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复杂购买行为模式下品牌忠诚 形成与发展机理研究

张月莉 / 著

**The Study of Mechanism of Brand Loyalty's Formation and
Development Under the Pattern of Complex Buying Behavior**



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摘 要

随着全球化竞争和本土竞争国际化的到来，国际品牌给本土品牌的生存与发展带来巨大压力，中国经济已从产品竞争时代走向品牌竞争时代。面对日趋激烈的市场竞争，培育和维护顾客对品牌的忠诚不仅成为提升本土品牌竞争力的关键，而且成为本土品牌应对国际挑战的基本策略。企业必须把握品牌忠诚的形成与发展规律以适应生存和发展的需要。

在不同的购买行为模式下，品牌忠诚的表现形式存在很大区别。这说明需从理论上分类探讨不同购买行为模式下品牌忠诚的形式及成因。本书将主要针对复杂购买行为模式下的品牌忠诚形成与发展机理进行研究，力图探索该情境下品牌忠诚的基本内涵和品牌忠诚建立及维系的客观规律，为企业进行营销创新提供理论基石和行动指南。

本书在全面总结相关研究的基础上，提出了全新的研究逻辑框架，运用结构方程模型以及带有潜变量二次效应和交互效应的结构方程模型等定量分析方法和工具，并辅以定性的理论分析，对复杂购买行为模式下品牌忠诚的形成与发展机理进行了深入的理论与实证研究。本书的中心论点是，复杂购买行为模式下的品牌忠诚其本质是一种态度驱动的忠诚，顾客与品牌之间存在着十分密切的关系，这种关系既包括“交易关系”，又包括深层次的“超越交易关系”，其中“交易关系”在消费者—品牌关系的维系中发挥基础性作用，而“超越交易关系”在消费者—品牌关系的维系和发展中往往起“催化剂”和“强化剂”的作用。本研究正是围绕这一中心论点而逐层展开论述。主要研究内容如下：

1. 在对品牌忠诚相关文献进行全面回顾的基础上,说明消费者不同购买行为模式与品牌忠诚不同表现形式之间的关系,并揭示了复杂购买行为模式下品牌忠诚的本质。

2. 在总结国内外相关研究的基础上,将复杂购买行为模式下品牌忠诚的驱动机制从线性到非线性两个层次逐层深入地展开研究。本书不仅全面分析了该情境中品牌忠诚的重要驱动因素,说明了上述变量对品牌忠诚的作用途径,从而深入揭示了品牌忠诚的形成原因,而且从双因素理论的角度进一步分析了部分关键驱动因素对品牌忠诚的非线性驱动作用,使得对品牌忠诚现象的理解更加丰富和深入,从而为企业更好地实施品牌管理提供了新的思路,也奠定了本书研究的逻辑基础。

3. 将委托—代理理论和关系营销理论相结合分析了顾客—品牌关系的形成过程,提取出品牌忠诚的关键驱动因素,从而建立复杂购买行为模式下品牌忠诚的基本驱动模型,根据理论研究的结果,对品牌感知价值、品牌满意(累积性)、品牌信任、品牌承诺和品牌忠诚之间的关系建立结构方程模型。通过对顾客卷入程度高且品牌间异质性较强的手机用户的实证数据研究,探讨该行为模式下品牌忠诚现象背后的真正原因。研究证实了复杂购买行为模式下品牌忠诚基本驱动模型的合理性,同时发现上述四个变量都是驱动品牌忠诚的重要因素。

4. 根据需求层次理论和双因素理论,将影响品牌忠诚的因素进一步区分为保健因素和激励因素,从而建立复杂购买行为模式下品牌忠诚的非线性驱动模型,并分别研究它们对品牌忠诚的形成与发展所起的作用。在充分的理论研究的基础上,对品牌满意(交易性)、品牌信任与品牌忠诚之间的复杂关系提出了包含二次效应和交互效应的理论假设,并通过结构方程模型对手机用户进行了检验。研究结果表明品牌满意(交易性)作为保健因素在形成品牌忠诚的过程中发挥着重要作用,但研究同时发现品牌信任对形成与发展品牌忠诚的激励作用比较微弱。

本书的主要结论性启示如下:

(1) 复杂购买行为模式下的品牌忠诚本质上是顾客与品牌之间密切关系的一种形式,企业应当重视品牌与顾客之间关系的培育和维系。

(2) 复杂购买行为模式下品牌忠诚的形成具有多个驱动因素,品牌感知价值、品牌满意、品牌信任以及品牌承诺都被证实品牌忠诚的形成与发展过程中发挥着重要的驱动作用。企业应运筹帷幄,综合利用上述因素来制定并实施品牌忠诚的驱动策略。

(3) 企业应区分形成与发展品牌忠诚的保健因素和激励因素。对于驱动品牌忠诚的保健因素,企业应优先保证将其维持在适当水平,因为保健因素是实现顾客对品牌忠诚的基础;而对于激励因素应重点加强,因为它们是形成与维持品牌忠诚的动力,是企业取得竞争优势的重要途径。

(4) 复杂购买行为模式下,品牌满意(交易性)是驱动品牌忠诚的保健因素。

(5) 复杂购买行为模式下,品牌信任是驱动品牌忠诚的激励因素。

本书从理论与实证角度所做的创新之处体现在:

(1) 理论创新——基于经济学、营销学、管理学等多种学科,对复杂购买行为模式下品牌忠诚的形成与发展机理进行了理论探讨。

本研究将顾客—品牌之间的关系看作一种委托—代理关系,首先从经济学的角度探讨了要建立消费者与品牌的关系所需克服的两大障碍:即道德风险和逆向选择。但经济学所提供的策略不足以在顾客—品牌之间建立保持长期关系的纽带,因此我们进一步结合关系营销理论识别了影响复杂购买行为模式下品牌忠诚形成的关键构件。在此基础上,运用管理学理论将这些关键构件区分为保健因素和激励因素,从理论角度指出它们对品牌忠诚的形成和维系发挥的不同作用。本研究所做的理论探讨无疑对深入理解品牌忠诚问题具

有参考价值。

(2) 模型创新——提出复杂购买行为模式下品牌忠诚的基本驱动模型和非线性驱动模型，并对此进行了实证研究。

为系统全面地反映复杂购买行为模式下品牌忠诚的形成与发展机理，本书创新性地加深了品牌忠诚理论的分析视野，建立起从线性和非线性两个层次来展开的对品牌忠诚生成机理逐层深入的研究，提出复杂购买行为模式下品牌忠诚的“基本驱动模型”和“非线性驱动模型”，并在我国进行了实证研究。该分析视角使得关于该情境下品牌忠诚生成机理的研究更加全面和系统化，弥补了目前相关研究比较零散、片面的不足。

(3) 方法应用上的创新——运用结构方程模型研究的新发展，实现了新技术在品牌忠诚领域的运用。

过去对顾客忠诚的研究主要集中于简单的线性影响因素的研究，而本研究创新性地运用结构方程模型领域的新发展，即有效处理潜变量二次作用和交互作用的新技术对品牌忠诚的形成与发展机制进行了实证研究，实现了新技术在品牌忠诚领域的应用，也进一步丰富了品牌忠诚生成与发展机理的研究。

Abstract

With the development of global competition and internationalization, the famous international brands have brought enormous pressures on our native brands. Chinese economy has transformed from product competition era into brand competition era. Faced with more and more fierce competition, cultivating and maintaining brand loyalty is very important for native brands, not only for promoting competition ability, but also as a fundamental strategy to deal with the international challenges. Therefore, enterprises have to pay great attentions to development rules of brand loyalty in order to meet the requirements of existence and development.

Brand loyalty always shows different styles under diverse patterns of buying behaviors, which leads to the need to research on the classification of brand development rules. Therefore, the dissertation studies the mechanism of cultivating and developing of brand loyalty under the patterns of complex buying behaviors. And also tries to explore the essence of brand loyalty and rules of cultivating and maintaining brand loyalty in the context of complex buying behaviors. The academic foundation stone and action guidelines are provided for marketing innovation as a result.

Based on the comprehensive literature review, a new research framework is developed which aimed at exploring the mechanism of formation and development of brand loyalty under the patterns of complex buying behaviors. Quantitative tools are applied in the research such as structural equation model (SEM), SEM with curvilinear effects and in-

teraction effects across latent variables. It is the main idea of the dissertation that the brand loyalty under the patterns of complex buying behaviors is driven by attitude in essence. That is to say, there are very intimate relationships between brand and customers as well including basic transactional relationship as more deeply over-transactional relationship. It is the transactional relationship that plays a foundational role, and it is over-transactional relationship that plays a catalytic role for maintaining the relationships. The main ideas above mentioned are going to be argued layer by layer. The main research contents are as following.

(a) Based on the reviews of relative literatures in the area of brand loyalty, the dissertation illuminates the relationships between diverse buying behavioral patterns and diverse loyal forms, and discloses the essences of brand loyalty in the context of complex buying behaviors.

(b) Through the understanding of academic researches by former researchers, we describe the driving mechanism of brand loyalty under the patterns of complex buying behaviors from the view points of two layers—linear and nonlinear driving factors. The research comprehensively analyzes the important driving factors of brand loyalty and their influencing paths on brand loyalty by which shows the forming mechanisms of brand loyalty. Furthermore, several of the important factors are studied specially about their nonlinear driving effects on loyalty brands from the view points of dual-factor theory. The research results in this part not only enrich and deepen our understanding of the brand loyal phenomena but also provide a new perspective of brand management, which establishes the logic foundation of the whole research.

(c) Integrating agency theory and relationship marketing theory, we describe the developing process of brand loyalty from which essential driving factors are extracted and a basis driving model of brand loyalty is established under the patterns of complex buying behaviors. The structur-

al equation model is set up to explore the influencing relationships of perceived brand value, cumulative brand satisfaction, brand trust and brand commitment on brand loyalty. The survey study is applied to explore the essential reasons of brand loyalty under the pattern of complex buying behavior by the samples of mobile telephone users characterized with high-involving product and high-perceived brands' difference. It is showed that all of the four variables have significant effects on driving brand loyalty.

(d) Based on need-gratification and dual-factor theories, we distinguish the driving factors into hygienic factors and motivative factors and build nonlinear driving model to probe into these antecedents' role respectively as hygienic factors and motivative factors. This study conceptualizes transaction-special brand satisfaction as a "hygiene factor" and brand trust as a "motivator factor", examines the differential nonlinear effects in brand loyalty mechanisms. We develop a structure equation model to explore the complex quadratic and interactive relationships of transaction-special brand satisfaction, brand trust and brand loyalty by surveying mobile telephone consumer. The results support the hygiene role of brand satisfaction, but the motivate role of brand trust only be found very weakly.

The main heuristic conclusions of this dissertation are as follows:

(a) The essences of brand loyalty under the pattern of complex buying behavior show a form of intimate relationships between brand and consumers, so the corporate should pay more attention to cultivate and develop this relationships.

(b) There are several driving factors of brand loyalty such as perceived brand value, brand satisfaction, brand trust and brand commitment which are all proved to be important antecedents of brand loyalty. So the corporate should map out a comprehensive strategy to carry on.

(c) Hygienic factors and motivative factors should be distinguished among driving factors of brand loyalty. It should be first-line assured to attain some adequate levels for hygienic factors which are the foundational factors of brand loyalty, and it should be stressly enhanced for motivative factors which are the dynamical factors of brand loyalty and important for corporate to obtain competitive advantage.

(d) Transaction-special brand satisfaction is the main hygienic factor of brand loyalty under the pattern of complex buying behavior.

(e) Brand trust is the mian motivative factor of brand loyalty under the pattern of complex buying behavior.

There are probably some slight innovations of this article embodies as follows:

(a) Innovation from the theoretical angle—the discussions of mechanism of brand loyalty's formation and development under the pattern of complex buying behavior based on economics, marketing and managemet.

The study regards the relationship of customers and brands as the relationship of principals and agents firstly, and points out that moral hazard and adverse selection problem are two obstacles in need of overcoming in order to maintain customer loyalty. But the strategies supplied by economics may not be enough to link customer and brand tightly for a long time. So, some effective variables of relationship marketing should be intergrated into these processes to solve these problems. Futhermore, the key factors extracted from above-mentioned processes can be divided into hygienic factors and motivative factors based on management theories and play differential effects to brand loyalty. The theoretical discussions will provide some reference value for comprehending this question deeply.

(b) Innovation from the model angle—building and proving about linear and nonlinear model of brand loyalty under the pattern of complex buying behavior.

Theories of brand loyalty are studied deeply from linear and nonlinear layers step by step innovatively to illuminate the mechanism of brand loyalty under the pattern of complex buying behavior. The simple antecedents model and the nonlinear antecedents model of brand loyalty are both builded and verified to explain the brand loyalty more comprehensively and deeply which can make up the current researches to some degree.

(c) Innovation from the method applied angle—application of new technology developed in the field of SEM to brand loyalty.

The foregone researches in the customer loyalty focus mainly on simply linear influencing effects, but the dissertation applies innovatively new technology developed in the field of SEM which can effectively deal with the curvilinear effects and interaction effects across latent variables to the research of brand loyalty. It not only realizes successfully the application of new technology, but also enrichs the studies of mechanism of cultivating and developing brand loyalty.

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第 1 章

绪 论

本章分析了本书的研究背景，阐述了研究现状和意义，介绍了本书的主要内容，给出了本书的研究框架，并对本书的研究方法和用于实证研究的行业背景进行了说明。

1.1

研究背景

在当今的超强竞争时代，每个企业都在努力寻找能使企业在激烈的竞争中保持长盛不衰的秘诀，从构建全面的“顾客满意”到创造优异的“顾客价值”，都曾是企业追求的目标。而 20 世纪 90 年代以来，随着市场竞争的日益加剧和企业争夺顾客成本的提高，学术界的研究焦点从“顾客满意”、“顾客价值”转向“顾客忠诚”（Oliver, 1999）^[1]。顾客忠诚将作为 21 世纪市场竞争中的重要策略而备受企业关注，培育和维护忠诚顾客已成为企业制胜的法宝，建立和保持顾客忠诚对企业的经营管理具有重要影响。

根据西方营销专家的研究和企业的经验，吸引一个新顾客所耗费的成本大概相当于维持一个老顾客的 5 倍，培养顾客的忠诚度可以有效节约企业开发客户的成本。大量研究同时认为顾客忠诚与企业利润正相关（Blattberg and Deighton, 1996；Hallowell, 1996；Page, Pitt and Money, 1996）^{[2][3][4]}。美国商业研究报告指出忠诚

消费者为企业带来的利润比首次消费者多 20% ~ 85%，而忠诚消费者每增加 5%，就会使企业利润增加 25%。忠诚的顾客会表现出对价格更低的敏感性、抵制其他诱惑、做正面的口碑宣传以及更少的经营成本，是企业最有价值的顾客群体（Ganesh et al.，2000；Zeithaml et al.，1996）^{[5][6]}。顾客忠诚不仅表现为对产品的一种理性偏好，而且是对品牌和企业的一种情感吸引力，他们会成为传道者，努力向他人推荐企业的产品或服务，并愿意为其支付较高的溢价，当发现产品或服务有某些缺陷时不仅能够谅解，而且会主动向企业反馈信息，提出有价值的建议。

众多学者的研究成果表明，顾客忠诚的收益比市场份额、单位成本以及与企业盈利能力相关的其他因素具有更强的效应（霍映宝，韩之俊，2004）^[7]。首先，市场份额是顾客忠诚的直接产物和表现形式，顾客忠诚是积累和提升市场份额的唯一手段或途径；其次，成本的节约和盈利能力的提高是一种以利润为核心的非市场导向的管理模式，而顾客忠诚的战略导向意味着企业的根本使命在于创造价值，而非仅仅获取利润，利润只是价值创造的结果。因此，谁赢得顾客忠诚，谁就能获得市场份额，谁就能赢得生存与可持续发展。长期的营销研究表明，顾客忠诚不仅是企业长期利润的重要源泉，更是企业核心竞争力的重要决定因素。顾客忠诚是战略营销规划的一个优先目标，是发展持续竞争优势的一个重要途径（Kotler，1984）^[8]。顾客忠诚是一门科学，任何企业都不能忽视顾客忠诚的经济学（霍映宝，韩之俊，2004）^[7]。全面深入了解顾客忠诚的内涵以及顾客忠诚与其相关概念的关系对企业的顾客关系管理乃至企业的长久发展意义重大。

日益进展的经济全球化和一体化的发展趋势，使得商品品牌作为企业经营活动中一股不可阻挡的力量渗透到世界经济的各个角落。企业的市场竞争从某个角度来说就是品牌的竞争，谁能够恰当的运用品牌战略，谁就能够赢得市场。任何谋求长期可持续发展的企业都必须把品牌战略作为竞争的基本策略（王永龙，2003）^[9]。