

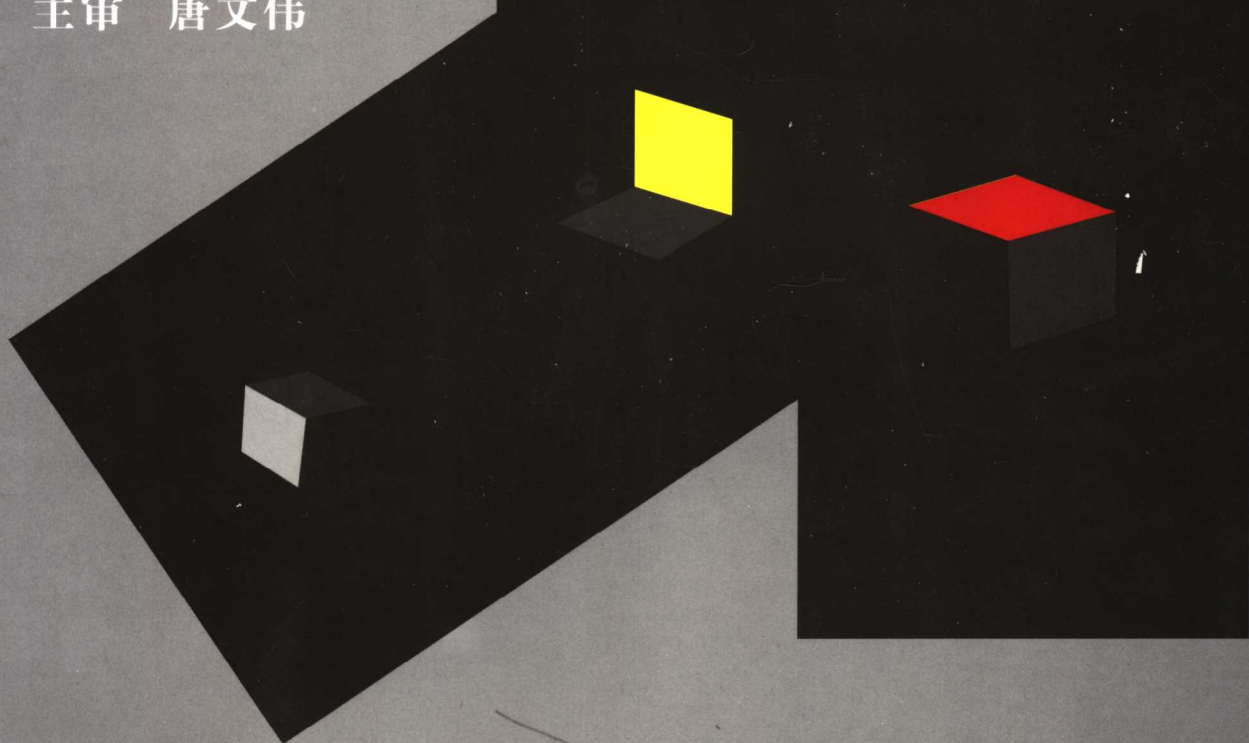
高等院校经济管理类专业双语系列教材

# MARKETING

## 市场营销学

主编 应 斌

主审 唐文伟



WUHAN UNIVERSITY OF TECHNOLOGY PRESS

高等院校经济管理类专业双语系列教材

# MARKETING

## (市场营销学)

主 编 应 斌  
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主 审 唐文伟

Wuhan University of Technology Press  
武汉理工大学出版社

**图书在版编目(CIP)数据**

市场营销学(双语)/应斌主编. —武汉:武汉理工大学出版社, 2005. 8  
高等院校经济管理类专业双语系列教材  
ISBN 7-5629-2237-3

I . 市… II . 应… III . 市场营销学-双语教学-高等学校-教材 IV . F713.50

中国版本图书馆 CIP 数据核字(2005)第 062809 号

出版发行:武汉理工大学出版社

地 址:武汉市武昌珞狮路 122 号 邮编:430070

<http://www.techbook.com.cn>

E-mail: wutpcqx@163.com wutpcqx@tom.com

印 刷 厂:武汉理工大印刷厂

开 本:787×1092 1/16

印 张:28.5

字 数:730 千字

版 次:2005 年 8 月第 1 版

印 次:2005 年 8 月第 1 次印刷

印 数:1—3000 册

定 价:37.00 元

凡购本书,如有缺页、倒页、脱页等印装质量问题,请向出版社发行部调换。

本社购书热线电话:027-87394412 87383695 87384729 87397097(传真)

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## 高等院校经济管理类专业双语系列教材

# 出版说明

为了提高我国高等教育的国际竞争能力,教育部早在 2001 年 8 月就印发了《关于加强高等学校本科教学工作提高教学质量的若干意见》的通知(教高[2001]4 号),文件强调,“按照‘教育面向现代化、面向世界、面向未来’的要求,为适应经济全球化和科技革命的挑战,本科教育要创造条件使用英语等外语进行公共课和专业课教学……”该文件还大力提倡编写、引进和使用先进教材。教育部[2005]1 号文件《关于进一步加强高等学校本科教学工作的若干意见》中又进一步明确提出,要提高双语教学课程的质量,继续扩大双语教学课程的数量。为响应国家教育部的要求,全国各大高校纷纷以各种形式开设双语课程,通过几年的探索和实践,各高校对双语教学的涵义有了更明确的认识,也积累了一些教学经验。

教材是教学的基础,对于双语教学来说尤其如此。经济管理类专业招生人数最多、就业面最广,而且随着我国加入 WTO 及对外交往的日益增多,今后对能够熟练使用外语(尤其是英语)的经济管理类人才的需求会越来越大。因此,在经济管理类专业中实施双语教学,具有更加现实的意义。要搞好经济管理类专业的双语教学工作,必须要有相应的英文教材,而我们对十余所教育部所属院校的调研表明,经济管理类专业的原版英文教材与我国的教学大纲及教学体系差异较大,而且普遍存在厚、贵、难等问题,不太适合我国高校的教学状况。此外,我国大学生现阶段的英语水平参差不齐,大多数学生的英语水平还不足以很好地理解英文原版教材的体系和内容,故英文原版教材现在还不可能在我国一般的高等院校大面积地推广。

许多高等院校的经济管理类专业,在开展双语教学的试点工作中,除了采用少量英文原版教材之外,还编写了部分英文讲义,经过试用后有的已经出版。但迄今为止,各校出版的零星英文教材,大多还没有形成系列,远远不能满足日益发展的双语教学的需要。为此,武汉理工大学出版社经过广泛、深入的调研,决定组织编写一套面向全国普通高等院校经济管理类专业双语教学的系列教材。首期五种教材于 2005 年秋季正式出版发行。

这套教材主要适用于高等院校经济管理类专业的本科生、研究生和 MBA 学生,其主要特点如下:

1. 通过名校名家,打造高质量的双语系列教材。为了切实保证教材的编写质量和水平,我们将系列教材的编写单位定位于教育部所属且经济管理类专业实力较强的院校,同时对编写人员的资历提出了一定要求,这套系列教材由上海交通

大学、山东大学、中南财经政法大学、武汉理工大学等院校双语教学经验丰富的教师编写,并特邀从事过本专业双语教学的专家、教授和外教审定书稿,力图通过名校名家,打造高质量的精品双语系列教材。

2.按照中国的教学大纲及教学要求编写。教材的体例和内容完全按照中国的教学大纲及教学要求设置,并以优秀的英文原版教材为参考。考虑到我国大学生现阶段的英语水平参差不齐,不少学生的英语阅读能力有限,教材中通过增加注释量对书中的重点和难点尤其是一些关键术语加以解释;或给出相应的参考译文,以帮助学生迅速理解和掌握教材中的知识点,不断提高英语阅读和理解能力。

由于组织编写经济管理类专业双语系列教材在国内还不多见,尽管我们做出了巨大努力,但在编写出版中难免还会存在这样或那样的问题,欢迎广大师生多提宝贵意见,也希望这套教材能得到大家的认可。

武汉理工大学出版社

2005年7月

## 前 言

随着中国加入 WTO 以及世界经济全球化的深入,市场营销在中国的发展日新月异。从 1979 年中国改革开放以来,中国的现代营销已经走过了近 30 年的历程,特别是近 10 年以来,中国的营销理论和营销实践的发展十分迅速。与此相适应,中国营销教育从起步到成长、从模仿到创新、从课堂到社会,知识传播手段越来越多样化,社会影响力越来越大。

中国营销专业教育已建立了从专科到博士的完整体系,营销教材层出不穷,从最初的中文译本流行发展到现在的英文原版、中文译本和中文原版三足鼎立的局面。但是,适合中国学生学习的英文双语教材却比较少见。此次由武汉理工大学出版社出版的系列双语教材正是为了解决这一问题而组织策划的。

本教材分三个部分,第一部分为营销基础理论(包括概论、营销环境、消费者分析、市场调研、市场细分和市场定位等 5 章);第二部分为营销策略(包括产品策略、价格策略、渠道策略、促销策略等 4 章);第三部分为营销理论新发展(包括服务营销、全球营销、营销新模式等 3 章)。每章包括教学目标、课文、生词及短语、中文注释、案例、习题及各章小节等内容。教学目标和各章小节有利于学生掌握各章的重点;生词及短语、中文注释有利于学生更好地理解课文;案例和习题则有利于学生将理论知识应用于实际问题。每章的课文有长有短,难度相当,教师可以根据课时和教学安排自行选择其中的课文进行授课。

本教材由中南财经政法大学工商管理学院的部分老师和研究生共同完成,具体分工如下:应斌策划、主编;李莺莉副主编。应斌(第 11 章、第 9 章第 3 节);李莺莉(第 2、6、10 章);沈铖(第 3 章);吴英娜(第 7 章);李新(第 5 章);周建设(第 9 章第 1、4、5 节);夏妮(第 1、12 章);陆燎原(第 8 章);杜鹃、薛楠(第 4 章);童文涛、胡琳卿(第 9 章第 2 节)。

本教材参考了许多学者的有关市场营销方面的文章与成果,我们尽可能在参考文献中一一列出,如有疏漏,请原作者包涵。由于作者水平有限,不当之处望读者不吝赐教。

应 斌

于中南财经政法大学

2005 年 6 月 1 日

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# **PART I**

## **Marketing Rudiments**



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# CHAPTER

## 1

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# INTRODUCTION OF MARKETING

### Chapter Objectives

After reading this chapter, you should be able to:

1. Know about the discovery and development of marketing.
2. Understand what marketing is.
3. Understand and grasp the core marketing concepts.
4. Explain what TQM and ROQ are.
5. Grasp the production concept, the product concept, the selling concept, the marketing concept, and the societal marketing concept.
6. Grasp the differences between the selling concept and the marketing concept.
7. Understand what integrated marketing, internal marketing, and external marketing are.
8. Explain what strategic planning, marketing planning, and marketing plan are.
9. Grasp the structure of the marketing plan.
10. Understand what business mission, marketing objective, SWOT analysis, and marketing mix are.

## 1.1 A Brief History of Marketing Management

The development of marketing began early in the twentieth century in the United States. It is closely related with the development of commodity economy and the gradual progress of the enterprise business philosophy. Usually, the evolution process of marketing can be classified as fol-

## 4 PART I Marketing Rudiments

lows:

### I . Period of Discovery (1900-1920)

The main capitalist countries underwent the Industrial Revolution during this period. A seller's market where demand exceeds supply appeared due to the rapid increase of productivity, high-speed development of urban economy, and an increased demand of goods. Under such circumstances, realizing the value of enterprise products was no longer a problem. Marketing appeared as an answer to the needs caused by this situation.

Marketing study pioneers appeared in this period. Among them the most famous ones were Arch W. Shaw, Ralph Star Bulter, John B. Swirniy, and J. E. Hagerty. Hagerty was a professor in Harvard and he published the first marketing textbook in 1912 after visiting the owners of several enterprises and understanding how they were conducting their marketing activities. Hagerty's book became a milestone that marked the beginning of marketing as an independent discipline. The principles and concepts covered in this textbook were not the same as those included in modern marketing; it was mainly concerned with distributing and advertising.

Arch W. Shaw published the book "*Some Problems in Market Distribution*" in 1915, taking the lead in isolating business-related activities from production-related activities and considering the functions of distribution as a whole. However, he did not yet use the term "marketing", but regarded it as the "distribution process".

"The marketing process begins when the manufacture process ends" was the marketing theory at this stage and it was based on traditional economics. It also suited the production concept, regarding supply as the centre.

### II . Period of Functional Study (1921-1945)

Marketing functional study was the characteristic at this stage. Renowned representatives of this phase were F. E. Clark, L. D. H. Weld, Alexander, Sarfare, Ilder, and Alderson.

Clark and Weld carried on overall argumentation on American agricultural product marketing, pointing out that the purpose of marketing is to make products smoothly transfer from farmers to buyers. This course included three important and interrelated concepts: centralizing (purchasing agricultural surplus), balancing (regulating supply and demand), and dispersing (breaking up the whole agricultural product into parts). It involves seven kinds of marketing functions: centralizing, storing, financing, undertaking the risk, standardizing, promoting and transporting.

The book "*Principles of Marketing*" that Clark published in 1942 innovated functional study to some extent. It summarized the overall function as exchange function, entity distribution function, supportive function etc. It highlighted that promoting means creating demand, which is actually the rudiment of marketing.

### III . Period of Formalization and Consolidation (1946-1955)

The most representative people of this period were Vaile, Grether, Cox, Maynard, and Beckman. A book entitled "*Marketing in the American Economy*" by Vaile, Grether, and Cox was published in 1952. This book explains comprehensively how marketing distributes resources,

guides the use of resources and particularly the use of rare resources. The book also covers how marketing influences individual assignments, and how personal income restricts marketing. In addition, the book states that marketing also involves offering products that adjust to the market. In the same year, Maynard and Beckman defined the term marketing in "*Principles of Marketing*" as "those actions that affect the exchange of goods or the transfer of the ownership of goods and all essential enterprise activities that serve goods entity assignment". Maynard summarized five different approaches to marketing studies: merchandise study, institution study, history study, cost study, and function study.

Therefore, the principles of marketing and approaches to its study had already been summed up in this period. Traditional marketing took shape then.

#### IV. Period of Management-Oriented Marketing (1956-1965)

The top representative scholars in this period were Wroe Alderson, John. A. Howard, and E. J. McCarthy.

Alderson advanced the term "functionalism" in one of his books, entitled "*Marketing Behavior and Executive Action*". Howard took the lead in proposing and describing the marketing theory and its application in terms of marketing management. He studied the issue of marketing management in terms of the relation between the enterprise environment and marketing tactics. In addition, he emphasized that enterprises must adapt to the external environment. McCarthy brought up new opinions on marketing management in his "*Basic Marketing*" published in 1960. He regarded consumers as a specific group, namely "target market", and suggested that to realize business objectives enterprises should focus on marketing strategies that adapt to the external environment and meet customer demands.

#### V. Period of Coordination and Development (Since 1966)

Marketing was separated from economics gradually and combined with theories such as management science, behavior science, psychology, social psychology, and so on. The marketing theory became more mature in this period.

George S. Downing introduced the systematic approach to marketing studies. He considered a company as a marketing system, which offers products and services to current or potential customers through various channels. This was achieved by means of pricing, promotion, and distribution. In addition, he pointed out that as a system, the company exists in a big structure comprised by markets, resources, and all kinds of social organizations. Companies are influenced by and act on the big structure simultaneously.

Philip Kotler, a famous American marketing professor, published a book called "*Marketing Management: Analysis, Planning, and Control*" in 1967, in which modern marketing theories were discussed to a greater extent and more systematically. He made a highly influencing definition for marketing management as the analysis, planning, implementation, and control of programs designed to create, build, and maintain beneficial exchanges with target buyers for the purpose of achieving organizational objectives. Furthermore, he pointed out that the marketing management should involve analyzing marketing opportunities, carrying on marketing researches,

making marketing strategies and tactics, and constituting, executing, and adjusting marketing plans.

Kotler differed from the traditional marketing definition in which the task of marketing management is only to stimulate consumer demand, and further proposed that marketing management also involves influencing the level, time, and constitution of the demand, and therefore its essence is demand management. He expanded the range of marketing applications by stating that marketing is the human activity that is related to the market and suitable for both profit and non-profit organizations.

Kotler put forward the "Mega Marketing" theory in 1984, in a situation that trade protectionism resumed and the state of closing markets appeared in domestic and international market. Mega Marketing, namely 6Ps, is adding 2Ps—political power and public relations—to original 4Ps. He proposed a strategy on which enterprises should not only passively adapt to the external environment, but should make efforts to influence the external environment actively.

### Words and Expressions

1. commodity economy 商品经济
2. evolution *n.* 发展, 进展, 演变
3. productivity *n.* 生产力
4. pioneer *n.* 先驱, 倡导者, 先锋
5. Harvard (美国) 哈佛大学
6. milestone *n.* 里程碑, 重要事件
7. isolate *v.* 使隔离, 使分开
8. as a whole 总体上
9. disperse *v.* (使) 分散, (使) 散开
10. functional study 功能研究
11. formalization *n.* 形式化, 正式化, 形成
12. consolidation *n.* 巩固, 合并
13. restrict *vt.* 限制, 约束, 限定
14. ownership *n.* 所有权
15. functionalism *n.* 功能主义, 实用第一主义
16. interrelated *adj.* 相关的
17. stimulate *v.* 刺激, 激励
18. essence *n.* 本质, 基本
19. Mega Marketing 大市场营销
20. products that adjust to the market 适销对路的产品

### Notes

1. 本节中涉及的主要专家学者有: 菲利普·科特勒 (Philip Kotler), 阿切·W. 肖 (Arch W. Shaw), 拉尔夫·斯达·巴特斯 (Ralph Star Bulter), 约翰·B. 斯威尼 (John B. Swirniy), 赫杰特齐 (J. E. Hagerty), 克拉克 (F. E. Clark), 韦尔达 (L. D. H. Weld), 亚历山大 (Alexander), 瑟菲斯 (Sarfare), 埃尔德 (Ilder), 奥尔德逊 (Alderson), 范利 (Vaile), 格雷特 (Grether), 考克斯 (Cox), 梅纳德 (Maynard), 贝克曼 (Beckman), 罗·奥尔德逊 (Wroe Alderson), 约翰·霍华德 (John. A. Howard), 尤金尼·麦卡锡 (E. J. McCarthy), 乔治·S. 道宁 (George S. Downing)。

2. 本节中涉及的书目有: *Some Problems in Market Distribution*《关于分销的若干问题》, *Principles of Mar-*

keting《市场营销学原理》, *Marketing in the American Economy*《美国经济中的市场营销》, *Marketing Behavior and Executive Action*《市场营销活动和经济行为》, *Basic Marketing*《基础市场营销学》, *Marketing Management: Analysis, Planning, and Control*《市场营销管理:分析、计划与控制》。

3. Arch W. Shaw published the book "*Some Problems in Market Distribution*" in 1915, taking the lead in isolating business-related activities from production-related activities and considering the functions of distribution as a whole. 阿切·W.肖于1915年出版了《关于分销的若干问题》一书,率先把商业活动从生产活动中分离出来,并从整体上考察分销的职能。

4. Howard took the lead in proposing and describing the marketing theory and its application in terms of marketing management. He studied the issue of marketing management in terms of the relation between the enterprise environment and marketing tactics. In addition, he emphasized that enterprises must adapt to the external environment. 霍华德率先从营销管理角度论述市场营销理论和应用,他从企业环境和营销策略两者关系来研究营销管理问题,并强调企业必须适应外部环境。

## 1.2 The Concept of Marketing Management

### 1.2.1 What is Marketing

What does the term marketing mean? Many people think of marketing only as selling and advertising. However, selling and advertising are only the tip of the marketing iceberg. Although they are important, they are only two of many marketing functions, and are often not the most important ones.

Today, marketing must be understood not in the old sense of making a sale—"telling and selling"—but in the new sense of satisfying customer needs. If the marketer does a good job of understanding consumer needs, develops products that provide superior value and prices, distributes, and promotes them effectively, these products will sell very easily.

We define marketing as a social and managerial process by which individuals and groups obtain what they need and want through creating and exchanging products and value with others.

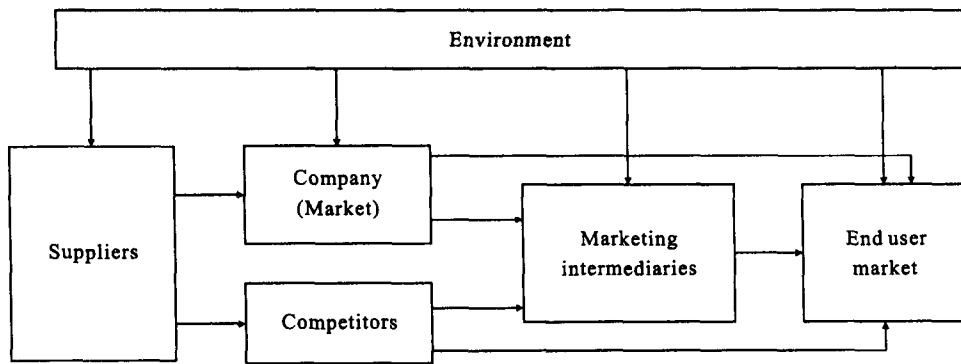
Figure 1.1 shows the main actors and forces in a modern marketing system. In the usual situation, marketing involves serving a market of end users in the face of competitors. The company and the competitors send their respective products and messages to consumers either directly or through marketing intermediaries. All of the actors in the system are affected by major environmental forces (demographic, economic, physical, technological, political/legal, social/cultural).

#### Words and Expressions

1. intermediary *n.* 中间商
2. demographic *adj.* 人口统计学的

#### Notes

1. We define marketing as a social and managerial process by which individuals and groups obtain what they need and want through creating and exchanging products and value with others. 我们将市场营销定义为:个人和团体通过创造及与他人交换产品 and 价值来获得他们欲求的东西的社会和管理过程。

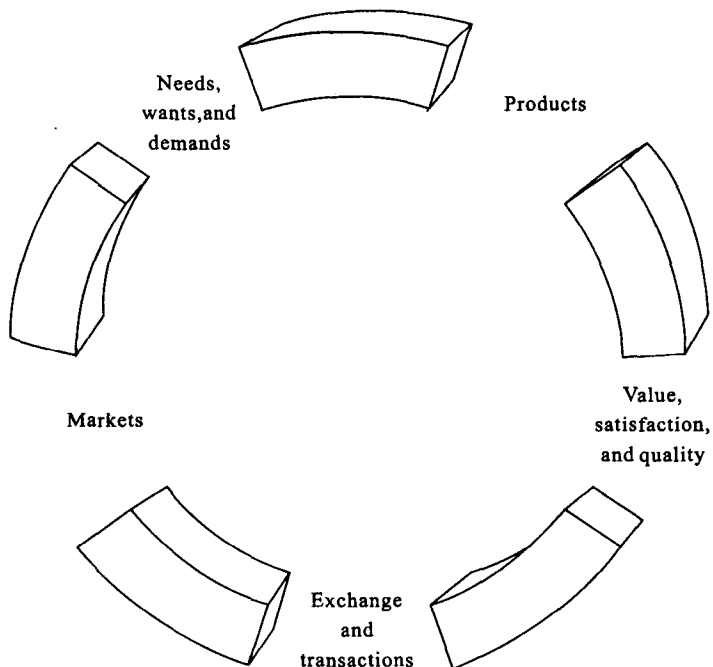


**Figure 1.1** Main actors and forces in a modern marketing system

Sources: Philip Kotler, Gary Armstrong. *Marketing*. Prentice Hall, 1996

### 1.2.2 Core Marketing Concepts

To explain the above definition of marketing, we examine the following core concepts: needs, wants, and demands; products; value, satisfaction, and quality; exchange, and transactions; and markets. These concepts are illustrated in Figure 1.2.



**Figure 1.2** The core concepts of marketing

#### I . Needs, Wants, and Demands

The most basic concept underlying marketing is that of human needs. Human needs are



states of felt deprivation. They include basic physical needs for food, clothing, shelter, and safety, social needs for belonging and affection, and individual needs for knowledge and self-expression. These needs are not invented by marketers; they are a basic part of the human makeup.

Wants are the form taken by human needs as they are shaped by culture and individual personality. A thirsty person in China may want a cup of green tea. A thirsty person in the United States may want a bottle of Coca-Cola. Wants are described in terms of objects that will satisfy needs.

People have almost unlimited wants, but have limited resources. Thus, they want to choose products that provide the most value and satisfaction for their money. When backed by buying power, wants become demands. Consumers view products as bundles of benefits and choose products that give them the best bundle for their money. Thus, a Honda Civic means basic transportation, low price, and fuel economy. A Mercedes means comfort, luxury, and status. Given their wants and resources, people demand products with the benefits that add up to the most satisfaction.

Outstanding marketing companies go to great lengths to learn about and understand their customers' needs, wants, and demands. They conduct consumer research about consumer likes and dislikes. They analyze customer inquiry, warranty, and service data. They observe customers using their own and competing products and train salespeople to be on the lookout for unfulfilled customer needs.

In these outstanding companies, people at all levels—including top management—stay close to customers. For example, top executives from Wal-Mart spend two days each week visiting stores and mingling with customers. At Motorola, top executives routinely visit corporate customers at their offices to gain better insights into their needs. Understanding customer needs, wants, and demands in detail provides important input for designing marketing strategies.

## II. Products

A product is anything that can be offered to a market for attention, acquisition, use, or consumption that might satisfy a want or need. In addition to goods and services, products include persons, places, organizations, activities, and ideas. Consumers decide which places to visit on vacation, which entertainers to watch on television, and which ideas to adopt. To the consumer, these are all products. If at times the term product does not seem to fit, we could substitute other terms such as satisfier, resource, or offer.

Many sellers make the mistake of paying more attention to the specific products that they offer than to the benefits produced by these products. They see themselves as selling a product rather than providing a solution to a need. A manufacturer of drill bits may think that the customer needs a drill bit, but what the customer really needs is a hole. These sellers may suffer from "marketing myopia". They are so taken with their products that they focus only on existing wants and lose sight of underlying customer needs. These sellers will have trouble if a new product comes along that serves the customer's need better or less expensively. The customer with the same need will want the new product.