9

The marketing mix – a helicopter view

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Chapter Topics

Marketing mix origin and background

The marketing mix concept follows directly from the very nature of marketing. The concept is inherent to any marketing situation without any exception, irrespective of its peculiarities – even if this is more obvious in some situations than others. In other words, the mix concept is quintessential to marketing (van Waterschoot and De Haes, 2008: 42). Logically, therefore, the origin and traces of the concept are intertwined with those of the marketing discipline. The antecedents of marketing practice go a long way back into the histories of many economies, even if their individual histories show different time patterns (Fullerton, 1988). History study reveals that managerial marketing practice and corresponding conceptual thinking as a distinct discipline (Bartels, 1962) resulted from dramatically changing market circumstances in the Western world, predominantly taking place around the end of the nineteenth and during the first half of the twentieth centuries. An increasing divide between production and consumption contributed to the structural presence of substantial supply and demand potential in diverse product and service areas. Over the years both supply and demand potential tended to become increasingly substantial as well as heterogeneous,

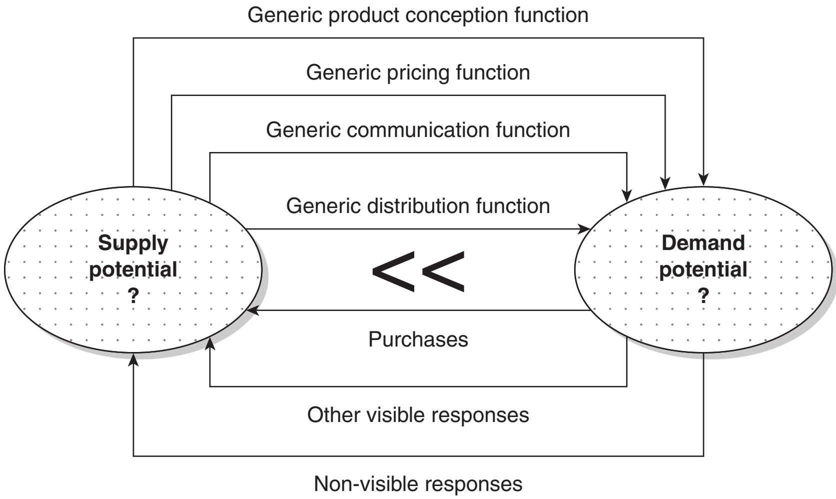

Figure 9.1 The new exchange model (van Waterschoot et al., 2006)

and as a result became also more or less non-transparent. Importantly also, even if potential demand typically increased, for example as a consequence of rising incomes, potential supply was or became typically even larger in relative terms, for example as a result of innovations. The rise of these buyers' markets forced or allowed marketers to carry through all sorts of marketing efforts to attract the attention, interest and preference of potential customers (van Waterschoot and De Haes, 2008).

The outcome of the previous developments was the rise of a basically new exchange model fundamentally different from the one traditionally assumed by economists (see Figure 9.1). The new model generically synthesizes the essential forces and properties of any marketing situation as opposed to other types of exchange situations. As such it summarizes the basics of both marketing theory and practice. Their subject matter concentrates on particular types of exchanges, the core conditions of which were generically defined by Philip Kotler (1972). For marketing exchanges to occur, the following conditions are necessary:

> **(1) [the presence of] two or more parties believing that it is appropriate or desirable to deal with one another; (2) a scarcity of goods [in the generic sense of the latter term]; (3) concept of private property which allows to make, accept or reject an offer; (4) each of the parties must possess something that might be of value to the other; (5) the 'wanting' party must be able to offer some kind of payment for it; and (6) the 'owning' party must be willing to forego the object or service for the payment. (Kotler, 1972: 47)**

On top of these structural exchange conditions there are some typical properties explaining the distinct character of the new exchange model: heterogeneity and non-transparency of demand and supply as well as the prevalence of buyers' markets (represented in Figure 9.1 by dots, question marks and inequality signs respectively) (van Waterschoot and De Haes, 2008). A major distinctive idea of the new model as opposed to the traditional microeconomic model is the implied type(s) of buyer response(s). The outcomes of the new model are far more differentiated than the sole key question in the traditional economic models, which is 'to buy or not to buy'. Additional types of visible responses become important like, for example, store visits or active information gathering. On the other hand also non-visible reactions are considered like, for example, brand learning, as well as delayed reactions like, for example, possibly consumer satisfaction. Consequently, the new exchange model allows the integration of subjective and even of non-rational behaviour (Bagozzi, 1975).

This new exchange model structurally implies four unavoidable and therefore generic marketing exchange functions. These are in spectacular contrast with the absence of those functions in the traditional models of microeconomics during the birth era of the new marketing discipline, which were focusing mainly on pure, transparent markets ruled by rationality (van Waterschoot, 2000; van Waterschoot and De Haes, 2008; van Waterschoot and Van den Bulte, 1992; van Waterschoot et al., 2006). In Figure 9.1 these four generic marketing exchange functions are represented by arrows originating from the marketer(s) towards the market(s). In 'reciprocal marketing' they go both ways (van Waterschoot and De Haes, 2008).

1. *A generic product conception function* – in the era of the emergence of the new exchange model products and services are increasingly becoming heterogeneous implying a passive or active product conception by marketers. This is in sharp contrast with homogeneous markets, which do not pose any significant strategic choice in terms of product composition. Now a choice needs to be made anyway – actively or passively – between the many imaginable alternative product concepts, to determine which specific product composition(s) would be marketed. So, a first vital, unavoidable exchange function consists of configuring something that would be valued by the prospective exchange party.
2. *A generic pricing function* – market participants enjoy more or less price freedom compared to the harsh reality of solely having to take or leave a market price. Now they have the opportunity to – again actively or passively – follow a pricing strategy. In fact in many cases marketers are even forced to. So, a second unavoidable exchange function consists of determining the compensation and sacrifices to be brought by the prospective exchange parties.
3. *A generic communication function* – the previous two functions would not allow any exchange if no communication could take place. In the described setting, communication with an eye on information and persuasion has become inevitable as well. The respective parties need to be informed about one another's existence, intentions and requirements and perhaps be persuaded about the attractiveness of the other party's offering, or even about entering into such an exchange relationship at all. This third fundamental exchange function therefore consists of bringing the offer to the attention of the prospective exchange party and influencing its feelings and preferences about it.

4. *A generic distribution function* – in the described setting, production and consumption are separated by different types of gaps – geographic, choice, time and amount (Bucklin, 1966, 1972) – which market participants have to bridge in order to make their products or services available for acquisition. No exchange would come about, if the respective parties were actually unable to deliver the object or service that is exchanged for some higher valued object or service. Here arises a fourth fundamental exchange function of placing the offer at the disposal of the prospective exchange party.

The marketing discipline considers these four functions as generic, in the sense that they have to be fulfilled anyhow, for exchange to come about. This necessity follows from the marketing discipline's realistic market assumptions, which would be called impure by economists because of the supposed lack of instantaneous transactions and perfect knowledge (Houston and Gassenheimer, 1987: 15). Consequently, poor execution of any of these functions would bring about poor exchange results or worse results than those that could potentially have taken place. However, if any of these generic functions were not carried out, no exchange could take place, no demand could be created, fulfilled or maintained (van Waterschoot and Van den Bulte, 1992).

The nature and scope of the marketing mix metaphor and concept

In view of the properties of the new exchange model the four generic exchange functions are unavoidably needed to influence demand to a greater or lesser extent. Those functions, however, cannot possibly be instrumental in themselves. In fact they materialize via actual choices in terms of demand impinging instruments, namely controllable elements affecting demand like, for example, all sorts of product and/or service attributes, product and/or service ranges, price schemes, all sorts of communication messages, personal and non-personal communication, communication vehicles and schedules, distribution networks, compensation schemes for intermediaries, exclusiveness arrangements, merchandising schemes, etc. These demand impinging instruments can theoretically be spread out over time as well as targeted in numerous ways and combined in a myriad of ways. The underlying concept is that of a controllable mixture of demand impinging elements – instruments – with divergent potential results depending on the timing and composition of the mixture. This idea received the suggestive and figurative label of 'marketing mix' (concept). It is indissolubly inherent to marketing activity. The reality of a large number and variety of demand impinging instruments that had to be combined was indeed structurally implied by the new exchange model from its very beginnings. That said, this idea was not clearly identified and described for a long period. It was not only a hardly identified concept; for a long time it remained a kind of implicit concept without a name (van Waterschoot and De Haes, 2008). The term 'marketing mix' was only coined in 1953 by Neil Borden in his presidential address to the American Marketing Association. He had been inspired by James Culliton (1948) who in the preceding decade had pictured the marketing executive as somebody combining different ingredients (van Waterschoot and Van den Bulte, 1992). The term 'marketing mix' from that point on referred not only to a picture or metaphor of pursuing certain market responses by using mixtures of instruments, but also to the corresponding concept (Borden, 1964) as well as to the included instruments.

The mix metaphor not only suggested the availability of a wide range of possible ingredients, as well as the numerous ways in which these elements could be combined. It also indicated the fact that different amalgamations might produce different results, with some more preferable than others. The marketing mix expression reminds one of many other types of combination with similar characteristics. Not every mixed grill is as delicious as any other and not every drink can be combined successfully with any other. The metaphor also suggests that the 'mixer' has control over a number of elements which he can self-reliantly mix as he likes. This is applicable only to some extent since marketing reality is always subject to some constraints. The mix metaphor contains even some more suggestions which cannot be taken literally in all instances like, for example, the suggestion of a one-time operation versus the reality of interactive operations and a longer term orientation (van Waterschoot and De Haes, 2008).

Formally defined, the concept of the marketing mix refers to the set of 'controllable demand-impinging elements (instruments) that can be combined into a marketing programme used by a firm (or any other organization) to achieve a certain level and type of response from its target market' (van Waterschoot and Van den Bulte, 1992: 88). By definition instruments are concerned that they more or less directly influence demand to a greater or lesser extent, like the price of a product or the way in which it is advertised.

However, not all marketing instruments are also marketing mix instruments. For example, marketing research – if carried out properly and if its information value exceeds its costs – is often a useful marketing instrument, without belonging to the marketing mix. The reason is that marketing research, normally speaking – unless the 'research' project is intended as a communications campaign in the first place – does not directly influence demand in any way or to any extent. Customers will not start buying more of a brand for the mere reason that its producer or distributor increases his marketing research budget, employs more competent research, personnel, hires a more skilled research agency, or starts using more appropriate research techniques. Adequate marketing research will normally only influence demand indirectly, for example by helping to (re-) specify product characteristics to better match customer needs and desires (van Waterschoot, 2000).

Next to exerting a more or less direct effect of a variable magnitude sooner or later, the demand impinging element should also be controllable to be a marketing mix instrument. Fine weather fosters coastal tourism, but is not a marketing mix instrument. However, the distinction between controllable and non-controllable elements, is not always obvious and lack of control does not necessarily imply lack of influence. Controlling over a variable means being able to establish its value. Influence over a variable means having some but not complete control of it (Ackoff, 1981: 174). A country's birth rate, for example, is an important but uncontrollable demand impinging element for a manufacturer of baby clothes. If, however, government measures such as birth premiums can significantly raise demand and if government measures are highly dependent on company lobbying, then the birth rate can be called susceptible to influence. As the example suggests, controllable (marketing mix) variables may be used to influence crucial, but uncontrollable environmental elements (van Waterschoot and Van den Bulte, 1992).

Marketing arguably applies without any exception to any voluntary exchange situation matching the properties of the new exchange model. Consequently, not just business organizations and their dealings with client publics may be concerned, but possibly also other organizations like, for example, non-profit organizations and possibly also other sorts of publics like, for example, employees or donators. At least, to the extent that and as long as the properties of the new exchange model prevail. This observation fully matches the conclusions of the broadening controversy amongst academics in the early 1970s and the corresponding, generic definition of marketing by Philip Kotler (1972).

All the applications or situations embraced by Kotler's (1972) generic marketing definition imply the mutual prevalence and use of the earlier mentioned four generic exchange functions, because otherwise exchanges simply cannot be realized. Partial applications in terms of generic exchange functions being used can consequently only be borderline cases. An example of the latter would be when the police try to convince the general public that they are their friend, thereby relying basically on communication only. But in any of those cases – full-fledged or partial – marketing mix instruments are inherently and indissolubly needed. The generic exchange functions are structurally present in any marketing situation, but can at the same time not materialize without the use of concrete demand impinging instruments. In other words, by definition the mix concept applies to any marketing situation without any exception: consumer marketing, B2B marketing, non-profit marketing, service marketing, retail marketing, etc. The mix concept even applies by definition also to less traditional sub-fields such as e-marketing (Möller, 2006) and relationship marketing.

Self-evidently, the inevitable, logical conclusion that the mix concept applies to any marketing situation without exception, does not counter-argue the fact that major differences would exist between those different groups of applications and corresponding schools of thought. Just like there exist lots of differences within those groups, for example as a consequence of different strategic and/or tactical options. Relationship marketing is a case in point. In many instances, relationships (in terms of reciprocal personal knowledge, social contacts, emotional ties, etc.) naturally develop between marketers and their customers (or any other relevant public). Naturally also, marketers capitalize on cultivating those relationships as this is an expedient towards gaining control over the exchange process, or, in other words, a means of increasing the likelihood of positive responses from the market. As long as relationships do not completely rule the game – that is, as long as the desired responses of the market are not structurally guaranteed – there is still a marketing situation at stake. Otherwise, other exchange mechanisms (e.g. social, emotional, financial, ownership, contractual systems, etc.) take over and the situation can no longer be considered as possessing a marketing character. The point therefore is, that as long as the upper limits of the relationship have not been reached in terms of magnitude and strength, and as long there is still a marketing exchange framework at hand, the generic exchange functions still largely and unavoidably determine the outcome of the exchange process. These exchange functions in turn cannot do else but materialize by means of demand impinging instruments under some or other form. Consequently, demand needs to be managed under some form or other. So, also under relationship marketing prices are charged, product concepts are being conceived, developed, delivered and communicated. The specific mix approach will probably be affected and characterized by the relationship context, resulting, for example, in a relatively great deal of personal and ongoing communication, pricing schemes based on loyalty, etc. The prevalence of these peculiarities, however, does not counter-argue the basic presence of a marketing mix. So, for logical reasons, we fully agree with those authors who are keen on underscoring the peculiarities of their sub-field, as far as they point at genuine differences (Grönroos, 1994). However, also for logical reasons, we do not agree with those who would go as far as denying the undeniable, namely the common generic roots of their sub-field with the overall marketing field, including the marketing mix.

Marketing mix functions, instruments and effects

The generic exchange functions materialize by means of the marketing mix, implying that those functions also represent the generic functions of the marketing mix itself. The most general marketing mix effects are those following from the simultaneous pursuit or execution of all exchange functions by means of the overall mixture of instruments. This will be discussed in the first subsection. The second subsection explores the horizon of possible effects of the mix still further as well as that of of individual instruments. The third subsection distinguishes between strategic and tactical effects and instruments, also with an eye on the discussion of mix classifications further on.

Primary vs. secondary functions, instruments and effects

In practice, numerous marketing mix instruments exist. Out of an endless theoretical list of mix instruments a specific actual combination or combinations have to be chosen, targeted and timed, taking into consideration their expected effects. A fundamental observation is the fact that any instrument out of that mixture, in itself, predominantly serves one of the four generic functions mentioned previously, but that at the same time it also contributes – albeit to a lesser extent – to the fulfilment of the three other functions.

It should be underscored that all possible individual marketing mix instruments do have primary as well as secondary effects, when looked at from a functional point of view. This distinction follows from the vital observation that any marketing mix instrument serves any generic marketing mix or exchange function. However, any marketing mix instrument actually serves primarily one of the four generic functions (at the same time it may also primarily serve the so-called 'promotional' function – see pp. 200–3). The corresponding effects on demand are the instrument's primary effects. At the same time it is crucial to observe that any marketing mix instrument also contributes, to a lesser extent, to the other generic functions (van Waterschoot, 2000: 189). The corresponding effects on demand are the instrument's secondary effects. The idea is summarized in Table 9.1.

Advertising is a classical communication instrument within the marketing mix, meaning that its primary function (and corresponding effect) is one of bringing the offer to the attention of the prospective exchange party and influencing their feelings and preferences about it (van Waterschoot, 2000; van Waterschoot and Van den Bulte, 1992). At the same time, however, advertising may add extra need fulfilment to the product – for instance, by providing prestige or the suggestion or belief of power or excellence. This is typically the case, for example, with Nike or Adidas advertisements. Conversely, advertising may imply a cost and hence influence the pricing function of the marketing mix. Such could be the case if a highly distinguished, favourite brand of wristwatch were featured in a notorious magazine like – supposedly – *Playboy*. Advertising also contributes to the availability function of the marketing mix – for instance by informing the public about the available points of sale. Finally, advertising contributes to the promotion function (see pp. 200–3) of the marketing mix, even if theme advertising is concerned, which by definition tries to build a long-term image and to prepare for long-term sales. Coca-Cola theme advertisements, for instance, next to establishing and maintaining this picture of young, smart and joyful people who at crucial moments of their lives never fail to think of Coca-Cola, will also make some people under some circumstances aware of their current thirst, or at least make them search almost on the spot for their favourite thirst-quencher.

Each individual marketing mix instrument may in itself foster, or hamper, any marketing mix function from several points of view. The use of tetra bricks, for example, fosters large-scale distribution of fruit juice, whereas the use of fragile fantasy bottles would rather hamper that sort of distribution. When the instruments are being mixed it is logical, that any positive or negative primary instrumental and also any secondary effect may – or even will – interact positively or negatively with any other instrument's primary and secondary effects. Tetra bricks would suit sales via hypermarkets and discount establishments, but might sustain less well a quality brand image. The latter would probably be more sustained if the beverage were packed in elegant bottles and sold via upmarket establishments. If the interaction amongst instruments is harmonious, this will contribute to positive synergy creation within the marketing mix. If the interaction amongst instruments is negative though, dis-synergy will follow. The possible mix interactions are manifold

Table 9.1 The multi-functional effects of marketing mix instruments

	Marketing mix instruments				
	Product instruments	**Price instruments**	**Communication instruments**	**Distribution instruments**	**Promotion instruments**
Generic functions					
Need-fulfilment function					
Configuration of something valued by the prospective exchange party	xxxxx	x	x	x	x or xxxxx
Pricing function					
Determination of the compensation and sacrifices to be brought by the prospective exchange party	x	xxxxx	x	x	x or xxxxx
Communication function					
Bringing the offer to the attention of the prospective exchange party and influencing its feelings and preferences about it	x	x	xxxxx	x	x or xxxxx
Distribution function					
Placing the offer at the disposal of the prospective exchange party	x	x	x	xxxxx	x or xxxxx
Promotional function					
Inducing immediate, overt behaviour by strengthening the generic functions during relatively short periods of time	x or xxxxx	x or xxxxx	x or xxxxx	x or xxxxx	xxxxx

Notes: xxxxx = primary effects/x = secondary effects

Source: van Waterschoot and Van den Bulte, 1992: 89

and not necessarily easily identifiable and predictable at the level of primary effects. At the level of secondary effects, they are typically even still much less obvious and less easy to predict – a phenomenon adding to the impression of creative genius required to find the magic mix formula.

So, any specific marketing mix instrument affects all four generic marketing mix functions anyhow, but predominantly typically only one of them. On the other hand, any generic marketing mix function is served by any specific marketing mix instrument or hampered by it. Since in actual applications several specific instruments contribute to the fulfilment of all four generic functions, coordination becomes of the utmost importance. The instrumental choices should be made in such a way that the different elements do not only reinforce one another's positive effects and neutralize one another's negative effects with regard to one single generic function, but also with regard to all four such functions simultaneously. Moreover, each generic function actually consists of a set of specific sub-functions that require specific instrumental goals. Communication, for example, presumes amongst other things the creation of awareness, knowledge, preference and conviction.

The wide range of marketing mix effects

The range of marketing mix effects is particularly wide and can be looked at from several points of views. Marketing mix effects can be looked at from the point of view of functions, from the stance of the overall mixture, from the stance of specific instruments, or from the perspective of interactions amongst instruments at primary or secondary functional level, etc. Each of those viewpoints though can still be differentiated further by looking into, for example, the magnitude and timing of the effect, its desirability, and so forth. The effects of marketing mix instruments may, for example, be greater or smaller, may take place sooner or later, and may lead to general demand changes for the whole product category and/or for particular offerings. This section briefly explores some of the most important distinctions (van Waterschoot, 2000: 183–94).

A first distinction to be made is between behavioural versus mental responses. Marketing mixes may lead to actual purchases or else to other forms of visible behaviour like, for example, the visiting of trade shows or word-of-mouth-communication. They may also lead to non-visible behaviour in the form of mental responses like increased brand awareness, certain brand associations, increased knowledge of product or service features, strengthening of attitudes, etc. Ultimately, most marketing programmes aim at making people act in a specific way favoured by the marketer. In an economic setting this is mostly buying. This does not conflict, however, with the fact that other sorts of reactions may also be favoured and somehow fit a marketing programme. The type of response provoked by marketing mix instruments may therefore range all the way from mental changes to visible behaviour. Depending on the case, these changes may (be intended to) take place in a shorter or longer time period. The building of a brand image or preference may take a long time. Conversely, when a supermarket chain announces a significant price reduction on a popular brand of soft-drink during one week, its goal is to create store traffic within the course of that particular week. Marketing mix instruments typically provoke both direct and indirect effects or responses. A direct reaction is one that follows from the use of mix instruments without any intermediate reaction. The opposite is the case for indirect effects. The famous Michelin guides, for example, were originally introduced with the intention of encouraging French drivers to travel further and thus to use more tyres. They did this by informing car owners of the location of attractive towns, hotels, restaurants, etc. Marketing mix effects can range all the way from constructive to destructive ones. For example, as a result of charging a discount price for a prestige brand, massive sales may accrue, but the brand image may become damaged. Marketing mix effects can be desirable versus undesirable. For example, a low price strategy may bring about an aspired market share gain, but also cause the undesirable organization of a 'grey' parallel distribution channel supplying neighbouring countries (Cespedes et al., 1988). The use of marketing mix instruments may lead to major versus minor effects. An advertising campaign, for example by a government organization, may cause an extremely small effect only, probably in spectacular contrast to what had been expected beforehand. Immediate effects may be caused versus delayed effects. The immediate effect of a price penetration strategy may be relatively modest in the short run for example, but have as a consequence that the corresponding brand can position itself as a mainstream brand in the future.

Last but not least it should be remarked, that most typically marketing mix instruments are used to increase demand. Because of possible differences between desirable and undesirable demand though, other possibilities also prevail. It could be advisable, for example, to limit demand temporarily and/or selectively and/or to synchronize demand to bring it into harmony with the organization's production capacity (Kotler and Levy, 1971).

Strategic vs. tactical marketing mix instruments and effects

With an eye on the discussion of marketing mix classifications in the next sections, some of the distinctions discussed in the previous paragraphs can best be combined already at this point into the crucial distinction between strategic and tactical marketing mix effects and instruments. Strategic instruments are the ones that have their effects essentially spread out over time. They do not have their main effect taking place immediately, but largely in the medium and relatively longer term. Strategic instruments are also the ones of which the effects are not necessarily visible, in the sense of not necessarily leading to overt (visible) behaviour. Tactical instruments on the other hand are instruments that predominantly lead to visible, short-term effects.

This distinction results from the fact that the strategic use of the four generic exchange functions does not always suffice to bring about exchanges. There are four typical reasons for this: physical inertia, psychological inertia, typical forms of risks and finally also competitive inertia (Beem and Shaffer, 1981: 16, 18). Direct inducement or provocation is in some situations a necessary condition for the exchange to take place. As a result, an additional 'situational' or 'promotional exchange function' may be needed at times to overcome these forms of inertia or to take extra advantage of favourable market developments, next to the four generic exchange functions. Direct inducement or provocation is indeed in some situations a necessary condition for exchange to take place, or else is called for to boost demand to a still more favourable level. Hence, promotion represents a 'situational' or 'complementary' marketing function (van Waterschoot and Van den Bulte, 1992: 88). This non-generic, but oppositely situational marketing mix function, specifically provokes immediate, visible reactions.

The instruments which specifically execute this promotional function are tactical or sales promotion (mix) instruments as opposed to strategic marketing mix instruments. Examples are direct-effect-advertisements as opposed to indirect-effect-advertisements. The latter can be found often when companies try to maintain their image in advertisements with more or less general statements. Direct-effect-advertisements in many cases focus on price elements and more paticularly on temporary price reductions. Therefore this type of advertisement typically provokes short-term demand reactions and thus is a promotional instrument. The promotional mix/instruments can more generally be positively defined as follows:

> **The subset of demand-impinging instruments that have no power of themselves but can, during relatively short periods of time, complement and sustain the basic instruments of the marketing mix (namely product, price, distribution, and communication) for the purpose of stimulating prospective exchange partners (commonly referred to as target market(s)) to a significant degree of desirable forms of immediate, overt behaviour. (van Waterschoot and Van den Bulte, 1992: 89)**

In summary, promotional instruments possess the following properties:

(a) Their primary effect is visible (overt) behaviour, e.g. purchase or trial use.

(b) The instruments are used on a temporary basis, because if they were used for a longer time they would lose their potential effectiveness.

(c) They are supplementary instruments.

(d) They supplement *any* sort of basic category (see functional marketing mix classification, p. 201).

(e) They cannot possibly exist on their own.

(f) They are used as tactical instruments, depending on the circumstances.

(g) Their secondary effect(s) are often not visible (at least not immediately).

It should be emphasized that the multifunctionality of instruments, including the distinction between primary and secondary functionality, also extends to promotional instruments. Promotion or sales promotion instruments (e.g. temporary price discounts) by definition primarily contribute to the promotion function next to their primary generic function (e.g. the pricing function) (van Waterschoot, 2000). Yet, these instruments also affect the (strategic aspects of the) other generic functions, sometimes in a negative way. Temporary price reductions, for instance, by their very nature primarily influence the pricing function next to the promotion function. They could more specifically limit the bracket of pricing possibilities for the future. If customers' price expectations were reshaped by massive price reductions, it may indeed turn out to be difficult to charge a higher price again afterwards. Promotion instruments may, however, also play a secondary, even undeniable, role outside their own strict field of operations. Consumer price discounts may result in, say, retailers spotting massive sales opportunities and therefore granting much more shelf space to the brand than they would have done otherwise. As a result, not only the availability function, but the communication function may also be influenced. More seriously, the impression might be created that a very ordinary brand would be involved, available everywhere, with no distinct features except its price. If for that reason, the exclusiveness of the product would be(come) endangered, this loss of exclusiveness touches upon the need fulfilment function of the marketing mix.

Pragmatic, mnemonic and pedagogical mix classifications

In the development of a new body of thought, such as marketing throughout the twentieth century, the making of listings and taxonomies is one of the primary tasks actually carried through. Not surprisingly therefore, early taxonomies were not developed in a deductive way on strictly logical grounds as a derivation from existing theory (Hunt, 1991). Rather they were made in an inductive way. Known elements, supposedly belonging to the investigated population, were inventoried and grouped into more or less crude, somewhat judgemental or even intuitive classes on the basis of their similarity. In this way early writers on the marketing mix tried to itemize the large number of controllable demand impinging instruments. Frey (1956) and Borden (1964) adopted a checklist approach. Other authors developed more succinct and convenient classifications that could be easily memorized (Frey, 1956; Howard, 1957; Lazer and Kelly, 1962; McCarthy, 1960). Of the many developed schemata, only McCarthy's has survived and has even become the 'dominant design' or 'received view', or at least the most popular view.

The McCarthy typology has become known as the 'Four P classification' of the marketing mix, since it distinguishes four classes of items under four headings beginning with the letter P: Product, Price, Place and Promotion. Although McCarthy only named these classes without defining them, three of them correspond more or less roughly to the previously mentioned generic marketing mix functions.

The first class contains Product-related instruments such as product variety, product quality, design, features, brand name, packaging, sizes, services, warranties and return. The second class comprises Price-related instruments like the list price of products, discounts, allowances, the payment period and credit terms. The third class holds Place-related instruments like the choice of distribution channels, the coverage of existing outlets or the location of outlets. The fourth class of instruments in the McCarthy typology is a hybrid one. Whereas the three previous classes do roughly correspond to three of the generic exchange functions of the new exchange model, McCarthy's fourth P does not even roughly correspond to the fourth generic function. Indeed this fourth P is typically subdivided into four sub-classes, of which only the first three exclusively encompass instruments that mainly aim to bring the offer to the attention of the prospective exchange party and to influence feelings and preferences about it. These three sub-classes are: mass communication; personal communication and publicity. The fourth P of the McCarthy typology, however, also encompasses a large, residual fourth sub-category, which serves as a catch-all to host all marketing mix instruments that do not find a place in any other category. In contrast with the three previously mentioned typical communication sub-classes, only the fourth sub-category of McCarthy' s fourth P consists of actual promotion instruments in the strict sense of the word, whereas the other three are basically strategic communication instruments. A traditional description representative of this (sales) promotion category of McCarthy's popular split-up is the following: 'Those marketing activities, other than personal selling, advertising and publicity, that stimulate consumer purchasing and dealer effectiveness, such as displays, shows and exhibitions, demonstrations, and various nonrecurring selling efforts not in the ordinary routine' (Alexander, 1960).

In terms of appeal and popularity the McCarthy typology has been and still is amazingly popular, presumably as a result of the P-mnemonic. From a classificatory point of view though, the classification fails to meet most of the basic quality criteria as put forward by Hunt (1991). It has no clearly defined classification dimensions, no positive definition of its classes, it suffers in terms of mutual exclusiveness and implies a major catch-all category.

Since the 1960s, the use and interpretation of the concept of the marketing mix has evolved and developed, not least through the classification of the four Ps by McCarthy (1960) in spite of its classificatory shortcomings. This classification, although it quickly became a standard, has not remained static. Later researchers have indeed sought to expand the classification; whereas others still have sought to criticize it.

Throughout the years a number of alternative marketing mix classifications have been formulated, often to reflect the peculiarities of a specific field of application. Remarkably, in most instances this adaptation was realized by adding one or more Ps to McCarthy's mnemonic four Ps list. In instances where an explication of a sub-category of instruments is concerned, such an addition – although conceptually not strictly necessary – is defensible on pedagogical grounds. In instances where an extension outside the boundaries of the marketing mix is concerned, no conceptual justification exists. Despite the indisputable relevance of the managerial issues behind the added Ps, the extension of the mnemonic list mainly serves as a sometimes disputable eye catcher. In further instances, the proposed names of the new categories are indeed not appropriate as a result of the obligatory P. The subsequent paragraphs summarize the main examples of such explications and extensions.

Occasionally, a separate fifth P is added to denote People, Personnel or Personal selling. In this way a collective noun is provided to stress the importance of all types of selling and servicing efforts which are being carried out by any person within the organization. In applications where sales efforts are of a typically high strategic value – as, for example, in the case of service marketing – no fundamental objection can be made to/against this explication, although there is no conceptual necessity since the provision of services belongs to the P of the (service) Product, and sales efforts form part of the 'P' of 'Communication'. In retail marketing, as well as the supplementary P of People a further P is often added to denote the Presentation of merchandise as well as the store layout. Again an explication is involved that is defensible on pedagogical grounds, but which is not necessary from a conceptual or classificatory point of view, since the generically rooted four Ps also hold these elements.

In service marketing Ps have also been added to represent Participants, Physical evidence and Process (Booms and Bitner, 1981). The Participants in a service marketing situation can significantly improve or harm the quality of the execution of service. However, the activities of the personnel carrying out the service conceptually belong to the first P of Product, encompassing all instruments which aim primarily at want fulfilment. In so far as the clients are meant by Participants, the addition becomes conceptually incorrect, since the marketing mix groups demand impinging elements and not the actual demand constituting elements. The Physical environment where the service is provided, together with tangible elements which are used to support the service, obviously influences demand. Where these elements are under the control of the marketer, they form part of the Product or Place instruments. If these elements cannot be controlled by the manager, they are by definition not marketing mix variables. The same remark also holds for the procedural elements of servicing, meaning that a separate P for Process is not really necessary.

With regard to the persuasion of the public outside the most typical target groups, Kotler (1986) has introduced the concept of 'megamarketing', denoting the art of supplying benefits to parties other than target consumers and intermediaries like agents, distributors and dealers – parties such as governments, labour unions and other interest groups that can block profitable entry into a market. Specific instruments in this context are Public Relations and Power. Public relations try to influence public opinion, mainly by means of mass-communication techniques. Power on the other hand addresses itself to 'influential industry officials, legislators, and government bureaucrats to enter and operate in the target market, using sophisticated lobbying and negotiating skills in order to achieve the desired response from the other party without giving away the house' (Kotler, 1986: 120). The term power is not at all appropriate though in this instance. Power refers to the ability of the marketer to get some other party (consumer, distributor, government, etc.) to do what they would otherwise not have done (buy, search for information, give a permit) (Coughlan et al., 2006: 197). Marketing mix instruments of whatever kind – if properly combined – are capable of developing a certain (smaller or larger) amount of power. Calling one instrument category, applied in a specific context, Power, implies both a linguistic and conceptual distortion to make the instrument fit a mnemonic row.

Pragmatic classifications, and especially those expressed in particular mnemonics – like a number of P's – may well be meritorious during the infant stage of a discipline. Intuitive categorizations under the form of mnemonics, rightly help in summarizing and memorizing crude key essentials of a new field during its pioneering stage. Over time, however, the drawbacks of this sort of infant classification become more disturbing as the discipline matures and becomes – or should become – more sophisticated. The divisions of the intuitive typologies are not clear cut but arbitrary, and the 'all other' categories become larger and larger, thereby causing increasing confusion (van Waterschoot and De Haes, 2008). The mnemonic form of the early typologies paradoxically risks becoming obligatory, leading to mnemonic extensions which further risk distorting or prohibiting logical reasoning. Those disturbing phenomena are very typical of the most well known of those pragmatic classifications namely the overly popular four Ps classification of McCarthy (1960).

So, in conclusion, sticking to pragmatic mnemonics in a mature discipline is unjustified both from a conceptual and consequently also from a managerial point of view. It prohibits the development of logical reasoning as well as the process of scientific fact finding and the formulating of managerial recommendations. Extending mnemonics for eye-catching reasons is tempting, but risky from the point of view of conceptual and terminological distortion.

Table 9.2 The essence of a functional marketing mix classification

		Dominant generic marketing mix function			
		Primary instruments of the generic product conception function	Primary instruments of the generic pricing function	Primary instruments of the generic communication function	Primary instruments of the generic distribution function
Situational marketing mix function dominant or not?	Primary strategic instruments				
	Primary tactical instruments				

Source: Based on van Waterschoot and Van den Bulte, 1992.

A functional classification of the marketing mix

In view of the fact that marketing mix instruments make up the central weaponry for influencing demand, common sense suffices for understanding that it is more than advisable to possess a reliable classification of those instruments. This could be compared with the literal weaponry of an army, where it would matter for instance to know what sorts of guns make up part of the arsenal in terms of impact, range, etc. A good classification is one that can host any element of the corresponding – well defined – population, and leaves no room for any outlier. It uses explicit classification criteria clearly informing users about the grounds of the split-ups used. The classification criteria should be independent of each other. Moreover the resultant classes should be capable of capturing any element belonging to the population, and any element should fit not more than one class at the same time.

This section provides a functional classification of the marketing mix, thereby using two main, explicit criteria (van Waterschoot and Van den Bulte, 1992). As a first criterion we will look at the primary generic function of the instruments within the context under study. This enables straightforward classification, since any marketing mix instrument is linked to any exchange function in a secondary fashion. However, the primary link is unique, provided the setting. In traditional retailing, for example, packaging could be seen as part of the product concept in the first place. In the self-service atmosphere of a hypermarket on the contrary, packaging may in the first place be a communication device.

The second classification criterion is based on the distinction between strategic marketing mix functions versus the tactical, situational or promotional function. In fact, each marketing mix instrument has both strategic and tactical effects. Some marketing mix instruments are primarily strategic instruments though. Some mix instruments on the other hand are primarily tactical (see earlier discussion). The combination of those two explicit classification criteria leads to the fundamental categorization of marketing mix instruments as represented in Table 9.2. The more detailed definitions of the different categories are available in Tables 9.3a and 9.3b.

The columns of Table 9.3 (a and b) represent a classification of the marketing mix instruments on the basis of the generic function they primarily fulfil. Vertically, the marketing mix variables are subdivided according to the criterion of whether the instruments are basic to the consummation of an offer (Table 9.3a) or whether those instruments are more complementary (Table 9.3b). This supplementary mix actually contains the elements fulfilling the previously mentioned 'situational' function that is by definition found in the promotion mix.

Criticism on the marketing mix metaphor and concept

In spite of the immediate and widespread acceptance of the marketing mix concept, it – or sometimes much more the metaphor – has been criticized in several respects.

Table 9.3a The details of a functional marketing mix classification

Marketing mix	**Product mix**	**Price mix**	**Communication mix**			**Distribution mix**
			Mass communication promotion mix	**Personal communication mix**	**Publicity mix**	
Basic mix	**Basic product mix**	**Basic price mix**	**Basic mass communication mix**	**Basic personal communication mix**	**Basic publicity mix**	**Basic distribution mix**
	Instruments that mainly conceive the way and extent in which the prospective exchange party's needs are satisfied.	Instruments that mainly fix the size and the way of payment exchanged for the goods or services.	Non-personal communication efforts that mainly aim at announcing the offer or maintaining the awareness and knowledge about it: evoking or maintaining favourable feelings and removing barriers to wanting.	Personal communication efforts that mainly aim at announcing the offer or maintaining awareness and knowledge about it; evoking or maintaining favourable feelings and removing barriers to wanting.	Efforts that aim at inciting a third party (persons and authorities) to favourable communication about the offer.	Instruments that mainly determine the intensity and manner of how the goods or services will be made available.
	e.g. product characteristics options, assortment, brand name, packaging, quantity, factory guarantee	e.g. list price, usual terms of payment, usual discounts, terms of credit, long-term savings campaigns	e.g. theme advertising in various media, permanent exhibitions, certain forms of sponsorship	e.g. amount and type of selling, personal remunerations	e.g. press bulletins, press conferences, tours by journalists	e.g. different types of distribution channels, density of the distribution system, trade relation mix (policy of margins, terms of delivery, etc.) merchandising advice

Source: van Waterschoot and Van den Bulte, 1992: 90

Table 9.3b The details of a functional marketing mix classification

Marketing mix	Product mix	Price mix	Communication mix			Distribution mix
			Mass communication promotion mix	Personal communication mix	Publicity mix	
Promotion mix	**Product promotion mix**	**Price promotion mix**	**Mass communication promotion mix**	**Personal communication promotion mix**	**Publicity promotion mix**	**Distribution promotion mix**
	Supplementary group of instruments that mainly aim at inducing immediate overt behaviour by strengthening the basic product mix during relatively short periods of time.	Supplementary group of instruments that mainly aim at inducing immediate overt behaviour by strengthening the basic price mix during relatively short periods of time.	Supplementary group of instruments that mainly aim at inducing immediate overt behaviour strengthening the basic mass communications mix during relatively short periods of time.	Supplementary group of instruments that mainly aim at inducing immediate overt behaviour strengthening the basic personal communications mix during relatively short periods of time.	Supplementary group of instruments that mainly aim at inducing immediate overt behaviour strengthening the basic publicity communications mix during relatively short periods of time.	Supplementary group of instruments that mainly aim at inducing immediate overt behaviour strengthening the basic distribution mix during relatively short periods of time.
	e.g. economy packs, 3-for-the-price-of-2 deals; temporary luxury options on a car at the price of its standard model	e.g. exceptionally favourable price, end-of-season sales, exceptionally favourable terms of payment and credit, short-term savings campaigns, temporary discounts, coupons	e.g. action advertising, contests, sweepstakes, samples, premiums, trade shows or exhibitions	e.g. temporary demonstrations, salesforce promotions such as salesforce contests	e.g. all measurements to simulate positive publicity about a sales promotion action	e.g. extra point of purchase material, trade promotions such as buying allowances, contests; temporary increase of the number of distribution outlets

Source: van Waterschoot and Van den Bulte, 1992: 90

Van den Bulte (1991) summarized these criticisms under nine headings. The following reflects Van den Bulte's inventory, together with our personal assessment.

The marketing mix concept is accused of applying to micro issues only, because it takes the stance of only one exchange party, namely the seller or the 'cake mixer' or the 'channel captain' rather than the consumer or society at large. Indeed, the channel captain perspective typifies the marketing discipline as a whole, except for those fields where social goals dominate from the outset, as in the case of true charity marketing. The marketing mix concept cannot be criticized in this respect, since the usefulness of a known and classified set of demand impinging instruments – even if suggested by the specific metaphoric expression – is not by its own nature limited to channel captain applications, but can apply to any exchange situation.

A second criticism concerns the concept's limited managerial use in an organizational context, because of its attributed 'lack of attention to the internal tasks of the marketing function, like disseminating information to all people involved in or affected by marketing activities, human resources management, and developing incentive and control systems' (Van den Bulte, 1991: 11). Also, this point of criticism results from unrealistic expectations about a fundamental and powerful but at the same time limited concept. The marketing mix concept has not been developed to encompass guidelines for internal organization and communication. On the other hand, a clearly defined and classified set of demand impinging instruments contributes to a sound demand management. The existence of the mix concept and a sound corresponding classification should be seen as a necessary, but at the same time insufficient, condition for theoretical and practical development.

Valuable research has been conducted regarding interactions and interdependencies between mix variables. The mix concept is criticized because the hypotheses cannot be derived from the metaphor itself. This criticism can again be countered quite easily. The mere inventory of a set of instruments cannot be supposed to encompass a theory about the interactions amongst them. The classification of these instruments, however, to some extent, can. Empirical investigation and theory building rely heavily on the way such instruments are classified. The classification itself, however, cannot be anything more than a solid tool for theory building and empirical investigation, which it cannot replace.

A fourth point of criticism accuses the marketing mix concept of a mechanistic view on markets. The market is often described in terms of response curves, depending on a certain 'parameter' or 'marketing decision variable' or on the entire mix. In this way the optimization problem upon which the concept of the marketing mix focuses is solved. Modelling the relationship between demand impinging instruments and market responses serves analytical and forecasting purposes. Forgetting the limitations and assumptions of the model or technique represents an undeniable risk, which cannot be attributed to the marketing mix as a concept though. Models – whether they are of a stimulus-response or of an interactive type – suppose a sound marketing mix concept and classification, but the characteristics of the former should not be attributed to the latter and vice versa.

A fifth point of criticism comes very close to the previous one. The concept is accused of having a one-way (stimulus-response) character, which would impede marketing from shifting its focus from exchange as an isolated act towards the richer concept of exchange relationships. The marketing mix concept conflicts in no way with an idea of interaction. Indeed, its instruments and their categorization perfectly fit such approaches, as they also fit the idea of an exchange relationship. An exchange relationship supposes, for example, a more pronounced quality and service accent than would a mere one-time exchange.

The concept's poor market orientation also follows from the suggested view of the customer as someone to whom something is done – by the cake mixer – and not as someone for whom something is done. The stimulus-response approach that is attributed to the marketing mix is at the same time criticized for proposing to lump individuals into a market of homogeneous respondents. Presence or absence, as well as degree of market orientation, depends on factors like market structure, power balance between parties, organizational structures and procedures, personal attitudes, and corporate culture, mission and goals. However, to blame the mix concept for causing a lack of market orientation is intellectually incorrect. This basic, but by its very nature limited, concept is a factual device in any market approach.

The mix concept is also criticized for implying a view of the firm (or any exchange-seeking party in general) – perhaps suggested to some people by the picture of the independent cake mixer – as being a rather self-sufficient social unit having access to a considerable resource base. Except for manufacturer-distributor links, the concept would remove resource dependency between social units. As a result the different bridging strategies – such as, for example, bargaining contracting, cooption, joint programmes, licensing, integration, trade associations and government action – are issues that would not be taken into consideration. Once again this is an example of unjustified criticism, resulting from unrealistic expectations. Also, here the argument can be turned round. Inter-organizational 'bridges' will influence the specific marketing mix choice. As such an argument is given not against but in favour of a clear concept and classification.

A further point of criticism concerns the concept's supposed reactive attitude towards the environment.

> **Traditionally, marketing mix proponents have myopically considered the transactional environment to be composed of customers and dealers only, putting all other social units into the category 'contextual', hence lumping them together into faceless environmental forces. Thus blinding themselves, they have not taken into consideration the fact that the links with some transaction-environmental units and the activities these deploy can be changed through lobbying, legal action, public relations, issue advertising, strategic partnering and so on. Finding a way to control or influence variables that were previously considered to be beyond discretion, is often the cornerstone of great marketing creativity and the gateway to superior profitability. (Van den Bulte, 1991: 18)**

This citation contains a major and well-expressed lesson in marketing management. Marketing practice and marketing theory have been putting too much emphasis on their traditional public, but there is no logic in blaming the mix concept for it.

Finally, critics accuse the mix concept of possessing a mechanistic and rational-economic neoclassical view of markets and firms, and stripping out the institutional and social supports to market processes such as attraction, trust, friendship, power and interdependency. As a result, the marketing mix would be 'rendered impotent before many strategic management problems' (Van den Bulte, 1991: 20). In this case the criticism also concerns actual marketing practice as well as the conceptual development that has taken place at an instrumental, tactical and strategic level; the criticism does not hit the mix concept itself though.

Conclusion

The mix concept is quintessential for marketing, as it links generic exchange functions to demand management. Even if unavoidably implied by the new exchange model, it was formulated – more especially under the form of a metaphor – only several decades after the new discipline's name 'marketing' was mentioned for the first time in 1902 as a course title (Bartels, 1962). Even if the marketing discipline, together with the underlying new exchange model and the implied mix concept originated from the consumer goods field, they generically stretch out to any exchange matching the underlying assumptions, including, for example, B2B marketing, service marketing, e-marketing and relationship marketing. That said, the peculiarities of those sub-fields are well worth being studied and also emphasized. Not to the extent, however, that the undeniably universal mix concept would be denied.

The mix metaphor has gained usage spectacularly quickly as a result of its expressiveness, liveliness, compactness and therefore memorability. Equally imaginative has been McCarthy's pragmatic grouping of the instruments. His four Ps classification also received acceptance speedily and easily, presumably as a result of its strong mnemonic appeal. The four Ps have even become synonymous with the marketing mix. They are so closely twinned that they could be considered 'Siamese' twin metaphors (van Waterschoot and De Haes, 2008). The mnemonic row, however, has too often been used as a means of explication of submixes (e.g. in the case of service marketing) or in order to draw attention to marketing aspects that were not always mix issues. Over the years the limitations of the original mnemonic approach have become apparent, amongst other things as a result of the increased importance of promotion instruments in marketing practice. Consequently, the four Ps classification, with its mixing up of strategic and tactical instruments and inherent negatively defined Promotion category within the communication family, has been contested by many authors. Its adaptation, based on modern insight into promotion, significantly improves the original scheme.

The marketing mix concept itself is as elementary, powerful, and at the same time limited in marketing thinking as the alphabet is in the use and development of language. It is therefore unjustifiable to blame the mix concept for the peculiarities of the overall discipline. In the same way the concept cannot be blamed for the limitations of the metaphor, which contributed so significantly to its popularity and understanding during the infancy of the discipline.

The marketing mix concept forms a fundamental building block in theory and practice. A clearly defined, named and classified concept is a necessary, but at the same time insufficient, condition for successful theory building and practical implementation. Marketing theory should concentrate its attention on measuring, explaining and predicting the isolated as well as the combined effects of the mix instruments, as a solid basis for actual practice in diverse fields and circumstances.

Recommended further reading

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