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沈 铖 / 著

品牌延伸绩效模型研究

以中国和加拿大
消费者为例

A Study of Brand Extension Performance Models
A Comparison between
Chinese and Canadian Consumers



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总 序

一个没有思想活动和缺乏学术氛围的大学校园,哪怕它在物质上再美丽、再现代,在精神上也是荒凉、冷清和贫瘠的。欧洲历史上最早的大學就是源于学术。大学与学术的关联不仅体现在字面上,更重要的是,思想与学术,可谓大学的生命力与活力之源。

我校是一所学术气氛浓郁的财经政法高等学府。范文澜、嵇文甫、潘梓年、马哲民等一代学术宗师播撒的学术火种,五十多年来一代代薪尽火传。因此,在世纪之交,在合并组建新校从而揭开学校发展新的历史篇章的时候,学校确立了“学术兴校,科研强校”的发展战略。这不仅是对学校五十多年学术文化与学术传统的历史性传承,而且是谱写 21 世纪学校发展新篇章的战略性手笔。

“学术兴校,科研强校”的“兴”与“强”,是奋斗目标,更是奋斗过程。我们是目的论与过程论的统一论者。我们将对宏伟目标的追求过程寓于脚踏实地的奋斗过程之中。由学校资助出版《中南财经政法大学青年学术文库》,就是我们采取的具体举措之一。

本文库的指导思想或学术旨趣,首先在于推出学术精品。通过资助出版学术精品,形成精品学术成果的园地,培育精品意识和精品氛围,提高学术成果的质量和水平,为繁荣国家财经、政法、管理以及人文科学研究,解决党和国家面临的重大经济、社会问题,作出我校应有的贡献。其次,培养学术队伍,特别是通过对一批处在“成长期”的中青年学术骨干的成果予以资助出版,促进学术梯队的建设,提高学术队伍的实力与水平。

最后,培育学术特色。通过资助在学术思想、学术方法以及学术见解等方面有独到和创新之处的成果,培育科研特色,力争通过努力,形成有我校特色的学术流派与学术思想体系。因此,本文库重点面向中青年,重点面向精品,重点面向原创性学术专著。

春华秋实。让我们共同来精心耕种文库这块学术园地,让学术果实挂满枝头,让思想之花满园飘香。



2007年12月10日

Preface

In absence of intellectual activities and a academic atmosphere, a university campus would be spiritually desolate and barren no matter how physically beautiful or modern it is. In fact, the earliest European universities in the history were originated from academic learning. The relationship between a university and academic learning is not only represented literally. What is more important, however, the ideas and academic learning are real sources of energy and vitality for all universities.

Zhongnan University of Economics and Law is a higher education institution which has a rich academic atmosphere. Having the academic seeds planted by such great masters likes Fan Wenlan, Ji Wenfu, Pan Zinian and Ma Zhemin, for more than fifty years generations of scholars and students in this university have been sharing the fruits and making their own contributions to it. Therefore, in the turning point of this century when a new historic page was turned over with the merging of Zhongnan University of Finance and Economics and Zhongnan University of Politics and Law, the newly established university had set its developing strategy as "Prosper with academic learning, be strong with scientific research", which is not only a historical inheritance of more than fifty years of academic culture and tradition, but also a strategic decision which is to lift our university onto a higher developing stage in the 21st century.

Making the university prosperous and strong is the ultimate goal as

well as the struggling process. We believe that the goal and process are integrated. We tend to combine the pursuing process of our magnificent goal with the practical struggling process. The *Youth Academic Library of Zhongnan University of Economics and Law*, which is published with university funding, is one of our specific measures.

The guideline or academic theme of this *Library* lies, firstly, in promoting the publishing of selected academic works. By funding the *Library*, we aim to have our own academic garden with high-quality academic fruits, form the awareness and atmosphere of quintessence and improve the quality and standard of our academic products, so as to make our own contributions in developing such fields likes finance and economics, politics and law, as well as humanity science, and working out solutions for major economic and social problems facing our country and the Communist Party of China. Secondly, our aim is to form a academic team—especially through funding the publishing of works of the middle-aged and young academic elites—to boost the construction of the academic echelon and enhance the strength and level of our academic team. Thirdly, we aim at establishing academic characteristics of our university. By funding those academic contributions which have some original or innovative points in their ideas, methods and views, we expect to foster our own characteristics in scientific research. Our final goal is to form an academic school and establish an academic idea system of our university through our efforts. Therefore, this *Library* places great emphasis particularly on the middle-aged and young fellows, selected works and original academic monographs.

Sowing seeds in the spring will lead to a prospective harvest in the autumn. Let us get together to cultivate this academic garden and make it be opulent with academic fruits and intellectual flowers.

Wu Handong

December 10, 2007

中文提要

本书共分为六章。第一章为导论,介绍研究背景、研究问题、研究方法、研究框架与潜在贡献。第二章为品牌延伸文献综述,从分类研究、关联性研究、反馈效应研究和延伸产品消费者评价研究等四个方面,对国内外研究结果进行综述。第三章为品牌延伸绩效模型构建,介绍研究模型的建立过程,提出以延伸产品消费者的购买意愿作为延伸绩效的评价指标,以企业形象、母品牌属性、延伸产品属性、信息活动属性和消费者人口统计变量为影响延伸绩效的主要变量。第四章为实证研究设计,根据本书建立的模型设计实证研究方案。第五章为分析与发现,陈述本书的统计分析结果。第六章为结果及讨论,总结和讨论研究结果,提出相应的管理借鉴,分析本书研究中存在的问题,明确需要进一步研究的领域。

本书的研究结论主要有以下四点:

1. 模型中的自变量和因变量有着明显的关联性;
2. 中加两国消费者有着共性也有差异;
3. 具有不同人口变量特征的中国消费者显示出了差异;
4. 各影响变量在品牌延伸绩效评价中的重要性各不相同。

本书的创新主要体现在三个方面:构建了品牌延伸绩效模型、实证检验了模型并进行了跨文化比较研究、规范了品牌延伸领域的基本概念、梳理相关的理论研究成果。由于条件所限以及作者水平的局限,本书留下了一些遗憾和疏漏,这些都需要在未来研究中修正和弥补。

Abstract

The book is divided into six chapters. The first chapter is introduction, introducing the book's research background, research problems, research methods, research frames and potential contributes. The second chapter is about review of literature of brand extension, involving category research, fit research, feedback effects research and extension product's consumer evaluation research. The third chapter is about brand extension performance model build-up, introducing the building process of the book's research model, setting the buying intention of extension product consumers as the evaluation standards of extension performance, regarding enterprise image, original brand property, extension product property, information activity property and consumer population change as the major variables of influencing extension progress. The fourth chapter is about experiment research design according to model design experiment plans designated by the book. The fifth chapter is analysis and conclusion, stating the book's statistic and analyse result. The sixth chapter is about results and discussion, summarizing and discussing the book's research results, proposing relevant management experience, analyzing the existing research problems of the book, clarifying the field of needing further research.

The book's research conclusion covers the following four points:

1. There are obvious relevance between the independent variables and dependent variables of the model.

2. Consumers in China and Canada have the common and the difference.

3. Chinese consumers characteristic of different population change appear different.

4. The importance of various affecting factors in the valuation of brand extension performance is different.

The creative ideas of the book contains 3 aspects: build up brand extension performance model, the experiment test the model, make a cross-cultural and comparative research, define the basic concepts in the field of brand extension, organize the relevant research results. Due to the limitation of conditions and the author's level, the book might leave some regret and omission, needing correcting and making up in the future research.

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第一章 导 论

第一节 研究背景

品牌研究专家 Keller 认为^①,对大多数公司来说,现在要考虑的问题已经不是说是否应该采用延伸品牌战略,而是如何实施品牌延伸战略。他这句话很好地总结了当前品牌延伸应用的实际情况。

现在无论从国内还是从国际上来看,品牌延伸都已经成为公司利用其知名品牌价值的一种重要手段。但是,品牌延伸战略在给企业带来利益的同时也伴随着巨大的潜在风险。当前,品牌延伸在我国的应用已经出现了泛滥的现象,因而品牌延伸专家符国群教授认为,品牌延伸在我国已不是一个单纯的学术问题,更是一个亟待研究和探索的重大实践课题。另一方面,品牌延伸在我国的研究还处于初级阶段,远远落后于实践的发展。

一、品牌延伸战略具有两面性

品牌延伸战略犹如一把双刃剑,使用得当能为企业带来诸多利益;若使用不当,则会给企业造成意想不到的损害。^②

(一) 品牌延伸战略的潜在利益

品牌延伸战略可以为企业带来两个方面的好处,一方面,延伸产品可

^① 凯文·莱恩·凯勒著,李乃和等译:《战略品牌管理》,中国人民大学出版社,2003年,第385页。

^② 柴俊武,万迪昉:《品牌延伸利弊与延伸绩效述评》,《预测》2004年第4期。