vzorci v okviru procesov nakupnega odločanja, s čimer ne moremo potrditi teze o popolni univerzalnosti dejavnikov nakupnega odločanja, niti v okviru primerjave vseh štirih držav (vključno s Slovenijo) niti samo treh muslimanskih držav.

Ključne besede: mladi porabniki, dejavniki nakupnega odločanja, velikosti učinkov, medkulturne razlike

* A working version of this paper was presented at the 40th annual EMAC conference, held in May 2011 in Ljubljana. The author wishes to thank Polona Grahek for her assistance in the data collection process as well as Irena Vida (University of Ljubljana, Faculty of Economics), Rajeev Batra (University of Michigan, Ross School of Business), and the two conference reviewers for their valuable comments and suggestions on how to improve this paper.

1. INTRODUCTION

Cultural and cross-cultural research has over the last few decades become *"one of the big questions"* in international marketing and international business (Buckley & Lessard, 2005). It should also be understood as a *"leading theory in international marketing research"* (Yaprak, 2008; *cf*. Nakata, 2003). This is to great extent because culture is today seen more than just a source of market variation, but increasingly as a *"pervasive influence which underlines all facts of social behavior and interaction"*. Overall, the role and importance of culture in a plethora of managerial and marketing contexts has led to a proliferation of cross-cultural research in international marketing (see Papadopoulos & Heslop, 2003). Culture and cross-cultural research hold profound implications for marketing theory and practice (Craig & Douglas, 2006, p 323). In this context, Clark (1990) and Triandis (1994) also point how cross-cultural research in marketing does not merely *"examine the generalizability of marketing theories,"* but also *"reveals their boundary conditions"* (Engelen & Brettel, 2010).

Within the explosion of cross-cultural research, we have also witnessed a fundamental shift of focus from initial country-of-origin studies to a central question of universality and cultural contingency across a plethora of international marketing issues (Yaprak, 2008). As globalization is leading to an increased socio-economic convergence, it is to a degree also resulting in: (a) increasingly standardized marketing strategies across cultural and geographical areas (Zou & Cavusgil, 2002), (b) the emergence of global brands (Aaker & Joachimsthaler, 1999) and (c) catering to globally-driven consumer cultures (Maynard & Tian, 2004). All these changes have led to apocalyptical predictions of the local consumer's market demise (Levitt, 1983). However, it has instead resulted in a more hybrid form of *marketing* or *marketplace glocalization* (Ritzer, 2003) and the existence of hybrid consumer cultures (Salcedo, 2003). Hence, the globalization of marketing does not necessarily entail uniform consumer patterns or cultures (Douglas & Craig, 1997). In fact, Lemmens, Croux & Dekimpe (2007) argue that globalization has actually led to strong cultural divergence patterns in industrialized countries. To some extent cultural elements seem to be stable over time, while *"consumer behavior remains diverse"* (Yeniyurt & Townsend, 2003). This calls for more research on universality and cultural contingency in consumer behavior (Craig & Douglas, 2006), particularly in non-Western cultures and/or smaller national cultures (Grachev & Bobina, 2006).

Young adult consumers (aged 15-30 years old) may be seen as an emerging population group (Arnett, 1999), which has *"economical autonomy and power of making independent decisions"* (Cardoso & Pinto, 2010). These consumers increasingly draw marketing attention (Xie & Singh, 2007), which has resulted in a series of empirical studies directed towards young adult consumer segments (see Cardoso & Pinto, 2010). A widespread academic interest has also been partly drawn on the proposition that young adult consumers may be perceived as *"competent consumers"*, who can make autonomous purchasing and consumer decisions (Grønhøj, 2007). Furthermore, this segment has been seen as one of the new emerging consumer segments in the last two decades (Douglas & Craig, 1997), despite remaining relatively under-researched (Wong, Polonsky & Garma, 2008). Their contribution may be in fact multiple, since they can significantly influence their parents' or family's consumption patterns (Zollo, 1995) as well as be the "early adopters" of new market and consumption trends. From a more sociological perspective, the embeddedness of consumer behavior in culture is not only interesting within Zukin & DiMaggio's (1990) *embeddedness typology*[1], but also due to the interaction between culture and consumerism, as a *"special feature of modernity and therefore a privileged prism for its examination"* (Zelizer, 2005, p 335).

Apart from looking into specifics of young adult consumers and their purchasing patterns, one of the more growing questions in research is the question of their homogeneity across cultures (i.e. Zhou, Teng & Poon, 2008). Cultural universalists, thus, use globalization and the emergence of the 'global village' to show a move towards a universal global consumer (Maynard & Tian, 2004). With regards to young adult consumers some have increasingly seen the young adult consumer segment as a segment *"holding a common culture"* (Fabris, 2003) with quite *"unified tastes"* (Gianluigi, 1992), and a segment that is universally *"cosmopolitan"* (Thompson & Tambyah, 1999). Some sociologists have also made similar observation on convergence of young adults as a unified socio-cultural segment. While some empirical evidence supports the universalist perspective (i.e. Hafstrom et al. 1992), others have shown this to be true on a more aggregate cultural level (western vs. non-western cultures) (Liefeld, Wall & Heslop, 1999).

1 In their typology, Zukin & DiMaggio (1990) build on the concept of *economic embeddedness* (Granovetter, 1985) and outline how economic action is embedded in *cognitive*, *structural*, *cultural* and *political* contexts.

The issue of cultural universality vs. cultural contingency can be applied as a tool for testing international and traditional marketing theories (Triandis, 1994), while also advancing marketing science (Steenkamp, 2005). As the marketing field is diverse, Engel & Brettel (2010) point that most studies of culture in the marketing field are comparative, rather than explanatory. Their analysis of 99 articles in 14 leading marketing journals (1990-2008 period) shows that cross-cultural research in marketing is mostly US-dominant (59%), based on a single country sample (65%) and mainly in the consumer-related research area (51%). Within the field itself a look into culture in international marketing or consumer research seems to be still 'struggling' with conceptual challenges of *cultural dimensions and typologies* (Magnusson et al., 2008) and less with substantive issues. It is particularly in this context that the issue of the *effect size of culture* may be very useful (Ven de Vijver, 2003) as it puts aside "*dimensions and typologies*," and looks at the effect size from a strictly statistical and substantive view.

The aim of this paper is to analyze and compare the importance of specific purchasing decision-making factors (for everyday goods) among three non-Western, very diverse Muslim countries (Turkey, Kazakhstan and Malaysia), and Slovenia[2]; for young adult consumers between 15 and 30 years of age. The goal of the paper is in this regard two-fold. First, it examines the importance of specific purchasing decision-making factors at the individual country level and ties it to their cultural characteristics (mostly *power distance*). Second, it addresses the issue of cultural universality vs. contingency through a concept of the *effect size* of culture, applying *partial eta square* and *Cohen's d* power analysis tests.

The paper makes several contributions to both, theory and practice. Empirically it contributes to a narrowing of the gap for multi-country, non-Western culture studies, as well as to growing research on young adult consumers. From a methodological perspective the paper tests the 'quality' and applicability of Fan & Xiao's (1998) survey instrument for purchasing decision-making factors of young adult consumers and it employs two different effect size measures. In addition, the results outline several implications for marketing practice and it suggests possible directions for future research in this area.

2 Slovenia was included in the study as a sort of European "yardstick".

2. PURCHASING DECISION-MAKING FACTORS AND YOUNG ADULT CONSUMERS

2.1 CONSUMER DECISION-MAKING TYPOLOGIES

Extensive research and myriad typological proposals have tried to model consumer decision-making and shopping patterns that fall outside the physical limits of this paper (for an overview see Wesley, LeHew & Woodside, 2006). Lysonski, Durvasula & Zotos (1996, p. 10) point to *"many attempts to profile"* consumer decision-making styles in order to *"understand a consumer's shopping behavior so as to use this as a counseling advice"* and to increase the effectiveness of marketing, segmentation and advertising effectiveness. In this context, Sproles (1985, p. 79) defines the consumer decision-making style as *"a patterned, mental, cognitive orientation towards shopping and purchasing, which constantly dominates the consumer's choices"* and followed it by saying *"these traits are ever-present, predictable, central driving forces in decision-making"*.

Most generally, Lysonski, Durvasula & Zotos (1996) outline three different approaches in the study of consumer decision-making, namely:

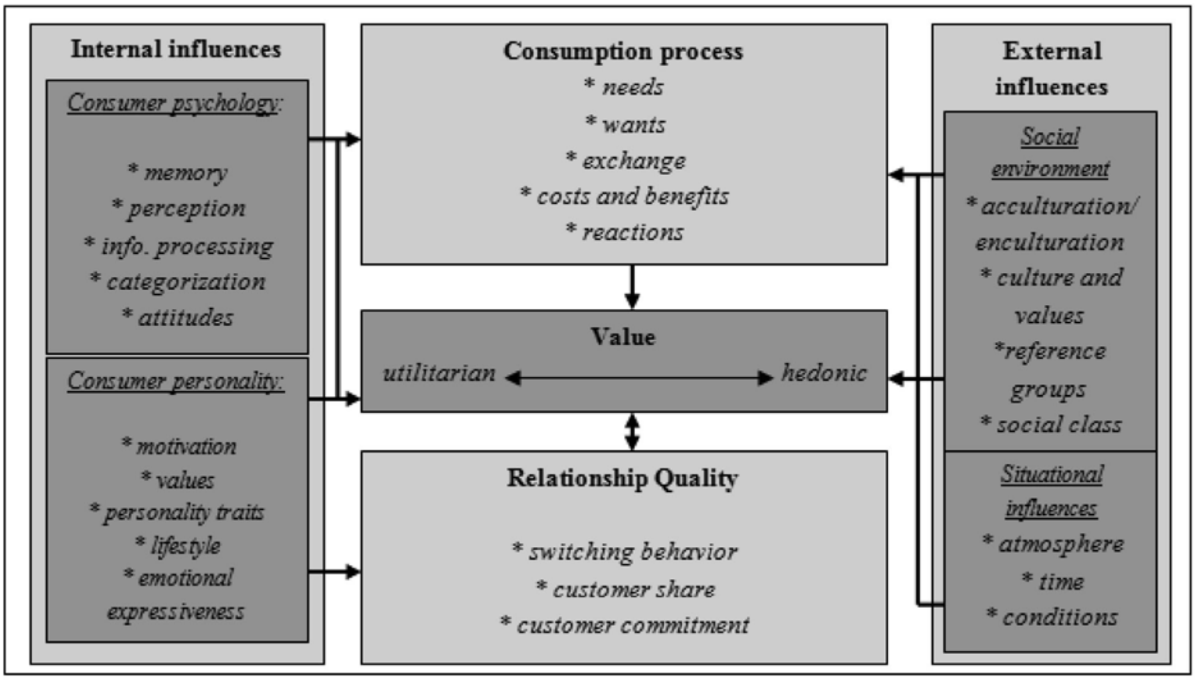
- *psychographic and life-style approach* (i.e. Wells, 1974; Lastovicka, 1982).
- *consumer typology approach* (i.e. Stone, 1954; Darden & Ashton, 1974; Moschis, 1976).
- *consumer characteristics approach* (i.e. Sproles, 1985; Sproles & Kendall, 1986; Sproles & Sproles, 1990).

In addition to this classification, East (1997) provides an alternative classification of consumer decision-making approaches, which are structured around: (a) *external conditioning* (based on external stimuli like advertising); (b) *cognition* (*cognitive approach*) (related to key product/service characteristics, information and available alternatives); and (c) *social interaction* (i.e. personal and group identity).

Providing perhaps one of the most comprehensive conceptual overviews of the factors influencing consumer decision-making, Figure 1 displays the *Consumer value framework* by Babin & Harris (2009), which distinguishes between *utilitarian vs. hedonic consumption behavior*, influenced by internal and external influences, the characteristics of the consumption process itself, and the overall relationship quality, in which the consumers' decision-making is embedded.

Despite a wide variety of consumer decision-making approaches, Lysonski, Durvasula & Zotos (1996) position the *consumer characteristic approach* by Sproles & Kendall (1986) as the dominant consumer decision-making approach in the field. Their *Consumer Style Inventory* (CSI) model is built on the identification of several dozen elements shaping consumers' cognitive and affective orientations towards shopping, opera-

Figure 1: Overview of the *Consumer value framework*



Source: Adapted from Rašković & Grahek, 2011; *cf*. Babin & Harris, 2009.

tionalized in a 40-item CSI instrument. Sproles & Kendall (1986, p. 276) defined the consumer decision-making style as *"a mental orientation characterizing a consumer's approach to making choices"*. While the CSI typology of Sproles & Kendall (1986) distinguishes between eight different consumer decision-making styles[3], Mokhlis & Salleh (2009, p. 576) point to most applications of the CSI instrument producing *"varying portions of the original CSI factors, while none of them reproduce all eight completely"*.

This paper employs the Fan & Xiao's (1998) survey instrument, built directly from the Sproles & Kendall's (1986) CSI typology. By testing Fan & Xiao's (1998) original model (developed specifically for the Chinese young-adult consumers) and applying it to a novel empirical setting, we directly follow the recommendation by Walsh, Mitchell & Thurau (2001). They emphasized not only to test the CSI across different populations and contexts, but also the need for cross-validations in different cultural contexts.

2.2 SPECIFICS OF YOUNG ADULT CONSUMERS

With regards to consumer decision-making patterns of young-adult consumers, studies have shown significant differences between young adult and other consumer segments in decision-making and consumer attitudes (Drolet, Williams & Lau-Gesk, 2007). Young adult consumers are believed to be more *hedonistic* in their consumer behavior and decision-making, which can also be related to how they spend their time (Cardoso & Pinto, 2010). They also often shop more impulsively (Grønhøj, 2007). Nonetheless, *price* remains one of the key decision factors on which this segment bases its decision (Ganassali et al., 2007). Another important factor is the issue of *branding*, since young adults are more fashion and media-oriented and are important trend spotters. They are also very susceptible to advertising, particularly personality endorsed (Herbst & Burger, 2002). Strong peer-to-peer communication in decision-making and purchasing is another specific characteristic of this segment. The importance of within reference group communication mirrors itself in both strong information utilization before purchasing and post-purchase information sharing (Achenreiner, 1997). Furthermore, while a country of origin and consumer ethnocentrism may vary across countries, young adult consumers usually display very low ethnocentric tendencies (Wong, Polonsky & Garma, 2008).

Furthermore, Grant & Waite (2003), Xie & Singh (2007), and Cardoso & Pinto (2010) provide four key reasons for marketing's growing interest in young adult consumers and their decision-making:

- Young adult consumers are still in the process of forming their personalities and still seek to establish their own consumption patterns as part of their own identity as future adults (Holbrook & Schindler, 1989).
- Young adult consumer act as important *opinion leaders* within their surrounding social environments.
- Young adult consumers act not only as trend conduits, but also as socio-cultural 'change agents' (Leslie, Sparling & Owen, 2001).
- With their increased economic autonomy, decision-making and purchasing power (Cardoso & Pinto, 2010) young adults are increasingly becoming a powerful spending group (Moschis, 1987; Grant & Waite, 2003).

Despite several reasons in favor of studying young adult consumers and their decision-making, this "niche" within consumer behavior and cross-cultural research is heavily under-researched (Wong, Polonsky & Garma, 2008; Cardoso & Pinto, 2010) and it lacks stronger empirical (Cardoso & Pinto, 2010) and generalizable evidence (Arnold & Reynolds, 2003).

3. RESEARCH HYPOTHESES

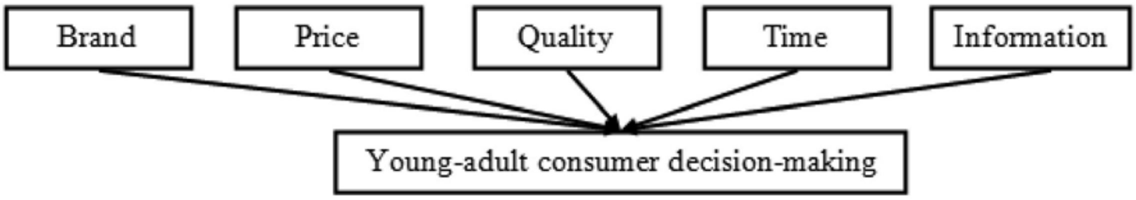
Based on the general premise of young adult consumers being *global citizens of the world*, *"holding a common culture"* (Fabris, 2003) with quite *"unified tastes"* (Gianluigi, 1992), and a segment that is universality *"cosmopolitan"* (Thompson & Tambyah, 1999), the main research hypothesis focuses on the degree of universality in purchasing decision-making factors across the studied samples of young adult consumers. Therefore, the first hypothesis is as follows:

H_1: Supporting a universalist perspective, there will be no statistically significant culture effect size differences across the studied young adult samples on the selected purchasing decision-making factors.

However, as my research compares selected purchasing decision-making factors across western and non-western young adult samples the second hypothesis focuses on the existence of non-significant culture effect size differences within the Muslim group of young-adult consumer

3 The eight consumer decision-making styles within the Sproles & Kendall (1986) typology include the: (1) *quality conscious (a perfectionist)*, (2) *brand conscious*, (3) *fashion and novelty conscious*, (4) *hedonic consumption*, (5) *impulsive*, (6) *confused by overchoice*, (7) *price conscious*, and (8) a *brand-loyal (habitual) style*.

Figure 2: Fan & Xiao's (1998) five-factor young adult consumer decision-making model



Source: Adapted from Fan & Xiao (1998).

samples, based on the work by Liefeld, Wall & Heslop (1999). Therefore, the second hypothesis is as follows:

H_2: In case significant culture effect size differences can be established for any of the selected purchasing decision-making factors, these differences can be attributed to the inclusion of both western and non-western young-adult consumers in the analysis, and do not hold only within a non--western, Muslim comparison.

4. METHODOLOGY AND DATA

4.1 SURVEY INSTRUMENT

Figure 2 displays the five-factor decision-making model of young adult Chinese consumers published by Fan & Xiao (1998) in the *Journal of Consumer Affairs*. This model was selected for two primary reasons. First, it is conceptually and substantively based on Sproles & Kendall's (1986) CSI framework, and second, it was specifically created for non-Western, young adult consumer decision-making contexts.

Since the original (31-item) model of Fan & Xiao (1998) included several items with a factor loading below 0.5 the initial quality of the survey instrument was first performed through *confirmatory factor analysis* (CFA) and testing goodness-of-fit statistics of the reflective *measurement model* within *Mplus*[4]. Given unsatisfactory goodness-of-fit statistics for the original 31 items of the Fan & Xiao (1998) model, 14 items from the original 31-item model were dropped. By removing items with similar loadings on two different factors and by removing items with factor loadings below 0.5 (in absolute values), the "purified" 17-item measurement model produced the following goodness-of-fit statistics within *Mplus*:

- χ^2 = 180.57; *df*= 59;
- χ^2*/df= 3.06;*
- *p=0.000;*
- RMSEA=0.068;
- CFI=0.90 and TLI=0.89

In the next step, Cronbach alpha measures were calculated to check the overall reliability of the five decision-making factors within the "purified" 17-item model. Table 1 provides a summary of the obtained reliability measures.

Given that the *"Time consciousness"* construct in the "purified" Fan & Xiao (1998) model was still below the critical value of 0.6, it was excluded from further analysis. In addition, no scalar invariance testing was performed, since no dependant variables were included in the analysis and only simple relative comparisons were made on observed, not latent scores.

4.2 DATA COLLECTION AND SAMPLE CHARACTERISTICS

Overall data was collected on 445 young adult consumers of 15-30 years old from Slovenia (29.2%), Malaysia (24.9%), Kazakhstan (23.1%) and Turkey (22.7%) in the early summer of 2010[5]. Data was collected through a structured web-based survey (administered only in English), using a *convenience snow ball* sampling approach to various social media sites (Facebook, MySpace, LinkedIn etc.). Several respondent demographic characteristics show (see Table 2) the samples

4 While the statistical package *Mplus* is used mainly for structural equation modeling, it also enables the testing of simple measurement models and it provides comprehensive goodness-of-fit statistics, like with testing structural models.

5 An overall response rate to the on-line survey was in the 25% range.

Table 1: Reliability measures for the five latent factors of the "purified" Fan & Xiao model

Dimension	*Brand Consciousness*	*Time Consciousness*	*Quality Consciousness*	*Price Consciousness*	*Information Utilization*
Cronbach α	*0.64*	*0.50 (excluded)*	*0.79*	*0.61*	*0.73*

were highly *matched*[6]. It is at this point important to emphasize that the samples are by no means country representative. The respondents came mainly from urban areas, they were above averagely educated and had above average disposable incomes and access to the Internet. The data should, therefore, be used only for relative cross-country comparisons and effect size calculations; absolute score explanations or any generalizability for that matter should be strictly avoided.

In addition to these characteristics, a predominant share of respondents within each country sample stated having *"above average disposable incomes"* (relative to the country national average). Overall, 49% of respondents earned part of their income by working, whereas 56% also received funding from family members (multiple answers were available).

4.3 EFFECT SIZE MEASURES

Due to the underlying complexity of most psychological and social phenomena Van de Vijver (2003) points out that statistics should be in these contexts beyond testing merely for statistical differences and should focus primarily at searching for differences in patterns. This is also consistent with the importance of exploring relative and ordering differences, not testing absolute values and differences in cross-cultural comparisons (Schwartz, 1999; Hofstede, 2001). Cankar & Bajec (2003) also believe the use of significance testing to be actually more harmful than beneficial to scientific research, since it is not complemented by an evaluation of variable effect sizes (*cf.* Cohen, 1990; Thomson, 1999a, and 1999b). Thus, Kirk (1996) stresses the inappropriateness of making generalized judgments on social relational phenomena based on significance testing, since it is influenced by sample size (Breaugh, 2003). Putting substantive issues aside, most researchers thus test and look for differences, without actually looking at their size (Cohen, 1994; Kirk, 1996; Haller & Krauss, 2002) or understanding the implications of their conclusions from such testing (Cohen, 1994).

Cohen (1988, p. 9-10) defines an effect size as *"the degree to which the phenomenon is present in the population or the degree to which the null hypothesis is false"*. However, since most research in social sciences is based on samples, rather than data on whole populations, Rosenthal (1994) points to the sample-based nature of most effect size measures employed today. Despite the substantive value of measuring the effect size, Cohen (1992, p. 155) notes that even with psychological research most *"researchers continue to ignore power analysis"* leading to a *"low level of consciousness about effect size"* (*cf.* Cohen, 1990). While more recently this trend has started to improve (Rosenthal, Rosnow & Rubin, 2000), it has been employed in a too *"simplistic manner"* with methodological mistakes and without a clear understanding of the methodological background of such power analysis (Breaugh, 2003, p. 79; *cf.* Fichman, 1999; Rosenthal, 1994). In part, this may also be attributed to a large array of effect size measures and indices (Breaugh, 2003; see Kirk, 1996 for an overview), which are in turn also grouped differently by different authors. Richardson (1996) distinguishes between effect sizes based on either (a) standardized differences between group means or (b) measures of explained variance. On the other hand, Thompson (2000) distinguishes between a summary of both previous groups and (c) measures of association. Furthermore, Fan (2001, p. 277) ads to this: *"Because the terminology used for describing the variety of effect size measures has not been standardized in the literature, confusion sometimes occurs about what effect-size measure has been reported in the study."* (*cf.* Kirk, 1996) Given a careful overview of the literature and

6 The use of matched sampling in cross-cultural multi-country comparison is a very common research practice (Hofstede, 1997), and also recommended (Van de Vijver & Leung, 1997; Cavusgil & Das, 1997; Schwartz & Sagie, 2000; Terracciano et al., 2005), since demographic variables, such as *level of education,* have been shown to significantly shape human behavior (Berry et al., 2011). For more on this issue please see Rašković & Kržišnik (2010).

Table 2: Key sample characteristics (indicating matched samples)

	Turkey		Malaysia		Kazakhstan		Slovenia	
Number of respondents	101		111		103		130	
Gender (male/female)	41.9%	58.1%	43.1%	56.9%	37.9%	62.1%	31.5%	68.5%
Average age (standard deviation)	23 years (4.5)		22 years (2.6)		24 years (3.5)		25 years (3.0)	
Share of urban population	96.2%		94.5%		93.2%		87.7%	
Share of respondents with at least 2-year college degree	74.3%		78.0%		79.6%		71.4%	

Table 3: Employed effect size measures and their methodological background

Measure	Type	Formula	Reference values
Partial eta square (η_p^2)	Explained variance	$\eta_p^2 = \frac{SS_{effect}}{SS_{effect} + SS_{error}}$	Young (1993): effect size as a percentage
Cohen's *d*	Std. mean difference	$d=(M_1 - M_2)/\ \sigma_{pooled}$ $\sigma_{pooled} = \sqrt{\frac{1}{2}(\sigma_1 + \sigma_2)}$	Cohen (1988): *small: 0.2, medium: 0.5 and large: 0.8*

Note: SS_{effect} *=sum of squares for effect of interest;* SS_{error} *= sum of squares for error term;* σ *= standard deviation;* σ^2 *= variance;* $SS_{treatment}$ *= sum of squares between groups;* SS_{total} *= total sum of squares;* MS_{error} *=mean square of the error term.*

various effect size measures, as well as based on the recommendations by Breaugh (2003), two different effect size measures are employed in our research, as summarized in Table 3.

The first effect size measure to be employed in our analyses is the partial eta square statistic (η_p^2), which belongs to the group of effect size measures based on explained variance. This effect size measure has been employed as one of the most frequent measures of effect sizes (Pallant, 2001; Young, 1993). However, given a critique of effect size measure based on explained variance (see Breaugh, 2003), an alternative effect size measure based on standard mean difference is also employed in our analysis, as recommended by Cohen (1988). Here, Breaugh (2003, p. 80) points to Cohen's *d* statistic being the most commonly used effect size measures in the literature today.

5. RESULTS

5.1 RELATIVE IMPORTANCE OF DECISION-MAKING FACTORS

Table 4 provides an overview of the aggregate mean scores for each decision-making factor, measured on a 7-point scale for all of the four compared countries.

According to Table 4, Slovenia scores relatively lowest on all four decision-making factors, with the highest difference relative to the three Muslim countries on the first factor of *brand* importance. The smallest relative difference among the four countries is in the factor of *price*. With regards to statistically significant differences among the three Muslim countries there is a statistical difference between Malaysia and Turkey in the decision-making factor of *quality*, and between Malaysia and Kazakhstan in the factor of *price.* The most important factor among the young adult consumers in our research both, overall and at the level of each specific country, is the decision-making factor of *quality*, followed by *price*; jointly indicating a strong *quality-price* relationship.

Linking the relative importance of both *quality* and *price* to *power distance* (as a cultural proxy), we can see that Malaysia's extremely high PDI score (highest country ranking) corresponds to statistically significantly higher scores related to the importance of both *quality* and *price*, compared to the remaining three countries (with lower and more comparable PDI scores).

Table 4: Comparison of decision factor mean scores across countries (7-point scale)

Dimension	Slovenia	Malaysia	Kazakhstan	Turkey
Brand (conscious)	***3.74*** (0.94)	***4.28*** (0.90)	***4.23*** (0.90)	***4.17*** (0.70)
Quality (conscious)	***4.59*** (1.09)	***5.18*** (0.89)	***4.93*** (1.09)	***4.65*** (1.15)
Price (conscious)	***4.37*** (0.88)	***4.84*** (0.83)	***4.42*** (0.75)	***4.65*** (0.87)
Information utilization	***3.72*** (1.08)	***3.90*** (0.99)	***3.76*** (1.08)	***3.94*** (1.10)

Note: Brackets show the value of standard deviations.

Table 5: Linking the importance of *quality* and *price* with culture (*power distance*)

Dimension	Slovenia	Malaysia	Kazakhstan	Turkey
Power distance index (PDI)*	**71**	**104**	**n/a (~ 79)****	**66**
Quality (conscious)	***4.59***	***5.18***	***4.93***	***4.65***
Price (conscious)	***4.37***	***4.84***	***4.42***	***4.65***

Note: * Based on Hofstede's (2001) typology and data. The PDI is measured on a scale from 0 to 120, with a higher index value corresponding to a higher degree of power inequality. ** While the PDI score is not available for Kazakhstan, we have used the combined average PDI score for all Muslim countries as a proxy.

5.2 CULTURE EFFECT SIZE

As it can be seen from the data in Table 5 and taking into account all four countries, the *brand* decision-making factor has the highest effect size of culture (6.2%), followed by *price* (5.1%) and *quality* (4.9%). All three factors are thus statistically significant, while *information utilization* is not. Comparing only the Muslim countries the results change, with the *brand* factor suddenly becoming non-significant, while *price* and *quality* remain statistically significant.

The results show that *information utilization* is not affected by culture and that *price* and *quality* remain important with regards to effect size of culture. The most dramatic impact of the effect size of culture is however seen for the factor *brand* that goes from being the most important factor with a 6.2% effect size across the four countries to the least important factor in terms of effect size of culture when comparing only the Muslim countries. Based on the results both hypotheses can be rejected. While rejecting the first hypothesis shows that culture affects the importance of several most cited decision-making factors in the literature (*brand*, *price* and *quality*) in a diverse European-Muslim multi country sample, the rejection of the second hypothesis also shows that these results are for the factors of *price* and *quality* 'robust' also within the Muslim subsample itself.

Lastly, Table 7 shows the pair-wise calculations of *Cohen's d* effect size coefficient. As it can be seen from the calculations, Cohen's d effect size measures are on average slightly lower (compared to partial eta square testing), although still indicating low-to-medium effect sizes for the decision-making factors of *quality* and *price*.

Similarly, and expectedly, much of the cross-cultural variability lies between Slovenia and the three Muslim countries. However, by looking at the culture effect sizes only among the three Muslim countries, the remaining effect size seems to correspond to differences in PDI for the decision-making factor of *quality* (highest pair-wise *d* coefficient is for the comparison between Malaysia and Turkey).

6. LIMITATIONS OF THE RESEARCH AND RECOMMENDATIONS

The use of a *matched snow ball sample* may be subject to critique, however matched simple convenience samples are extensively employed in cross-cultural research (see Rašković & Kržišnik, 2010); they offer control of important demographic variables. The use of snow ball sampling may on the other hand result in a strong respondent bias on important geographic, demographic and psychographic respondent characteristics. While a validated multi-item measurement questionnaire has been used to ensure validity, the questionnaire was administered only in English.

The timing of the research during summer must also be taken into account. Additionally, the use of a particular effect size measure may also be taken into consideration, and alternative measures could also be employed (see Howell, 1992, for more on this). Furthermore, in looking at how

Table 6: Partial eta square effect size measure of culture

	Brand	Quality	Price	Info.
***4 countries:** Partial eta square effect size**	6.2%	4.9%	5.1%	0.8%
***4 countries:** Level of significance*	(0.000)	(0.000)	(0.000)	(0.335)
***Only Muslim:** Partial eta square effect size**	0.3%	4.2%	4.4%	0.5%
***Only Muslim:** Level of significance*	(0.629)	(0.01)	(0.01)	(0.428)

Note: In interpreting partial eta square effect size results, please refer to the formula and method of calculation.

Table 7: Cohen's d effect size pair-wise country estimates (*d* values in absolute)

	Turkey	Malaysia	Kazakhstan	Slovenia
Brand				
Turkey	0	…	…	…
Malaysia	0.13	0	…	…
Kazakhstan	0.07	0.07	0	…
Slovenia	0.52**	0.59**	0.53**	0
Quality				
	Turkey	**Malaysia**	**Kazakhstan**	**Slovenia**
Turkey	0	…	…	…
Malaysia	0.52**	0	…	…
Kazakhstan	0.25*	0.25*	0	…
Slovenia	0.05	0.59**	0.31*	0
Price				
	Turkey	**Malaysia**	**Kazakhstan**	**Slovenia**
Turkey	0	…	…	…
Malaysia	0.22*	0	…	…
Kazakhstan	0.28*	0.53**	0	…
Slovenia	0.32*	0.55**	0.06	0
Time				
	Turkey	**Malaysia**	**Kazakhstan**	**Slovenia**
Turkey	0	…	…	…
Malaysia	0.04	0	…	…
Kazakhstan	0.17	0.14	0	…
Slovenia	0.20*	0.17	0.04	0

Note: * Corresponds to weak effect size (Cohen, 1992); ** Corresponds to medium effect size (Cohen, 1992).

much effect size can be reduced by splitting the data between a European subsample and a Muslim subsample, having both subsamples more balanced in terms of the number of countries would make the results much more comparable. Furthermore, the research did not measure the level of either religious beliefs or practices in any of the three Muslim countries. Despite holding a common religious background, there are most likely very large religious differences between the three selected Muslim countries, with Malaysia probably the most religiously orthodox and Kazakhstan the least. Nonetheless, no control variables were included in our analysis regarding either religious background of the respondents or the level of their religious behavior.

In terms of the recommendations for future research, a more representative sampling technique and including a more balanced subsample of European countries is recommended. In addition, it would also be interesting to learn how much the geographical location of countries (as a proxy for cultural similarity) within the Muslim subsample would impact the results on the culture effect size within the Muslim subsample, as one could perhaps argue that Malaysia, Kazakhstan and Turkey are very diverse Muslim countries. Therefore, future research should also pay more attention to measuring directly both cultural, as well as religious characteristics of the respondents.

7. IMPLICATIONS FOR THEORY AND PRACTICE

Our results show that a strictly universalist approach does not hold and that there is a degree of cultural contingency in the decision-making factors of young adult consumers; both in a European-Muslim and only Muslim context. Furthermore, the results indicate that cultural contingency is linked to some of the most often referred to decision-making factors in literature (i.e. *price* and *quality*). On the other hand, the role of *brands* becomes more important on the aggregate European-Muslim comparison level, but less important within a more 'rounded' Muslim sub-context. The dramatic change of the *brand* factor, going from having the highest culture effect size in a European-Muslim comparison to being statistically non-significant within the Muslim sub-context, indicates a twofold cultural contingency perspective. On the first level, some of the contingency is related directly to the specifics of a particular national culture, corresponding to the country level analysis. On the second level, some of the contingency is however also embedded in a wider 'regional cluster' of countries. It is perhaps here that cross-cultural and international marketing research may still be lacking all the necessary tools for measuring and addressing cultural contingency, as most of the tools are based on large western national cultures (e.g. the US).

In terms of marketing practice, the results in Table 2 indicate that *quality* and *price* are the two most important decision-making factors. Thus, creating a clear *quality-at-a-good price* positioning seems to be the appropriate marketing strategy for winning young adult consumers. One has to only look at a fashion giant Zara to see the success of such strategy. On the other hand, the issue of *branding* is more complicated. While personality-endorsed products seem to be successful in capturing the attention of young adult consumers, building brand equity in their eyes should be again more related to the *quality-at-a-good price* aspect, while at the same time being sensitive to regional and cultural specifics. Thus, an effective brand should mirror a universal message of *quality-at-a-good price*, and a regionally adapted 'personality'.

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WHY SLOVENIAN WOOD PRODUCTS LOST GLOBAL MARKET: ENHANCING COMPETITIVENES OF SLOVENIAN TIMBER VALUE CHAIN*

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Strokovni članek

Abstract: Slovenia has always been among the most forested countries in Europe and even today has one of the fastest growing stocks of wood (Slovenia Forest Service, 2011a). Yet, just ten years ago Slovenia was among top 15 global exporters of wooden furniture (Kaplinsky et al., 2003), while today, production of wooden furniture – the main value added wooden product – barely reaches 40% of its 2008 production level (Ministry of Agriculture, Forestry and Food of the Republic of Slovenia, 2011). Some of this downturn is clearly attributed to the decline of the construction industry due to economic crisis. However, inefficiencies in wood supply chain management as well as overly fragmented forest property, combined with inadequate market awareness or even the lack of interest by 450,000 Slovenian private forest owners, bears most of the fault. It seems that the only way to improve competitiveness of Slovenian wooden products is to encourage market cooperation not only among forest owners, but also with other links of wood products value chain in order not only to develop new wood products, but also to market the existing ones properly. Related to the supply chain side of the story, associations of small forest property owners can assist forest owners in a joint appearance on the market and facilitate access to financial means for the forestry management. A joint ownership of sawmills and other wood-products facilities can improve market access, as it establishes a direct link between a forest owner and wood products manufacture. Such integration however requires financial resources not easily available in the current financial crisis. On the other hand, by employing relationship marketing to increase relationship commitment and trust forest owners can quickly benefit in terms of reduced relationship costs. Small forest properties will need to be certified for sustainable production too, since nowadays certification is seen as a ticket to enter and stay on the global timber market. Finally, linking Slovenian wood products to a country brand as well as employing

relationship marketing along the whole distribution channel might help improve competitiveness of Slovenian timber value chain.
Keywords: Slovenia, small scale forestry, value chain, timber production

ZAKAJ JE SLOVENSKA LESNOPREDELOVALNA INDUSTRIJA IZGUBILA SVETOVNI TRG: KAKO IZBOLJŠATI KONKURENČNOST SLOVENSKE LESNOPREDELOVALNE VERIGE

Povzetek: Slovenija je ena najbolj gozdnatih držav v Evropi z izjemno hitro rastjo zaloge lesa (Zavod za gozdove Slovenije, 2011a). Še pred desetimi leti je bila tudi med največjimi globalnimi izvozniki pohištva iz lesa (Kaplinsky idr., 2003), danes pa proizvodnja pohištva, kjer se dosega največja dodana vrednost med izdelki iz lesa, komaj doseže 40 odstotkov ravni iz leta 2008 (Ministrstvo za kmetijstvo, gozdarstvo in prehrano, 2011). Nekaj krivde za ta upad je vsekakor mogoče pripisati trenutni gospodarski in finančni krizi, glavni razlogi pa so neučinkovito upravljanje dobavne verige, razdrobljena lastnina gozdnih površin, pomanjkljivo trženjsko znanje 450.000 slovenskih lastnikov zasebnih gozdnih površin in celo njihova popolna brezbrižnost za trženje lesa. Za povečanje konkurenčnosti slovenskih lesnih proizvodov je zato nujno potrebno spodbuditi sodelovanje lastnikov gozdnih površin z drugimi deležniki v lesnopredelovalni verigi, pa ne samo zato, da bi razvili nove izdelke iz lesa, ampak tudi zaradi ustreznejšega trženja obstoječih lesnih izdelkov. Združenja malih lastnikov gozdnih površin bi tako pomagala lastnikom s skupnim nastopom na trgu, pa tudi s finančno pomočjo za upravljanje malih površin gozdov. Malim lastnikom gozdnih površin lahko dostop do trga olajša tudi skupna lastnina žag in drugih lesnopredelovalnih obratov, saj vzpostavlja neposredno povezavo med lastnikom gozda in proizvajalcem izdelkov iz lesa, vendar taka integracija zahteva velika finančna sredstva, ki so v trenutnih kriznih razmerah težko dosegljiva. Po drugi strani pa bi lahko lastniki gozdov z uporabo trženja na podlagi odnosov (angl. relationship marketing) povečali medsebojno zaupanje in zvestobo ter tako znižali stroške odnosov s preostalimi deležniki v lesnopredelovalni verigi. Prav tako bodo tudi male gozdne posesti potrebovale certifikat za trajnostno proizvodnjo, saj je ta danes nujen za obstoj na globalnem lesnopredelovalnem trgu. Nenazadnje bi prav povezava znamke države s slovenskimi izdelki iz lesa kakor tudi uporaba trženja na podlagi odnosov vzdolž celotnega distribucijskega kanala povečala konkurenčnost slovenske lesnopredelovalne verige.
Ključne besede: Slovenija, malo gozdarstvo, veriga, lesnopredelovalna proizvodnja

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1. INTRODUCTION

Although the timber industry is not a ‘traditional’ marketing domain, concepts like *relationship marketing*, *supply and value chain management* and *branding* hold in this setting today more than ever. Even more specifically, Brodrechtova (2008, p. 450) on the example of export marketing strategies of the Slovak timber industry highlights the lack of holistic export-oriented marketing strategies in transition markets and emphasizes a balanced importance of both, *“physical and relational resources”*, to accelerate access into the timber market, along not just the entire supply chain, but also the entire value chain to final customers.

According to Elyakime & Cabanettes (2009, p. 169), who studied (domestic) marketing strategies of timber in France, the long-term oriented management of *“commercial relationships”*, in particular between “*forest owners and wood industrialists*”, is integral part of wood marketing. Their view directly relates to Morgan & Hunt’s (1994) perspective on *long-term* and *value-adding* relationship orientation within marketing (e.g. relationship marketing), which is related not only to recent *strategic marketing* focus within supply chain management (Flint, 2004), but also to the tendencies towards a more balanced integration of logistic and marketing dimensions within supply chain management (Alvarado & Kotzab, 2001). Adding to these recent developments within the value and supply chain management’s literature, Peppard & Rylander (2006, p. 128) point to the emergence of a *“network perspective”* within these fields, which have led to the transformation *“from a value chain to a value network”.* This can be usefully applied when analysing the deficiencies of supply chain management and marketing strategies of highly fragmented value networks, like timber value chain in Slovenia, since poor market performance of Slovenian timber products originates at the supply side of the value chain and is further exacerbated by a lack of a holistic export marketing strategy.

This paper builds on Elyakime & Cabanettes’s (2009) analysis of timber marketing strategies in the case of highly fragmented private forest estates (following Balkytė & Peleckis, 2010) and Brodrechtova’s (2008) analysis of timber marketing strategies in transitional countries. In general, the paper focuses on the *value creating relationships* between forest owners and wood products manufacturers. Based on this supply chain perspective the main research proposition of this paper is that highly fragmented supply chain relationships within Slovenian timber industry is the main cause for Slovenia’s poor export performance in the international timber market and this is further exacerbated by the lack of marketing export strategy. Only by understanding deficiency of the existing supply chain can we explain why Slovenian timber industry does not have a unified and focused export marketing strategy.

This topic has been often analysed from a supply chain perspective only, however, nowadays it is unavoidable to view it in terms of network perspective as value creating relationships seems to be a corner stone of *market competitiveness*. Namely, in order for a supply chain, as defined by Menzer et al. (2001), to develop into the chain that delivers an added value to customers, every part of the chain should be strong and effectively connected to each other (Ross, 1998; Stevens, 1989; Tyndall et al. 1998; Ellram & Cooper, 1990). Especially related to forestry, Elyakime & Cabanettes (2009) point out that “*cooperation is rare [in timber industry] and the confrontation of conflicting interests is unavoidable*”, which calls for “*integrated management of the marketing of timber*”.

This paper is also motivated by the EU Forestry Strategy (2005); its main purpose is simultaneous improvement of global competitiveness of the European forestry and preservation of natural resources of the European Union. In order to achieve this goal, several measures are necessary, including ones aimed at increasing added value to all links in the forestry value chain and consequently improving the long-term competitiveness of wooden products.

The paper employs a *qualitative mapping approach* to the *Slovenian timber market* to identify key supply chain actors (forest owners, logging companies, sawmills and value added wood product manufacturers), their roles and goals, to determine the nature of relations among them and identify policy issues that influence their performance. The main purpose of the *timber market map* is to examine factors that have the greatest impact on the Slovenian wood-product value chain, and consequently on the competitiveness of wood products. In this regard and following Hellin et al. (2005), this paper, therefore, analyses *timber value chain* and the *environment* (e.g. infrastructure, institutions, policies, processes etc.), in which this value chain operates and is therefore integral part of such a market map. The paper pays special attention to connections between small forest property owners and logging companies (usually “forest concessionaires”), as this causes most concern when implementing value creating relationship and consequently impacts competitiveness of the Slovenian forestry and related industries (see Ministry of Agriculture, Forestry and Food of the Republic of Slovenia, 2010; Chamber of Agriculture and Forestry of Slovenia, 2011; Slovenian Forest Service, 2011b; Schmithüsen & Hirsch, 2010).

This paper is mainly aimed at finding important implications for the marketing theory and practice based on the Slovenian timber industry, which is non-competitive on the global wood products' market despite the country's enormous natural resources of wood. Furthermore, its conclusions may not only stimulate a long-overdue research interest of marketers for this industry, but also help solve the following dilemma: *why Slovenia has not been able to adequately capitalize on its huge timber (export market) potential*.

The remainder of the paper is organized as follows. Section 2 gives a general overview of the environment, in which the Slovenian timber value chain operates. It briefly discusses Slovenian forests, their management and basic economic indicators of Slovenian forestry and wood products industries. Section 3 focuses on the Slovenian timber value chain, with particular emphasis on major market actors (private forest owners and forest concessionaires), and the nature of relations between them. Creating value added relationships is a key to competitiveness, therefore, section 4 offers suggestions how to use relationship marketing to boost the value creating relationship not only between small forest property owners and timber buyers, but also among small forest owners themselves, and it proposes the use of country brand to improve the competitiveness on foreign markets. Section 5 is a summary of our conclusions.

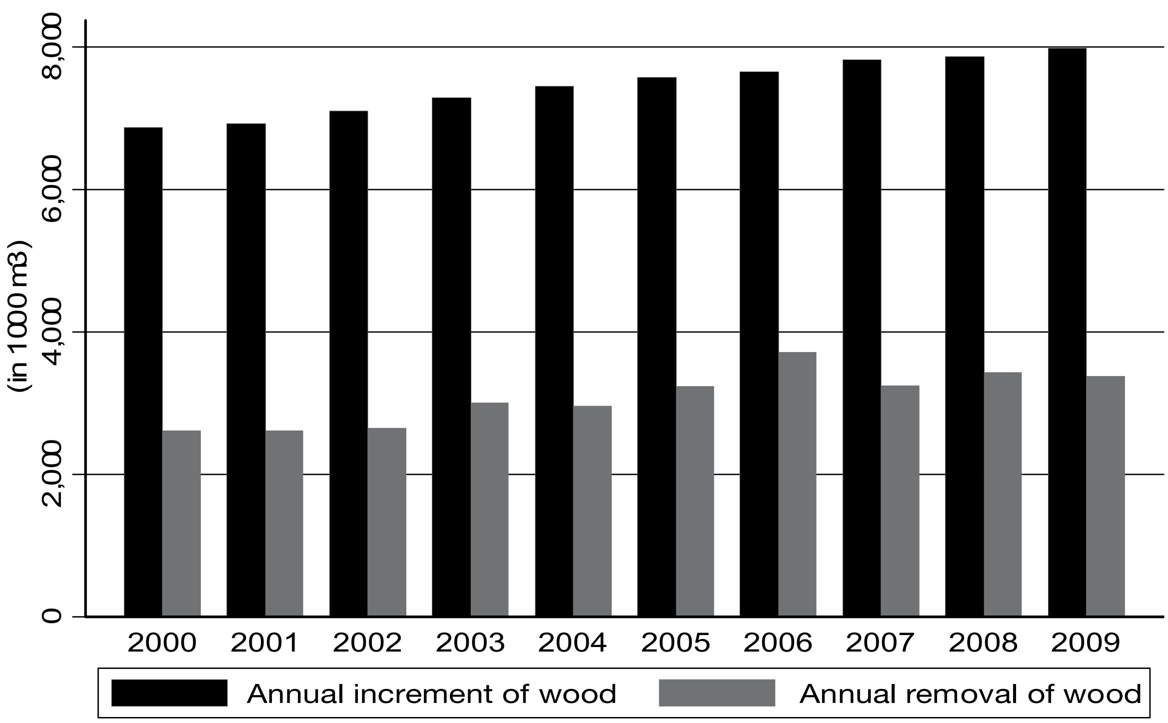
2. THE ENVIRONMENT OF SLOVENIAN TIMBER VALUE CHAIN

2.1 SLOVENIAN FORESTS AS A NATURAL RESOURCE FOR TIMBER INDUSTRY

Slovenia is, after Finland and Sweden, the third most densely forested country in Europe; almost 60 per cent (1,185,145 ha) of its entire territory is covered with forests (Slovenia Forest Service, 2011a).

In order to protect ecosystems and biodiversity Slovenia encourages "close-to-nature" forestry, thus approximately 90 per cent of Slovenian forests regenerate naturally (European average is 40%), the rest is regenerated by planting and seeding (MCPFE, 2007). As a result, Slovenia is dominated by mixed forests: 70 per cent of forests are covered with beech, fir-beech and beech-oak, which have a high production and market

Figure 1: Slovenian wood increment compared to wood extraction from 2000 until 2009



Data source: Slovenia Forest Service (2010).

capacity and can be used as a source for a wide variety of wood products[1].

With over 270 m^3 of wood per hectare of forest (Gale, Lešić & Kutin Slatnar, 2011) Slovenia also has one of the fastest growing stocks of wood in Europe, preceded only by Austria, Switzerland, Luxemburg and the Czech Republic. A main cause for this growth can be attributed to the fact that annual wood increment in Slovenian forests goes far beyond annual wood removal as indicated in Figure 1. Mirko Medved, director of the Slovenian Forestry Institute, warns how long-standing insufficient timber extraction leads to forest aging (Šoštarič, 2011), which yet again reduces forest productivity and timber value (Murty, McMurtrie & Ryan, 1996).

2.2 SLOVENIA'S FORESTS MANAGEMENT

Almost 75 per cent of Slovenian forests are privately owned, the remainder are public and owned by the state and local communities (Slovenia Forest Service, 2011a). Austria, France, Sweden and Norway have a similar share of private forests (Schmithüsen & Hirsch, 2010). However, Slovenia is different in terms of the size of average private forest property. Due to more than 450,000 private forest owners more than 40 per cent of Slovenian forest properties are smaller than 6 ha, usually split in different locations (Schmithüsen & Hirsch, 2010), which precludes cost efficient production and marketing of timber on the individual private forest property basis. Not surprisingly, only public forests (roughly 25 per cent of all forests) are considered to be systematically managed (e.g. maintained and utilized).

Slovenia public forests' management is based on a strict separation of collective and commercial activities (Matjašič, 2006). Collective activities are carried out by publicly financed Slovenia Forest Service – SFS (*Zavod za gozdove Slovenije)*. Commercial activities are carried out by forestry companies, which have acquired forest concessions (so called "forest concessionaires"). Therefore, in Slovenia three actors are involved in public forest management (Matjašič, 2006):

- Farmland and Forest Fund of the Republic of Slovenia (*Sklad kmetijskih zemljišč in gozdov Republike Slovenije*) manages publicly owned farmland, farms and forests.
- Slovenia Forest Service is responsible for sustainable management of Slovenian forests regardless of their ownership.
- Forest concessionaires carry out forestry work in public and privately owned forests (in agreement with private owners only).

Slovenia started granting concessions for public forests' management in 1996. A concession, awarded without public tender by Farmland and Forest Fund of the Republic of Slovenia on behalf of the state to forest companies for 20 years, includes logging and harvesting of timber, timber sales, restoration, conservation and silvicultural work, as well as the construction and maintenance of the forest infrastructure (National Farm Land and Forest Fund Act, article 10a). A concessionaire may only be an individual or a legal entity that is registered to practice forestry in Slovenia (National Farm Land and Forest Fund Act, Article 2). The concessionaire exploits public forest according to the annual program set by Farmland and Forest Fund of the Republic of Slovenia.

Forest concessionaire's overall financial performance is therefore determined by a concession fee for use of public forests (prescribed by National Farm Land and Forest Fund Act, Article 10a), standard costs of public forest exploitation (defined by Ministry of Agriculture, Forestry and Food), its technical and cost efficiency (Li, 2006) and revenue generated from other non-regulated activities, including logging in private forests. According to Kavčič & Slapničar (2008), the majority of forest concessionaires generate more than 60 per cent of revenue from other activities (data for 2005); therefore their financial performance may be closely related to added value generated by logging in private forests.

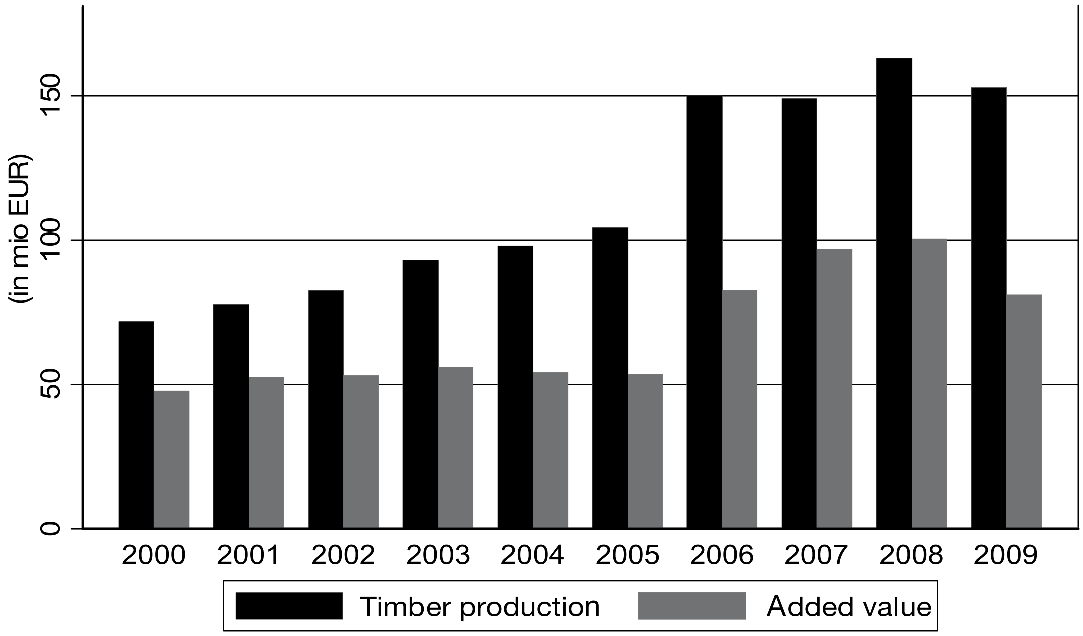
In 2009, the cut in Slovenian forests amounted to 3,374,191 m^3 (a decline of 1.6 per cent compared to 2008): 1,853,772 m^3 coniferous and 1,520,419 m^3 deciduous trees (Slovenia Forest Service, 2010). The cut in public forests was carried out according to forest management plans; however cut in private forests fell well behind, hence the total cut in 2008 fell 34 per cent short of plans. In 2009 (as in 2008), logging was carried out by over 70 forest companies, however majority of work was done by 14 forest concessionaires (AJPES database, 2010). Overall financial performance of concessionaires is the key to success of Slovenian forestry in both, the economic and ecological terms.

2.3 ECONOMIC INDICATORS OF SLOVENIAN FORESTRY AND WOOD PRODUCTS INDUSTRIES

Given the high volume and quality of Slovenian forests, Slovenian forestry and wood products industries should be a vital driver of Slovenian economy, although vast majority of logging is

1 For an overview of commercial usability of each wood type see Wiemann (2010).

Figure 2: Slovenian timber production and added value of Slovenian forestry from 2000 until 2009



Data source: Statistical office of the Republic of Slovenia (2011a).

done in public forests (less than 25 per cent of all forests). However, contribution of forestry to Slovenia's gross national product is barely around 0.2 per cent, same as in neighbouring Croatia, which has half as much forests (The World Bank, 2010). Moreover, as Figure 2 indicates, even though wood removal remained at the approximately same level from 2007 until 2009, added value of Slovenian forestry declined heavily. Given the fact the number of the employees decreased by more than 10 per cent during the same period (Statistical Office of the Republic of Slovenia, 2011a), the decline in added value is directly attributed to lost value in the eyes of a timber customer.

Certainly, part of the problems of Slovenian forestry can be attributed to current economic crisis. Yet, Figure 2 shows how growth of added value in Slovenian forestry severely dropped in 2009, when Slovenian construction industry was still reasonably active[2]. Since 2010 performance of the wood processing industry was negative again and Slovenian furniture manufacturers' profits dropped too, it is not surprising that Ministry of Agriculture, Forestry and Food of Republic of Slovenia (2011) finds that Slovenian forestry and forestry-related industries are still in deep crisis.

Despite of huge stock of wood and the urgency to increase logging to preserve quality of wood, timber customers are frequently rejected in Slovenia. Anica Zavrl Bogataj, director of the Forestry, Hunting and Fishing Directorate within Slovenian Ministry of Agriculture, Forestry and Food, points out a case of IKEA-Austria; the company was willing to invest in Slovenian timber industry "*if Slovenia can provide at least several hundred thousand cubic meters of wood per year*" (Šoštarič, 2011). Regrettably, as noted by Zavrl Bogataj, Slovenia is currently unable to comply with such requests due to "*discontinuities in wood-products production chain*" (Šoštarič, 2011).

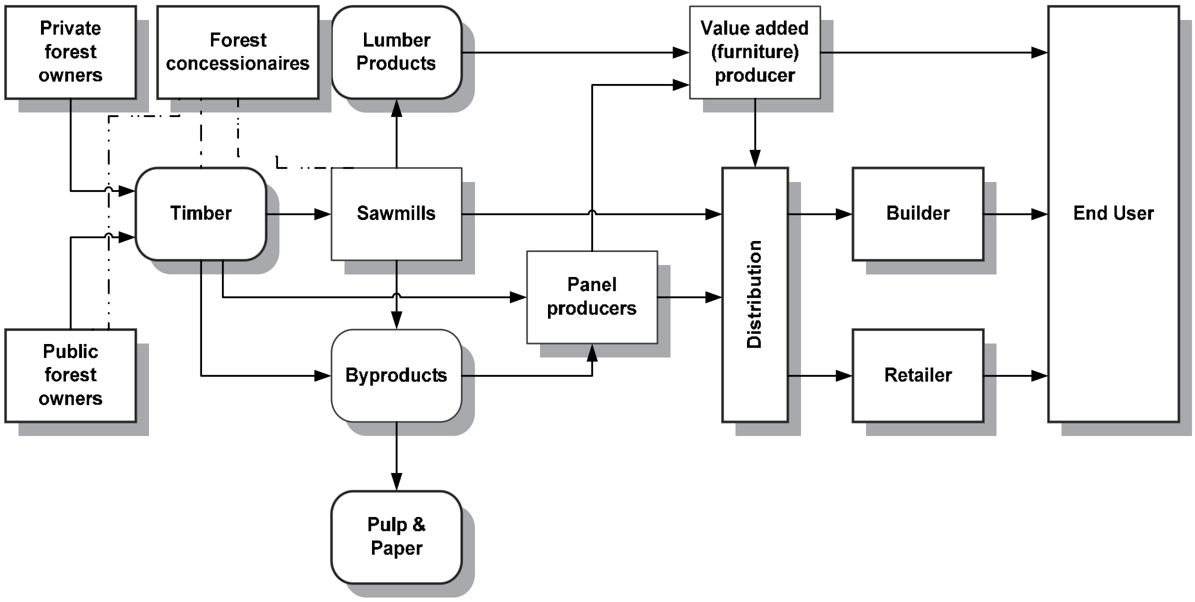
Nevertheless, Slovenian timber exports are increasing: 26 per cent of round wood was exported in 2009 (Statistical Office of the Republic of Slovenia, 2011a). Majority of exports go to Austria and Italy due to their higher purchase prices compared to domestic market (Kmetijski inštitut Slovenije, 2011). Austria has regionally highly competitive sawmill industry with large and modern sawmills, which enables them to offer higher purchase prices. Exports to Austria follow timber price growth: since 2004, when export was negligible, the share of exported round wood grew to 17.2 per cent of Slovenian annual wood harvest in 2009 (Piškur, 2010). Current financial crisis may be another reason for export to Austria: namely, Austrian buyers are more regular payers compared to domestic buyers.

3. THE SLOVENIAN TIMBER VALUE CHAIN

The flow of various wood products can be plotted as a modified Porter's value chain (1985). Figure 3 gives an insight into the flow of Slovenian wood

2 For detailed data on added value in Slovenian construction see Statistical Office of the Republic of Slovenia (2011a).

Figure 3: Simplified value chain of Slovenian forestry and wood related industries



Source: Choen & Kozak, 2006 and author's analysis

products: from small private forest owners and public forests to final customer(s), which can buy timber, paper or wooden house furniture.

Wood products include timber (focus of our analysis) as well as lumber, paper and furniture. Following Vandermerwe (2000), every "link" in the value chain – from a forest owner to a retailer – should add value to the final customer (end user), including a link between forest owners, logging companies (mostly forest concessionaires) and sawmills. Added value arises when perceived value of a product exceeds a product price in the eyes of a customer (Day, 1990). A value chain's link adds value to the whole value chain if it manages to increase perceived value of the product in the eyes of a customer more than it increases the product price (influenced by costs of value chain link's operation). Products with lower or no added value are not competitive and can be quickly squeezed from the market by more successful competitors.

The Slovenian Ministry of Agriculture, Forestry and Food (2010) sees a number of factors that has a devastating impact on the non-competitiveness of Slovenian wood-product value chain on the global market, namely:

- private owners of overly fragmented forest property,
- disorganization of forest owners in terms of forest management and marketing,
- heterogeneous forest industry.

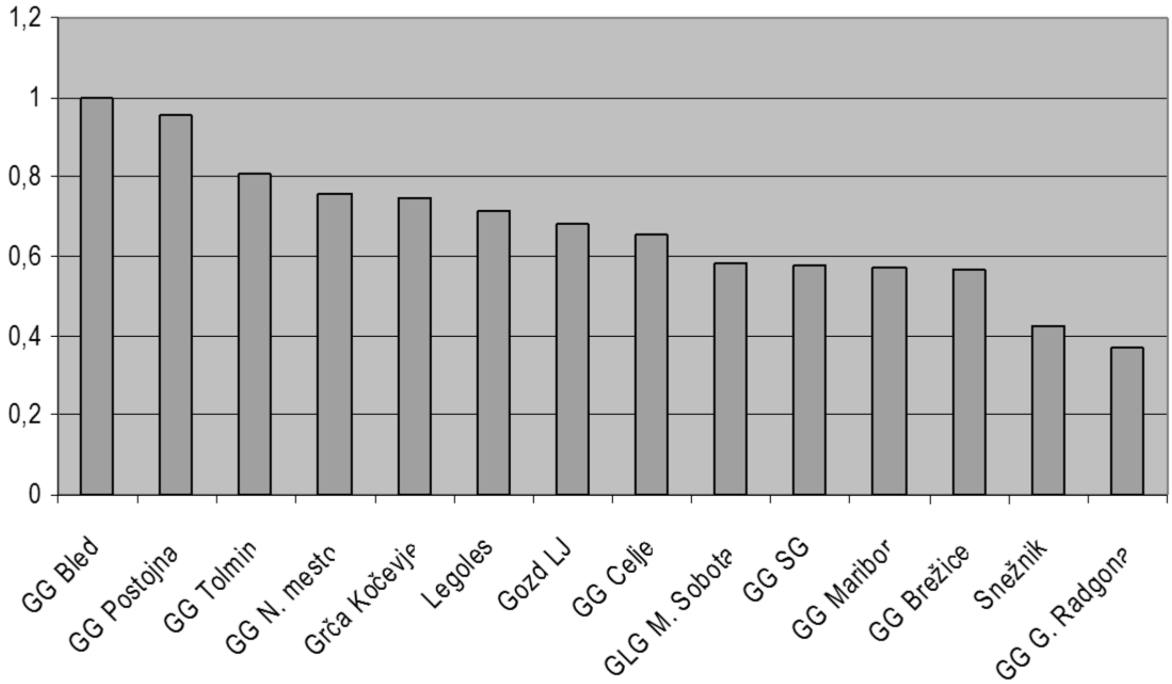
Wood supply is determined by private owners' capabilities and willingness to enter the wood market. On the other hand, wood demand is determined by capabilities of wood buyers (mostly forest concessionaires as they buy most of the wood and timber in Slovenia) to get a wood of higher quality and process it cost effectively in order to achieve added value for their customers (producers of furniture, pulp and paper industry, constructors and end users); therefore, value creating relationship among private forest owners and forest concessionaires is crucial for the competitiveness of wood products.

3.1 PRIVATE FOREST OWNERS

In Slovenia, there are more than 450,000 private forest owners (compared to 145,000 entities in Austria (Weiss et al., 2010). Although they hold almost 75 per cent of Slovenian forests, the average private forest property is only 2.5 ha (compared to average size of 13 ha in the EU) (Slovenia Forest Service, 2011a). More than 40 per cent of Slovenian forest properties are smaller than 6 ha (compared to less than 10 per cent of forest properties in Austria) and they are usually split in three different locations (Schmithüsen & Hirsch, 2010). Majority of Slovenian private forest properties is thus well below the 10 ha limit used to distinguish small-scale forestry from industrial one (Russell & Mortimer, 2005), which inevitably leads to costly production and marketing of timber on the individual owner basis.

Such a severely fragmented forest property makes it almost impossible to use forest cost efficiently on the individual owner basis due to lack of economy of scale, even though quite a number

Figure 4: Relative cost efficiency of Slovenian concessionaires



Source: Mörec & Jeromel, 2011.
Note: vertical axis indicates a relative degree of cost efficiency: in the analysis most cost efficient concessionaire has a cost efficiency of 1; efficiency of others is shown in relation to the most cost efficient concessionaire.

of small forestry harvesting equipment is today commercially available[3]. According to the Chamber of Agriculture and Forestry of Slovenia (2011), the return on Slovenian private forests is continually deteriorating and the consequences are (and will be) felt not only by the owners and wood processing companies, but also by residents as well as, since properly managed forests improve ecological function.

Lack of optimal utilization of small forest properties already has its consequences: in 2009, logging in private forests fell well behind plans (Slovenia forest Service, 2010). One reason is obvious: small forest owners are not interested in an economic activity, since removal of small quantities of logs is not profitable or can even cause loss (costs of removal frequently exceeds a log's selling price). In addition, 75 per cent of Slovenian small forest owners (compared to 33 per cent in Austria (Weiss et al., 2006)) are not employed in agriculture or forestry and are therefore not economically dependent on forest (Schmithüsen & Hirsch, 2010). Consequently they might not even be interested in entering the wood market, since forests represent only a small fraction of their assets. And even if they wish to enter the market, they have inadequate market information and therefore miss many business opportunities.

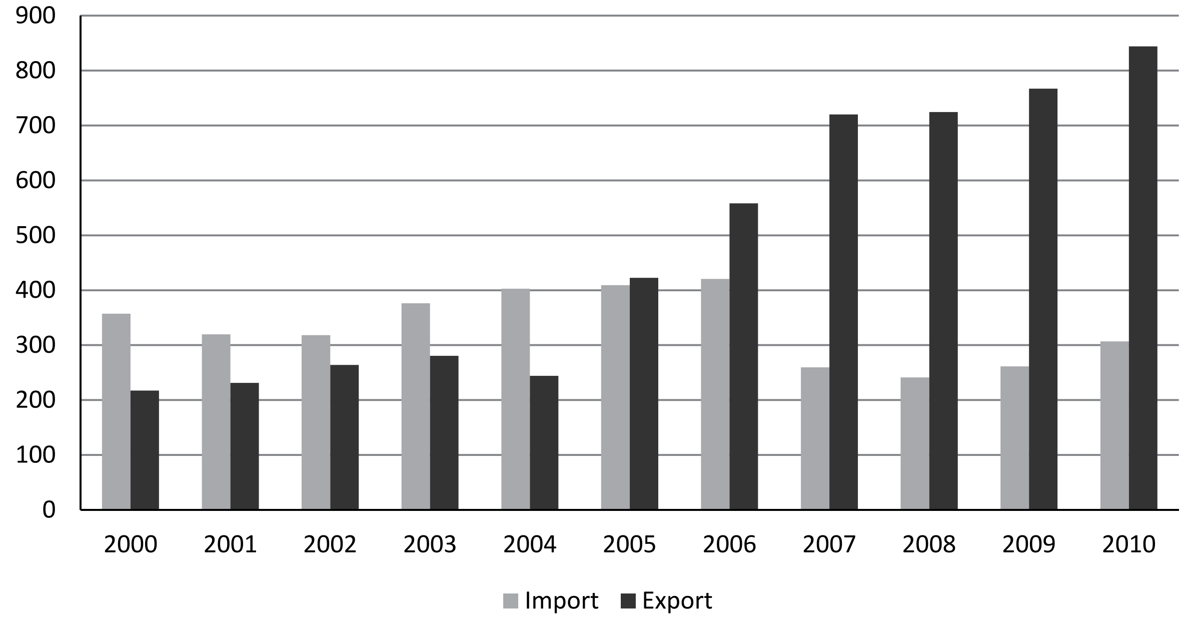
Excluding small forest owners from the wood market leads to undesired consequences for wood buyers: lower supply of wood means less choice of wood at higher prices, since important part of high quality wood never comes to the market.

3.2 FOREST CONCESSIONAIRES AS LOGGING COMPANIES AND SAWMILL OPERATORS

In Slovenia, logging is carried out by over 70 forest companies (AJPES database, 2010). However the majority of forest work is performed only by 14 companies with a concession for public forest management (forest concessionaires). Their primary responsibility is to perform logging on public and private forest properties. Additionally, they have to meet the annual plan for cultivation works in public forests and forest infrastructure maintenance set by Slovenian Forest Service. The plan is more comprehensive for concessionaires who cover greater area of public forests or areas, which require large scale restoration after natural disasters (fire, heavy wind or snow). Not surprisingly, forest concessionaires covering terrain with low share of forestation (like GG Gornja Radgona) or rugged terrain (like Snežnik) are cost inefficient (see Figure 4) and consequen-

3 Among others, Slovenian producer of forestry equipment »Tajfun«, one of the biggest producers of forestry equipment in the world, has a special line for small forestry harvesting equipment (see www.tajfun.com).

Figure 5: Slovenian export-import timber flows in the period from 2000 until 2010 (in 1000s m^3)



Data source: Statistical Office of the Republic of Slovenia (2011a).

tly less competitive on the timber market (Mörec & Jeromel, 2011). Namely, Slovenian Ministry of Agriculture, Forestry and Food, who set standard costs of forest exploitation, does not take into account differences in quality of forests and difficulty of terrain. As these costs are part of concession fee calculation, they negatively affect concessionaire's overall financial performance. To increase efficiency and consequently competitiveness of the concessionaires it would be reasonable to consider reducing a number of concessions and increase the area, covered by one concession.

According to Ministry of Agriculture, Forestry and Food of the Republic of Slovenia (2011), in 2010 purchase prices for conifer logs (from private forest owners) were 25 per cent lower compared to the prices offered by foreign buyers, mostly from Austria and Italy (€61/m^3 compared to €83/m^3). As a result export of wood has been rising ever since 2004 and has been particularly high the last four years (see Figure 5).

On the top of it and precisely because of a favourable selling price offered by foreign timber buyers, the use of timber in Slovenia has been sharply decreasing since 2007. Consequently, share of exports of wooden furniture (high value added products) in total export of Slovenia decreased by more than half in the period from 2000 to 2010 (Statistical Office of the Republic of Slovenia, 2011b). The reason is that Slovenian logs are leaving Slovenian supply chain when they should be sawn at Slovenian sawmills. Namely, Slovenian sawmills (major ones are again in operation by forest concessionaires) cannot offer a competitive price to private forest owner, because of inefficiencies within their operations, arising from both, improper determination of public forest management costs (calculated as fee calculation) and lack of economy of scale due to an overly fragmented sawmill capacity. Thus in 2010 all Slovenian sawmills produced only 0.7 million m^3 of lumber (Ministry of Agriculture, Forestry and Food of the Republic of Slovenia, 2011). During the same year, Austria – the fifth biggest exporter of lumber (sawn wood) in the world – produced 9.6 million m^3 of lumber, of which 65 per cent was produced by Austrian eight biggest sawmills (Federal Ministry of Agriculture, Forestry, Environment and Water Management Forestry Department of Austria, 2011). To fill such enormous capacities (and also because they can afford it due to economies of scale), Austrian sawmills offer premiums on large quantities and for speedy delivery of logs. It is no surprise that Ministry of Agriculture, Forestry and Food of Republic of Slovenia (2011) estimate that export of Slovenian timber will further increase and that production of lumber will continue to decline in Slovenia.

4. VALUE CREATING RELATIONSHIP AS A MARKETING STRATEGY

Even though relations among buyers and sellers are generally viewed in economic terms, commitment and trust are becoming increasingly important particularly in industrial relationships. As Berhäll (2004) points out, if a common marketing objective is how to differentiate one product from another, in forestry "*familiarity and easiness of approaching the round-wood buyer seems to provide the clues to beneficial long-term outcomes*". Specifically in the environment with prevailing small scale forestry, v*alue-chain constellations* (Poirier & Reiter, 1996), networks of business entities, who are sharing resources and knowledge in order to be more competitive on target market, seems to be increasingly important for business success (Schmithüsen & Hirsch, 2010; Šoštarič, 2011).

Relations between small forest property owners and logging companies (mostly operated by forest concessionaires) seem to cause most concern. A main reason is that small forest property owners lack motivation for participating on the timber market. An obvious solution to this problem could be property consolidation or reduction of ownership rights. However, Mirko Medved, director of Slovenia Forestry Institute, has already rejected this option (Šoštarič, 2011).

On the other hand, studies have shown the log's selling price is the main driver in motivating forest owners, regardless of estate size (Weiss et al., 2010). Considering current conditions in Austria, potential additional wood supply boosted by higher offered price will most likely flow to Austrian buyers. This can be prevented only if domestic sawmills offer an even higher price or if they offer value in some other form, not necessarily in the form of higher purchase price. Whereas latter requires vastly improved efficiency of domestic sawmills, this pricing strategy does not seem very likely to happen in the near future. Since Slovenian sawmills are extremely small compared to Austrian ones, they will need to integrate horizontally to achieve economies of scale in order to improve their cost efficiency and consequently be able to offer a more competitive price to forest owners.

However, a connection between private forest owners and forest concessionaires could be established also by a joint ownership of sawmills and other wood product facilities. Slovenian forest concessionaires are providing services for small forest owners too and for this purpose they use large scale equipment. Schmithüsen & Hirsch (2010) suggest small forest property owners to enter into the joint ownership of large scale facilities and thus benefit from economies scale. Additionally, joint ownership of sawmills and other wood product facilities can improve market access as it establishes a direct link between forest owners, timber and lumber production. Given that economic crisis has severely affected Slovenian forestry, this solution is a great opportunity to acquire an abandoned production facility in a less costly manner. Such a project, however, is still not feasible without substantial external funding.

Because there is not enough funds to carry out vertical integration, the only solution is to increase commitment and trust (e.g. the "*degree to which the person involved [in the business relationship] feel emotionally secure*"; Berghäll, 2004) among trading partners (forest owners and sawmills) by employing *relationship marketing*. According to Dwyer and Tanner (2002) trust leads to relationship commitment and is therefore directly related to competitive advantage (Ratnasingam & Pavlou, 2003). Since Slovenian sawmills cannot afford, because of cost inefficiency, to offer more competitive (higher) prices to forest owners, they should offer them benefits in terms of reduced *relationship costs* (e.g. reduced impression of unfair treatment by a buyer (sawmill) or reduced complexity of interaction to a sawmill).

Slovenia could also follow the Austrian example by encouraging cooperation between forest owners within associations of small forest property owners. Such associations can assist small forest owners in joint appearance on the market and facilitate access to financial means for management. The study on Austrian forest owners shows that such associations are of particular importance to those small scale forest owners with no agricultural background (Weiss et al., 2010). Since 75 per cent of Slovenian small forest owners are not employed in agriculture or forestry, those associations can be a valuable source of forestry, including marketing knowledge. Furthermore, the Austrian example shows forest owners associations can negotiate selling prices, which are normally (to an individual forest owner) considered as set.

However, perceived value in the eyes of a customer is not only added by market price reduction, but by responding to customer needs, too. For example, Kaplinsky et al. (2003) found buyers of wood products are increasingly focused on quality (ISO9000), labour (SA8000) and environmental standards. Some customers – especially in the UK, Germany, and Switzerland (Ministry of Agriculture, Forestry and Food of the Republic of Slovenia, 2011) – already require certification wood products are produced in sustainable manner. In Slovenia, only public forests are certified to be sustainably managed (Širca, 2009). Namely, certification is too expensive for small forest property owners. Puškur (in Širca, 2009) notes the certificate is a prerequisite to enter and remain on the market. As requirements for certified wood have also expanded into public procurements, small forests will probably need certification as well. Small forest owners associations could be seen as a means of achieving economies of scale in the process of certification.

This certification process may also be systematically linked to the country brand "I Feel Slovenia", since it aligns with a country brand's mission "*going forward with nature*" (Republic of Slovenia Government Communication Office, 2011). The essence of the brand of Slovenia are forests: according to Government Communication Office (2011), the brand resembles feeling of Slovenia "*through the smell of the forest, the rushing of a creek, the fresh taste of water and the softness of wood*"[4]. Following De Chernatony & Virgo (2006) country brand design model, it should be wise to align the brand of Slovenia not only with marketing of tourist products, but also with Slovenian wood products. This alignment would not only be particularly fruitful for Slovenian forestry, but it could also be beneficial to the Slovenian tourist industry, as wooden products can act as a promotional tool.

However, Slovenian timber value chain doesn't exist without high value added wood products. Many believe Slovenia needs new high value added wooden products to improve competitiveness on foreign markets and consequently save Slovenian wood value chain. This is definitely true, nonetheless, frequently high value added products with high market potential already exist, but are not positioned or promoted properly. For example, new EU Directive on energy performance of buildings no. 2010/31/EU is an additional market opportunity for wooden houses, since they commonly meet new low energy requirements. Slovenian wood product industry should take advantage of this regulation change and of the green country brand, especially because almost half of eco-conscious buyers nowadays prefer wooden houses (Ministry of Agriculture, Forestry and Food of the Republic of Slovenia, 2011) and Slovenian wood is truly sustainably produced.

Studies on impact of specially designed export marketing strategies on a firm's overall performance give mixed results (e.g. Thirkell and Dau (1998) found evidence that an export marketing strategy affects a firm's export performance, whereas Julian (2003) could not find any direct influence). Nonetheless, this strategy is particularly important for Slovenian high value added wood products industry as it is heavily dependent on foreign markets. Since Slovenian wood products (lumber and furniture) cannot be competitive in terms of prices due to higher production costs, employing relationship marketing along the whole distribution channel (as suggested by Brodrechtova, 2008), linking Slovenian wood products to the country brand, utilisation of certification as a proof of sustainable production as well as proper placement and promotion of existing wooden products could improve competitiveness of the Slovenian wood products in foreign markets.

5. CONCLUSION

Slovenian forestry prospects do not paint a rosy picture. Added value of Slovenian forests is declining. Despite of one of the fastest growing stocks of wood in Europe, timber buyers are frequently rejected. Long-standing insufficient timber removal leads to forest aging, which yet again reduces forest productivity and timber value.

High quality stock of wood is clearly important, however, Slovenian forestry is a sad case of an industry in decline due to broken links in a timber value chain: discontinuities of small forest property owners to the logging companies (forest concessionaires). Required economies of scale to justify investment in forest equipment and lack of motivation and knowledge by small forest property owners seem to be the biggest hurdle to efficiently participate on the timber market.

As property consolidation and reduction of ownership rights are not acceptable in Slovenia, cooperation between small forest property owners is a key to an improved timber value chain. An association of small forest property owners could enhance timber removal efficiency by providing cheaper access to forestry equipment and enhance bargaining power on the timber market. As a result, a leaner value chain could benefit small forest property owners in a form of higher profitability of their assets. A good example is neighbouring Austria, where small forest property owners have increased their bargaining power (and prices) through close cooperative networks.

Although final returns on forest property depend on management of every individual forest owner, a leaner wood product value chain, better utilisation of country brand as well as proper promotion of existing high value wood products could improve competitiveness of the entire Slovenian forestry, increase its added value and facilitate preservation of natural resources, just as the EU forest strategy (2005) requires. The only question is, whether Slovenian small forest property owners have become too small to even care.

4 For detailed description of the country brand development see Konečnik-Ruzzier & De Chernatony (2012).

All these internal issues do not only hinder profitability and effectiveness of the Slovenian timber industry as a whole, but also mirror themselves in inefficient export marketing strategies of the Slovenian timber industry. While this has manifested itself in an increasing number of small forest owners selling their timber to higher Austrian bidders (which consequently collect high margins on selling Slovenian timber to foreign markets), the issue of a more efficient value chain or network management reflects itself not only in purchase prices, but in all elements of the international marketing mix, which could increase the bargaining power of the small Slovenian forest owner and enable the whole industry to capitalize on this huge international market potential.

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HORIZONTAL MOBILITY OF HOUSEHOLD ELECTRICITY CONSUMERS AND THEIR WILLINGNESS TO PAY FOR ADDITIONAL SERVICES: A PLATFORM FOR NEW MARKETING STRATEGIES OF ELECTRICITY DISTRIBUTION COMPANIES IN SLOVENIA

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Izvirni znanstveni članek

Abstract: This paper analyses the issues related to demand and electricity consumers' preferences and choices in order to develop a platform for designing new marketing strategies of the Slovenian electricity distribution companies. The analysis is limited to household customers. The aim of this paper is threefold. First, it investigates the horizontal mobility of households and the factors that influence consumers' decision-making process whether to switch their electricity supplier. Results show that household electricity consumers are price sensitive, however electricity suppliers have an option to lessen the customers' price sensitivity by increasing reliability of electricity supply, by influencing the complexity of administrative procedures related to switching the current electricity supplier, or by offering additional products and services to electricity consumers. Second, we study consumer expectations of additional products and services. We identify several additional products and services that the household consumers perceive as adequate complements to the electricity supply. Third, this paper investigates consumers' willingness to pay for such additional services and products. The evaluation of willingness to pay accompanied by expected pressures on electricity prices show that future profits of electricity suppliers will strongly depend on the offer of additional products and services. At the end, we suggest that electricity distribution companies in Slovenia will have to rethink and redesign their mission, vision and goals as well as their marketing strategies if they are to benefit from lessons of this research.

HORIZONTALNA MOBILNOST GOSPODINJSKIH ODJEMALCEV ELEKTRIČNE ENERGIJE IN NJIHOVA PRIPRAVLJENOST PLAČATI DODATNE STORITVE: PLATFORMA ZA PRIPRAVO NOVIH MARKETINŠKIH STRATEGIJ SLOVENSKIH DISTRIBUTERJEV ELEKTRIČNE ENERGIJE

Povzetek: Naša raziskava je analiza vprašanj, povezanih s povpraševanjem, željami in odločitvami odjemalcev električne energije, da bi lahko pripravili temelje za pripravo novih marketinških strategij slovenskih distributerjev električne energije. Analiza se nanaša le na gospodinjske odjemalce. Imeli smo tri cilje. Prvič, raziskati horizontalno mobilnost gospodinjstev in dejavnike, ki vplivajo na potrošnikov proces odločanja o tem, ali naj zamenja svojega dobavitelja električne energije. Rezultati kažejo, da so gospodinjski odjemalci električne energije občutljivi na ceno, vendar imajo distributerji električne energije možnost zmanjšati to občutljivost, tako da izboljšajo zanesljivost oskrbe z električno energijo, da spremenijo administrativne postopke zamenjave dobavitelja električne energije in da ponudijo svojim odjemalcem dodatne storitve. Drugič, preučili smo pričakovanja potrošnikov glede dodatne ponudbe izdelkov in storitev. Identificirali smo več dodatnih izdelkov in storitev, ki jih gospodinjski odjemalci električne energije dojemajo kot ustrezno dopolnitev dobavi električne energije. Tretjič, preverili smo njihovo pripravljenost plačati za te dodatne storitve in izdelke. Rezultati kažejo, da bodo dobički distributerjev električne energije močno odvisni od dodatne ponudbe. Na podlagi raziskave na koncu predlagamo, naj slovenski distributerji električne energije na novo premislijo in preoblikujejo svoje poslanstvo, vizijo in cilje ter njihove marketinške strategije.

1. INTRODUCTION

This paper is a case study of Slovenian electricity distribution companies, which are facing a challenge to establish a more contemporary electricity system, where the market, competition and private ownership play an important role. On the supply side the Slovenian retail electricity market consists of five predominantly state-owned electricity distribution companies, which are regionally distributed and are the owners of the electricity distribution network. Besides these five firms new firms supplying electricity on the retail market are emerging. The ownership of new firms is in most cases mixed, i.e. partly private, partly state-owned. New suppliers entered the retail electricity market due to electricity market opening. In Slovenia, full electricity market opening took place in 2007. This has enabled horizontal mobility of business consumers and households; both are now free to select and/or switch to another electricity supplier. Enabled horizontal mobility was thus a precondition for establishing competition between electricity suppliers.

Although the abovementioned changes created favourable conditions for strengthened competition, it nonetheless remains weak and it has not yet achieved the desired effects. As a result, the five predominantly state-owned electricity distribution companies still maintain the predominant position on the retail electricity market with their market share exceeding 75 per cent (Energy Agency, 2010: p. 56). Furthermore, only a small percentage of consumers have since switched their retail supplier. In the first three years, after the market fully opened, only 21,655 changed their supplier, representing only 2.4 per cent of all electricity consumers. In this period, the largest increase in the number of consumers switching their supplier took place in 2009, when 12,749 business and household consumers, i.e. 1.4 per cent of all consumers, changed their retail electricity supplier. As it had been expected, household consumers were more reluctant to do so than business consumers. In 2009, only 1.1 per cent of all household consumers changed their electricity supplier (Energy Agency, 2010: p. 54).

The changes due to the opened electricity market and weak but increasing horizontal mobility of customers have brought forward the need to design new marketing strategies in Slovenian electricity distribution companies. In order to design such strategies the need to analyse the characteristics of electricity demand is also highlighted. This paper focusses on the issues related to demand and electricity consumers' preferenc-

Table 1: Sample descriptive statistics

Variable	Mean value	Standard deviation	Min	Max
Satisfaction with current electricity supplier	3.80	0.99	1	5
Monthly electricity bill in €	45.46	27.42	0	320
Number of household members	3.44	1.42	1	8
Number of household members under the age of 18	0.72	0.95	0	7
Number of male household members	1.56	0.85	0	5
Number of household members with a university degree	0.79	0.99	0	6
Number of household members employed full time	1.34	0.99	0	6

es and choices. The analysis is limited to household customers. By studying the characteristics of household electricity demand we build the basis for designing new marketing strategies in Slovenian electricity distribution companies. The aim of this paper is threefold. First, it investigates horizontal mobility of households and the factors that influence consumers' decision-making process whether to switch their electricity supplier. Second, we study consumer expectations of the expansion of provided products and services. Third, we also investigate consumers' willingness to pay for such additional services and products.

2. SAMPLE OF SLOVENIAN HOUSEHOLD ELECTRICITY CONSUMERS

Our analysis of demand and electricity consumers' preferences and choices is limited to household customers. An unbalanced stratified sample of households purchasing electricity from Supplier X, one of five electricity distribution companies in Slovenia, is applied. The data about consumers' preferences and choices were collected with direct interviews using a detailed questionnaire. 501 households were interviewed in customer service offices of Supplier X from October to December 2007. This period was chosen as at that time all households were already able to choose their electricity supplier, however, this option was still novel as it had been available for 4 months only. The sample is representative of the total population of consumers of Supplier X as the share of interviewed household customers in a particular area corresponds to the share of the Supplier X's household customers living in that area.

The questionnaire used for direct interviews consists of five parts. The first part is comprised of questions related to consumer preferences about the provision of additional services and products to be offered by Supplier X. The second part includes questions about customers' inclination toward switching their current electricity supplier in cases of (a) price differentials between their current supplier and other suppliers on the market, (b) differences in the array of additional services and products offered by their current supplier compared to other suppliers on the market, (c) differences in reliability of electricity supply between their current supplier and other suppliers on the market, and (d) complexity of administrative procedures related to switching to other electricity supplier. The fourth part is comprised of questions about customers' inclination to switch their current electricity supplier if the current supplier offered specific additional services and products. In this part of the questionnaire the additional services and products were specified in advance. The fifth part consists of demographic characteristics of the households.

Table 1 shows selected characteristics of the interviewed household consumers. Satisfaction with a current electricity supplier is measured with the five-point Likert scale (5 indicates high satisfaction). An average household in our sample spends €45.46 monthly for electricity and has 3.44 household members. The average number of members under the age of 18 is 0.72, the average number of male members is 1.56 and the average number of members with a university degree equals 0.79. On average 1.72 members are employed either full time or part time and 0.62 members are pensioners.

3. FACTORS AFFECTING HORIZONTAL MOBILITY OF HOUSEHOLD ELECTRICITY CONSUMERS

In this section of the paper we investigate horizontal mobility of households. We focus on electricity prices as the key factor affecting horizontal mobility of household electricity consumers. We look at the factors that influence consumers' price sensitivity. Identification of such factors allows us to infer conclusions about factors that affect consumers' decisions to switch to another electricity supplier. Based on the literature review (e.g. Choynowski, 2002; Ek and Söderholm*, 2008;* Ferrari and Giulietti, 2005; Gamble et al., 2009; Hansla, 2004; *Pomp and Shestalova, 2007*) we set the following goals of our analysis. First, we investigate whether households are sensitive to price differentials between electricity suppliers and whether they are sensitive to such an extent that they would consider switching their current electricity supplier. Additionally, we investigate whether consumers' sensitivity to price differentials between electricity suppliers is affected by non-price factors, such as the provision of additional either electricity related or electricity unrelated services and products, reliability of electricity supply and complexity of administrative procedures associated with switching of the electricity supplier.

In the direct interviews the household consumers were asked whether they would consider switching their current electricity supplier if the price of their current electricity supplier exceeded the price of other electricity suppliers by 2, 5, 8, 10, 15 or 30 per cent. Based on these data we were able to investigate whether households are sensitive to price differentials between electricity suppliers by directly calculating the point price elasticity for electricity demand that reflects the relative change in the number of household consumers of a particular electricity supplier in response to a one-per-cent change in electricity price. The described data thus enabled us to overcome the parameter identification problem related to simultaneous equation relationship (Douglas, 1987; Tajnikar et al., 2000).

The results are shown in Column I of Table 2. Table 2 shows the cumulative share of household consumers that would consider switching their current electricity supplier at various price differentials. As indicated by Column I, at the electricity price differential between the current and other suppliers amounting to 10-15 per cent, the cumulative share of households considering switching their current supplier equals 51.02 per cent. Therefore, if only prices differed between electricity suppliers more than half of household consumers would consider switching their current electricity supplier at price differentials amounting up to 15 per cent. The point price elasticity is highest when the electricity price of the current electricity supplier exceeds the price of other potential suppliers by 8-10 per cent. This indicates that households' price sensitivity is highest when price differentials amount to 8-10 per cent. The results in Table 2 show that over 65 per cent of household customers would consider switching their current supplier at price differentials amounting up to 30 per cent. This result indicates that over 30 per cent of household customers are not price sensitive at the suggested price differences.

To investigate whether consumers' sensitivity to price differentials between electricity suppliers

Table 2: Households' sensitivity to electricity price differentials

Electricity price differential (in %)	only differences in electricity price		current electricity supplier offers additional products/services		current electricity supplier assures higher reliability of electricity supply		administrative procedures of switching electricity supplier are complex	
	(I)		(II)		(III)		(IV)	
	Cumulative share of households	Price elasticity	Cumulative share of households	Price elasticity	Cumulative share of households	Price elasticity	Cumulative share of households	Price elasticity
0-2	4.67	2.43	2.63	1.34	2.42	1.23	5.07	2.64
2-5	10.77	2.20	6.87	1.47	6.26	1.32	11.56	2.36
5-8	22.97	4.93	15.76	3.29	13.13	2.46	21.09	3.77
8-10	40.45	**13.35**	31.92	**10.80**	24.24	**6.67**	34.48	**9.30**
10-15	51.02	3.78	43.84	3.71	39.59	4.45	45.23	3.44
15-30	65.86	2.25	60.20	2.12	57.37	2.15	59.83	1.88

is affected by non-price factors, we again used direct interviews in order to establish whether household customers would consider switching their current electricity supplier if the price of their current electricity supplier exceeded the price of other electricity suppliers by 2, 5, 8, 10, 15 or 30 per cent, although their current supplier would provide either additional services and products or higher reliability of electricity supply. We also investigated whether at the same price differentials consumers' sensitivity would be affected by the complexity of administrative procedures associated with switching of the electricity supplier.

Results in Columns II-IV in Table 2 confirm that non-price factors impact the consumers' price sensitivity as suggested by theory (Douglas, 1987). It is reasonable to expect that the provision of additional products and services would decrease the consumers' price sensitivity. Column II of Table 2 confirms this expectation. In this case a lower percentage of consumers (60.2 instead of 65.86) would consider switching their current supplier at price differentials amounting up to 30 per cent. This indicates that almost 40 per cent of household customers are not price sensitive at the suggested price differences if additional products and services are offered by their current electricity supplier. Also in this case the households' price sensitivity is highest when price differentials amount to 8-10 per cent. Expectedly, the point price elasticity coefficient is lower (10.8) than in the case when the provision of additional products or services is not considered. A similar conclusion can be drawn from the results of the household consumers' price sensitivity in the case of the current supplier's superior reliability of electricity supply compared to other potential suppliers (Column III, Table 2) as well as in the case of complexity of administrative procedures associated with switching of the electricity supplier (Column IV). Interestingly, the share of households that are not price sensitive at the suggested price differentials is highest when the current electricity supplier assures higher reliability of electricity supply. The point price elasticity is also the lowest in this case.

Our discussion reveals that household consumers are price sensitive, however, electricity suppliers have an option to lessen the customers' price sensitivity and thereby retain their customer base even when price differentials are set in place. The key factor affecting price sensitivity is reliability of electricity supply. However, the latter cannot be affected by retail electricity suppliers as an electricity system network operator is responsible for assuring reliability. Similarly, electricity retailers have limited influence on the complexity of administrative procedures linked to switching the electricity supplier. On the other hand, they are free to design and expand the array of offered products and services. Hence, we further investigate the possibilities of electricity suppliers additionally providing both, the electricity related and the electricity non-related products and services.

4. NON-PRICE COMPETITION THROUGH ADDITIONAL PRODUCTS AND SERVICES OF ELECTRICITY DISTRIBUTION COMPANIES

This section of the paper investigates the willingness of household customers to buy additional electricity related and electricity non-related products and services offered by electricity suppliers in order to retain their customer base. The goal of our analysis is to establish those products and services that the consumers would include in the array of products and services offered by their current electricity supplier. To attain this goal we use the data obtained by means of direct interviews as mentioned in Section 2 of this paper.

In order to investigate the willingness of household consumers to buy additional electricity related and non-related products and services, we employed a benchmarking analysis to create a list of products and services offered by German and British retail electricity suppliers. This was then adapted to conditions on the Slovenian market and the capacity of Slovenian electricity distribution companies to include them in their offer (Tajnikar et al., 2008). Such a revised list of additional electricity related and non-related products and services was included in the questionnaire and evaluated by the interviewed households.

The interviewed households were asked to assess each of the listed additional products and services. They were asked to express whether they would include an individual product/service in the array of products and services offered by their current electricity supplier. Products and services were evaluated using the five point Likert scale with 1 indicating that the household consumer does not want a particular products or service in the array of products and services offered by their current electricity supplier and 5 indicating that the household consumer strongly agrees with the inclusion of a particular product or service into the supplier's array of products and services.

For every product and service included in the questionnaire Table 3 shows the mean value

Table 3: Consumers' willingness to buy additional products and services

Service/product	Mean value	Share of responses with mark 5 or 4 (in %)	Share of households NOT WILLING to buy (in %)	Share of households WILLING to buy (in %)
Offering advice on reducing electricity consumption	3.94	78.28		
Installing modern electricity meters	3.89	75.33	33.55	66.45
Offering a 24/7 maintenance and repair of electrical installation and wiring	3.66	67.22	30.96	69.04
Offering special offers and discounts for various products and services	3.61	62.28		
Opening a specialised shop offering electric devices	3.50	56.74	43.37	56.63
Designing and constructing electricity installations	3.46	58.17	46.57	53.43
Organising a network of firms providing repair of electrical household appliances	3.29	51.97	48.71	51.29
Organising a network of firms providing repair of TV and radio devices	3.26	50.11	50.00	50.00
Organising reward games for customers	3.12	39.29		
Publishing a monthly bulletin	3.08	40.27		
Providing internet access	3.06	39.73	64.16	35.84
Providing cable TV	2.94	34.35	65.45	34.55
Providing mobile phone services	2.73	26.42	74.09	25.91
Opening an internet specialised shop	2.71	27.46	77.54	22.46
Providing stationary phone services	2.69	25.74	72.04	27.96
Managing apartment buildings	2.50	19.95	77.97	22.03
Providing grocery delivery service	2.11	9.73	88.01	11.99
Providing home delivery of medicine	2.07	9.37	86.94	13.06
Providing prepared food delivery service	2.06	9.48	91.42	8.58

of the obtained answers from the interviewed household consumers based on the five-point Likert scale. Table 3 also shows the share of household consumers that assessed the products and services with highest marks of 4 and 5. In Table 3, the analysed products and services are listed in a descending order according to the mean value of the obtained assessments. The household consumers perceive the service of offering advice on reducing electricity consumption, the service of installing modern electricity meters and the service of a 24/7 maintenance and repair of electrical installation and wiring as the most appealing. For these three services a high share of household consumers selected either marks 4 or 5. As indicated by Table 3 services such as grocery delivery, prepared food delivery, home delivery of medicine and funeral services are perceived as the least interesting. Although these services are offered by several German and British electricity providers, households in Slovenia do not associate them with electricity distribution companies. Namely, households link such services to other more traditional types of utility service providers.

Although all products and services listed in Table 3 expand the activities of electricity distribution companies, not all of them can generate the supplier's additional revenue directly. Namely, services like advice on reducing electricity consumption, special offers and discounts, reward games and provision of monthly bulletins are forms of consumer bonuses provided free of charge. Their aim is to contribute to customer satisfaction and to thereby retain or even expand the customer base. All other listed products and services are to be sold to household consumers. These products and services are also expected to increase customer satisfaction but more importantly they can generate additional revenue to their providers.

In assessing the potential for generating revenues by providing additional products and services both, their demanded quantity and an acceptable price, have to be considered. To shed some light on the demanded quantity of products and services that are to be sold to the household consumers, the interviewed household consumers were asked to identify whether they would actually buy such products and services from their current electricity supplier. The last two columns of Table 3 show the results. As expected, the strongest willingness to buy is characteristic for the service of a 24/7 maintenance and repair of electrical installation and wiring and the service of installing modern electricity meters. Namely, 69.04 per cent of household consumers are willing to buy these services. Similarly, 66.45 per cent of the interviewed household consumers would purchase the service of installing modern electricity meters. Willingness to buy is smallest for funeral services as only 7.74 per cent of the interviewed households would buy this service from their current electricity supplier.

In order to asses the acceptable price for additional products and services of electricity suppliers the aforementioned analysis of the willingness to buy has to be supplemented by an analysis of consumers' willingness to pay.

5. CONSUMERS' WILLINGNESS TO PAY FOR ADDITIONAL PRODUCTS AND SERVICES PROVIDED BY ELECTRICITY DISTRIBUTION COMPANIES

In this section of the paper we analyse the customers' willingness to pay for selected additional products and services that could be offered by electricity suppliers. Willingness to pay (hereinafter WTP) is the maximum amount an individual is willing to pay to acquire some goods or services, or the maximum amount an individual is willing to pay to avoid a prospective loss. WTP is usually elicited from stated or revealed preference experiments (Culyer, 2010: 549). In our case we assess WTP using the contingent valuation. Contingent valuation measures record preferences expressed in response to hypothetical circumstances as specified in the questionnaire (Brent, 2003: 298). Using the questionnaire, described in section 2 of this paper, the interviewed household consumers were presented with different possible future scenarios about the provision of additional products and services from their current electricity supplier. The respondents were asked to state the maximum amount of money they are willing to pay for a particular product or service. They were also asked to identify the price level they perceive as too high for a particular product or service.

Considering the questionnaire length and interview time limitations, the WTP was not assessed for all products and services listed in Table 3. After consulting the representatives of the Supplier X, only the provision of internet access and service of organising a network of firms providing repair of household appliances, TV and radio sets were included in the WTP analysis. These two services were selected because the Supplier X already has the needed capacities to assure their provision in a very short time. Although the two services selected for the WTP evaluation are not perceived by consumers as most interesting (see Table 3), a significant share of household consumers expressed their willingness to buy both services (50 per cent for services of organising network of firms providing repair of household appliances, TV and radio sets and 35.84 per cent for providing internet access).

5.1 WILLINGNESS TO PAY FOR INTERNET ACCESS

The data obtained by means of the questionnaire as described in Section 2 of this paper show that 68.54 per cent of all the interviewed households already have internet access. More than half of such household consumers (50.15 per cent) stated that they would be willing to change their internet service access provider and purchase internet access from their existing electricity supplier. 79.01 per cent of respondents that would consider changing their existing internet access provider stated that a lower price would be the main reason for changing their existing internet access provider. Other listed reasons for switching the internet access provider include better quality of access, faster access, greater reliability, etc. Of all the interviewed households 31.46 per cent do not have internet access. 15 per cent of such consumers indicated that they would be willing to purchase internet access from their existing electricity supplier either because they still do not have internet access, because other internet providers were not able to offer them internet access or because they would be interested in purchasing both internet access and electricity from the same provider. The latter reason is related to the principle of "one stop utility" shop.

Table 4: WTP for internet access

Groups of respondents	Category	N	Average (in € per month)	Standard deviation (in € per month)	Min (in € per month)	Max (in € per month)
All respondents	WTP	472	11.61	8.38	0	30
	WTP_{max}	471	17.95	13.55	0	100
Respondents with internet access provided by other internet providers	WTP	322	13.76	7.14	0	30
	WTP_{max}	322	21.36	12.12	0	100
Respondents with internet access that would consider purchasing internet access from Supplier X	WTP	162	14.71	6.22	0	26
	WTP_{max}	158	21.81	9.09	0	40
Respondents without internet access	WTP	148	6.75	8.79	0	25
	WTP_{max}	147	10.37	13.56	0	50
Respondents without internet access that would consider purchasing internet access from Supplier X	WTP	19	14.61	6.77	0	24
	WTP_{max}	17	23.65	9.91	0	50

In order to evaluate WTP of the interviewed household consumers all respondents were asked to identify the amount they would be willing to pay for the provision of internet access by their existing electricity supplier. Considering that the majority of households in Slovenia already have internet access and that internet access is offered by several providers with intense marketing activities, we assumed that the interviewed household consumers have a fairly good notion about the price ranges. This is why we first asked an open-ended question asking the consumers to specify an amount of money they would be willing to pay for internet access. This amount represents an acceptable price for internet access for an individual interviewed household consumer. Second, we asked them to specify the level of price they would perceive as too high for the service of internet access. Results of the WTP evaluation are presented in Table 4. In Table 4, the descriptive statistics of the answers received on the question about the amount of money the interviewed households would be willing to pay for internet access are presented under category "WTP". The descriptive statistics of the received answers related to the second question are described under category "WTP_{max}".

As indicated in Table 4, the amount an average interviewed household consumer is willing to pay for internet access service is €11.61 per month. The average level of internet access price the respondents would perceive as too high for this service is €17.95 monthly. The average amount the respondents are willing to pay is highest in both groups of households that would consider purchasing internet access from Supplier X irrespective of whether they have or do not have internet access. Expectedly, the average amount the respondents are willing to pay for internet access is lowest in the group of households without internet access that are not considering the Supplier X as their potential internet access provider.

Besides identifying the amount households are willing to pay for internet access, we analysed willingness to pay further by studying its determinants. We used Tobit or censored regression analysis (Tobin, 1958) to investigate whether selected demographic and other characteristics of households obtained by means of the questionnaire significantly influence the above discussed amounts the households are willing to pay for internet access. Tobit model is typically applied in the case of data where a dependent variable, in our case willingness to pay, is 0 for a significant of observations. Namely, in such cases estimates obtained by conventional regression methods are biased. To study the determinants of willingness to pay we apply the following model (Greene, 2003):

$$WTP_i^* = \mathbf{x'_i}\,\beta + \varepsilon_i \text{, where}$$

$$WTP_i = WTP_i^* \text{ if } WTP_i^* > 0 \text{ and } WTP_i = 0 \text{ otherwise}$$

WTP_i is the willingness to pay stated by household consumers. WTP_i^* is an unobserved latent variable. $\mathbf{x}_i$ stands for a vector of explanatory variables, β is a vector of regression coefficients and ε_i is a random error.

We estimated two models. The specification of the-willingness-to-pay factors that are tested as explanatory variables is identical for both models. Explanatory variables include an average monthly household electricity bill (*ebill*), number of household members (*member*), number of household members under the age of 18 (*member18*), number of male household members (*male*), number of household members with higher education degree (*educ*) and number of employed household members (*employ*). The first model investigates the determinants of the amount the households have specified in the questionnaire as an acceptable price for internet access (WTP):

$$WTP_i^* = \beta_0 + \beta_1 ebill + \beta_2 member + \beta_3 member18 + \beta_4 male + \beta_5 educ + \beta_6 employ + \varepsilon_i$$

The second model studies those factors that determine the level of price the interviewed household consumers would perceive as too high for the service of internet access (WTP_{max}):

$$WTP\max_i^* = \beta_0 + \beta_1 ebill + \beta_2 member + \beta_3 member18 + \beta_4 male + \beta_5 educ + \beta_6 employ + \varepsilon_i$$

For the results of the Tobit regression estimation of both models see Table 5. The estimated coefficients in the second column represent the marginal effects of explanatory variables on the latent variable WTP^*. Similarly, the estimated coefficients shown in the fifth column represent the marginal effects of explanatory variables on the latent variable WTP_{max}^*. Since our data are not censored, i.e. the dependent variables *WTP* and WTP_{max} are not incompletely observed but are continuous random variables over strictly positive values, we are interested in the marginal effects of explanatory variables on the expected observed dependent variables *WTP* and WTP_{max}. Thus, we are reporting not only the marginal effects on the latent dependent variable but also the marginal effects of explanatory variables on the unconditional expected value of the observed dependent variable (Cong, 2000). Coefficients representing the latter marginal effects are shown in the third and sixth columns of Table 5 for *WTP* and WTP_{max} respectively. Marginal effects of all explanatory variables are calculated at the means of variables. This means that they are calculated for the average household.

The analysis shows that the amount the households are willing to pay for internet access significantly increases with the average monthly household electricity bill. Results show that for one unit increase in the average monthly household electricity bill the expected increase in willingness to pay for internet access is €0.035. Households with more employed household members also exhibit higher willingness to pay for internet access. Given a one unit increase in the number of employed household members the expected increase in willingness to pay for internet access is €1.35. The impact of other variables is not found to be statistically significant.

Similarly, the level of price that the interviewed household consumers perceive as too high is positively influenced by the average monthly household electricity bill, but the impact is less significant. Results show that for a one unit increase in the average monthly household electricity bill the expected increase in the price level households perceived as too high for internet access is €0.48. The level of price that the interviewed household consumers perceive as too high is also determined by the number of employed household members. In this case the size of the coefficient, measuring the impact of the employed household members, is higher than in the first model. For a one unit increase the number of employed household members the expected increase in the price level households perceived as too high for internet access is €2.14.

Table 5: Tobit regression results

Variable	WTP			WTP_{max}		
	Marginal effect – latent	Marginal effect – unconditional expected value	t	Marginal effect – latent	Marginal effect – unconditional expected value	t
ebill	0.0415**	0.0347**	2.17	0.0577*	0.4755*	1.87
member	0.2116	0.1768	0.33	1.1747	0.9676	1.14
member18	-0.7053	-0.5893	-1.06	-1.0892	-0.8972	-1.01
male	-0.7318	-0.6115	-0.88	-1.5792	-1.3008	-1.18
education	0.3259	0.2723	0.60	1.4368	1.1836	1.61
employment	1.6127***	1.3476***	2.80	2.5999***	2.1417***	2.78
constant	6.1837***	5.1672***	4.18	6.5766***	5.4175***	2.72
LR $\chi2$	23.27***			33.95***		

Notes: * significant at p<0.1, ** significant at p<0.05 and *** significant at p<0.01

Our results also indicate that the willingness to pay increases with the number of household members and the number of household members with a higher education degree. Willingness to pay, on the other hand, decreases with the number of household members under the age of 18 and the number of male household members. However, the related regression coefficients are not statistically significant.

5.2. WILLINGNESS TO PAY FOR THE SERVICE OF ORGANIZING A NETWORK OF FIRMS PROVIDING REPAIR OF HOUSEHOLD APPLIANCES, TV AND RADIO SETS

According to Table 3, more than half of all interviewed household consumers would be interested in buying the service of organizing a network of service providers for repairing household appliances, TV and radio sets from their current electricity supplier. In order to evaluate WTP for the service of organizing a network of firms providing repair of household appliances, TV and radio sets all the interviewed household consumers were asked to identify the amount they would be willing to pay for the provision of this service by their existing electricity supplier. Considering that this is a novel service not only for the electricity suppliers but also on the Slovenian market, we did not expect the interviewed household consumers to have a good notion about the price ranges for such a service. This is why, contrary to the questions posed in the case of internet access, we used a multiple choice question to infer about the price the interviewed household consumers would consider acceptable for the service of organizing a network of firms providing repair of household appliances, TV and radio sets. Multiple choice questions limited respondents' answers as they were offered six different price levels for the analysed service (0, 2, 5, 7, 10 and 11 euros) and then asked to select one of the offered price levels. In addition to selecting the acceptable price level, the respondents were also asked to identify the level of price they would perceive as too high for the service of organizing a network of firms providing repair of household appliances, TV and radio sets.

For the results of the WTP evaluation for the service of organizing a network of firms providing repair of household appliances, TV and radio sets see Table 6. They indicate that 45 per cent of respondents are not willing to pay for this service. Approximately 30 per cent of the respondents are willing to pay €2 monthly, nearly 15 per cent of the respondents would be willing to pay €5 monthly and only slightly more than 10 per cent would pay €7-11 monthly.

Table 6: Willingness to pay for the service of organizing a network of firms providing repair of household appliances, TV and radio sets

Category	N	Share (in %)
WTP 0 €	221	45.29
WTP 2 €	143	29.30
WTP 5 €	73	14.96
WTP 7 €	28	5.74
WTP 10 €	16	3.28
WTP 11 €	7	1.43
Total	**488**	**100**

As mentioned, the respondents were also asked to identify the level of price they would perceive as too high for the service of organizing a network of firms providing repair of household appliances, TV and radio sets (WTP_{max}). 467 of the interviewed household consumers answered this question. The average stated price amounts to €7.66 monthly with a standard deviation equalling €17.58.

Also for the service of organizing a network of service providers for repairing household appliances, TV and radio sets the willingness to pay was investigated further by studying its determinants. Again, we used Tobit regression analysis to investigate whether selected demographic and other characteristics of households obtained by means of the questionnaire significantly influence the above discussed amounts the households are willing to pay for the service of organizing a network of service providers for repairing household appliances, TV and radio sets. In this case we estimated only one model due to data limitations. The estimated model tests the factors that determine the level of price for the analysed service the interviewed household consumers perceive as too high (WTP_{max}):

$$WTP\max_i^* = \beta_0 + \beta_1 ebill + \beta_2 member + \\ + \beta_3 member18 + \beta_4 male + \beta_5 educ + \\ + \beta_6 employ + \varepsilon_i .$$

The results of the Tobit regression estimation for the tested model are in Table 7. Also in this case both the marginal effects of explanatory variables on the latent dependent variable and the marginal effects of explanatory variables on the expected observed dependent variable are reported. Marginal effects are again calculated at variable means, so the results hold for the average household. The analysis shows that the price level households perceive as too high for the analysed

Table 7: Tobit regression results

Variable	WTP_{max}		
	Marginal effect – latent	Marginal effect – unconditional expected value	t
ebill	-0.0073	-0.0041	-0.24
member	2.5063*	1.4022*	1.79
member18	-4.2179***	-2.3597***	-2.84
male	-1.0708	-0.5991	-0.61
education	2.3072**	1.2908**	2.02
employment	1.3700	0.7664	1.10
constant	-4.5958	-2.5711	-1.49
LR $\chi 2$	23.52***		

Notes: * significant at p<0.1, ** significant at p<0.05 and *** significant at p<0.01

service significantly increases with the number of household members and with the number of household members with a higher education degree. The results show that for one unit increase in the number of household members the expected change in the price level households perceive as too high for the analysed service is €1.4. One unit increase in the number of household members with high education will result in a €1.29 increase of the price level households perceive as too high for the analysed service. On the other hand, this price level is significantly negatively affected by the number of household members under the age of 18. Results show that for one unit increase in the number of household members under the age of 18 the expected decrease in the price level households perceive as too high for the analysed service is €2.36. Additionally, the price level that the interviewed households perceive as too high is negatively influenced by the average monthly household electricity bill although this impact is statistically insignificant. The same holds true for the impact of the number of male household members. The impact of the employed household members is, on the other hand, positive but also statistically insignificant.

6. CONCLUSION

This paper addresses three issues related to designing new marketing strategies in Slovenian electricity distribution companies in light of the changes brought by the electricity market opening.

The first issue addressed in this paper is horizontal mobility of household electricity consumers and the factors that influence consumers' decisions to switch the electricity supplier. Research shows that household electricity consumers are price sensitive, however, the electricity suppliers have an option to lessen the customers' price sensitivity by increasing reliability of electricity supply, by influencing the complexity of administrative procedures related to switching their current electricity supplier or by offering additional products and services to electricity consumers. The key factor affecting price sensitivity is reliability of electricity supply. However, the reliability of electricity supply cannot be affected by the retail electricity suppliers as assuring reliability is a responsibily of the electricity system network operator. Similarly, electricity retailers have limited influence on the complexity of administrative procedures related to switching the electricity supplier. On the other hand, they are free to design and expand the array of offered products and services.

This is why the second issue investigated in this paper is the willingness of household customers to buy additional electricity related and non-related products and services from their current electricity supplier. We employed a benchmarking analysis to create a list of products and services offered by German and British retail electricity suppliers. This array was than adapted to conditions on the Slovenian markets and the capacity of Slovenian electricity distribution companies to include them in their offer. We found that the household consumers perceive the service of offering advice on reducing electricity consumption, the service of installing modern electricity meters and the service of a 24/7 maintenance and repair of electrical installation and wiring as most appealing. As expected, households expressed the strongest willingness to buy for the service of a 24/7 maintenance and repair of electrical installation and wiring and the service of installing modern electricity meters.

The willingness to buy selected additional products and services has to be supplemented by the analysis of consumers' willingness to pay to assess the potential of electricity suppliers for generating business revenues. This is why the third issue addressed in this paper is the consumers' willingness to pay for such additional services and products. Willingness to pay was evaluated for two services. For internet service access an average interviewed household consumer is willing to pay €11.61 per month. The average level of internet access price the respondents would perceive as too high for this service is €17.95 monthly. Both the acceptable and maximum amount the households are willing to pay for internet access is significantly higher in households with higher monthly electricity expenditures and in households with more employed members. In the case of the service of organising a network of firms providing repair of household appliances, TV and radio sets approximately 30 per cent of the respondents are willing to pay €2 monthly, nearly 15 per cent of the respondents would be willing to pay €5 monthly and only slightly more than 10 per cent would pay €7-11 monthly. 45 per cent of the interviewed household consumers are not willing to pay for this service. The average price perceived as too high for this service amounts to €7.66 monthly. The analysis shows that the price level households perceive as too high for the analysed service significantly increases with the number of household members and the number of household members with a higher education degree.

The three issues explored enable us to draw a platform for designing new marketing strategies in electricity distribution companies in Slovenia. Our research indicates that electricity distribution companies in Slovenia need to rethink and redesign their mission, vision and goals as well as their marketing strategy as part of their general business strategy. This conclusion stems from our findings that current customers of electricity distribution companies accept and expect increased market orientation of their current electricity suppliers as they are aware of the advantages of increased competition. Namely, our results show that electricity consumers are willing to change their current electricity suppliers, that they are sensitive to both price and non-price competition and that they are willing to purchase and pay for additional products and services.

The redesign of mission, vision and goals has to take into account the necessity to change the focus of electricity distribution companies from operations related to the functioning of the network to operations related to purchasing and selling electricity. Our results indicate that electricity consumers expect reorientation of processes towards creating higher value-added for customers. In creating higher value-added, reliability and the quality of electricity supply have to be a precondition and market orientation has to be the basic characteristic of new marketing strategies and policies of electricity distribution companies.

Changes brought by the electricity market opening and the readiness of consumers to switch their current electricity supplier no longer foster the existing regional geographical distribution of suppliers. As a result a single Slovenian electricity market is being formed where all electricity suppliers compete for all potential customers. The aggregate electricity demand in such a market is limited. In such circumstances the competition between suppliers will strengthen as the consumers' awareness of the possibility of horizontal mobility increases. Because our results show that electricity consumers are price sensitive, it is probable that the electricity prices will decrease almost to a level of average costs. In such circumstances purchase price of electricity, efficiency and non-price elements of competition become important issues. Our results confirm that electricity consumers are open to non-price competition. This means that marketing strategies of electricity distribution companies have to shift not only from assuring reliability and the quality of electricity supply to selling electricity but also from price to non-price competition. Namely, the electricity distribution companies will not be able to maintain or expand their customer base solely on the premise of reliability of supply and electricity price. The sale of electricity will have to be accompanied by the provision of other customer-oriented products and services. The expected pressures on electricity prices and our evaluation of willingness to pay indicate that future profits will strongly depend on the inclusion of additional products and services as complements to electricity supply.

In order to implement marketing strategies and policies based on the aforementioned platform, electricity distribution companies have to change their organisational structure and assign a greater role to their sales and marketing departments. Necessity for electricity distribution companies to engage in non-price competition and expand their array of products and services by including both electricity related and non-related additional products and services also requires organisational changes. As a result electricity suppliers will have to become diversified multi-purpose companies.

Even though the results provide a valuable insight into preferences of household electricity consumers, some limitations of our study have to be highlighted. The first limitation stems from the fact that only household consumers of one of five electricity distribution companies were surveyed. Second, we make our conclusions based on stated preferences. Namely, there is a strong possibility that the survey based on stated preferences may result in the overstated actual willingness to buy and in the overstated actual willingness to pay. Third, the survey was carried out in 2007 when the electricity market fully opened. At that time the idea of horizontal mobility was new to household consumers. Repeating the survey at a later time might thus provide additional conclusions. However, it is reasonable to expect that the awareness of consumers about their options to change their electricity supplier will increase and that household consumers will become even more demanding and will increasingly seek ways to minimize their electricity bill and/or obtain additional value from their electricity suppliers. This is why we believe that the conclusions advocated in this paper will gain even more relevance as the electricity market develops and competition on the supply side strengthens.

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POTROŠNIK IN KOMUNICIRANJE DRUŽBENE ODGOVORNOSTI: POGLED SKOZI PERSPEKTIVO USTVARJANJA SMISLA

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Povzetek: Družbena odgovornost je koncept, ki se ga uporablja, raziskuje in teoretizira vsak dan. Celotno področje družbene odgovornosti je teoretično in raziskovalno usmerjeno v podjetja, njihove ugodnosti, težave itd., kar prinaša (preveč) enostranski pogled na področje (komuniciranja) družbene odgovornosti. Raziskovanje ni usmerjeno v potrošnika in njegovo konstrukcijo družbene odgovornosti. Poleg tega zanemarja procese ustvarjanja pomenov družbene odgovornosti. V prispevku zagovarjamo tezo, da je potrošnika kot aktivnega prejemnika in sporočevalca treba bolje spoznati, da bi lahko z njim uspešneje vstopali v komunikacijske procese in tematizirali družbeno odgovornost.
Ključne besede: družbena odgovornost, komuniciranje družbene odgovornosti, ustvarjanje smisla

CONSUMER AND CORPORATE SOCIAL RESPONSIBILITY COMMUNICATION: A SENSEMAKING APPROACH

Abstract: Social responsibility has become a number one topic in academic, professional and everyday life. Corporate social responsibility is, however, theoretically and research-wise focussed on companies, their benefits and challenges; this has led to a predominantly one-dimensional view on (communicating) social responsibility. Research efforts are seldom oriented towards consumers and their construction of social responsibility and neglect processes of sensemaking of social responsibility. This paper argues we need to better understand a consumer as an active receiver and sender in order to be more successful in communication processes and discussions about social responsibility with them.
Keywords: social responsibility, communication of corporate social responsibility, sensemaking approach

Pregledni znanstveni članek

1. UVOD

Pregled sodobne literature pokaže, da je komuniciranje družbene odgovornosti precej aktualna tema med raziskovalci (npr. Beckmann, 2007; Ihlen, Bartlett in May, 2011; Morsing, Schultz in Nielsen, 2008). Razprave potekajo na podlagi različnih teoretičnih izhodišč, vodijo pa jih tudi različni interesi in perspektive, med katerimi nedvomno prevladuje pogled s strani podjetja oz. pogled od znotraj navzven. Ta se ukvarja zlasti z vprašanjem, kako učinkovito komunicirati družbeno odgovornost in pri tem doseči najboljši možni rezultat za podjetje, torej je precej akcijsko in enosmerno naravnan. Manj pa je avtorjev, ki bi raziskovali načine, kako se potrošniki kot ključni deležniki vključujejo v »progresivne interakcijske procese osmišljanja družbene odgovornosti« (Morsing in Schultz, 2006: 324), ki krepijo zavedanje o tej problematiki in gradijo pričakovanja, ki so skupna podjetjem in potrošnikom.

V tem prispevku bomo predstavili pregled obstoječe literature, ki obravnava komuniciranje družbene odgovornosti in vedenje potrošnikov. Naš cilj je oblikovati okvir za razumevanje različnih vidikov raziskovanja problematike, ki jih lahko najdemo v literaturi, in nakazati možne nove poti raziskovanja. Z razmahom prispevkov o komuniciranju družbene odgovornosti se namreč kaže jasna potreba po novih vidikih raziskovanja, ki jih je moč razviti iz obstoječih vrzeli v literaturi. Eden takih vidikov temelji na konceptu ustvarjanja smisla[1] (ang., *sensemaking*; Dervin in Foreman, 2003; Morsing in Schultz, 2006). Osnovna predpostavka ustvarjanja smisla je, da posamezniki retrospektivno ustvarjajo smisel o okolju, lastnem vedenju in posledicah tega vedenja. Z drugimi besedami: smisel ustvarjajo tako, da (subjektivno) pripisujejo pomene realnosti na podlagi kognitivnih predispozicij, prepričanj in predvidevanj (Weick, 1995). Koncept izhaja iz organizacijskih ved (Weick, 1995), a je v teorijah komuniciranja in institucionalizacije družbene odgovornosti uveljavljen in pogosto uporabljen. Skušali ga bomo navezati na ustvarjanje smisla, kot ga razume komunikologija – kaj občinstvo, javnosti, potrošniki zares mislijo, čutijo, želijo ter kako osmišljajo situacije in kontekste (Dervin in Foreman, 2003). Naš cilj je nakazati, kako lahko koncept ustvarjanja smisla na obeh ravneh in poljih uporabimo za razumevanje družbene odgovornosti in komuniciranja ter v tem pogledu poskusimo najti ideje za nadaljnje razmišljanje in raziskovanje omenjene problematike.

1 Pojem »smisel« se skozi koncept osmišljanja ali ustvarjanja smisla razume kot način interpretacije neke situacije, konteksta; kakšne pomene ji pripišemo. Znotraj koncepta ustvarjanja smisla se vrtimo okrog pojmov »smisel«, »pomen«, »realnost«, ki pa niso sopomenke, temveč se med seboj povezujejo. Pojem »smisel« se torej razlikuje od pojma »pomen« – slednji govori o sporočilu situacije – in od pojma »realnost«, ki ponazarja izkušnje posameznika, ki določajo, kako bo določeno stvar videl, interpretiral. Smisel je tako »celostna konstrukcija koherentnega razumevanja različnih pomenov, ki so osnova za naša dejanja« (Kinghorn, 2002: 6). Pri ustvarjanju smisla realnost ni objektivna, temveč subjektivna, konstruirana (Weick, 1995).

2. UOKVIRJANJE DRUŽBENE ODGOVORNOSTI: VIDIK KONTEKSTUALNOSTI

2.1 DRUŽBENA ODGOVORNOST

Ena od osnovnih zadreg področja družbene odgovornosti je, da ni jasne, splošno sprejete opredelitve koncepta oz. da je teh mnogo. Raziskava Blowfielda in Murraya (2008) je pokazala, da obstaja vsaj 147 opredelitev družbene odgovornosti podjetij. Številnim opredelitvam družbene odgovornosti je skupno naštevanje področij, ki jih družbena odgovornost zajema oz. jih z družbeno odgovornim vedenjem posamezniki ali podjetja lahko rešujejo (Morsing in Schultz, 2006). Ena izmed širše sprejetih pravi, da lahko družbeno odgovornost razumemo kot pričakovanja družbe o vedenju podjetja (posameznika), ki je družbeno ali moralno pričakovano ter ga posamezniki in družba lahko upravičeno zahtevajo od podjetja (posameznika) (Whetten, Rands in Godfrey, 2001). Takšna opredelitev implicira dejstvo o institucionalni vpetosti družbene odgovornosti v družbo in okolje. Družbeno odgovornost se institucionalizira skozi interakcijo in komuniciranje (Schultz in Wehmeier, 2010). Pri tem so ključne družbene strukture in specifična okolja, v katerih se ti procesi dogajajo. Pregled opredelitev kaže na to, da je razumevanje družbene odgovornosti institucionalno pogojeno in da lahko še tako dobra opredelitev v nekem drugem okolju, družbenih okoliščinah ali strukturah, deluje nezadostno ali celo narobe (Freeman in Hasnaoui, 2011).

Dahlsrud (2006) pri pregledu in analizi številnih definicij ugotavlja, da se te načeloma ne izključujejo, da so ujemajoče in da nejasnost glede družbene odgovornosti ne izhaja iz problema opredeljevanja, ampak iz tega, kako je družbena odgovornost konstruirana v specifičnem kontekstu. Izziv torej ni zgolj v definiranju družbene odgovornosti, ampak v razumevanju tega, kako je v določenem kontekstu družbena odgovornost konstruirana in kako je potrebno to družbeno konstrukcijo upoštevati pri komuniciranju in razvoju strategij podjetij (Dahlsrud, 2006: 6).

Izkaže se, da je konstrukcija družbene odgovornosti podjetja oz. konstrukcija pričakovanj iz okolja bolj pomembna kot akcijsko delovanje podjetja v tej smeri (Joutsenvirta in Vaara, 2009). Funkcionalistična perspektiva, ki zagovarja akcijski pogled in nenehno iskanje učinkov družbene odgovornosti, družbeno odgovornost namreč razume predvsem kot orodje, ki podjetju zagotavlja legitimnost in ugled (Wehmeier in Schultz, 2011). Legitimnost podjetju dajejo potrošniki (in drugi deležniki) skozi komuniciranje pričakovanj in z izpolnitvijo teh s strani podjetja. Legitimnost se tako gradi skozi komuniciranje in institucionalizacijo (Schultz in Wehmeier, 2010). To lahko na makro in srednji ravni organiziranja in institucionalizacije proučujemo skozi prizmo neoinstitucionalizma, katerega težava pa je v tem, da se ne ukvarja neposredno s komunikacijo (Schultz in Wehmeier, 2010), medtem ko mikro raven vključuje tudi neposredno preučevanje »tvorjenja« družbene odgovornosti med deležniki (Schultz in Wehmeier, 2010).

2.2 KOMUNICIRANJE DRUŽBENE ODGOVORNOSTI

Komuniciranje družbene odgovornosti lahko pomeni dvoje: je odgovornost skozi komuniciranje in je komuniciranje družbene odgovornosti (Reisch, 2006: 189). Pri odgovornosti skozi komuniciranje je pogosto vzpostavljen dialog oz. dvostransko komuniciranje, pri čemer naj bi takšno komuniciranje povečevalo kredibilnost komuniciranja družbene odgovornosti. Ihlen, Bartlett in May (2011: 8) v najnovejši knjigi, ki se ukvarja s področjem komuniciranja družbene odgovornosti, to razumejo kot način, kako korporacije komunicirajo v procesu družbene odgovornosti in o njem ter kako pri tem uporabljajo jezik in simbolno govorico. Zanimivo je, da je pri raziskovanju tega področja v zadnjem času opazen premik k širši perspektivi razumevanja komuniciranja družbene odgovornosti, kar je zagotovo posledica dejstva, da se teoretiki in organizacije v praksi vse bolj zavedajo dejstva, da je družbena odgovornost fluiden koncept, odvisen od številnih dejavnikov. V literaturi se je pojavil koncept ustvarjanja smisla (ang. sensemaking), ki je nekakšen idealni model komuniciranja podjetja z deležniki (Pater in Lierop, 2006; Morsing in Schultz, 2006), predstavlja enakovredno dvostransko komuniciranje in je postavljen nasproti »dajanju smisla« (ang. sensegiving), s katerim podjetje skuša predvsem posredovati pomene o njegovi družbeni odgovornosti. Gre torej za akcijsko naravnan pristop, saj podjetje samo (brez interakcije z deležniki) ustvarja pomen družbene odgovornosti, samo odloča, kaj je pomembno, kakšne bodo družbeno odgovorne akcije itd. Ustvarjanje smisla je po drugi strani vzajemen proces, v katerem so deležniki partner podjetja in skupaj odločajo, določajo in delujejo. Ustvarjanje smisla je v tem pogledu pomemben proces pri institucionalizaciji družbene odgovornosti, saj se ukvarja s komunikacijo in konstruiranjem pomena (Schultz in Wehmeier, 2010).

Avtorji stanje na področju komuniciranja družbene odgovornosti, komunikacijske pristope oz. komuniciranje o družbeni odgovornosti z izbranimi komunikacijskimi orodji raziskujejo predvsem z vidika podjetij (npr. Morsing in Schultz, 2006; Reisch, 2006). Splošnejše ugotovitve glede komuniciranja so večkrat protislovne. Tako naj bi bilo po eni strani najbolj smiselno o družbeni odgovornosti poročati v letnih poročilih, ki bolj subtilno in strokovno opišejo družbeno odgovorna prizadevanja, po drugi strani pa je npr. leta 2005 »Global Stakeholder Report on CSR« priporočal: »Ne trudite se doseči posameznikov z vašimi družbeno odgovornimi sporočili. Ne bodo jih brali in ne cenili. Da bi dosegli potrošnike, uporabite druga orodja.« (Reisch, 2006: 195)

Morsing in Schultz (2006: 332) ugotavljata, da ima lahko komuniciranje družbene odgovornosti, z namenom da bi povečali legitimnost podjetja, obraten učinek. Tako stanje imenujemo paradoks samopromotorja. Raziskave kažejo, da potrošniki cenijo manj opazno oziroma bolj diskretno komuniciranje o tovrstnih temah in zavračajo bahanje o uspehih. Beckmann (2007: 173) po drugi strani ocenjuje, da so ta spoznanja protislovna z zahtevami in potrebami po več informacijah s strani potrošnikov. Ena ključnih ugotovitev je tudi ta, da potrošniki bolj zaupajo neodvisnemu viru informacij oziroma neodvisnemu podporniku družbeno odgovornih pobud (Morsing in Schultz, 2007: 334).

Komuniciranje družbene odgovornosti pogosto povečuje skepticizem (drugih) deležnikov, saj dobijo občutek, da poskuša podjetje s temi akcijami nekaj prikriti oz. da simbolno prevladuje nad dejanskim. Raziskave kažejo, da bolj ko podjetje poudarja svoja etična in socialna prizadevanja, več kritične pozornosti deležnikov bo deležno (Morsing in Schultz, 2006: 323). Schultz in Wehmeier (2010: 22) predlagata tiho komuniciranje kot strategijo odgovornega komuniciranja podjetij, s čimer se podjetje izogne zmanjšanju ugleda. »Kar zadeva občutljive teme, kot je družbena odgovornost podjetij, je preprosto delati dobro mogoče bolj primerno, kot delati dobro in govoriti o tem.« (Schultz in Wehmeier, 2010: 22) Ta strategija se izogne morebitnemu skepticizmu, saj ne daje obljub in ne ustvarja podob o prihodnosti, ki morda ne bodo nikoli dosežene. S tem se izogne tudi razočaranju; vendar po drugi strani odpira proces institucionalizacije interpretacij pomembnih deležnikov v procesu dajanja smisla (Schultz in Wehmeier, 2010: 22). Kljub ideji o t. i. tihi strategiji raziskovalci ugotavljajo, da je tudi na evropskih tleh vse bolj prisotna potreba po eksplicitnem in ne samo implicitnem komuniciranju družbene odgovornosti. Deležniki in potrošniki si namreč želijo jasnih informacij o družbeni odgovornosti organizacij (Morsing, Schultz in Nielsen, 2008).

Podobno ugotavljajo tudi Ihlen, Bartlett in May (2011), ko pravijo, da je komuniciranje pomembno, saj se skozenj oblikujejo pomeni o družbeni odgovornosti, pomaga pa tudi pri razumevanju, kako se družbena odgovornost uveljavlja v podjetju in širše. Pri tem se opirajo na znano Watzlavickovo tezo, da je nemogoče nekomunicirati in da je lahko tudi tišina na področju družbene odgovornosti zgovorna oblika komuniciranja. Komuniciranje družbene odgovornosti je potemtakem neizogibno, ključno vprašanje pa je, na kakšen način poteka.

Iz pregleda literature o komuniciranju družbene odgovornosti je pri pogledih na problematiko razvidna neka »napetost«. Pogledi so ujeti med ustvarjanje zavedanja o odgovornem delovanju podjetij skozi komuniciranje in zagotavljanje legitimnosti skozi zaznane motive podjetij, ki glasno komunicirajo o svoji družbeni odgovornosti. Obenem se zdi, da tudi pri potrošnikih obstaja razpetost med potrebo po večji informiranosti in skepticizmom, kljub željam potrošnikov o pogostejšem komuniciranju družbene odgovornosti.

3. DRUŽBENA ODGOVORNOST, POTROŠNIK IN KOMUNICIRANJE

Večina raziskav o potrošnikih in družbeni odgovornosti še vedno temelji na paradigmi kognitivnega procesiranja informacij (Beckman, 2007). Metaanaliza raziskav zadnjih dveh desetletij, ki povezujejo družbeno odgovornost podjetij s potrošniki kot deležniki, pokaže na to, da so si rezultati velikokrat nasprotujoči, prisotno pa je tudi pomanjkanje znanja glede posledic strateškega komuniciranja družbene odgovornosti podjetij (Beckmann, 2006: 27-30). Ključne ugotovitve preteklih raziskav v zvezi s potrošniki in družbeno odgovornostjo so, da se potrošniki zavedajo pomena in so zainteresirani za družbeno odgovornost podjetij: pravijo, da je družbena odgovornost eden od kriterijev za nakup (Handelman in Arnold, 1999; Lewis, 2003). Družbena odgovornost podjetij vpliva na pozitiven odnos do podjetja in/ali znamke (Murray in Vogel, 1997) in deluje kot varovalo v kritičnih situacijah (Dean, 2004; Ricks, 2005). Družbenoodgovorne dejavnosti podjetja imajo pozitiven dodaten učinek na strateške zaveze (sponzorstva, soznamčenje itd.) (Ross, Patterson, in Stutts, 1992). Ena pomembnejših ugotovitev je tudi ta, da neodgovorno vedenje podjetja bolj vpliva na prepričanja potrošnikov kot pa odgovorno vedenje (Elliott in Freeman, 2001). Nekatere raziskave kažejo, da potrošniki zelo malo vedo o tem, katero podjetje je družbeno odgovorno in katero ne, na to niso pozorni ali se ne ukvarjajo s tem (Belk, Devinney in Eckhardt, 2005; Carrigan in Attalla, 2001), in da pri (nakupnem) odločanju potrošnikov prevladujejo tradicionalni kriteriji odločanja (Beckmann, Christensen in Christensen, 2001; Carrigan in Attalla, 2001), kjer pomembno vlogo igrajo produktne kategorije in/ali cene (Elliott in Freeman, 2001; Mohr in Webb, 2005), pripravljenost plačati več za odgovornejše izdelke in storitve pa je nizka (Osterhus, 1997).

Raziskave kažejo, da vlada splošen skepticizem in cinizem glede družbene odgovornosti podjetij, posamezniki ločijo med osebnimi in družbenimi posledicami etičnega oz. neetičnega vedenja podjetja (Mohr, Webb in Harris, 2001; Sen in Bhattacharya, 2001) in da je družbeno odgovorne potrošnike težko profilirati (Mohr, Webb in Harris, 2001), saj med njimi obstajajo občutne nacionalne in kulturne razlike (Andreu, Beckmann, Bigne, Chumpitaz in Swaen, 2004).

V literaturi je le malo zanesljivih študij, ki bi se poglobljeno ukvarjale s tem, kaj potrošniki dejansko vedo o družbeno odgovornih naporih podjetij (Dawkins, 2005) in kakšna so sploh stališča do družbene odgovornosti med potrošniki (Duarte, Mouro in das Neves, 2010). Pri tem je pomembno, da so informacije, ki ne pomagajo rešiti posameznikove lastne situacije in poiskati rešitve, za potrošnike brez vrednosti. Za več komunikacijskih kampanj se je pokazalo, da za posameznike, ki se poskušajo sprijazniti s svojimi lastnimi prepričanji in občutki glede okoljske odgovornosti, niso pomembne (Madden, 1999). Du, Bhattacharya in Sen (2007) na primer ugotavljajo, da je zavedanje potrošnikov o družbeno odgovornih pobudah zelo nizko, vendar je to predpogoj, da se pri potrošniku ustvarijo prepričanja o družbeni odgovornosti ponudnika. Pomanjkanje zavedanja potrošnikov je očitno ključna ovira za strateško načrtovano komuniciranje družbene odgovornosti (Du, Bhattacharya in Sen, 2007).

Zato bi bilo smotrno osredotočiti se na potrošnika, kar pa ne pomeni, da mu podjetje poskuša vsiljevati informacije, ki so dobre in koristne po mnenju podjetja (Walker, 2006), ali da ga poskuša prepričevati. Če želimo, da je družbena odgovornost transparentna za potrošnike, je kakovost informacij pomembnejša od količine (Schrader, Hansen in Halbes, 2006). S tem se strinjajo tudi

Du, Bhattacharya in Sen (2007), ki pripominjajo, da so potrošniki zelo občutljivi in odzivni na družbeno odgovorno komuniciranje, pri čemer veliko težo dajejo notranji motivaciji, ki vodi podjetje v družbeno odgovornost.

Sklenemo lahko, da je preučevanje reakcij potrošnikov na družbeno odgovorno komuniciranje pomanjkljivo. Čeprav je potrošnik vključen v proces raziskovanja, le-to poteka skoraj izključno z vidika koristi podjetja oz. tega kaj družbena odgovornost in komuniciranje družbene odgovornosti pomenita za podjetje. Raziskave so usmerjene v podjetja, njihovo interpretacijo družbene odgovornosti, zelo malo pa se jih primarno osredotoča na potrošnike, njihovo videnje, razumevanje, potrebe, uporabo informacij itd. (Sen in Bhattacharya, 2001: 225) Avtorji se sicer zavedajo, da neupoštevanje potrošnikov v raziskavah na tem področju vodi do nepopolnega razumevanja procesov, ki so ključni z vidika preučevanja komuniciranja družbene odgovornosti (Vitell, 2003: 33).

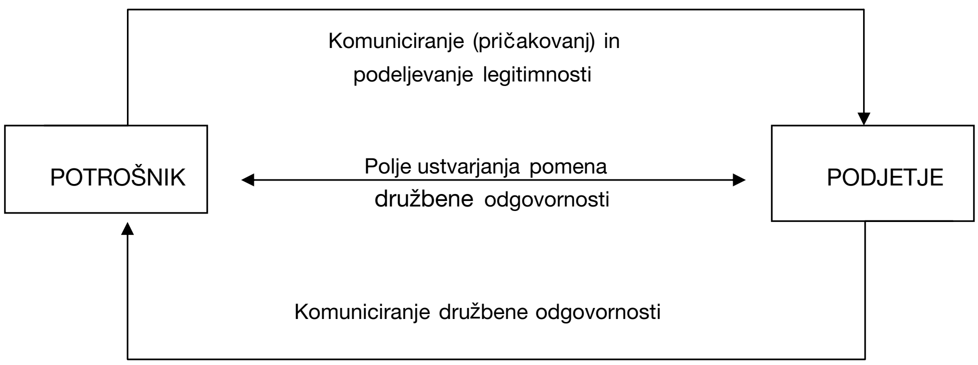
4. KONSTRUIRANJE DRUŽBENE ODGOVORNOSTI SKOZI KONCEPT USTVARJANJA SMISLA

Zanemarjanje potrošnika kot aktivnega posameznika, ki v komunikacijskem procesu ni le prejemnik, ampak interpret in ustvarjalec pomenov, ustvarja vrzel v raziskovanju, ki jo deloma skuša zapolniti koncept ustvarjanja smisla, kot ga poznamo v organizacijskih teorijah (Weick, 1995). Vendar se zdi, da tudi ta pristop ne vidi posameznika, potrošnika v dovolj celostni luči. Čeprav je utemeljen na interakciji, vsaj implicitno kot glavnega akterja še zmeraj vidi podjetje (Morsing in Schultz, 2006). Zanimivo bi bilo torej v to polje raziskovanja vpeljati še pristop ustvarjanja smisla, ki je utemeljen s komunikološke perspektive (Dervin in Foreman, 2003) in ki ga lahko, z vidika institucionalističnega pogleda na družbeno odgovornost, uporabimo za boljše razumevanje konstruiranja pomenov družbene odgovornosti.

Tako kot avtorji, ki se opirajo na organizacijski koncept ustvarjanja smisla, le-tega vidijo kot idealen koncept komuniciranja med deležniki in podjetjem (Morsing in Schultz, 2006; Schultz in Wehmeier, 2010), pristop ustvarjanja smisla s komunikološke perspektive (Dervin, 1998) v središče postavlja komunikacijske procese. Tu je še bolj poudarjen pogled od zunaj navznoter; ključen je posameznik, ki je ustvarjalec smisla. V obeh primerih rabe koncepta ustvarjanje smisla sicer temelji na razumevanju simbolične interakcije, kot jo definira npr. Blumer (1999: 194); »ljudje interpretirajo ali »določajo« delovanja drug drugega in se ne le odzivajo nanje. Njihov »odziv« ni neposreden rezultat medsebojnih delovanj, ampak namesto tega temelji na pomenu, ki ga pripisujejo tem delovanjem. Tako se človeška interakcija posreduje z uporabo simbolov, interpretacijo ali zagotavljanjem pomena medsebojnih delovanj«. Širše ustvarjanje smisla pomeni oblikovanje in pripisovanje smisla stvarem, dogodkom itd., saj pomen, smisel ne obstaja sam po sebi, pač pa ga ljudje pripisujemo. Podobno velja tudi za komuniciranje oz. sporočila, ki nastajajo šele v komunikacijski interakciji med pošiljateljem in prejemnikom (Hardy, 2011). Pri tem avtorji opozarjajo, da je treba težo dati sprejemanju (konzumpciji) sporočil (Hardy, 2011; Lammers in Barbour, 2006), saj vedno obstaja razlika med tem, kaj nekdo sporoči in kaj nekdo prejme in razume. Pomen ni določen vnaprej, ne glede na to, kako močan je vir sporočanja, kako široko je bila sporočilo poslano itd.

Te ključne misli povzemamo v spodnjem modelu (Slika 1). V tem modelu je družbena odgovornost družbeno konstruirana v komunikaciji med podjetjem in potrošniki kot deležniki. Ti skozi svoja pričakovanja prispevajo k izgrajevanju legitimnosti podjetja in njegovemu družbeno odgovornemu ravnanju (Joutsenvirta in Vaara, 2009), soustvarjajo pomen (Schultz in Wehmeier, 2010), hkrati pa sprejemajo informacije, ki jih podjetje posreduje (Hardy, 2011), jih interpretirajo in posredujejo informacije o pomenih nazaj podjetju. Družbeno odgovornost se

Slika 1: Ustvarjanje pomena družbene odgovornosti



tako oblikuje skozi komuniciranje med deležniki; skozi povratno in dvostransko komuniciranje pa se ustvarja pomen družbene odgovornosti.

Centralno vprašanje ustvarjanja smisla je, kako zmanjšati ali razrešiti dvom in negotovost pri posamezniku (Weick, 1995), pri čemer je diskontinuiteta kot temeljna poteza sveta osrednja predpostavka ustvarjanja smisla. Statični red ne obstaja; pojavljajo se vrzeli (npr. med realnostjo in človeškimi čuti) in posameznik ves čas poskuša to negativno stanje preleviti v stanje soglasja (Vodeb, 2004: 12). Z vidika razumevanja družbene odgovornosti to pomeni, da ni statičnega, neodvisnega pomena družbene odgovornosti, ampak se ta vsakič znova v interakciji med deležniki in podjetjem (Morsing in Schultz, 2006) in na mikro ravni, pri posamezniku, ustvarja na novo (Dervin, 1992).

Pri tem je ključno komuniciranje, ki je konstitutivno za oblikovanje pomena (Hardy, 2011). Komuniciranje je tudi osrednji proces, ki ga proučuje ustvarjanje smisla, skozenj poteka ustvarjanje in razgradnja smisla in nenehno gibanje. Posameznikova raba informacij in sistema je odvisna od tega, kako razume določeno situacijo (Walker 2006: 403). Posameznik po eni strani sam ustvarja smisel, glede na svoj kontekst, preteklost itd., po drugi strani pa uporablja smisel, ki ga kreirajo drugi oz. ga kreira v sodelovanju, v preseku s »svojimi« organizacijami (Dervin 2003: 331). Išče informacije, ker mora/želi v nenehni negotovosti osmišljati realnost, zato da se lahko nanjo ustrezno odzove z dejanji. Ustvarjanje smisla se ves čas spreminja in redefinira, ko posameznik skuša sprejeti, razumeti realnost (Dervin, 1983). Ustvarjanje smisla poteka na podlagi dejanj posameznika oz. potrošnika in ne zgolj z njegovim abstraktnim razumevanjem določenih pomenov; gre za učenje, ki temelji na celokupnosti posameznikovih znanj, čustev in predhodnih izkušenj. Dervinova (1983) pravi, da posameznik nenehno potuje skozi prostor in čas ter ustvarja smisel svojih dejanj v zunanjem svetu. Pri tem se občasno srečuje s kognitivnimi vrzelmi, ki jih mora premostiti, tako da na novo ustvari smisel. Pomaga si z različnimi strategijami; med njimi je ključno iskanje in uporaba informacij (Dervin, 1983), pa tudi uokvirjanje, razumevanje, ustvarjanje pomenov ter oblikovanje vzorcev (Weick, 1995).

Ustvarjanje smisla ne predpostavlja statičnega modela komuniciranja, ampak je prisotno zavedanje, da se pod statičnostjo zmeraj skriva neprestano ustvarjanje (ali razgradnja) smisla (Dervin, 1992: 65). Takšen pogled na svet je »procesni«, in ne statični, kot to prevladuje v npr. segmentacijah javnosti (Walker, 2006) in drugih ustaljenih oblikah v komuniciranju. Gre za komunikativno dejavnost, ki vodi štiri osrednje naloge komuniciranja: »misliti na ljudi, pogovarjati se z njimi, jih spraševati in oblikovati sistem, ki jim bo služil« (Dervin, 1998: 39). Za vsako od teh nalog morajo upravljavci komuniciranja razviti globlje razumevanje potrošnikov in njihovih potreb, preden vstopajo v komunikacijski proces.

Če to apliciramo na področje družbene odgovornosti, bi to pomenilo, da morajo podjetja razumeti potrošnikovo konceptualizacijo in interpretacijo družbene odgovornosti, da bi lažje doumela njihova pričakovanja in na tej osnovi zgradila legitimnost podjetju. Splošne karakteristike potrošnikov, ki jih podjetja pri komuniciranju rada vzamejo za izhodišče, niso relevantne, pomembno je, kako se potrošniki dejansko obnašajo in kako konstruirajo realnost (Walker, 2006).

Z razumevanjem kontekstov in interpretacij družbene odgovornosti (tudi če gre v resnici za pomanjkanje zavedanja o družbeni odgovornosti, kot npr. ugotavljajo Du, Bhattacharya in Sen, (2007)), se oddaljimo od ideje, da so komuniciranje in informacije »dobrine« z objektivno realnostjo. Pri komuniciranju družbene odgovornosti se moramo zato izogibati t. i. univerzalnim tehnikam, ki naj bi delovale v vsakem kontekstu in se osredotočiti na komuniciranje, ki bo intrinzično drugačno (Walker, 2006). Po eni strani je treba ustvariti dialoški odnos in prisluhniti potrošniku, da bi razumeli, kako deluje in reagira v določeni situaciji (Foreman-Wernet in Dervin, 2006), po drugi strani pa je včasih smiselno uporabiti tudi t. i. strategijo »odsotnosti komuniciranja« oz. tihega komuniciranja, s katero se izognemo obljubam in vsiljevanju tematik prek komunikativnega določanja realnosti, ki jih kot organizacija s konkretnimi dejanji na področju DOP morda ne bomo nikoli dosegli (Schultz in Wehmeier, 2010). S strategijo tihega komuniciranja se lahko izognemo razočaranjem in negativnim odzivom potrošnikov in vstopimo v proces soustvarjanja mnogoterih realnosti, s čimer spodbudimo večjo vključenost in aktivnost potrošnikov (Schultz in Wehmeier, 2010).

5. POVZETEK UGOTOVITEV IN PREDLOGI ZA NADALJNJE RAZISKOVANJE

Pregled teorije in raziskovanja na področju družbene odgovornosti nam pokaže kar nekaj problemov in pomanjkljivosti. Prvi problem se dotika opredelitev družbene odgovornosti, pri katerem sicer ugotovimo, da ni tako pomemben kot problem konstrukcije družbene odgovornosti v različnih kontekstih (Dahlsrud, 2006).

Na področju družbene odgovornosti vidimo kot ključna dva vsebinska problema: problem (enostranskega) pogleda s strani podjetja in pomanjkanje konkretnih znanj o komuniciranju družbene odgovornosti, ki bi izvirala iz zavedanja o pomenih, ki jih družbeni odgovornosti pripisujejo potrošniki. Očitno je, da je na področju družbene odgovornosti usmerjenost teorij, raziskovanja in prakse v večini primerov iz podjetja ali nanj. Tudi potrošnik je definiran skozi prizmo podjetja; takšen pogled po mnenju nekaterih avtorjev onemogoča širšo sliko, saj nam le delno osvetli problematiko preučevanja. Pomanjkanje konkretnih znanj o komuniciranju družbene odgovornosti izhaja iz protislovja raziskav na tem področju. Avtorji ne vedo in ne povedo prav veliko o konkretnih učinkih komuniciranja družbene odgovornosti in o oblikah komuniciranja, ki naj bi se uporabljale za transparentno komuniciranje družbene odgovornosti.

Ključni raziskovalni napotek, ki izhaja iz pregleda literature, je, da se morata raziskovanje in upravljanje osredotočiti na globlje razumevanje potrošnika in situacije, v kateri se nahaja, oziroma izhajati iz potrošnika. Tega ne sme misliti le kot prejemnika informacij, temveč kot aktivnega uporabnika, interpreta, ustvarjalca smisla, tudi partnerja v dialogu (Dervin, 2003).

Kot pomembno pot raziskovanja komuniciranja družbene odgovornosti zato vidimo pristop ustvarjanja smisla (Dervin, 2003). Za veliko družbenoodgovornih dejavnosti in komunikacijskih kampanj se je v raziskavah izkazalo, da za potrošnike niso bile pomembne, ker so konstruirale smisel z vidika sporočevalca (Dervin in Foreman, 2003) in prezrle potrošnikovo videnje in razumevanje situacije, njegovo osmišljanje.

Ključno je, kako potrošnik misli družbeno odgovornost, saj bomo le tako lahko uspešno komunicirali z njim. Pomembno je tudi njegovo razumevanje in pojasnjevanje situacije, ko ne ravna v skladu s svojimi prepričanji ali namerami. O njegovem vedenju in uporabi informacij ne moremo zgolj sklepati. Znotraj pristopa ustvarjanja smisla raziskovalec ne skuša ustvarjati slike delovanja potrošnika s stališča lastnega razumevanja (Dervin, 1998), ampak poskuša razumeti njegov način konstruiranja pomenov, razumevanja in pričakovanj.

Pristop ustvarjanja smisla kot raziskovalni pristop je lahko dobra podlaga za razvoj novih komunikacijskih pristopov. Sodelovanje potrošnikov v komunikacijskih procesih je namreč ena temeljnih zahtev sodobnega in družbenoodgovornega podjetja (Morsing in Schultz, 2006; Morsing, Schultz in Nielsen, 2008). Transparentnost komuniciranja družbene odgovornosti, ki jo s tem pristopom lahko ustvarimo, sicer ni zagotovilo, da jo bodo potrošniki dejansko podprli oziroma se odgovorno vedli (Schrader in drugi, 2006). Zagotovo pa je potreben pogoj, ki si zasluži več raziskovalne pozornosti, predvsem z vidika poglobljenega raziskovanja potrošnika in konstruiranja (pomenov) družbene odgovornosti.

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SISTEMATIČNOST MERJENJA MARKETINŠKEGA DELOVANJA V SLOVENSKIH PODJETJIH

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Izvirni znanstveni članek

Povzetek: Podjetja so zadnjih nekaj let podvržena pritisku merjenja marketinškega delovanja, tako s strani poslovnega kot akademskega sveta. Marketing Science Institute (MSI), na primer, je več let zaporedoma poudarjal pomen raziskovanja marketinškega delovanja in je med glavnimi raziskovalnimi prioritetami dosledno (1998, 2000, 2002, 2004, 2006) predlagal merjenje marketinškega delovanja in z njim povezane teme. To področje je na slovenskih tleh še precej neraziskano, kljub njegovemu pomenu v tujini. V prispevku se teoretično in empirično osredotočamo na sistematičnost merjenja marketinškega delovanja, pri katerem raziskujemo njegove posamezne korake – katere metrike izbrati, kako jih primerjati, kako predstaviti rezultate, kdo naj spremlja te rezultate, kaj ti rezultati pomenijo za marketing in kakšen pomen ima merjenje v slovenskih podjetjih za marketing in za podjetje. S kvalitativno raziskavo med slovenskimi podjetji (majhen vzorec) smo empirično ugotovili, da je sistematičnost merjenja marketinškega delovanja med preučevanimi podjetji precej razvita in se lahko primerja s tujimi, nekoliko pa vendarle zaostaja glede implementacije standardne preglednice merjenja marketinškega delovanja.
Ključne besede: merjenje marketinškega delovanja, metrike, standardna preglednica merjenja marketinškega delovanja, zadovoljstvo z marketingom

SYSTEMATIC MARKETING PERFORMANCE MEASUREMENT IN SLOVENIAN COMPANIES

Abstract: For the past few years, companies have been exposed to great pressure from business and the academic field with regard to marketing performance measurement. For instance, Marketing Science Institute (MSI) has for several years stressed the importance of marketing performance measurement research and has consistently (1998, 2000, 2002, 2004, 2006) proposed marketing performance measurement and related themes as a research priority. Despite the importance of marketing performance measurement abroad, in Slovenia, this field is still quite neglected as a research topic. In this article, we are theoretically and empirically focused on systematic marketing performance measurement and we explore its several steps – which metrics to choose, how to compare them, how to represent the results, who should follow the results, what they mean for marketing and what importance the measurement has for marketing and companies. Our empirical qualitative research of Slovenian companies (a small sample) shows that systematic marketing performance measurement is developed quite well and can be compared to foreign companies. However, with regard to marketing dashboard implementation it somehow lags behind.

Keywords: marketing performance measurement, metrics, marketing dashboard, satisfaction with marketing

1. UVOD

Merjenje marketinškega delovanja (angl. *marketing performance measurement*) še nikoli ni bilo tako pomembno kot danes. Tega se vedno bolj zavedajo tudi slovenska podjetja. V zadnjih nekaj letih je merjenje marketinškega delovanja postalo imperativ v upravah podjetij in med teoretiki marketinga (Ambler in drugi, 2004; Clark, 2007: 36). Želja po povečanju prodaje, števila odjemalcev, potreba po dolgoročnem merjenju marketinškega delovanja in zahteve po večji odgovornosti marketinga (angl. *marketing accountability*) – vse to je usmerilo pozornost na odnos med marketinškimi aktivnostmi in delovanjem podjetja (Clark in Ambler, 2001: 232). Pomen raziskovanja omenjenega področja je poudaril tudi Marketing Science Institute (MSI), ki med glavne raziskovalne prioritete ves čas (npr. v letih 1998, 2000, 2002, 2004, 2006) uvršča merjenje marketinškega delovanja in z njim povezane teme (O‘Sullivan in Abela, 2007: 79; Pont in Shaw, 2003: 2064).

Pomemben člen merjenja marketinškega delovanja predstavlja uporaba ustreznih metrik in nenehno spremljanje rezultatov – to omogoča učenje organizacije. Podjetja z učinkovitimi sistemi merjenja ugotovijo, kje delajo napake in kje delajo dobro, kar je koristno za prihodnje načrtovanje marketinškega delovanja in delovanje podjetja (Morgan in drugi, 2002: 371). Merjenje marketinškega delovanja pomeni tudi sposobnost prevajanja »neotipljivosti« marketinga v številke. Vodstva podjetij namreč marketinški jezik včasih težko razumejo, še posebej takrat, ko je treba povečati vložek v marketinške aktivnosti.

Avtorji omenjajo mnoge prednosti, ki jih prinaša merjenje. Glavni cilj je, da se dokončno dokaže učinek in vrednost marketinških aktivnosti (Clark in Ambler, 2001: 235; O'Sullivan in Abela, 2007: 80). Prav tako merjenje pozitivno vpliva na delovanje podjetja, na povračilo oglaševanja in donosnost delnic. Zmožnost merjenja marketinškega delovanja povečuje zadovoljstvo upravnega odbora z marketingom in izboljšuje položaj marketinškega oddelka v podjetju (O'Sullivan in Abela, 2007: 88–90).

Cilj tega prispevka je zgoščen pregled literature, ki se ukvarja s problematiko merjenja marketinškega delovanja, da bi prikazali, katere metrike so pomembne in v uporabi ter kaj naj bi merjenje pomenilo za marketinške oddelke in podjetja. Cilj je tudi osvetliti problematiko v slovenskih podjetjih, v zvezi s katerimi raziskav o problematiki merjenja marketinškega delovanja ni veliko, in na ta način prispevati zanimiva izhodišča tudi za prakso slovenskega marketinga.

Prispevek je razdeljen na teoretični del s pregledom literature o merjenju in metrikah marketinškega delovanja in empirični del, ki se kvalitativno loteva iskanja odgovorov na raziskovalna vprašanja, zastavljena v nadaljevanju. Prispevek sklenemo z diskusijo rezultatov in izhodišči za prihodnje raziskovanje.

2. KAJ JE MERJENJE MARKETINŠKEGA DELOVANJA?

Merjenje marketinškega delovanja je poslovni proces, ki organizaciji daje povratno informacijo o rezultatih marketinških naporov[1] (Clark in drugi, 2006: 191; O'Sullivan in Abela, 2008: 80) in se nanaša na kakovost marketinških programov, usmerjenih v strategijo in njihovo izvajanje (Bonoma in Clark, 1988: 2). Gre za obliko marketinških informacij, ki imajo lahko pomemben vpliv na vedenje vodstva podjetja pri oblikovanju proračuna, hkrati pa organizaciji pomagajo pri sprejemanju odločitev glede prihodnosti (Clark in drugi, 2006: 191–192), pri ocenjevanju preteklega delovanja, omogočajo prilagoditev razporeditve virov in so koristne za napovedovanje prihodnjega delovanja (Clark, 2007: 41). Merjenje marketinškega delovanja lahko v primeru razvitega sistema merjenja pripomore k boljšemu delovanju organizacije (Clark in drugi, 2006: 192).

Vrednotenje marketinškega delovanja je sestavljeno iz treh tipov merjenja, in sicer iz *učinkovitosti*, *uspešnosti* in *prilagodljivosti okolju* (Clark, 2000: 4), kar pomeni, da je pogled na marketinško delovanje večdimenzionalen.

Učinkovitost marketinga (delati stvari prav) predstavlja pomembno področje raziskovanja pri vrednotenju marketinškega delovanja. Pomeni primerjavo med rezultati marketinga in vložki v marketing, pri čemer je zastavljeni cilj maksimiranje rezultatov v sorazmerju z vložki – denar, sposobnosti, čas, trud in aktivnosti (Bonoma in Clark, 1988: 3; Clark, 2000: 4–5). Pri uspešnosti (delati prave stvari) gre za primerjanje rezultatov programa z zastavljenimi cilji (Bonoma in Clark, 1988: 4) oziroma za psihološko distanco med pričakovanimi in doseženimi rezultati marketinškega delovanja (Clark, 2000: 7), pričakovanja pa izvirajo prav iz zastavljenih ciljev programa in strategije podjetja. S primerjavo pričakovanj z rezultati je enostavno ugotoviti zadovoljstvo vodstva z delovanjem marketinga (Bonoma in Clark, 1988: 4). Če delovanje marketinškega oddelka dosega ali celo presega zastavljene cilje, to pomeni, da je uspešno (Clark, 2000: 7). Poleg uspešnosti in učinkovitosti je pomemben dejavnik še prilagajanje podjetja okolju. Tu gre za dejanja konkurence, distribucijo komunikacijskih kanalov ter za spremembe v pravnem, ekonomskem in demografskem smislu v celotnem tržnem okolju (Bonoma in Clark, 1988: 6). Vprašanje je, kako dobro je marketinški program prilagojen zunanjemu okolju – uspešen je takrat, ko strategija podjetja ustreza zahtevam okolja (Clark, 2000: 6–7).

Za uspešno delovanje marketinga in celotnega podjetja je pomembno tudi, kako so ključni dejavniki med seboj povezani in kako se lahko njihova povezanost smiselno uporabi, na primer spremembe vrednosti znamke za ocenjevanje sedanjega marketinškega delovanja in za napovedovanje prihodnjega (Clark in Ambler, 2001: 239). Ključno je, da vodstvo razume to povezanost, kar omogoča sistem merjenja marketinškega delovanja (v nadaljevanju: sistem merjenja), s ključnimi metrikami, ki so vedno vidne in dostopne. Predvsem je torej pomembno, da marketinški strokovnjaki, pa tudi vodstvo, razumejo kompleksne vzročne modele med različnimi marketinškimi metrikami (Ambler in Roberts, 2007: 243).

Sistematično merjenje marketinškega delovanja mora odražati dinamičnost podjetja v turbulentnem okolju. Če se podjetje in trg spreminjata počasi, potem je tudi metrike smiselno spreminjati redko; če pa se podjetje ali trg spreminjata hitro, je treba temu prilagajati tudi metrike. To predstavlja problem, saj primerjanje zahteva stalnost metrik, dinamičnost pa zahteva spremembe. Podjetja se lahko soočajo s tem tako, da spremljajo ključne metrike v vsakem obdobju poročanja, ostale pa sporadično (Ambler in Roberts, 2007: 245). V vsakem primeru je pomembno, da so uporabljene metrike definirane kot ključne za panogo ali podjetje (Pauwels in drugi, 2009: 183) in relevantne za trenutno situacijo podjetja, saj mu morajo pomagati doseči njegove cilje (Ambler, 2000: 64). Pri izbiri metrik je zato treba upoštevati različne dejavnike, da se lahko z ustreznimi metrikami vzpostavi in razvije sistem merjenja marketinškega delovanja in da marketing pridobi uporabne podatke.

Vprašanje, ki si ga zastavljajo mnogi, je, koliko metrik je dovolj za merjenje marketinškega delovanja. Odkar je odgovornost marketinga postala pomembna, so skušali odkriti eno samo, »srebrno metriko«, ki bi povzela vso marketinško delovanje

1 Marketing v tem prispevku razumemo, kot ga definirajo Kotler in drugi (2009: 6-7): »Marketing je osredotočenost na odjemalce, ki prežema organizacijske funkcije in procese, ter je usmerjen k marketinškim obljubam prek vrednosti ponudbe, omogoča izpolnjevanje individualnih pričakovanj, ki so ustvarjene s pomočjo obljub, in izpolnitev teh pričakovanj prek podpore odjemalčevih procesov generiranja vrednosti, ki na ta način podpirajo ustvarjanje vrednosti v podjetju, odjemalcih in deležnikih.«

in ki je privlačna predvsem zaradi enostavnosti (Ambler in Roberts, 2005: 2–5). Zamisel je, da stvari ostajajo preproste, da se posameznim metrikam dodajajo uteži in da se z njihovim kombiniranjem opredeli en sam kazalnik, ki ga vodstvo lahko uporabi kot sredstvo nadzorovanja. Vendar ena sama metrika oziroma srebrno pravilo ni dovolj (Ambler in Roberts, 2005: 2; Ambler in Roberts, 2007: 243), kar Ambler in Roberts (2007: 243) ponazorita z metaforo človeškega zdravja. Če ima nekdo krvni tlak v mejah normale, hkrati pa zelo povišan holesterol, bi bil zgolj en kazalnik tega, kako zdrav je, nezadosten. Zdravje podjetja/znamke je podobno zdravju človeka v tem, da moramo iskati ključne kazalnike zdravja in bolezni, ki nam pokažejo, čemu naj namenimo svojo pozornost.

Podjetja imajo zastavljene številne cilje, ki jih želijo doseči s svojim marketinškim delovanjem, in ker vsak cilj potrebuje vsaj eno metriko za ugotavljanje napredka (nekateri tudi več), zahteva ocenjevanje marketinga mnogovrstne metrike delovanja (Ambler in Roberts, 2005: 2; Ambler in Roberts, 2007: 242). Smiselno je ubrati srednjo pot in izbrati dovolj, hkrati pa ne premalo metrik. Vsekakor pa je dobro, da podjetje uporabi več kot eno že zaradi večdimenzionalnosti marketinškega delovanja. Metrike za marketing morajo biti uporabne in dovolj obsežne (Grønholdt in Martensen, 2006: 243), kar v kombinaciji s finančnimi in nefinančnimi metrikami omogoča primerjavo z načrti in konkurenco (O'Sullivan in Abela, 2007: 90).
Ker je identifikacija metrik ena izmed najpomembnejših smeri raziskovanja merjenja marketinškega delovanja, je poleg ustreznega števila metrik treba izbrati še pravo vrsto metrik. Treba je vključiti različne metrike (finančne in nefinančne) ter jih primerjati s cilji in rezultati konkurence (O'Sullivan in Abela, 2007: 81). Kljub temu rezultati raziskav kažejo, da so vodstvu pomembnejše finančne metrike, ki so jih tudi merili pogosteje v primerjavi z metrikami, ki so povezane z odjemalci, konkurenco in znamko. (Ambler in drugi, 2004: 480, 485). Dandanes se sicer pojavlja trend merjenja nefinančnih metrik marketinškega delovanja, kar O'Sullivan in Abela (2007: 83) razumeta kot pomemben napredek, saj to dodatno prispeva k bolj popolnemu opisu prispevka marketinga.

Na podlagi pregleda literature so v Tabeli 1 zbrane metrike, ki se najpogosteje navajajo oziroma se dosledno ponavljajo kot najpomembnejše in najuporabnejše (LaPointe, 2005) in ki so med avtorji (Ambler, 2000; Ambler in drugi, 2004; Grønholdt in Martensen, 2006; Pont in Shaw, 2003) razumljene kot osnova oziroma kot primarne metrike, iz katerih naj bi podjetja izhajala pri merjenju marketinškega delovanja. Pri razdelitvi posameznih metrik smo uporabili prilagojeno sistemizacijo, ki jo predlagata Grønholdt in Martensen (2006), in jih razdelili na: metrike, ki so rezultat miselnih procesov pri odjemalcih, metrike, povezane z rezultati vedenja in odjemalci, in finančne metrike.

Naj opozorimo, da ne obstaja popoln sklop izbranih metrik marketinškega delovanja, ki bi ustrezal

Tabela 1: Najustreznejše in najpogosteje uporabljene metrike v literaturi*

Metrike, povezane z miselnimi procesi	Metrike, povezane z rezultati vedenja	Finančne metrike
• Zavedanje izdelka/storitve s strani odjemalcev	• Celotno št. odjemalcev	• Prodaja (količina in vrednost)
• Zaznana kakovost izdelka/storitve s strani odjemalcev (tudi glede na konkurenco)	• Št. novih odjemalcev	• Dobiček/dobičkonosnost
• Zavedanje o znamki	• Ohranitev odjemalcev	• Bruto donosnost prihodkov iz prodaje
• Podoba/osebnost znamke	• Zvestoba odjemalcev	• Tržni delež (količina in vrednost)
• Ugled znamke	• Spreobrnitev odjemalcev (povezava s prodajo)[1]	• Penetracija trga
• Vrednost znamke	• Št. pritožb odjemalcev	• Dobičkonosnost odjemalcev
• Zadovoljstvo (tudi glede na konkurenco)	• Zvestoba znamki	• Bruto donosnost prihodkov iz prodaje (na kupca)
• Relevantnost izdelka/storitve za odjemalca	• Preferenca znamke glede na konkurenco	• Tok denarja
• Zaznana diferenciacija izdelka/storitve		• Vrednost delnic
• Zaznana kakovost izdelka/storitve s strani odjemalcev (glede na konkurenco)		• Povračilo vložka (ROI)
• Znanje o izdelku/storitvi/znamki		• Vrednost življenjske dobe kupca

Vir: Ambler, 2000; Ambler in drugi, 2004; Grønholdt in Martensen, 2006; LaPointe, 2005; Pont in Shaw, 2003.
* Ta metrika meri, koliko se spreobrnitev odjemalcev (preusmeritev potrošnikov k drugi znamki oziroma podjetju ali obratno) pozna pri prodaji.

Slika 1: Veriga marketinške vrednosti

Vir: Grønholdt in Martensen (2006: 245).

vsem podjetjem, panogam in trgom. Pomembno je, da podjetja prilagajajo izbiro metrik lastni strategiji, ciljem in dogajanju v okolju (Grønholdt in Martensen, 2006: 250), prav tako pa tudi svojim zmožnostim in potrebam. Prepričanje, da bi morala vsa podjetja uporabljati enake metrike, bi pomenilo, da bi morala vsa podjetja slediti enaki marketinški strategiji, pri tem pa bi izgubila diferenciacijo oziroma bi se nehala razlikovati med seboj (Ambler, 2000: 64).

Na izbiro vrste metrik vpliva sektor oziroma panoga, v kateri podjetje deluje. Izbira metrik glede na panogo omogoča lažjo primerjavo z delovanjem konkurence (Ambler in drugi, 2004: 478). To je vključeno v vse tri poti merjenja, na primer tržni delež v primerjavi s konkurenco (finančne metrike), zvestoba odjemalcev glede na konkurenco (metrike, povezane z rezultati vedenja), zavedanje, podoba in ugled znamke (metrike, povezane z miselnimi procesi) ipd. Poleg teh dejavnikov je ključno tudi, da so izbrane metrike enostavne za razumevanje in uporabo, morajo biti dovolj obsežne, da lahko dajo natančno oceno marketinškega delovanja (Clark, 1999: 720), omogočati morajo konsistentno napovedovanje, prav tako pa morajo biti zanesljive (Ambler in Roberts, 2005: 5, 11). Identificiran sklop metrik mora ustrezati pogojem nujnosti, natančnosti, doslednosti in zadostnosti[2] ter procesom, v katerih so ti sklopi lahko uporabljeni pri oceni trenutnega in napovedih prihodnjega delovanja (Clark in Ambler, 2001: 241).

Slediti je treba več metrikam, jih primerjati oziroma povezovati med seboj. Metrike se morajo vodstvu predstaviti kontinuirano, in sicer v jasni in integrirani obliki – idealno gledano je to v podobi standardne preglednice merjenja marketinškega delovanja, s čimer lahko na enostranskem prikazu jasno vidimo povzetek ključnih metrik marketinškega delovanja.

Čeprav je večina večjih marketinških oddelkov v velikih mednarodnih podjetjih uspela oblikovati učinkovite merske sisteme znotraj ene izmed treh poti, pa so le redki sposobni sintetizirati vse tri poti na način, ki pomaga razložiti eno pot z drugo. Vsaka pot merjenja meri različne komponente marketinškega delovanja na različne načine; nekatere so vezane na kratkoročne, nekatere na dolgoročne izide (LaPointe, 2005). Ustrezen oziroma uporaben sistem merjenja (standardna preglednica merjenja marketinškega delovanja – angl. *dashboard*[3]) pa nudi vpogled v vse tri poti, ki vključuje znanje iskanja komaj opaznih kontekstualnih povezav, tudi v grafičnem smislu.

3. VLOGA IN POMEN MERJENJA MARKETINŠKEGA DELOVANJA

Cilj merjenja marketinškega delovanja je dokazovanje učinka in vrednosti marketinških aktivnosti, kot so denimo marketinško komuniciranje, promocija in druge aktivnosti, ki predstavljajo večji del tipičnega marketinškega proračuna (Clark in Ambler, 2001: 235; O'Sullivan in Abela, 2007: 80). Z ustreznim merjenjem marketinškega delovanja lahko direktorji formalizirajo doprinos marketinških aktivnosti k ciljem in delovanju podjetja (Ambler in Roberts, 2005: 11). Doprinos marketinga k uspešnemu delovanju podjetja oziroma k finančnim rezultatom sta na holističen in integriran način ponazorila Grønholdt in Martensen (2006: 245), ki sta razvila model oziroma verigo marketinške vrednosti (Slika 1).

Ena izmed pomembnejših prednosti, ki jih prinaša merjenje marketinškega delovanja (tako kaže raziskava CMO Council v Grønholdt in Martensen, 2006: 249) je tudi to, da tista podjetja, ki imajo razvit formalen, obsežen in dodelan sistem merjenja, prekašajo konkurenco v pomembnih finančnih metrikah, marketing pa uživa večje zaupanje in zadovoljstvo vodstva. Posledično je razumevanje marketinga boljše in njegov prispe-

2 Nujnost se nanaša na izločanje metrik, ki ne prinašajo dodatnih informacij; natančnost zahteva točnost metrik; doslednost pomeni, da so metrike primerljive med poslovnimi enotami in skozi čas; zadostnost pa pomeni, da ne smejo biti izključeni nobeni ključni kazalniki marketinškega delovanja (Clark in Ambler 2001, 235).

3 Standardna preglednica merjenja marketinškega delovanja je enostaven, enostranski prikaz relativno majhne zbirke medsebojno povezanih ključnih metrik delovanja in prioritetnih gonilcev delovanja, ki odražajo kratkoročne in dolgoročne interese celotne organizacije. Gre za sistem spremljanja ključnih metrik, delovanja in kazalnikov, ki komunicirajo delovanje marketinga skozi celotno organizacijo (Pauwels in drugi, 2009: 175, 177). Glavna prednost preglednice je ravno ta, da v *enostranskem prikazu* združuje številne metrike, kar v veliki meri znižuje porabljeni čas za argumentiranje in pospešuje sprejemanje odločitev (LaPointe, 2005).

vek k delovanju celotnega podjetja opaznejši, poveča se tudi kredibilnost marketinške funkcije, tako v očeh finančnikov kot tudi v očeh vodstva (Grønholdt in Martensen, 2006: 249).

Podjetje mora nenehno spremljati marketinške rezultate, saj nadzor omogoča proaktivnost pri predvidevanju težav, preden te vplivajo na marketinško delovanje, oziroma učenje organizacije – kje podjetje dela napake in kje dela dobro, kar je koristno za prihodnje načrtovanje marketinškega delovanja in delovanja podjetja (Morgan in drugi, 2002: 371). Lahko se preverja tudi, ali je podjetje strateško izbralo prave cilje in ali so bili ti cilji doseženi (Ambler in drugi, 2004: 476).

Učenje organizacije prek sistema merjenja omogoča doseganje boljših rezultatov, kar marketing z metrikami lahko dokaže. American Marketing Association definira marketinško odgovornost (angl. *marketing accountability*) kot »odgovornost za sistematično upravljanje z marketinškimi sredstvi in procesi z namenom doseči merljive koristi v povračilu vložka v marketing in povečano marketinško učinkovitost, medtem ko se vzdržuje kakovost in povečuje vrednost korporacije« (AMA v Ambler in Roberts, 2005: 5).

Marketinški oddelek pogosto nima dovolj pomembne vloge v podjetju oz. se mu ta ne priznava. Aktivnosti marketinškega oddelka se ne povezuje neposredno s povečanimi prihodki podjetja (LaPointe, 2005), saj nekatera vodstva podjetij v splošnem gledajo na marketinške izdatke kot na kratkoročne stroške (Grønholdt in Martensen, 2006: 243). Ustrezen sistem merjenja omogoča širjenje novih metod ocenjevanja prispevka marketinga k poslovanju podjetja in predstavlja velik korak k večji vitalnosti marketinga znotraj podjetja ter, še pomembneje, k izboljševanju poslovanja v celoti (Grønholdt in Martensen, 2006: 243; O'Sullivan in Abela, 2007: 88; Rust in drugi, 2004: 76; Sevin v O'Sullivan in Abela, 2007: 80). Večje razumevanje vodstva za marketing, še posebej če je merjenje marketinškega delovanja zaznano kot objektivno, pomaga, da marketinški direktorji laže pridejo do sredstev, ki so potrebna za vzdrževanje in rast marketinškega premoženja[4] (Ambler in Roberts, 2007: 242).

4 Marketinško premoženje so viri, ki jih je podjetje bodisi pridobilo ali ustvarilo in se lahko uporabijo za ustvarjanje prednosti na trgu. Marketinško premoženje je otipljivo ali neotipljivo (Hooley idr., 2001). Omenjeni avtorji k marketinškemu premoženju uvrščajo npr. premoženje, vezano na odjemalca, kot so znamke in ugled, notranje premoženje, kot je nadzor nad informacijami in stroški, premoženje podporne verige, kjer je mišljen odnos med posameznimi členi na tržni poti, in premoženje, vezano na zavezništva, kamor sodi npr. dostop do trga in deljenje tehnologije (Hooley idr., 2001).

4. MERJENJE MARKETINŠKEGA DELOVANJA V SLOVENSKIH PODJETJIH

4.1 RAZISKOVALNA VPRAŠANJA

Na podlagi pregleda literature o merjenju marketinškega delovanja smo si zastavili tri raziskovalna vprašanja, da bi poglobili razumevanje praks merjenja v izbranih uspešnih slovenskih podjetjih. Vprašanja, ki si jih zastavljamo na podlagi teoretičnih izhodišč so naslednja:

- RV_1: Na kakšen način v slovenskih podjetjih merijo marketinško delovanje?
- RV_2: Kakšno vlogo ima merjenje marketinškega delovanja v slovenskih podjetjih za marketinško načrtovanje?
- RV_3: Kako merjenje marketinškega delovanja vpliva na pomembnost oziroma položaj marketinga v slovenskih podjetjih?

Z raziskavo želimo na slovenskih primerih empirično preučiti, na kakšen način v slovenskih marketinških oddelkih poteka merjenje marketinškega delovanja, na primer, katere metrike se uporabljajo za merjenje, kako poteka njihova izbira, kako pogosto se spreminjajo, kakšnih raziskav se poslužujejo ipd. Prav tako želimo ugotoviti, kakšen pomen ima merjenje za marketing in podjetje ter kako vpliva na položaj marketinga znotraj teh podjetij.

Za vsako izmed navedenih raziskovalnih vprašanj smo v intervju vključili podvprašanja, vezana na posamezno raziskovalno vprašanje; tako smo skušali dobiti celovit vpogled na določeno tematiko, ki jo je pokrivalo raziskovalno vprašanje, in pridobiti tudi druge informacije, ki so prav tako pomembne – nekatere predstavljajo iztočnice nadaljnjega raziskovanja.

4.2 METODOLOGIJA, VZOREC IN ZBIRANJE PODATKOV

Odgovore na raziskovalna vprašanja smo pridobili z delno strukturiranimi poglobljenimi intervjuji. Nabor podjetij za intervjuvanje je temeljil na predpostavki, da imajo večja slovenska podjetja večje in verjetno tudi bolje razvite marketinške oddelke, nekatera izmed izbranih podjetij imajo tudi zaposlene direktorje marketinga, ki so bili izbrani (ali pa so kandidirali) za marketinške direktorje leta. Tako smo se povezali z desetimi večjimi slovenskimi podjetji, za katera smo predvidevali, da imajo tudi v praksi dobro razvito marketinško funkcijo. Izmed desetih izbranih so se odzvala štiri, v katerih smo izvedli intervjuje z marketinškimi strokovnjaki na vodilnih položajih. V našem vzorcu so bila štiri večja slovenska podjetja, ki delujejo v telekomunikacijski, prehrambni oziroma energetski industriji. Gre za uspešnejša slovenska podjetja, izmed katerih sta dve pretežno izvozno usmerjeni oziroma jima tuji trgi pomenijo prioriteto v primerjavi z domačim, slovenskim trgom. Intervjuji so potekali poleti 2011 v prostorih izbranih podjetij ter smo jih z dovoljenjem snemali in naknadno zapisali za potrebe kvalitativne analize.

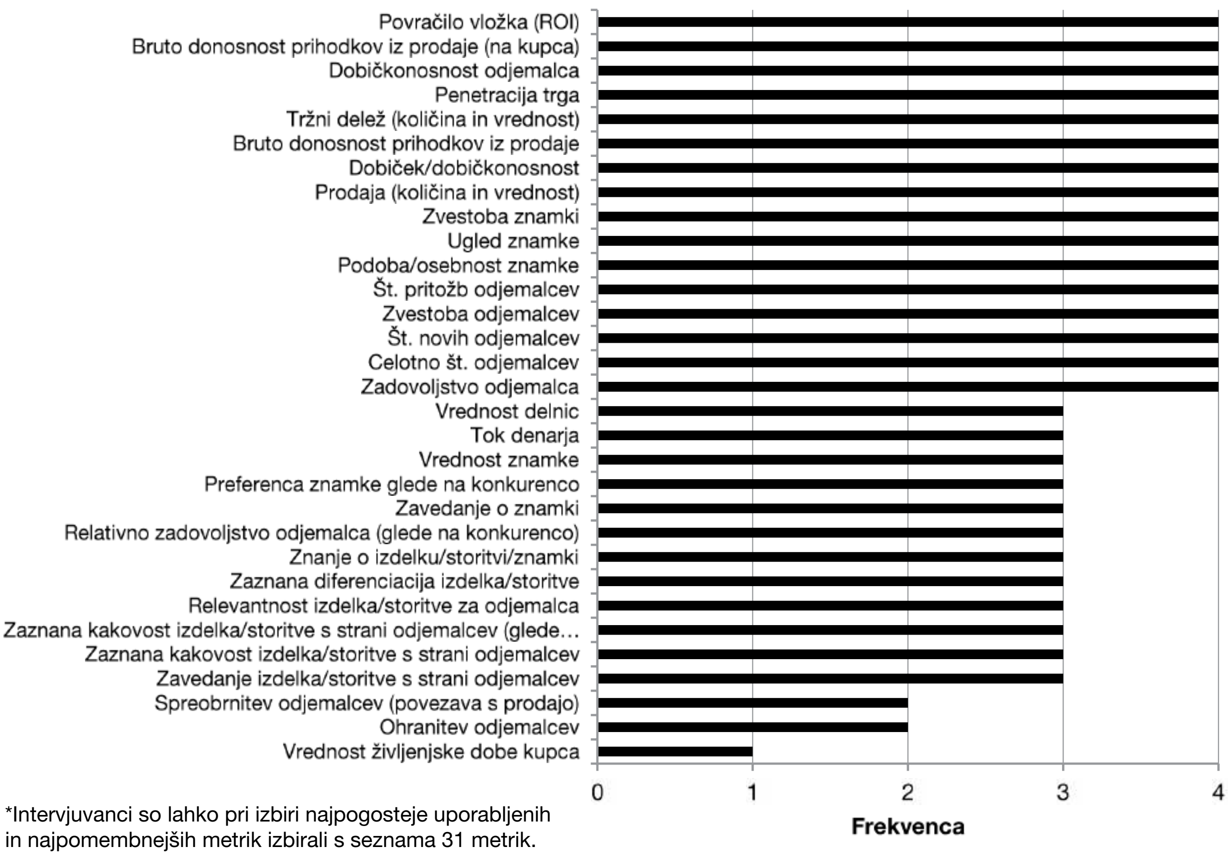
4.3 ANALIZA, PREDSTAVITEV IN INTERPRETACIJA REZULTATOV

Podatke, zbrane v intervjujih, smo analizirali z iterativnim pristopom, ki je v uporabi v kvalitativnem raziskovanju znotraj marketinga in nasploh (npr. Daymon in Holloway, 2002), z namenom redukcije podatkov in oblikovanja perspektiv z interpretativnimi temami, ki izhajajo iz podatkov. V procesu analiz smo podatke organizirali v tematske kategorije, povezane z raziskovalnimi vprašanji (Tabela 2).

Rezultati kažejo, da je sistem merjenja in spremljanja marketinškega delovanja v preučevanih slovenskih podjetjih dokaj razvit in spremljanje marketinškega delovanja poteka dokaj sistematično. Sistemi merjenja in spremljanja, ki jih uporabljajo, so precej dovršeni, saj podjetja z različnimi orodji in programi poenostavljajo merjenje in si tako olajšajo pridobivanje pomembnih podatkov za pripravo marketinških aktivnosti. Tri izmed štirih podjetij prikazovanje podatkov poenostavljajo z uporabo standardne preglednice merjenja marketinškega delovanja[5], na kateri bi bilo treba v prihodnje še graditi in vanjo več vlagati, saj je trenutno v začetnih fazah razvoja oziroma še ni uporabljena v obliki, v kakršni podjetju prinaša največje prednosti. Preglednica vključuje vse metrike in vse pridobljene podatke iz raziskav, ki so v obliki daljših mesečnih poročil in/ali PPT predstavitve. Enostranski prikaz preglednice pa sicer združuje številne metrike, kar v veliki meri znižuje porabljeni čas za argumentiranje in pospešuje sprejemanje odločitev, vendar vizualne metode omogočajo enostavno predstavitev ključnih metrik ter vzročno povezanost med marketinškimi napori in (finančnimi) rezultati na vsakomur razumljiv način (LaPointe, 2005).

5 Pojma »standardna preglednica merjenja marketinškega delovanja« v teh treh podjetjih, ki preglednico uporabljajo, ni bilo potrebno posebej pojasnjevati, saj so takoj ob omembi vedeli, za kaj točno gre (v Podjetju 4, kjer preglednice ne uporabljajo, je bila potrebna razlaga, saj pojma niso poznali). Pri tem naj izpostavimo, da smo v intervjujih pri vprašanju o standardni preglednici omenili tudi angleški izraz »dashboard«, saj smo bili mnenja, da bo to pripomoglo k boljšemu razumevanju tega, kar sprašujemo. V podjetjih uporabljajo tudi angleški izraz.

Graf 1: Najpogosteje uporabljene metrike merjenja marketinškega delovanja*



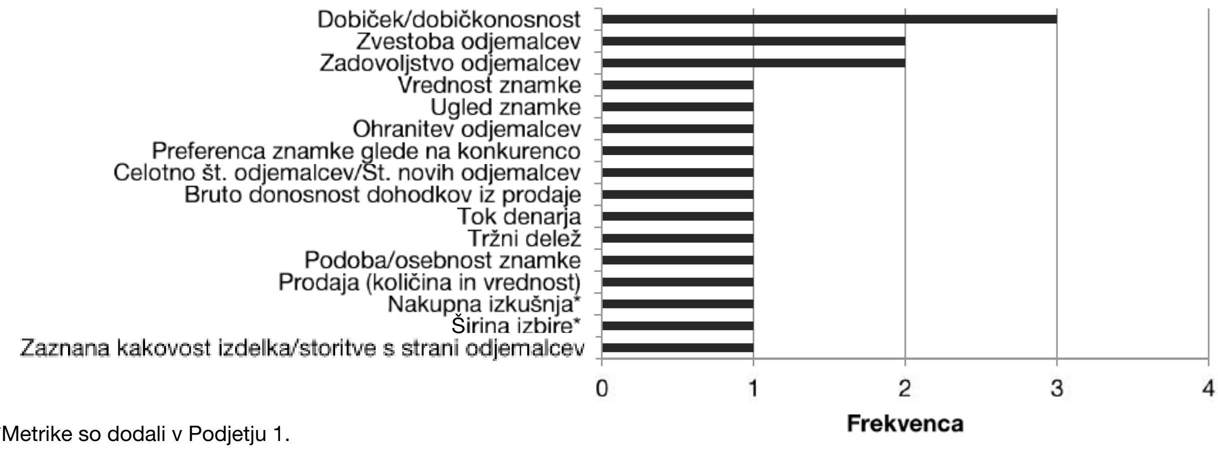
*Intervjuvanci so lahko pri izbiri najpogosteje uporabljenih in najpomembnejših metrik izbirali s seznama 31 metrik.

Tabela 2: Predstavitev rezultatov raziskave po posameznih podjetjih (primerjava po ključnih značilnostih merjenja marketinškega delovanja)

Značilnosti / Podjetje	PODJETJE 1	PODJETJE 2	PODJETJE 3	PODJETJE 4
Industrija	Prehrambna industrija, delovanje v Sloveniji in v tujini	Telekomunikacije	Večja korporacija, ki združuje več podjetij s področja prehrambne industrije, delovanje v Sloveniji in v tujini	Večja korporacija, ki združuje več podjetij s področja prehrambne industrije, energetike
Velikost podjetja	Veliko	Veliko	Veliko	Veliko
RV1: NA KAKŠEN NAČIN V SLOVENSKIH PODJETJIH MERIJO MARKETINŠKO DELOVANJE?				
- ***Razvitost sistema MMD***	Precej razvit, ker ima marketing dobro pozicijo v podjetju	Precej razvit, ker ima marketing dobro pozicijo v podjetju	Precej razvit, ker ima marketing dobro pozicijo v podjetju	Slabše razvit, saj vodstvo meni, da marketing v veliki meri ne prispeva k uspehu podjetja
- ***Delovanje sistema MMD***	• izbira metrik glede na tržne usmeritve, strategijo in panogo • pomen kontinuitete merjenja – stalno merjenje in spremljanje ključnih metrik • spreminjanje metrik v primeru reorganizacije, postavitve novih strateških usmeritev, nekoliko tudi glede na spremenljivost trga • kontinuirane in ad hoc raziskave v podjetju, večinoma pa preko marketinških agencij – spremljanje in primerjava s konkurenco v ključnih metrikah • vrsta metrik: vse tri skupine; marketingu in vodstvu pomembnejše nefinančne • pomen kombiniranja in primerjanja metrik: iskanje povezav, primerjava rezultatov z obdobji za nazaj	• izbira metrik glede na strategijo podjetja, zahteve vodstva in lastnikov, svetovne trende, spremenljivost trga in panogo • pomen kontinuitete merjenja – stalno merjenje in spremljanje ključnih metrik • spreminjanje metrik v primeru nove strategije, novih ciljev • kontinuirane in ad hoc tržne raziskave – spremljanje in primerjava s konkurenco v ključnih metrikah • vrsta metrik: vse tri skupine; za lastnike in vodstvo so pomembnejše finančne metrike, marketingu so pomembnejše nefinančne • pomen kombiniranja in primerjanja metrik: iskanje povezav med finančnimi in nefinančnimi, primerjava rezultatov z obdobji za nazaj	• izbira metrik glede na spremembe v industriji, makrookolje in znanje • kontinuirane in ad hoc raziskave v podjetju, večinoma pa preko Nielsen raziskav – spremljanje in primerjava s konkurenco v ključnih metrikah • vrsta metrik: vse tri skupine; finančne in nefinančne enako pomembne • pomen kombiniranja in primerjanja metrik: iskanje povezav med finančnimi in nefinančnimi, primerjava rezultatov z obdobji za nazaj	• izbira metrik glede na strategijo, kaj koristi podjetju v prihodnje • pomen kontinuitete merjenja – stalno merjenje in spremljanje ključnih metrik (zaradi primerljivosti rezultatov, spremljanje sprememb skozi leta) • spreminjanje metrik v primeru uvajanja novosti in glede na spremenljivost trga, trende, celotno okolje in konkurenco • kontinuirane raziskave v podjetju, večinoma pa preko Nielsen raziskav – spremljanje in primerjava s konkurenco v ključnih metrikah • vrsta metrik: vse tri skupine; za vodstvo so pomembnejše finančne metrike, marketingu so pomembnejše nefinančne • pomen kombiniranja in primerjanja metrik: iskanje povezav med finančnimi in nefinančnimi
- ***Uporaba rezultatov MMD***	• osnova za marketinške aktivnosti in strategijo • spremljanje trendov, konkurence • kje se podjetje nahaja v okolju • kje so potrebne izboljšave • kakšen vpliv imajo določene zadeve na neko aktivnost	• prilagajanje delovanja glede na situacijo na trgu • spremljanje delovanja konkurence • spremljanje, kaj je bilo, učenje za naprej • na osnovi rezultatov se naredijo načrti za prihodnje leto	• spremljanje in upravljanje znamk, podjetja • analiza stanja in ukrepanje za vnaprej • kje se podjetje nahaja • uspešno zastavljanje strategije za naprej • podjetje lahko predvideva, kaj se bo dogajalo v prihodnosti	• dokazovanje učinka marketinga • evalvacija za nazaj • načrtovanje za naprej – veš, kako se strateško usmerjati v prihodnje • kje je podjetje, kaj še potrebuje izboljšave • lažje odločanje, ker so odločitve podprte z rezultati za nazaj
- ***Uporaba standardne preglednice merjenja marketinškega delovanja (=dashboard)***	Da – okrnjena oblika (vključuje vse podatke, ne le ključne): mesečno pošiljanje preko e-pošte v obliki PPT predstavitve	Da – uporaba »statičnega dashboarda« preko e-pošte (vključuje vse podatke, ne le ključne); pripravlja se »dinamični dashboard« preko intraneta podjetja	Da – okrnjena oblika: poročila	Ne, vendar si želijo implementacije – lažje dokazovanje učinka marketinga

RV2: KAKŠNO VLOGO IMA MERJENJE MARKETINŠKEGA DELOVANJA V SLOVENSKIH PODJETJIH ZA MARKETINŠKO NAČRTOVANJE?				
- ***Dokazovanje učinka marketinga***	• Marketing prispeva k poslovanju podjetja (razvidno iz rezultatov).	• Marketing prispeva k poslovanju podjetja (razvidno iz rezultatov).	• Marketing prispeva k poslovanju podjetja (razvidno iz rezultatov).	• Ustrezen sistem bi pripomogel k dokazovanju učinka marketinga.
- ***Izboljšanje delovanja marketinga***	• Merjenje kaže, kje se mora podjetje še izboljšati, kje je potrebna dodatna pozornost.			• Rezultati kažejo, kje je podjetje, kje so potrebne izboljšave.
- ***Evalvacija za nazaj in spremljanje trenutnega delovanja***	• primerjava rezultatov z obdobji za nazaj • Rezultati kažejo, kje se podjetje nahaja v okolju in glede na konkurenco. • Merjenje omogoča ugotavljanje, kakšen vpliv imajo določene zadeve na neko aktivnost. • spremljanje kazalnikov učinkovitosti poslovanja, kako podjetje stoji	• primerjava rezultatov z obdobji za nazaj • prilagajanje delovanja glede na situacijo na trgu • omogoča follow-up proces – spremljanje kampanj	• primerjava rezultatov z obdobji za nazaj • rezultati kažejo, kje se podjetje nahaja v okolju in glede na konkurenco • omogoča spremljanje uspešnosti (podlaga za upravljanje znamk in podjetja) • Rezultati omogočajo analizo stanja.	• primerjava rezultatov z obdobji za nazaj • rezultati kažejo, kje se podjetje nahaja v okolju in glede na konkurenco
- ***Načrtovanje prihodnjega delovanja***	• Rezultati predstavljajo osnovo za marketinške aktivnosti in strategijo. • Rezultati kažejo, kje se podjetje mora še izboljšati, kar se upošteva pri prihodnjem načrtovanju.	• Na osnovi rezultatov merjenja se pripravijo načrti za prihodnje leto – spremljanje, kaj je bilo, učenje za naprej.	• Merjenje omogoča ukrepanje za vnaprej (na osnovi analize stanja). • Metrike kažejo podjetju pot naprej, prihodnje usmeritve. • Podjetje lahko predvideva, kaj se bo dogajalo v prihodnosti. • Merjenje omogoča uspešno zastavljanje strategije za naprej.	• Rezultati merjenja podjetju kažejo, kako se strateško usmerjati v prihodnje. • Tako lahko podjetje gradi na tistem, kar ima potencial v prihodnosti. • Rezultati podjetje usmerjajo, katere aktivnosti naj izvaja v prihodnje. • Merjenje omogoča uspešno zastavljanje, tudi dopolnjevanje in nadgrajevanje marketinške strategije za naprej.
- ***Druge prednosti sistema MMD***		• časovno veliko manj zamudno • standardiziranost (npr. vizualni standardi) olajšana kompleksnost, zelo hitro in urejeno poročanje		• lažje odločanje, ker so odločitve podprte z rezultati za nazaj
RV3: KAKO MERJENJE MARKETINŠKEGA DELOVANJA VPLIVA NA POMEMBNOST OZIROMA POLOŽAJ MARKETINGA V SLOVENSKIH PODJETJIH?				
- ***Marketinški proračun***	• stalen • ni si ga težko »izboriti« • za MMD namenjeno 15 % marketinškega proračuna	• spreminja se na osnovi postavljene strategije, glede na rast stroškov, inflacijo, gospodarsko krizo • Ni si ga težko »izboriti«. • za MMD namenjen manjši del	• Za različne trge se različno vlaga. • Ni si ga težko »izboriti«. (pomen argumentacije) • Težko je oceniti, koliko je namenjeno za MMD.	• stalen: 1 % od prihodkov • težko si ga je »izboriti«. • za MMD namenjen precejšen znesek
- ***Pomen marketinga za poslovanje podjetja***	• Marketing prispeva k poslovanju podjetja, kar verjame tudi vodstvo.	• Marketing pomembno prispeva k uspehu podjetja.	• Marketing ima ključno funkcijo, saj ustvarja vrednost – najpomembnejša funkcija podjetja.	• marketing kot strateška funkcija • velik doprinos marketinga k poslovanju podjetja, česar vodstvo ne pripoznava
- ***Zadovoljstvo z marketingom***	• marketinški oddelek: zelo zadovoljen • vodstvo: zelo zadovoljno	• marketinški oddelek: zelo zadovoljen • vodstvo: zelo zadovoljno	• marketinški oddelek: zelo zadovoljen • vodstvo: zelo zadovoljno	• marketinški oddelek: nezadovoljen • vodstvo: drugače gleda na marketing (strošek)
- ***Položaj marketinga v podjetju***	• visoka pozicija	• visoka pozicija, povezanost vodstva z marketingom	• visoka pozicija, ker se marketing razume kot nekaj, kar ustvarja vrednost podjetja	• slabša pozicija marketinga, ker vodstvo ne pripoznava pomena in učinka marketinga
- ***Marketing kot investicija/strošek***	• investicija	• investicija, v določeni meri pa tudi strošek (denar bi se lahko porabil za kaj drugega)	• investicija – marketing je edini, ki prispeva k dobičku	• strošek (s strani vodstva), čeprav v marketingu verjamejo, da gre za investicijo

Graf 2: Najpomembnejše metrike merjenja marketinškega delovanja



*Metrike so dodali v Podjetju 1.

Podjetja najprej izberejo ključne metrike za spremljanje marketinškega delovanja, pri čemer upoštevajo številne dejavnike – spremenljivost trga, panogo, strategijo in situacijo podjetja, tržne usmeritve, spremembe okolja in trende v svetu, kar Grønholdt in Martensen (2006: 250) izpostavljata kot zelo pomembne dejavnike presoje izbire metrik. Naj še omenimo, čeprav so nefinančne metrike za marketinške oddelke nekoliko pomembnejše, lastniki in vodstvo dajejo večji poudarek finančnim metrikam, kar so ugotovili tudi Ambler in drugi (2004: 480). V vseh podjetjih pa kljub temu merijo tako finančne in nefinančne metrike oziroma metrike, povezane z miselnimi procesi in rezultati vedenja, ter finančne metrike. Graf 1 prikazuje frekvenco uporabe ključnih metrik v preučevanih podjetjih, graf 2 pa prikazuje frekvenco metrik, ki so jih v preučevanih podjetjih označili kot najpomembnejše metrike merjenja marketinškega delovanja.

V preučevanih podjetjih dajejo velik pomen kontinuiteti merjenja, ki omogoča primerjavo z leti za nazaj. Izbrane metrike nato predvsem kontinuirano merijo in spremljajo z različnimi raziskavami. Metrike primerjajo in kombinirajo med seboj na različne načine, da dobijo celoten vpogled v marketinško delovanje:

> »/…/ v zadnjem času smo s temi kazalci začeli res … jih povezovat med sabo in ne gledamo samo finančne finančniki, tržne tržniki*, pa ne vem, prodajne prodajniki, ampak vse te kazalce povezujemo med sabo, da dobimo celotno sliko. /…/ vedno, vedno kombiniramo, ker vemo, da številke ti lahko pokažejo sto različnih stvari, odvisno kako gledaš, ne. In če imamo pogled s finančnega in nefinančnega vidika, nam to lahko največ pove*« (Intervjuvanec 2, 2011).

Prilagajanje oziroma pripravljanje marketinških aktivnosti in strategije tako temelji na trdnih temeljih, saj podatki različnih raziskav dajejo podjetju zanesljive in konkretne rezultate, kar poenostavlja odločanje za naprej. Ker so odločitve podprte z rezultati, je tudi veliko laže zagovarjati odločitve. Te značilnosti kažejo na učinkovitost sistemov merjenja (Morgan in drugi, 2002: 371).

Poročila o merjenju v treh izmed štirih podjetij posredujejo ustreznim osebam prek standardne preglednice merjenja marketinškega delovanja, ki je v preučevanih podjetjih trenutno v uporabi sicer v precej okrnjeni obliki.

Sistematičnost merjenja in spremljanja marketinškega delovanja ima po mnenju intervjuvancev velik pomen. Sistematično merjenje izboljšuje delovanje marketinga, hkrati pa raziskave merjenja marketinškega delovanja omogočajo dokazovanje učinka marketinga, saj se marketinške aktivnosti, ki jih podjetje izvaja, odražajo v (finančnih) rezultatih podjetja. Na to sta opozorila tudi O'Sullivan in Abela (2007: 88–90), ki sta poudarila, da se implementacija merjenja marketinškega delovanja odraža v boljšem marketinškem delovanju in delovanju podjetja ter vpliva na izboljševanje položaja marketinga v podjetju:

> »/…/[spremljanje marketinškega delovanja] doprinese k pomenu, ker se vidi, da je na koncu v bistvu neki efekt marketinga, da dejansko aktivnosti, katere delaš, za katere nameniš toliko pa toliko v končni fazi energije, truda, finančnih sredstev, da se nekje odraža njihov efekt, da se vidi, da so bile uspešne, da dejansko ni bil v končni fazi stran vržen denar /…/« (Intervjuvanec 4, 2011).

Merjenje marketinškega delovanja omogoča spremljanje preteklega in sedanjega delovanja.

Podjetja na podlagi teh rezultatov prilagajajo svoje delovanje in načrtujejo prihodnost.

> »Ker ko, ne vem, je prvo četrtletje leta mimo, pogledamo*, kako je bilo dejansko stanje, pa rečemo, tam smo dobri, tam smo slabši, kaj lahko spremenimo, kaj lahko zgubimo, da nas še vedno pripelje do končnega cilja, ne«* (Intervjuvanec 2, 2011).

> »/…/tako tudi vedno vidimo, kako so kaj naši tržni deleži, kakšna je bila naša pozicija, kje smo, kam bi radi prišli. Na podlagi tega tudi vidimo, na katerem produktu treba delati v prihodnje, v katerih geografskih predelih Slovenije smo recimo najbolj šibki*, in te tak usmerjamo tudi naše marketinške aktivnosti v prihodnje, ne«* (Intervjuvanec 4, 2011).

V treh izmed štirih podjetij pravijo, da si proračuna za marketing ni težko »izboriti«, saj se z dobro argumentacijo da marsikaj zagovarjati in posledično tudi dobiti določen odstotek proračuna podjetja. V teh podjetjih so zelo zadovoljni z marketingom, ker je ta dobro organiziran, ima visok položaj in pomembno funkcijo ter je razumljen kot investicija. Tudi vodstva so v teh treh podjetjih zelo zadovoljna z marketingom, ki ima dobro pozicijo, saj je vodstvo precej povezano z marketingom in ga razume kot nekaj, kar ustvarja vrednost podjetja.

5. SKLEP, OMEJITVE IN NADALJNJE RAZISKOVANJE

Osrednji namen prispevka je bil preučiti sistematičnost merjenja marketinškega delovanja v slovenskih podjetjih. Pri tem smo izhajali iz teoretičnih spoznanj različnih avtorjev, ki poudarjajo, da je merjenje pomemben del načrtovanja in izvajanja marketinških aktivnosti. Avtorji pri merjenju zagovarjajo celovito obravnavo čim več elementov, prilagajanje okolju in upoštevanje nefinančnih elementov merjenja, ki so za marketinške strokovnjake včasih celo bolj koristni in povedni od zgolj finančnih.

Dokazovanje učinkovitosti in uspešnosti marketinga je neposredno povezano s položajem marketinga v podjetjih, saj je od doprinosa marketinga k uspehu podjetja (oziroma od zmožnosti ta doprinos dokazati) odvisna zaznava marketinških aktivnosti kot investicije ali kot stroška. To je nakazala tudi naša raziskava. Marketinški direktorji v preučevanih podjetjih verjamejo, da merjenje marketinškega delovanja pripomore k dokazovanju uspešnosti marketinga, prav tako pa menijo, da ima razumevanje za to tudi vodstvo podjetja. Marketing se v večini preučevanih podjetij razume kot investicija za prihodnost in kot ključna strateška funkcija v podjetju, saj ustvarja njegovo vrednost– posledično ima funkcija v podjetju tudi boljši položaj in večjo kredibilnost.

Sistem merjenja marketinškega delovanja v preučevanih podjetjih se lahko primerja s tujo prakso, opisano v literaturi. Nekoliko zaostaja le z implementacijo standardne preglednice merjenja marketinškega delovanja, ki postaja v praksi pomembna zaradi enostavnosti in preglednosti. Je pa spodbudna misel, da je preglednica v slovenskih podjetjih v fazi razvoja ali nadgradnje, kar pomeni, da sledijo drugim uspešnim podjetjem po svetu.

Raziskava ima nekatere omejitve, ki jih je treba izpostaviti, saj lahko pomagajo pri oblikovanju in izvedbi prihodnjih raziskav. Vseh elementov zaradi prostorske omejenosti nismo podrobno raziskali, zato nekatere ideje za zdaj ostajajo na papirju ter predstavljajo možnosti in izhodišča prihodnjega raziskovanja, ki bi s podrobnejšimi analizami lahko še v večji meri osvetlilo merjenje marketinškega delovanja v slovenskih podjetjih.

V prihodnje bi bilo zanimivo natančneje preučiti povezave med položajem in pomenom marketinga v podjetju ter med razvitostjo sistema merjenja marketinškega delovanja; prav tako povezanost med uspešnostjo in učinkovitostjo sistema ter uspešnim poslovanjem podjetja. Tovrstne ugotovitve bi dodatno pokazale, kakšen učinek ima lahko dober marketing za posamezno podjetje in kakšno pozicijo mora imeti znotraj podjetja.

Prihodnje raziskave bi bilo dobro še razširiti in poglobiti. V Podjetju 2 so omenili, da za povezovanje podatkov in spremljanje rezultatov uporabljajo določene programe, ki jim v veliki meri poenostavljajo merjenje in spremljanje marketinškega delovanja. Smiselno bi bilo pregledati programe, kar bi dalo boljši vpogled v način primerjanja podatkov; kakšno je in kakšno mora biti komuniciranje z zaposlenimi preko sistema, ali je bolje, da vsi vidijo vse podatke ali raje samo nekatere glede na funkcijo. Prav tako bi bilo zanimivo podrobneje raziskati, kdo točno meri katere specifične metrike in katere marketing zgolj spremlja. V raziskavi smo ugotovili, da glavnih treh skupin metrik ne meri nujno marketinški oddelek, ampak tudi nekateri drugi oddelki (finance, prodaja, investicije, kontroling), vendar se tudi rezultati njihovega merjenja spremljajo in upoštevajo pri podajanju celotne ocene marketinškega delovanja. Pri tem bi bila zanimiva ugotovitev, ali je takšen način porazdelitve merjenja med več oddelkov ustrezen, saj nekateri avtorji (npr. Ambler in Roberts, 2007: 241–242) kolebajo med tem, ali naj vse meri marketinški oddelek sam ali pa je bolje, če se to prepusti kar finančnikom.

Pomembna je tudi standardna preglednica merjenja marketinškega delovanja, ki v še večji meri poenostavlja pridobivanje in analiziranje podatkov. V preučevanih podjetjih pravijo, da preglednica zanje pomeni nadaljnjo stopnjo razvoja sistema, zato bi bilo dobro preveriti, ali to velja, kakšne konkretno so prednosti in kaj pomenijo za podjetje.

Ena izmed omejitev raziskave je majhen, nereprezentativen vzorec večjih slovenskih podjetij. Za dopolnitev in razširitev ugotovitev bi bilo smiselno izvesti dodatne, tudi kvantitativne raziskave, da bi se te ugotovitve potrdile na dovolj velikem vzorcu, s čimer bi dobili boljšo in bolj zanesljivo sliko o merjenju marketinških aktivnosti v večjih slovenskih podjetjih, saj pridobljeni rezultati iz raziskave ponujajo vpogled v merjenje marketinškega delovanja v zgolj nekaterih večjih slovenskih podjetjih. Za natančno preučitev sistematičnosti merjenja marketinškega delovanja bi lahko napravili tako kvalitativno kot kvantitativno analizo, in sicer bi globinske intervjuje kombinirali z anketnim vprašalnikom. Tako bi bili odgovori v intervjujih izčrpni in podrobni, hkrati pa bi z anketnim vprašalnikom spoznali profil posameznega podjetja. To bi omogočilo pridobitev drugih ugotovitev, npr. raznih dejavnikov, ki vplivajo na merjenje (velikost podjetja; panoga, v kateri podjetje deluje; uspešnost podjetja; velikost marketinškega oddelka oziroma število zaposlenih v marketingu; marketinški proračun; povezanost in integriranost marketinškega oddelka z drugimi oddelki ipd.).

Rezultati in ugotovitve, kljub nekaterim pomanjkljivostim, prispevajo svoj delček k razumevanju sistematičnosti merjenja marketinškega delovanja v slovenskih podjetjih in razvoju pri nas v veliki meri še neraziskanega področja. Prispevek predstavlja dobro izhodišče za prihodnje raziskovanje. Ne nazadnje pa rezultati raziskave ponujajo tudi vpogled v prednosti merjenja marketinškega delovanja, kar je lahko motivacija za slovenske marketinške strokovnjake, da uvedejo sistem merjenja, lahko pa tudi pomaga »razsvetliti« vodstva podjetij in prispeva k boljšemu razumevanju marketinške funkcije v slovenskih podjetjih.

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Gartner, W.C., & Bachri, T. (1994). Tour operators' role in the tourism distribution system: An Indonesian case study. *Journal of International Consumer Marketing*, *6*(2), 161-179.

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Chapters in Books
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Članki v revijah
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Knjiga
Aaker, D., & Joachimsthaler, E. (2000). *Brand leadeship*. New York: The Free Press.

Poglavje v knjigi
Gartner, W.C. (1993). Image formation process. In M. Uysal, & D.R. Fesenmaier (Eds.), *Communication and Channel Systems in Tourism Marketing* (pp. 191–215). New York: The Haworth Press.

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