

英文版



(第四版)

# 消费者行为与营销战略

CONSUMER BEHAVIOR AND  
MARKETING STRATEGY

(FOURTH EDITION)

J. PAUL PETER  
JERRY C. OLSON



## 世界财经与管理教材大系



东北财经大学出版社



McGraw-Hill 出版公司

**图书在版编目 (CIP) 数据**

消费者行为与营销战略: 英文 / (美) 彼德 (Peter, J. P.), (美) 奥尔森 (Olson, J. C.) 著. —大连: 东北财经大学出版社, 1998.8

(世界财经与管理教材大系·市场营销系列)

ISBN 7 - 81044 - 458 - 1

I. 消… II. ①彼…②奥… III. ①消费者行为论 - 英文②市场营销学 - 英文  
IV. F713.55

中国版本图书馆 CIP 数据核字 (98) 第 19563 号

辽宁省版权局著作权合同登记号: 图字 06 - 1998 - 127 号

J. Paul Peter, Jerry C. Olson: Consumer Behavior and Marketing Strategy, Fourth Edition

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This edition is published jointly by McGraw-Hill Book Co. and Dongbei University of Finance & Economics Press, for sale in P. R. China only.

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东北财经大学出版社 合作出版  
McGraw-Hill 出版公司

东北财经大学出版社发行

(大连市黑石礁尖山街 217 号 邮政编码 116025)

北京万国电脑图文有限公司制版 大连理工大学印刷厂印刷

开本: 787×1092 毫米 1/16 字数: 1 150 千字 印张: 48 插页: 2

1998 年 8 月第 1 版

1998 年 8 月第 1 次印刷

策划编辑: 方红星

封面设计: 张智波

定价: 72.00 元

ISBN 7 - 81044 - 458 - 1/F·1141

## 出版者的话

但凡成事，均缘于势。得势则事成，失势则事不顺。顺势而行，如顺水行舟；借势而动，如假梯登高；造势而为，如太空揽月。治学、从政、经商、置业，均不可一日失势。势者，长处、趋势也。

今日中国，是开放的中国；当今世界，是开放的世界。改革开放，大势所趋，势不可挡。经济开放、文化开放、政治开放，世界需要一个开放的中国，中国更要融入开放的世界。借鉴国际惯例，学习他人之长，已经到了不可不为之时。

借鉴国际惯例，学习他人之长，已属老生常谈，但学什么、如何学、以何为蓝本为众多志士仁人所关注。可喜的是，由赤诚图文信息有限公司精心策划，ITP、McGraw-Hill及Simon & Schuster等国际出版公司特别授权，东北财经大学出版社荣誉出版的“世界财经与管理教材大系”现已隆重面世！她以“紧扣三个面向，精选五大系列，奉献百部名著，造就亿万英才”的博大胸襟和恢弘气势，囊括经济学、管理学、财务与会计学、市场营销学、商务与法律等财经、管理类主干学科，并根据大学教育、研究生教育、工商管理硕士（MBA）和经理人员培训项目（ETP）等不同层次的需要，相应遴选了具有针对性的教材，可谓体系完整，蔚为大观。所选图书多为哈佛、斯坦福、麻省理工、伦敦商学院、埃维商学院等世界一流名校的顶尖教授、权威学者的经典之作，在西方发达国家备受推崇，被广为采用，经久不衰，大有“洛阳纸贵”之势。

借鉴国际惯例，毕竟只是因势而动；推出国粹精品，才是造势而为。在借鉴与学习的同时，更重要的是弘扬民族精神，创建民族文化。“民族的，才是国际的”。我们提倡学他人之长，但更希望立自己之势。

势缘何物，势乃人为。识人、用人、育人、成人，乃人本之真谛。育人才、成能人，则可造大势。育人、成人之根本在教育，教育之要件在教材，教材之基础在出版。换言之，人本之基础在书本。

凡事均需讲效益，所谓成事，亦即有效。高效可造宏基，无效难以为继，此乃事物发展之规律。基于此，我们崇尚出好书、出人才、出效益！

东北财经大学出版社

1998年8月

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*Rose and Angie*  
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## PREFACE

*Consumer Behavior and Marketing Strategy*, fourth edition, is designed for both undergraduate and graduate courses that focus on consumer behavior theory and research and their use in developing marketing strategies.

These courses are typically taught to junior- or senior-level undergraduates at four-year schools, sophomores at two-year schools, and second-year MBA students. Most of these students will have taken a general introductory course in marketing principles, and many will have some background in the social sciences.

The major purpose of the text is to give students the knowledge and skills necessary to perform consumer analyses that can be used for understanding markets and developing effective marketing strategies.

### WHY WE WROTE THIS BOOK

Having researched and taught in the area for many years, we saw a need for a text with a more integrative, strategic marketing approach to consumer behavior. Although writing a textbook is never easy, we undertook the task to resolve several specific problems we saw in the existing consumer behavior texts.

- **A consumer behavior text should be more than just a review of the consumer behavior literature.** The history of consumer behavior certainly can be a fascinating topic, but we believe that a focus on *marketing strategies* is more appropriate, particularly when the consumer behavior course is taught within a marketing curriculum. Experience has taught us that the strategic approach is more valuable for undergraduates and master's students training for jobs in marketing management.
- **A consumer behavior course should be well integrated into the marketing curriculum.** Although the consumer behavior course is typically housed in marketing departments, it often stands alone as a course in applied or cognitive psychology. Many consumer behavior texts do not make it clear how the psychological and behavioral concepts can be used to develop and evaluate marketing strategies. The application and implications of the material are often unclear. We find, however, that today's marketing and business students want courses more relevant for the types of marketing decisions managers must make.
- **A consumer behavior text should show how the topics fit together and can be used by a manager to develop marketing strategies.** Too often students leave a consumer behavior course with little knowledge of the way topics fit together and how the information can be used. We wanted to present an *integrated view of consumer analysis* rather than the

fragmented knowledge of separate theories and concepts often found in other texts.

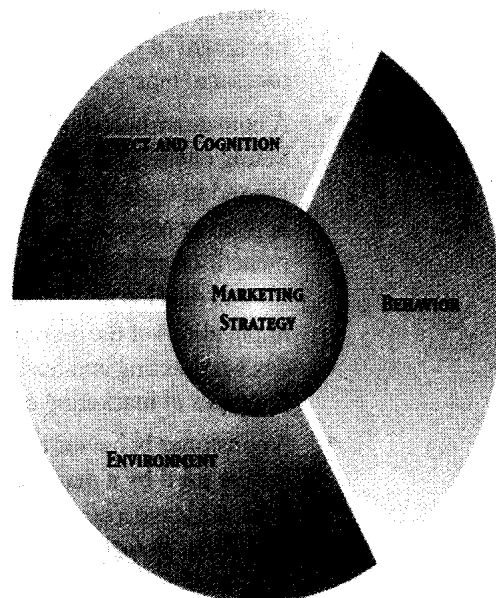
**WHY THIS TEXT  
DIFFERS FROM  
TRADITIONAL  
CONSUMER  
BEHAVIOR  
BOOKS**

To prepare a text that would meet our objectives and overcome the problems described above, we had to make several changes from traditional texts.

- First, we deemphasized or omitted dated consumer behavior topics and research that have little to do with developing marketing strategies.
- Second, we included topics and research from other areas that are not covered in traditional consumer behavior texts but have useful implications for developing marketing strategy.
- Third, we created some new ideas and frameworks that we felt would be useful for educating future marketing managers.
- Fourth, we developed a simple model that encompasses the major elements of consumer analysis and can be used to integrate the field. This model, shown below, includes four major interacting elements that must be considered in any consumer analysis: **affect and cognition, behavior, the environment, and marketing strategy**. We believe the Wheel of Consumer Analysis is a powerful tool for analyzing consumer behavior. It can be used as a conceptual tool for understanding consumers and for guiding the development of marketing strategies.

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**THE WHEEL OF CONSUMER ANALYSIS**





## TEXT ORGANIZATION

The text is organized around the Wheel of Consumer Analysis.

- **Section One** provides an overview of the Wheel of Consumer Analysis and explains how each of the four elements influences the other elements in a dynamic, reciprocal manner.
- **Section Two**, devoted to *affect and cognition*, provides a current view of consumers' internal psychological processes and their relevance for marketing strategy development.
- **Section Three** discusses *behavior* and provides a detailed treatment of the overt actions of consumers and how these actions influence and are influenced by marketing strategies.
- **Section Four** is devoted to the *environment* and analyzes stimuli external to consumers that influence how they think, feel, and act.
- **Section Five** discusses *marketing strategies* by which marketing stimuli (such as products, advertisements, stores, and price information) are created and placed in consumer environments in order to influence consumer affect, cognitions, and behaviors.

## SPECIAL FEATURES OF THE TEXT

This book contains a variety of pedagogical aids to enhance student learning and facilitate the application of consumer behavior concepts to marketing practice:

- **Introductory scenarios.** Each chapter begins with an interesting example that discusses a real-world situation involving some aspect of consumer behavior. Then, each chapter ends with a "Back To . . ." section that summarizes how the chapter material relates to the opening example. This clearly shows students how the chapter concepts are relevant to marketing strategy decisions. This feature has been very successful in generating student interest and increasing understanding of the chapter material.
- **Examples.** Reviewers have applauded the inclusion of many examples of marketing strategies used by actual companies. These examples demonstrate how consumer behavior concepts are used by marketers. Also, they increase student interest in the material.
- **Highlights.** Each chapter contains longer examples called Highlights that show the relevance of consumer behavior concepts and give students real-life examples of marketing strategies. All Highlights are referenced in the text but are self-contained for individual study.
- **Key terms and concepts.** We include a list of key terms and concepts and the page on which they are discussed at the end of each chapter to facilitate study of the material. These terms and concepts are also boldfaced within the chapter text.

- **Marketing Strategy in Action.** Each chapter concludes with a case that focuses on consumer analysis issues facing real companies. These short cases are included to help integrate consumer behavior information into the marketing strategy development process. The discussion questions accompanying the cases can be used for written assignments or to stimulate in-class discussion.
- **Review and discussion questions.** Each chapter contains a series of review and discussion questions that emphasize the understanding and application of chapter material to strategic marketing issues. These can be used for written assignments, in-class discussions, essay exam questions, or for student self-study.
- **Annotated additional reading.** For students who wish to study specific topics covered in a chapter more deeply, we have selected readings, articles, books, and other materials appropriate for them. The readings are briefly annotated to help direct students to appropriate sources.
- **Notes.** Notes for the most current and useful references and additional sources of information are provided at the end of the book. These sources illustrate and expand upon major topics in each chapter of the text.
- **Glossary.** The text contains a glossary of key consumer behavior terms. Many of these definitions were previously prepared by the authors for the American Marketing Association's *Dictionary of Marketing Terms*.

## INSTRUCTIONAL AIDS

The text package contains two major instructional aids. These include:

- **Instructor's Manual.** We have carefully revised the Instructor's Manual to reflect the changes in this edition. The manual contains a variety of useful information and suggestions for teaching each of the chapters in the text, plus transparency masters, notes for the Marketing Strategy in Action cases, and information for designing several types of term projects.
- **Manual of Tests and CompuTest.** The revised Manual of Tests consists of 2,000 multiple-choice and short-answer questions. "Rationales" for the answers to some of the more difficult application questions have been included. The Manual of Tests has been thoroughly reviewed to ensure a reliable, high-quality teaching tool for the instructor. In addition, CompuTest offers the instructor the option of constructing a computer-generated test from the questions in the Manual of Tests.

## ACKNOWLEDG- MENTS

We are indebted to many people who contributed to the development of the current and previous editions of this book. First, we thank our students for *their* contribution to *our* education. Second, we thank Gilbert A. Churchill, Jr., Irwin Consulting Editor, Steve Patterson, Sponsoring Editor, and Nancy Barbour,

Irwin Developmental Editor, for their encouragement, constructive criticism, and patience throughout the preparation of this edition. Finally, we thank the reviewers of this text for the time, effort, and insights they offered. They include:

M. Wayne Alexander <i>Moorhead State University</i>	Mike Etzel <i>University of Notre Dame</i>	William S. Piper <i>The University of Southern Mississippi—Gulf Park</i>
Delores Barsellotti <i>California State Polytechnic University—Pomona</i>	Andrew M. Forman <i>Hoestra University</i>	David W. Schumann <i>University of Tennessee</i>
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	Betty J. Parker <i>University of Missouri</i>	

In addition to the reviewers named above, we also found feedback from individual users of the first, second, and third editions—both professors and students—to be invaluable in helping us shape this fourth edition to meet your needs and interests. We would appreciate your comments and suggestions on this fourth edition.

*J. Paul Peter  
Jerry C. Olson*

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