

THOMSON

营销学精选教材·英文影印版

ADVERTISING, PROMOTION, AND OTHER ASPECTS
OF INTEGRATED MARKETING COMMUNICATIONS

整合营销传播

广告、促销与拓展

[第7版]

Terence A. Shimp 著



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Terence A. Shimp

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出版者说明

进入 21 世纪,市场营销科学在中国开始向纵深发展,一方面,广大营销学者继续追踪国际学术界在市场营销研究前沿的探索 and 深化,另一方面,学者们也在致力于发展对中国现实更具解释力的营销理论,并且在这两个方面,都取得了非常实质性的进步和成果。营销学是一门应用科学,随着社会和经济的发展,许多新问题、新现象不断出现,新的营销理论和观点也纷纷出现,国内外学术界的研究兴趣点也就相应发生变化。在中国,营销现实日渐变得丰富多样,理论研究逐步规范化和科学化,高等院校的教学内容和方式也随之发生了很大变化,教师和学生都不再满足于 20 世纪 80 年代引进的一批偏重管理学的“营销学理论”教科书。营销学科在中国的日渐成熟和发展,迫切要求具有更高学术水平和更强现实指导能力的教科书,不但能够带给学生最前沿、最深刻的学术思想和从事研究的科学方法,而且教给学生在实际工作中进行正确决策的科学指导。

基于此,北京大学出版社引进出版了《营销学精选教材》系列丛书(本丛书包括影印版和翻译版,个别影印版有局部删节),在选择这些书的过程中,我们得到了北京大学光华管理学院郭贤达老师,西安交通大学管理学院庄贵军老师,武汉大学经济管理学院汪涛老师,大连理工大学管理学院董大海老师,中国人民大学商学院李先国老师等学者的真诚帮助,在此,对他们表示最诚挚的感谢!我们希望这些书带给广大读者的是对营销科学的兴趣和激情,是深刻的学术思想和科学的研究方法,是从事营销实际工作时最好用的工具,同时也是广大教师和学生最好用的教科书。

《营销学精选教材》是一个开放的系列,根据现实情况的发展和需要,我们还会陆续引进其他品种,在此,诚邀各位专家学者热情推荐优秀的营销学图书(em@pup.pku.edu.cn)。此外,真诚欢迎广大读者在使用过程中对我们的图书提出宝贵的意见和建议。

北京大学出版社
经济与管理图书事业部
2005 年 12 月

20 世纪 80 年代,市场营销学开始在我国迅速传播和发展。80 年代以来,设立该专业或开设市场营销学课程的高等院校数量显著增多,研究工作亦有显著的进展。尤其是 90 年代以来,随着中国市场化改革进程的加快,社会急需大量的受过专业训练的营销人才,更是推动了我国高等院校中市场营销专业教育的迅猛发展。自此以后,市场营销学可以说是基本上实现了在我国的启蒙和普及。

随着第一阶段启蒙和普及目标的实现,当前国内对于市场营销的研究和教育开始向两个方向发展:其一就是对当前国际学术界在市场营销研究前沿的追踪和深化;其二就是结合国内市场环境的特点和经济发展的需要,实现市场营销理论的本土化,发展对中国现实更有解释力的市场营销理论。我想,这两个方向会在相当长一段时间内影响国内市场营销学的研究和教育。

营销研究的转型必然要求营销知识的传播机构,主要包括高等教育机构以及出版机构,也要做相应调整。以出版为例,在 20 世纪营销知识的传播和普及中,出版机构扮演着非常重要的角色。实际上,正是菲利普·科特勒博士的《营销管理》教材的引入(我印象中最早的版本是科学技术文献出版社出版的第 6 版)奠定了国内营销研究的学科基础,而该书从第 6 版直到第 11 版的先后引入,也见证了国内市场营销学科快速发展的历程。可以说,在国内其他领域,还很少看见一本教材会对一个学科的教学和研究能产生如此巨大和广泛的影响。然而,从另一个角度,这也许同样暴露出当前国内营销知识传播中所面临着的尴尬境地:如果说一门学科可以只用一本教科书来概括,至少说明我们对这个学科的理解和解说还缺乏足够的甚至是必要的张力和活力。

首先,按照美国市场营销学会会刊主编瓦格纳·卡马库拉的观点,市场营销学是在管理学、行为科学(心理学和社会学)和定量分析(数学和计量经济学)这三门较成熟学科的基础之上发展起来的独立学科。因此,市场营销学之中有三个侧重:侧重于管理学的叫做“市场营销学理论”,侧重行为科学的称为“消费者行为学”,而侧重营销方法论以及由此延伸出的定量分析手段的则是“市场营销科学”。所以,在市场营销的知识体系中,科特勒博士的《营销管理》只是涉及市场营销理论部分(我个人认为,本书只是营销学的入门读物,对于研究生以上层次并不适用),而营销科学(研究方法)以及消费者行为理论却没有得到同样的重视。

其次,不可否认,科特勒博士的《营销管理》确实是一本非常好的教材,他为市场营销学构建了一个较为全面的分析框架,但是他更强调一个完善的理论体系的勾勒,强调对众家之言的兼容并包,对该体系中的很多主题,却缺乏更详细的扩展和讨论。例如,渠道策略和价格策略是该书公认的薄弱章节。

最后,有些新的营销理论和观点,由于研究视角和范式的不同,很难被该书兼容,因而得不到全面的体现,如服务营销、关系营销以及组织市场营销等。

因此,也许除了科特勒,我们还应该再看点别的。

所以,我们迫切需要更加丰富和高质量的市场营销出版物。

北京大学出版社所引进出版的“市场营销学精选教材”则很好地顺应了这一要求。目前入选该套丛书的著作有三本,分别是 Roland T. Rust, Katherine N. Lemon 和 Das Narayandas 合作撰写的 *Customer Equity Management*, Roger J. Best 教授撰写的 *Market-based Management: Strategies for Growing Customer Value and Profitability* 以及 James C. Anderson 与 James A. Narus 撰写的 *Business Market Management: Understanding, Creating, and Delivering value*。这是一个开放性的书系,以后还将根据需要,陆续引进其他的品种,欢迎各位专家学者的推荐。

这些入选著作有一些共同特点:其一,这些作者均系出名门,具有深厚的理论素养,在各自领域中均为蜚声世界的大家。其二,虽然这些著作都具有极强的学术价值,但全然不是“书斋的学问”。由于这些作者在理论研究之余,均具有丰富的咨询和实践经验,这就决定了这些著作不会耽于说教、“语言无味,面目可憎”,而是深入浅出,令人耳目一新。

一般说来,一本好的营销学教材应该具备如下的重要特点:首先,一本好书应根植于对某一领域的实际研究,而许多书籍只是给学生提供了一个基于抽象的理论基础上的简单的提纲。另外,一本好书应该让学生和营销实践者们很容易看懂,并能在其指导下制定成功的策略,为此,好的教材应列举大量的相关案例,分析具有创造性的策略并结合实际进行评述。而很多书籍要么在论述时缺乏丰富的案例,要么在分析时缺乏理论的深度。

而在这两方面,该套丛书均表现出优秀教材的素质:大度、深刻且平易近人,相信它不仅对于市场营销理论的研究和学习,而且对于营销实务的操作和实践,都是极好的指南。

江涛

武汉大学市场营销系教授

2005年10月于珞珈山

关于本书

适用对象

本教材适用于本科生或研究生的营销传播、广告、促销战略、促销管理及相关课程。

内容简介

Terence A. Shimp 所著的《整合营销传播：广告、促销与拓展》(第 7 版)将营销传播各个方面的理论与实践结合在一起,既具有丰富的实质性内容又具有很强的可读性,既反映出该领域的前沿思想又注重其发展演变,是当前市场上的领先教材。本教材除了一如既往地强调经受过时间考验的整合营销传播方法,还进行了重要的修订,以期反映该领域新的学术文献和实践方面的进展。

作者简介

Terence A. Shimp 在肯特州立大学(Kent State University)任教四年之后,加盟到南卡罗来纳大学(University of South Carolina)。在此后的二十多年中,他在南卡罗来纳大学担任营销学教授及营销学系项目主任,他还是 W. W. Johnson 基金会的优秀教师。Shimp 博士是 Robert Hill Carter 的冠名教授。他的研究领域包括消费者学习、劝说、对营销传播和广告的反饋等方面。他曾经获得过九项教学奖。

主要特色

- 本教材之前的六个版本,一直注重既从消费者的角度又从商家的角度考量营销传播,并试图在其中寻求一个平衡。而第 7 版却将重心稍稍偏移到营销传播的管理方面,以市场为导向的营销传播在第 7 版中也得到了比以往更多的关注。

- 本教材提供了营销传播各个方面的前沿理论及实践素材,这些内容符合学生的理解水平,并以大量实例的形式得以展示,包括营销传播面临的挑战、营销传播聚焦以及全球聚焦等。

营销传播面临的挑战——以一个与该章主题安排相一致的实例开篇,以激发学生的兴趣,并说明随后的内容安排。

营销传播聚焦——这部分内容已经进行了重新的修订以便进一步说明营销传播的关键概念,每一章均以现实中的公司为例,以说明营销传播的各个方面是如何运用于实践的。

全球聚焦——这些经过修订的部分提升了本书的全球视野,使公众更为关注营销传播的全球化运用。

- 第 7 版仍沿用了第 6 版 20 章内容的体例安排,但是对一些章节进行了重新的编写和组织安排以使内容更具逻辑性。

教辅产品

请反馈本书最后的“教学支持服务”表,汤姆森公司将免费提供相应教辅。

Dedication

To my dear wife, Judy, who has been my number-one supporter over the years, and who helped me on this edition by locating advertising illustrations and other visuals. Since the previous edition, I have been blessed with two additional grandsons, John Parker and Spencer James—now the twenty-first-century version of a basketball team is in place (my brothers know what I refer to). Also, to all of my family members, past and present, to whom I owe whatever positive character traits I may possess, a heartfelt word of appreciation and love.

PREFACE

Responding to a Dynamic World

The field of marketing communications is ever-changing. Brand managers continually attempt to gain advantage over competitors and endeavor to achieve larger market shares and profits for the brands they manage. Marketing communications, or *marcom*, is just one element of the marketing mix, but advertising, promotions, marketing-oriented public relations, and other marcom tools perform increasingly important roles in firms' quests to achieve financial and nonfinancial goals. Marcom practitioners are confronted with the rising costs of placing ads in traditional advertising media (television, magazines, and so on) and are aggravated by the ever-growing clutter when advertising in these media. For these reasons, advertising and promotion budgets are beginning to shift away from traditional media and toward the Internet, which in recent years has become an important advertising medium both as a means of accessing difficult-to-reach groups (such as college-age consumers) and in providing numerous options for presenting advertising messages and promotional offers to these groups.

Marketing communicators realize now more than ever that their advertising, promotion, and other marcom investments must be held financially accountable. Companies continually seek more effective ways of communicating effectively and efficiently with their targeted audiences. Marketing communicators are challenged to use communication methods that will break through the clutter, reach audiences with interesting and persuasive messages that enhance brand equity and drive sales, and assure that marcom investments yield an adequate return on investment. In meeting these challenges, companies increasingly embrace a strategy of integrated marketing communications whereby all marcom elements must be held accountable for delivering consistent messages and influencing action.

Focus of the Text

Whether a student is taking this course to learn more about the dynamic nature of this field or to make a career in advertising, promotions, or some other aspect of marketing, *Integrated Marketing Communications in Advertising and Promotion* will provide him or her with a contemporary view of the role and importance of marketing communications. The text emphasizes the role of integrated marketing

communications (IMC) in enhancing the equity of brands and provides thorough coverage of all aspects of an IMC program: advertising, promotions, packaging and branding strategies, point-of-purchase communications, marketing-oriented public relations, word-of-mouth buzz creation, and event- and cause-oriented sponsorships. These topics are made even more accessible in this edition through expanded use of examples and applications. Appropriate academic theories and concepts are covered in the text to provide formal structure to the illustrations and examples.

Integrated Marketing Communications in Advertising and Promotion is intended for use in undergraduate or graduate courses in marketing communications, advertising, promotion strategy, promotion management, or other courses with similar concentrations. Professors and students should find this book substantive but highly readable, eminently current but also appreciative of the evolution of the field. Above all, marketing communications practice in its varied forms is blended with research and theory. Throughout its previous six editions, this book has always attempted to balance its coverage by examining marketing communications from both the consumer's and marketer's vantage points. This edition, however, represents a slight shift of emphasis to focus more than ever on managerial aspects of marketing communications. Business-to-business (B2B) oriented marketing communications also receives greater attention in this edition than before.

Changes and Improvements in the Seventh Edition

The seventh edition of *Integrated Marketing Communications in Advertising and Promotion* reflects many changes beyond those described so far. The entire textbook has been thoroughly updated and reflects the following emphasis:

- The text provides state-of-the-art coverage of major academic literature and practitioner writings on all aspects of marketing communications. These writings are presented at an accessible level to students and illustrated with copious examples and special inserts—Marcom Challenge vignettes, IMC Focus boxes, and Global Focus inserts.
 - *Marcom Challenge*—Each chapter opens with a factual anecdote that corresponds with the thematic coverage of the chapter and serves to pique students' interest and illustrate the type of material to follow.
 - *IMC Focus*—These features have been updated to further illustrate key IMC concepts within each chapter by using real-company situations that showcase how various aspects of marketing communications are put into practice.
 - *Global Focus*—These updated boxed features enhance the text's global perspective and spotlight the international application of marcom principles.
- The text retains the same number of chapters (20) as in the sixth edition, but some chapters have been substantially rewritten or rearranged to reflect a more logical progression of material covered. The following updates and improvements are reflected in this new edition:
 - Chapter 1 expands its coverage of IMC fundamentals and also provides a model of the marcom process that makes a useful framework for comprehending the strategic and tactical aspects of marketing communications.
 - Marcom's role in enhancing brand equity and influencing behavior receives expanded coverage in Chapter 2. The most important addition to this chapter is increased emphasis on achieving marcom accountability, including discus-

sion of return on marketing investment and efforts to measure marcom effectiveness.

- In view of the growing importance of ethical issues, Chapter 3 provides in-depth coverage of ethical issues in marketing communications along with marcom-related regulatory and environmental issues. This chapter is moved front and center in this edition to better stress its importance.
- Chapters 4 through 6 focus on the fundamental marcom decisions that are based on the marcom-process model introduced in Chapter 1. These chapters include detailed coverage of marcom targeting (Chapter 4), positioning (Chapter 5), and objective setting and budgeting (Chapter 6). Chapter 4 includes a thorough update of demographic facts and figures, Chapter 5 integrates the coverage of positioning with fundamentals of consumer behavior and the concept of meaning creation, and Chapter 6 augments discussion of marcom budgeting.
- Chapter 7 combines material previously covered in two chapters that discusses marcom's role in facilitating product adoption and the importance of brand naming and packaging.
- Chapter 8 is a new and unique chapter that explores the role of on- and off-premises signage, out-of-home advertising, and point-of-purchase communications—all of which generally are neglected or receive minimal coverage in most advertising and marcom texts.
- In its overview of advertising management, Chapter 9 examines the role of messages, media, and measurement. Added coverage is given to the relation between share of voice and share of market and the role of advertising elasticity.
- Chapter 10 lays out the fundamentals and importance of advertising creativity, and Chapter 11 then deals with the message and endorser factors that influence message processors' motivation, opportunity, and ability to process ad messages.
- Expanded and improved coverage of measures of advertising effectiveness is the focus of Chapter 12.
- Chapter 13 provides detailed treatment of media planning and analysis. Importantly, this chapter is presented before coverage of specific advertising media, whereas in previous editions it was presented after that coverage. By presenting the media planning and analysis material first, it is possible to employ a common set of concepts, terms, and metrics in describing the specific media covered in the chapters that follow.
- Chapters 14 (traditional ad media), 15 (Internet advertising), and 16 (other ad media) offer in-depth coverage of all forms of advertising media. The material is thoroughly updated with numerous applications and illustrations.
- Coverage of Internet advertising (Chapter 15) is greatly expanded and updated in view of the profound changes that have transpired since the previous edition. This new chapter is especially current in its treatment of search engine advertising, wireless forms of Internet advertising, and the role of blogs and podcasts.
- Chapter 16 expands its coverage of other forms of ad media, including material related to direct mail and database marketing, videogame advertising (adver-gaming), brand placements in movies and TV programs, and cinema advertising.
- Chapter 17 introduces sales promotions and covers trade-oriented promotions in detail. However, the treatment of trade promotions is scaled back in comparison to the previous edition as it looks primarily at the most important and troubling form of trade promotion: trade allowances.
- Chapters 18 and 19 deal with consumer-oriented forms of sales promotions. Whereas all forms of consumer-oriented promotions were covered in a single

chapter in the previous edition, these topics are included as two separate chapters in the seventh edition. Chapter 18 covers only sampling and couponing, and Chapter 19 examines all remaining forms of consumer promotions.

- Chapter 20 provides updated coverage of marketing-oriented public relations along with event- and cause-oriented sponsorships.



A Premier Instructional Resource Package

The resource package provided with *Integrated Marketing Communications in Advertising and Promotion*, seventh edition, is specifically designed to meet the needs of instructors by providing an array of high-quality items to bring a contemporary, real-world feel to the study of advertising, promotion, and integrated marketing communications. Go to <http://aise.swlearning.com> to find the following instructor's support materials:

- **Instructor's Manual.** This comprehensive and valuable teaching aid includes a list of chapter objectives, chapter summaries, detailed chapter outlines, teaching tips, and answers to discussion questions. The *Instructor's Manual* for this edition is revised by Laurie A. Babin of the University of Southern Mississippi.
- **Test Bank.** The Test Bank, also revised by Laurie A. Babin, provides testing items for instructors' reference and use. It has been thoroughly revised and contains over 1,500 multiple-choice, true/false, and essay questions in varying levels of difficulty, and is available in both Microsoft Word and ExamView.
- **ExamView™ Testing Software.** ExamView is a computerized testing program that contains all of the questions in the printed test bank. **ExamView™ Testing Software** is an easy-to-use test creation software compatible with Microsoft Windows. Instructors can add or edit questions, instructions, and answers, and select questions by previewing them onscreen; select them randomly, or select them by number. Instructors can also create and administer quizzes online, whether over the Internet, a local area network (LAN), or a wide area network (WAN).
- **PowerPoint Presentation.** This edition includes an updated and improved PowerPoint presentation for class lectures.

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