

MINISTRY OF EDUCATION AND SCIENCE OF UKRAINE
SIMON KUZNETS KHARKIV NATIONAL UNIVERSITY OF ECONOMICS

MARKETING

Guidelines
to practical tasks and assignments
for independent performance
for Bachelor's (first) degree higher education students
of speciality 051 "Economics",
study program "International Economy"

Kharkiv
S. Kuznets KhNUE
2023

UDC 339.138(072.034)

M31

Compiled by N. Boiko

Затверджено на засіданні кафедри маркетингу.
Протокол № 1 від 29.08.2022 р.

Самостійне електронне текстове мережеве видання

Marketing [Electronic resource] : guidelines to practical tasks
M31 and assignments for independent performance for Bachelor's (first)
degree higher education students of speciality 051 "Economics", study
program "International Economy" / compiled by N. Boiko. – Kharkiv :
S. Kuznets KhNUE, 2023. – 101 p. (English)

Guidelines to practical classes on the academic discipline are provided.
The order of preparation and conducting of practical classes, which is determined
by the guidelines, as well as test and control questions for self-assessment are
given.

For Bachelor's (first) degree higher education students of speciality
051 "Economics", study program "International Economy".

UDC 339.138(072.034)

© Simon Kuznets Kharkiv National
University of Economics, 2023

Introduction

The essence of the marketing concept is to meet the needs and wants of consumers as fully as possible in order to achieve sustainable competitive advantages and profit in the long term.

The development of market relations, the integration of Ukraine into the European economic space necessitate more active use of marketing methods and tools by enterprises and organizations. At the same time, in practice, the implementation of marketing in the activities of domestic enterprises is at an unsatisfactory level. In particular, specialized marketing departments do not perform all classic marketing functions (or perform them partially and irregularly), and do not have the appropriate level of authority and funding. In addition, most of the marketing functions are performed not only by specialized marketing units, but also by non-specialized units, for which marketing operations are not always the first priority among their responsibilities. Such an organization leads to the duplication or inconsistency of many actions, the lack of centralized marketing planning and the possibility of qualitative assessment of the effectiveness of the measures.

A practical lesson is an organizational form of an educational lesson, in which the teacher organizes a discussion with students on the topics defined by the work curriculum. Practical classes are held in the form of conversation, review and discussion of essays and reports, discussions, etc.

Practical classes involve consolidating the knowledge acquired at lectures and during self-study of problematic course questions, as well as during individual educational and research work.

The main purpose of practical lessons is to expand, deepen and consolidate theoretical knowledge, increasing the level of assimilation of the educational material, develop the abilities and skills, scientific thinking and oral speech of students.

The structural and logical scheme of the study of the academic discipline is presented in Table 1.

Table 1

The structural and logical scheme of studying the academic discipline

Prerequisite	Post-requisite
Economic theory	International economics
Microeconomics / Macroeconomics	International trade
Economics of the enterprise	International logistics activity
Management	International business strategies of the enterprise

As a result of the studying of the academic discipline, the students of the educational degree "Bachelor" according to the educational and professional program "International Economy" acquire the competences listed in Table 2.

Table 2

Professional competences that students receive after studying the academic discipline

Competences	Learning outcomes
1	2
GC4. The ability to apply knowledge in practical situations	LO5. The ability to apply analytical and methodical tools to substantiate proposals and make management decisions by various economic agents (individuals, households, enterprises and state authorities)
GC7. Skills in using information and communication technologies. GC8. The ability to search, process and analyze information from various sources	LO6. The ability to use professional argumentation to convey information, ideas, problems and methods of solving them to specialists and non-specialists in the field of economic activity

Table 2 (the end)

1	2
GC11. The ability to make informed decisions. CK7. The ability to apply computer technologies and data processing software to solve economic problems, analyze information and prepare analytical reports	LO10. The ability to to conduct an analysis of the functioning and development of business entities, to determine functional areas, to calculate the relevant indicators characterizing the effectiveness of their activities
GC9. The ability to adapt and act in a new situation. CK4. The ability to explain economic and social processes and phenomena on the basis of theoretical models, to analyze and meaningfully interpret the obtained results	LO12. The ability to apply the acquired theoretical knowledge to solve practical problems and meaningfully interpret the obtained results
GC7. Skills in using information and communication technologies. CK7. The ability to apply computer technologies and data processing software to solve economic problems, analyze information and prepare analytical reports	LO19. The ability to use information and communication technologies to solve social and economic problems, prepare and present analytical reports
GC4. The ability to explain economic and social processes and phenomena on the basis of theoretical models, to analyze and meaningfully interpret the obtained results	LO21. The ability to think abstractly, apply analysis and synthesis to identify the key characteristics of economic systems of various levels, as well as the peculiarities of the behavior of their subjects
GC13. The ability to act socially responsibly and consciously. GC17. The ability to make informed management decisions regarding the determination of priority areas of development and the organization of international economic interaction of entities at different levels of management	LO24. The ability to act socially responsibly and consciously based on ethical principles, value and respect cultural diversity, individual differences of people

The purpose of the academic discipline is to prepare students who possess modern economic thinking and the relevant competences necessary for conducting effective marketing activities. In accordance with the defined goal, the academic discipline solves the following tasks:

systematization and generalization of the theoretical and methodological basis of marketing activity;
identifying factors that shape consumer behavior;
substantiation of the information analytical basis of marketing research;
formation of a marketing complex and organization of marketing activities of the enterprise;
planning of marketing activities of the enterprise.

The subject of the academic discipline is the theoretical and methodological support and practical aspects of the activity of business structures regarding the satisfaction of consumer demand as priority market subjects.

Content module 1. Marketing and its modern concept

Topic 1. The essence of marketing

Guidelines for studying the topic

In the process of studying this topic, it is necessary to pay attention to the following questions: in what period and why marketing appears as a science; what the purpose of the enterprise's marketing activity is; what a marketing system is; basic functions of marketing; characteristics according to which marketing is traditionally distributed.

Practical task 1. A discussion seminar.

Questions for discussion:

1. The essence of marketing. Relevance and necessity of studying and using marketing.
2. Evolutionary stages and concepts of marketing development and management systems in enterprises.
3. Modern marketing concepts.

Guidelines for practical training

A discussion seminar is a consultative form of classes that help students understand the material studied at lectures and while reading books.

They, as well as lectures, are mainly devoted to narrow but relevant topics. The main goal of this teaching method is to consolidate and completely understand the content of the studied material, which was previously presented at the lecture. The main thing in the seminar is the dialogue between the students and the teacher, which allows you to analyze the material from different angles, to correlate it with the experience and knowledge that the students have.

This increases the effectiveness of mastering the topic in question and ensures the continuity of the learning process. Seminars, in contrast to lectures, are held in small groups, involve greater student activity and are characterized by two-way communication during classes.

They allow the teacher to establish stronger connections between the material that the students received at the lecture and the knowledge and experience that they have at the present time. The most important place in them is given to the discussions and performances of the students.

Practical task 2. The individual task.

According to the results of the study of international (or Ukrainian) advertising information companies, find examples or promotional videos of orientation to different marketing concepts. Submit the results in the form of Table 3.

Table 3

Examples of the use of marketing concepts by enterprises

Concepts	Examples
The concept of improvement of production	
The concept of improvement of goods	
The concept of intensification of commercial efforts	
The marketing concept	
The concept of socio-ethical marketing	
The interaction concept	

Determine which concept dominates among enterprises.

Practical task 3. The individual task.

Divide the suggested answer choices into functions and objectives of marketing activity by filling in Table 4.

1. Comprehensive market research.
2. Orientation to commercial success.
3. Analysis of the external environment.
4. Increase in the enterprise's market share by 5 %.
5. Activation of the advertising campaign.
6. Control of the results of marketing activities.
7. Evaluation of alternative marketing strategies.
8. Profit maximization.
9. Development of a pricing strategy.
10. Achieving the specified return on invested capital.

Table 4

Goals and functions of marketing activities

Marketing objectives	Marketing functions

Guidelines for practical training

An individual task is one of the forms of educational organization process in institutions of higher education, which provides for the creation of conditions for full implementation of students' creative abilities and aims to deepen, generalize and consolidate the knowledge that students receive in the process of learning, as well as the application of this knowledge to practice.

Individual tasks include writing abstracts, essays, execution of calculations, graphic works, preparation of reports, analysis of practical situations, preparation of abstract materials from publications according to certain problems, students' own research before the Olympiads, conferences, etc. A component of individual tasks is preparation of individual tasks.

The purpose of the individual assignment is to provide a deep and complete coverage of the topic based on a generalization and critical analysis of the theoretical foundations of the researched issue, as well as expressing one's point of view and substantiating the conclusions on the given issue.

A mandatory condition for the performance of an individual task is to direct it to the solution of the given problem, to highlight a personal attitude to the researched issue, and to be creative in doing work in general.

An individual task involves independent work with literature and Internet resources on the relevant subject. According to the results of the scientific analysis of the material, the student offers his own solution to the problem and reinforces his work with a presentation of research results.

Topic 2. Fundamental theories of marketing

Guidelines for studying the topic

In the process of studying this topic, it is necessary to pay attention to the following questions: Product life cycle theory: the essence, the stages, changes associated with them. Theory of market segmentation. Segmentation methods. Segmentation conditions. Market strategy based on the results of segmentation: undifferentiated marketing, differentiated marketing, targeted or concentrated marketing. The theory of "crystallization" of the market.

Practical task 1. Product life cycle.

It is known that the life cycle of most products consists of four stages: putting the product on the market; growth; maturity; decline. Certain values of classification features are inherent in each of them. Using the information given below, it is necessary to set the classifications in the correct sequence according to the signs inherent in each of the stages of the life cycle of goods.

1. Sales volume:

- a) low;
- b) fast growing;
- c) the highest;
- d) decreasing.

6. Operational marketing goals:

- a) make the product known, achieve first purchases;
- b) a larger market share is possible;
- c) a higher profit is possible for conditions of simultaneous preservation of the market share;
- d) cost reduction and skimming.

2. Costs per client:

- a) very low;
- b) low;
- c) high;
- d) average.

3. Profit:

- a) growing;
- b) decreasing;
- c) negative;
- d) high.

4. Customers:

- a) early followers;
- b) late;
- c) innovators;
- d) wide middle.

5. Competitors:

- a) the number of competitors decreases;
- b) only a few;
- c) the number of competitors increases;
- d) the number of competitors remains unchanged; there is a tendency to a decrease.

7. Product strategies:

- a) offer product options, provide services and guarantees;
- b) offer different brands and models;
- c) offer the main product;
- d) withdraw "weak" goods.

8. Pricing:

- a) price reduction;
- b) prices are the same as those of competitors or lower;
- c) the focus on the maximum possible value for consumers;
- d) price is determined by the incentive strategy.

9. Advertising:

- a) make goods famous and attractive for the mass market;
- b) make the product known for early adopters, followers and trade;
- c) reduce advertising to the level necessary to maintain reliable consumers;
- d) emphasize various features and brand benefits.

Practical task 2. Product life cycle.

Table 5 contains information on the sale of planters by PJSC "Chervona Zirka" in Kirovohrad. Construct a graph of the life cycle of the product, showing on the curve the income from the sale of products and profit. Highlight the stages of the life cycle that the product has gone through and determine the stages at which it was in 2015 and 2018.

Implementation of planters by PJSC "Chervona Zirka" in Kirovohrad

Year	Volume of implementation, thousand pieces	Selling price of 1 pc, thousand hryvnias	Cost of implementation 1 pc, thousand hryvnias
2013	4	8.5	8.0
2014	6.5	9.0	8.0
2015	10.5	9.2	7.7
2016	13.5	10.0	7.6
2017	14	10.5	7.4
2018	13	9.0	7.0
2019	9	8.5	6.5
2020	8	7.0	5.8
2021	7	6.0	4.8

Guidelines for doing practical tasks 1 – 2

The life cycle of a product (product life cycle) is the period of time during which a product circulates on the market, starting from the moment it enters the market and ending with its withdrawal from the market. It is one of the fundamental issues of the concept of modern marketing.

According to the marketing concept, any product goes through a life cycle, that is, there is a certain period of time when it is present on the market. In a typical product life cycle, there are four phases stages:

bringing goods to the market. First appearance of the product on the market. A small increase in sales volumes and, accordingly, minimal or non-existent profit are characteristic of this stage;

growth. A period of rapid growth in sales volume if the product is accepted by the market, and the demand for it grows. Profits also increase as sales increase;

maturity. Sales volumes are significant, but further sales growth is not observed. Profit at this stage has stabilized, since additional costs are not required to bring the product to the market;

decline, withdrawal from the market. This stage of the product life cycle is characterized by a significant decrease in sales volumes up to a complete drop in demand for this product. Profits plummet to zero.

In some cases, individual stages are divided into several substages for a more detailed description of the behavior of the product and decision-making related to the activity at this stage. For example, the first stage of launching a product to the market can be divided into two substages: the creation of a new product and launching it to the market.

The dependence of the change in sales volume is usually depicted graphically (Fig. 1).

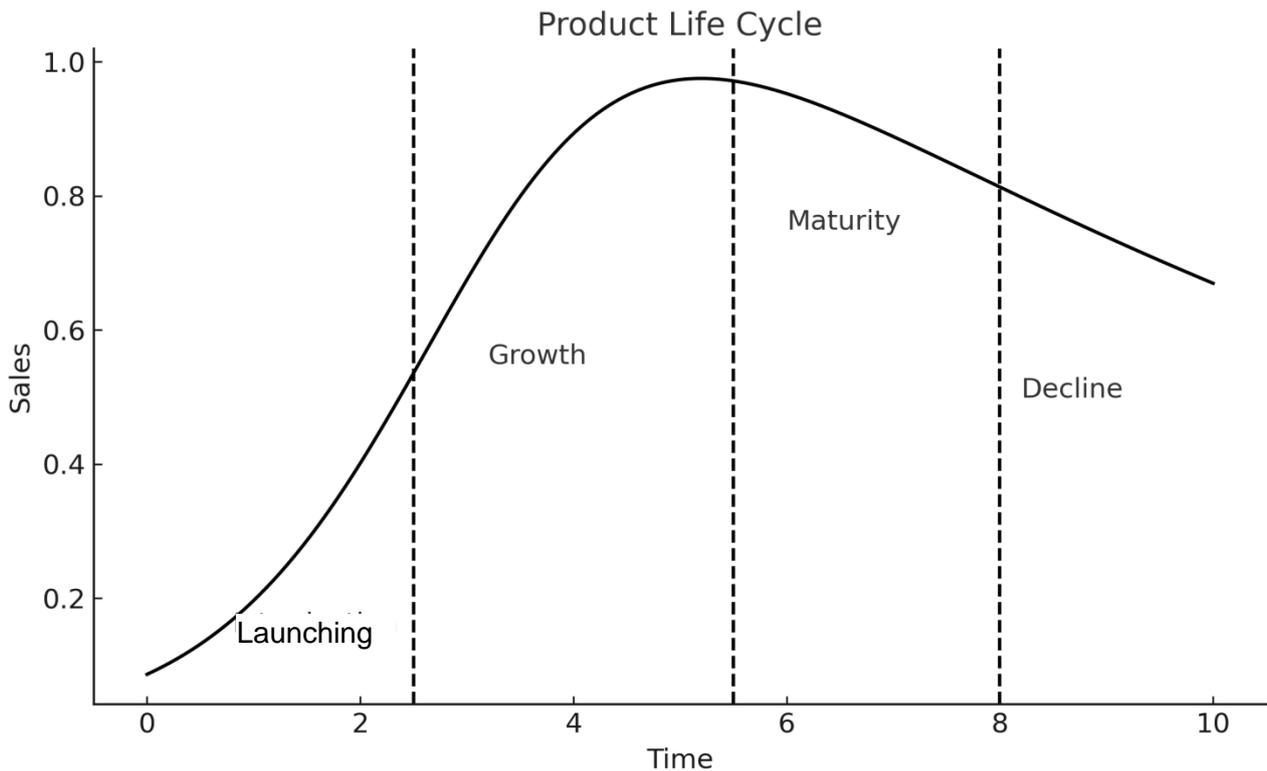


Fig. 1. The life cycle of a product

Product life cycle theory is necessary for:

management orientation to the review of production and market dynamics.

The decision that now supposedly promises significant profit in the future (without taking appropriate preventive measures) may be the cause of financial problems. In this regard, it is necessary to constantly take care of the timely restoration of production, its diversification;

as a planning tool, the life cycle theory requires making decisions on the choice of marketing tools, taking into account the peculiarities of one or another stage.

Practical task 3. Market segmentation and product positioning.

Nestlé Ukraine is one of the largest companies in the field of food production.

Today, the Nestlé company has 511 factories and enterprises in 86 countries of the world, more than 15,000 different types of food are produced, more than 8,500 brands are presented.

The Nestlé group employs 280,000 people.

As part of the long-term investment strategy, the company actively invests in local production, developing products that meet the tastes and traditions of the population in different countries, and also uses local raw materials and components.

Thus, Nestlé combines international experience and leadership in the food industry with the needs and tastes of consumers. In addition to food production, Nestlé also owns shares in companies in the perfumery, cosmetic and pharmaceutical industries. At all Nestlé production facilities in different countries, only natural raw materials of the highest quality are used, which guarantees the complete safety of finished products for the health of consumers. Strict incoming quality control of raw materials is carried out at each enterprise. Each delivery is checked, and if even the smallest deviations from the current standards are detected, the raw materials are not allowed for production. Ensuring and controlling the proper shelf life of finished products is also of fundamental importance for the company. First of all, Nestlé is consolidating its position and expanding its presence in Ukraine due to investments in local production and industrial infrastructure, active support and promotion of trademarks, and establishment of a national sales network.

The general strategy of the Nestlé company involves a presence in all countries where possible. Nestlé continues to maintain its commitment to follow and respect all relevant local laws in each of the markets in which the company's products are distributed.

Using the data of the website of company Nestlé, perform the following tasks.

1. Outline the main areas of activity on the market that are most attractive for Nestlé in Ukraine. At the same time, think about who the company's most dangerous competitors are on the Ukrainian market.

2. Propose a list of criteria that can be used for segmentation within each direction of the identified product offering.

3. Choose the type of Nestlé products and determine its competitive advantages necessary for successful positioning.

4. What psychographic features of Ukrainian consumers can Nestlé use to strengthen its position in the Ukrainian segment, taking into account the need for a healthy lifestyle?

Guidelines for doing practical task 3

Market segmentation is dividing the market into segments.

A segment is a group of consumers who have common characteristics and react in the same way to the firm's marketing efforts.

A sign of segmentation (Table 6) is a way of dividing the market into segments. If the segmentation is performed according to one feature, it is called *one-dimensional*, otherwise – *combined*.

Market segmentation based on several characteristics can be carried out in one of the following ways:

if the behavior of consumers of a certain product is determined psychographically or based on behavioral variables, then first identify these variables and then describe the consumer profile;

if consumer behavior is primarily determined based on demographic variables, then consumers are first divided according to them (gender, age, income level), and then differences in their behavior when buying goods are researched.

Table 6

Signs of segmentation of consumer markets

Segmentation sign	Feature parameters
Demographic	Age, gender, family size, stage of the family life cycle, profession, occupation, nationality, race, income, hobbies
Geographical	Region, population size, population density, city/village
Anthropometric	Physiological characteristics of a person (height, weight, skin type etc.)
Psychographic	Personality type, lifestyle, social class
A sign of behavior consumers	User status, purpose of purchase, consumption intensity, search for advantages, attitude to the brand

To assess the degree of attractiveness of various market segments segmentation criteria are used. Criterion segmentation is a method of assessing the expediency of a choice of a certain market target. The most important criteria are the following:

- the size of the segment and its rate of change (growth, reduction);
- the level of competition in the segment and its availability;
- resources of the organization mastering the segment.

After choosing a marketing strategy and specific segments of the market, the company develops a set of measures to enter one or more market segments and performs product positioning.

Product positioning on the market is provision of a competitive product position on the market and development of detailed of the marketing complex. Positioning is development and creation of the product image in such a way that in the mind of the buyer, it occupies a worthy place, different from the position of competitors' goods.

Positioning strategies are as follows:

- positioning based on distinctive characteristics of a product ("Activia" yogurt);
- positioning based on the benefits of purchasing the product or on solutions to a specific problem (shampoo Head&Shoulders);
- positioning based on a special method of use of the product;
- positioning aimed at a certain category of consumers ("Antoshka" megamarket chain);
- positioning according to the price/quality ratio ("Gala – why pay more").

Topic 3. Marketing models

Guidelines for studying the topic

In the process of studying this topic, it is necessary to pay attention to the following questions: What is a marketing model? Groups of marketing models. Objects of sale. Consumer marketing (B2C). Consumers and their characteristics. The purpose of consumer marketing. Marketing of industrial goods (B2B). Main features of industrial goods. Categories of industrial goods. The purpose of industrial marketing. The difference between consumer marketing and business marketing. Marketing of services and its features.

Place marketing and its advantages. Personal marketing. Marketing of ideas. Enterprise marketing. Fields of application of marketing tools. International marketing. Demand-driven marketing models.

Practical task 1. Marketing models.

In order to deepen your knowledge on the subject of marketing models, study independently the relevant material and fill in Table 7.

Table 7

Demand-driven marketing models

Marketing model	Essence	Examples
Conversion marketing		
Stimulating marketing		
Developmental marketing		
Remarketing		
Synchronous marketing		
Supportive marketing		
Demarketing		

Practical task 2. Marketing models.

Conduct a comparative analysis (common features and differences) of the specified types of marketing:

- domestic and international marketing;
- enterprise marketing and service marketing.

The results should be presented in the form of a table.

Guidelines for doing task 2

The comparison must be done separately for each of the marketing functions or features: analysis of the marketing environment, product policy development, price policy development, distribution policy development, communication policy development, etc.

For clarity, use an example (Table 8) that provides a comparative analysis of B2C (consumer marketing) and B2B (industrial marketing).

The main differences between consumer and industrial marketing

Comparison sign	Characteristics of final consumption goods	Characteristics of goods for production purpose
1	2	3
Goods	<p>Food products, clothes, shoes, non-food products of general use.</p> <p>The consumer's interest in purchasing the product is determined by the need for the individual to obtain certain life benefits, which characterizes his biological and social essence.</p> <p>The purchase of goods and services is carried out by individuals for personal or family consumption and use</p>	<p>The list of goods is much wider (raw materials, materials, equipment, facilities, patents, licenses, etc.).</p> <p>The interest is related to the production necessity of purchases; larger volumes of purchases; high professional level of buyers; a more complicated decision-making process regarding the purchase, a longer time for implementation; much higher buyer risk; close business relations between the buyer and the seller; derived demand; interplay.</p> <p>Consumers are enterprises of various sectors of the economy, state institutions, institutions, public organizations, banks, credit, insurance, investment and innovation companies, etc.</p>
Price	It depends on the pricing strategy, sales channel and level of market monopolization	The price list for standard goods, for special ones is according to the results of negotiations or competitive bidding
Promotion	Emphasis on advertising; trademark, brand, sales promotion	Emphasis on personal selling and technical consulting, direct advertising (direct mail), participation in exhibitions, Internet
Distribution	Through long channels of movement of goods of intermediaries and intermediary commercial structures	Through significantly shorter one- or two-level channels of movement of goods and sales of specialized suppliers and retailers. Service and distribution network requirements play a decisive role in the conclusion of agreements
Relations	Relationships do not last long, contacts are temporary	Long-term, multilateral relations, service, equipment leasing, building and construction rental

Table 8 (the end)

1	2	3
The process of making a customer's purchase decision	Decisions are made individually or at the family level. Purchase motives are often irrational (emotional or dictated by fashion)	Decisions are made collegially with the participation of many members of the organization using the specification, various technical and economic information. Purchase motives have a rational character, which is determined by the specialization of firms, their financial capabilities, and the volume of product sales
Markets, consumers, demand	A significant number of consumers. The demand is direct and depends significantly on the prices. Buyers are end consumers who purchase goods for personal, home or family use	Consumers are concentrated in specific regions. The demand is derived from the demand of end consumers, it varies in a significant range, it depends less on prices. The number of consumers is insignificant. Buyers are commercial firms, institutions that set themselves the goal of making a profit. They buy goods for industrial use or resale

Practical task 3. Marketing models.

With the help of Jerome McCarthy's 4P model, determine what the characteristics of service marketing are:

the tourist operator "Coral Travel";

the higher educational institution S. Kuznets Kharkiv National University of Economics;

McDonald's fast food chain.

Guidelines for doing task 3

This model is based on the marketing mix 4P: product, price, distribution, and promotion.

According to this model, if a company produces the right product at the right price and sells it in the right place with competent advertising support, it will have many clients.

Practical task 4. Marketing models.

Solve the case with the help of Hunt's Ladder model, which is characterized by the fact that the sales funnel begins to "act" long before the first contact with the target audience.

Step 0 – 1. Oleksandr had worked for hire all his life, but a few months ago he created his own business. He found an office space, hired employees, supervised their work and partially worked on projects himself. But soon a problem arose: Oleksandr did not have time to cope with dozens of cases and responsibilities.

Every day he sat in the office until late in the evening, he was very tired, but he was sure that this situation was okay. He is now the director of the company and has a lot to do.

But one day he saw the checklist "10 signs that you don't know how to manage your time". Olexander recognized himself in this description. Now he knows why nothing was on time at work. You need to learn how to manage time.

It is necessary to continue development, that is, to "build" all other steps according to this model.

Practical task 5. Marketing models.

Analyze the target audience of the following enterprises/companies by according to the segment and determine on which level of Hunt's ladder it is located:

TM Heinz;

TM Zara;

Siemens;

Warsaw University;

Green Forest language.

Guidelines for doing tasks 4 – 5

The key idea of the model is that each customer is at a certain stage of awareness of the product/service.

In order for him to make a purchase, he needs to go through all 5 steps: from the absence of a problem to the conclusion of a deal.

Hunt's five steps are:

Steps 0 – 1. Lack of problem / indifference. At this step, the potential client does not understand his problem. Accordingly, he does not yet have a need for the product.

Actions: it is necessary to reveal the problem so that the person understands: yes, he has it and needs a solution. Thematic content (photos, pictures, videos, articles, checklists, etc.) is best suited for this.

Step 2. There is a problem, but there is no solution. At this step, a person has realized that he has a problem, but does not know how to deal with it. He begins to be interested in this topic, to search the Internet for information about it and ways to get out of the situation.

Actions: we show the potential client as many options as possible to solve the problem. Product reviews, case studies, examples, etc. are suitable for this.

Step 3. Comparison of ways to solve the problem. At this step, the potential client actively searches for and compares different options for solving the problem. For this, he uses various sites, groups in social networks, forums, etc. He studies the features of each method, its advantages and disadvantages.

Actions: it is necessary to show potential customers high-quality review content, give useful and valuable information on the topic that interests them. It is important not to impose the purchase of a certain product.

Step 4. Product selection. The potential client has finally decided on the method of solving the problem. It remains to choose a specific product that will be as effective as possible.

Actions: it is necessary to show the benefits of purchasing the client's product. Demonstrate how a person's life will change after a purchase. Show the company's expertise and its difference from the competition.

Step 5. Supplier selection. At this step, the potential customer clearly knows what product he needs. It remains to find a company that will be the most profitable to purchase it. A person compares different companies according to certain criteria (experience, price, guarantee, etc.). When a brand that fits the given criteria is has been selected, the product is purchased.

Actions: capacious and detailed product descriptions are required, demonstrating the benefits of solving a problem with this product. Important is the development of a commercial offer and UTP (promotions, discounts, bonus cards, guarantees, etc.).

Practical task 6. Marketing models.

A fitness store turned to a marketing agency to promote its social networks.

The agency planned to work according to the SOSTAC model. Develop a universal structure for the customer according to the specified model.

Guidelines for doing task 6

The development of a marketing plan of the SOSTAC model will allow you to set adequate goals for the development of the project, and also determine what actions need to be taken to realize these goals. All this will take place within the framework of a specific development strategy, as well as under the reliable control of pre-developed reporting.

The SOSTAC model consists of the following:

1. Situation. The first stage of marketing planning is the analysis of the current situation. This is an overview of your project who you are, what you do, and how your online sales are going. External and internal factors affecting your business are also considered. This is an analysis of where the company is now:

marketing audit of the external and internal environment;

analysis of the current situation: market environment, markets and consumers;

identification of strengths and weaknesses, opportunities and threats.

The situation is a starting point, an analysis of available resources, tools, ideas, goals and desires. It is necessary to understand what we want to achieve and what we have for it.

As far as resources are concerned, it is important to understand not only finances or material property, but also relevant information, knowledge and new ideas.

2. Objectives. This stage of your marketing plan system should be goal-focused. Once you've determined your goal, it's important to make it as precise and unambiguous as possible. What does the company want to achieve?

Industry sales, market share and profit targets.

Main aspects affecting the goals.

At this level, you define the end goal. As a rule, for business, it is profit, promotion of a new product, brand development etc. Goals can be different.

3. Strategy. A strategy tells you how you are going to achieve your goal. This is a general idea of achieving the goal. How will these goals be achieved?
Determination of the main target markets.

Excellent advantage.

Necessary product positioning.

Marketing / sales objectives.

Actually, here we determine how we will get from point A to point B. This is a global level. For example, you choose a promotion strategy on the Internet.

4. Tactics. Tactics contain the specific tools you plan to use to accomplish the goals of your marketing plan. When you create your strategy, you'll describe each tactic in more detail, as well as specify certain KPIs for each tactic.

Products.

Pricing.

Distribution.

Promotion.

Here we are thinking about what tools and specific steps we will use from point A to point B.

For example, if you chose promotion on the Internet, then your tools can be contextual advertising, SEO promotion, social networks, etc.

5. Actions. This stage of your marketing planning system focuses on how to turn your plans into action. The action section covers what needs to be done in each of the tactics listed in the previous section of the SOSTAC plan to realize its goals. Who does what?

The schedule of events.

Responsible people.

Budget for the implementation of the plan.

Actions are the time we will need, specific steps, application of selected tools. That is, these are specifics regarding the implementation of a well-thought-out plan.

6. Control. Intermediate results.

Plan implementation control.

Measuring the effectiveness of the marketing programs.

At this stage, the KPI is monitored, that is, indicators that will tell us whether we are achieving our goals or not. And if we are achieving it, how qualitatively and effectively we are doing this.

For example, you can evaluate the investment in advertising by the cost of attracting customers or the rate of return on investment.

Test questions for self-assessment according to content module 1

1. Marketing is:

- a) such knowledge and understanding of the client, that the product or service is exactly suitable for the latter and sells itself without sales efforts;
- b) a type of activity aimed at meeting the needs of consumers through exchange of goods;
- c) systematic influence on the opinion and behavior of consumers through the transmission of information about goods in mass media.

2. What is the main thing in the definition of marketing:

- a) reduction of production costs;
- b) sale of goods;
- c) improving the quality of life;
- d) satisfying the needs of customers;
- e) determining the price of the product?

3. What is marketing:

- a) active control over the market and prices in accordance with supply and demand;
- b) measures against economic crises and ensuring the matching of supply and demand;
- c) a comprehensive systematic approach to solving market problems, which covers all stages of movement of goods?

4. Is it true that the main goal of studying marketing is to achieve success in business:

- a) yes;
- b) no?

5. What do companies focus on when carrying out marketing activities:

- a) the production of those goods that are needed by the consumer and for which there is a significant demand;
- b) the sale of those goods that have already been produced without taking into account the needs of consumers?

6. Marketing begins with:

- a) product development and production;
- b) market research and consumer needs;
- c) an informational advertising campaign.

7. Choose the right sequence of activities at the enterprise which focuses on marketing:

- a) mass production – sales;
- b) study of consumer needs – mass production – sales;
- c) mass production – sales promotion – sales.

8. Entities performing marketing functions are:

- a) end users, marketing specialists, wholesale trade, accountants, technologists;
- b) consumers, marketing specialists, retail trade, wholesale trade, product manufacturers;
- c) marketing specialists only.

9. What system does marketing cover:

- a) production;
- b) sales;
- c) production and sales?

10. Which of the listed activities are outside the scope of marketing:

- a) marketing research;
- b) inventory control;
- c) warehousing;
- d) product planning?

11. The definition of marketing includes all the listed elements, except:

- a) maximization of profits;
- b) creation of cost price;
- c) consideration of social values;
- d) creation of target market and demand.

12. Among the listed, indicate the functions of marketing:

- a) orientation to commercial success;
- b) comprehensive analysis of the external environment;
- c) increase in the enterprise's market share by 5 %.

13. Among the listed, indicate the goals of marketing:

- a) study of consumer behavior;
- b) control of quality indicators of goods;

- c) profit maximization by increasing the market share;
- d) formation of effective product promotion channels.

14. Which of the mentioned actions is not part of marketing activity:

- a) marketing research;
- b) formation of the advertising budget;
- c) choice of production technology;
- d) deepening the range of products?

15. In marketing, the concept of need means:

- a) desire, which is supported by the purchasing power of consumers;
- b) a person's feeling of a lack of something;
- c) requests that have acquired a specific form according to the cultural level of an individual.

16. In marketing, the concept of desire means:

- a) a person's feeling of lack of something;
- b) requests supported by the purchasing power of consumers;
- c) a need that has acquired a specific form according to the cultural level of an individual.

17. The term "demand" in marketing means:

- a) a person's feeling of lack of something;
- b) needs supported by the purchasing power of consumers;
- c) needs that have acquired a specific form in accordance with the cultural level of an individual.

18. The concept of exchange in marketing means:

- a) the act of receiving from someone a desired object with the offer of something in return;
- b) everything that can satisfy needs and desires and is offered to the market for the purpose of attention, acquisition and use;
- c) the totality of existing and potential buyers of goods;
- d) commercial exchange of values between two parties.

19. The concept of market in marketing means:

- a) the act of receiving from someone a desired object with the offer of something in return;
- b) everything that can satisfy needs and desires and is offered to the market for the purpose of attention, acquisition and use;
- c) the totality of existing and potential buyers of goods;
- d) commercial exchange of values between two parties.

20. According to the degree of importance, the needs are placed in the following sequence (from more urgent (important) to less urgent (important)):

a) physiological, self-preservation, social, need for respect, for self-affirmation;

b) physiological, social, self-preservation, self-affirmation, respect;

c) need for self-affirmation, respect, social, self-preservation, physiological.

21. Student Ivanenko got hungry. It's time I had a bite he thought. The situation is about:

a) desire;

b) need;

c) demand.

22. Student Petrenko got hungry. "I'll go to a cafe and have borscht", he thought. The situation is about:

a) desire;

b) need;

c) demand.

23. Student Ivanov got hungry, went to a cafe and bought himself three pies. The situation is about:

a) the need;

b) desire;

c) demand.

24. The term "marketing complex" covers:

a) market research;

b) pricing;

c) product;

d) sales methods;

e) strategic planning;

f) methods of product promotion.

25. Which of the specified types of activities do not belong to the marketing complex:

a) customer service;

b) advertising campaign;

c) determination of the method of sale of goods;

d) survey of consumers?

26. The "Obolon" enterprise take a lot of efforts to disseminate information about itself and its goods by placing advertising messages on

television, on the radio, in newspapers, on billboards, etc. This activity refers to the element of the marketing complex, which has the name:

- a) distribution;
- b) marketing communications (promotion);
- c) propaganda.

27. Various activities, thanks to which the physical availability of the product is ensured for target consumers, include:

- a) methods of distribution of goods;
- b) marketing communications;
- c) all of the above.

28. Developmental marketing is used when the demand:

- a) potential (hidden);
- b) decreases;
- c) negative;
- d) excessive.

29. The purpose of which type of marketing is to change the negative attitude of consumers towards the product to the positive:

- a) developing;
- b) demarketing;
- c) remarketing;
- d) conversion?

30. The purpose of which type of marketing is to restore demand and find new possibilities of revitalization:

- a) conversion;
- b) synchromarketing;
- c) developing;
- d) remarketing?

31. When the demand in the goods market decreases, enterprises should apply:

- a) conversion marketing;
- b) stimulating marketing;
- c) remarketing;
- d) counteractive marketing.

32. Businesses use demarketing when demand:

- a) decreases;
- b) corresponds to the offer (satisfactory);

c) is excessive;

d) is negative.

33. Businesses turn to countermarketing when the demand for goods:

a) corresponds to the offer;

b) decreases;

c) is negative;

d) is irrational;

e) fluctuates.

34. In a situation where there is no demand, enterprises resort to the following measures:

a) remarketing;

b) stimulating marketing;

c) conversion marketing;

d) developmental marketing.

35. Demand for goods that are contrary to the interests or well-being of society, for products with the expired term of use is called:

a) potential;

b) negative;

c) irrational;

d) hidden.

36. Businesses significantly increase, reduce or discontinue product price advertising activity in the event that the demand is:

a) is excessive;

b) oscillates;

c) is irrational;

d) is negative.

37. Stimulating sales under conditions of consumer indifference to the product is the goal in situations when the demand:

a) is satisfactory;

b) is absent;

c) decreases;

d) is hidden.

38. The tasks of which type of marketing are market segmentation, determination of strengths and weaknesses of the enterprise, marketing goals and development of a promising direction of the company's development:

a) tactical marketing;

b) strategic marketing?

39. The marketing activity of the "S" company proceeds from the fact that every market is unique, as a result of which it maximally adapts to national features of foreign markets. What type of marketing does this enterprise use:

- a) export;
- b) global;
- c) foreign economic;
- d) multinational.

40. The company "SP" entered the market, where the demand significantly exceeds the supply. In this situation it will be most appropriate for the company to apply the concept of:

- a) product improvement;
- b) improvement of production;
- c) intensification of sales.

41. What are the three factors underlying the concept of social and ethical marketing:

- a) profitability of the enterprise, consumer needs and public interests;
- b) profitability of the enterprise, return on investment and sales efficiency.

42. What marketing concept does "Sandora" LLC use, if it apart from market research, planning, sales promotion, performs the function of interaction with buyers, suppliers, intermediaries:

- a) intensification of commercial efforts;
- b) social and ethical marketing;
- c) classic marketing (traditional);
- d) relationship marketing?

43. The concept of intensification of commercial efforts determines the purpose of marketing activity – increase in sales due to:

- a) the use of intensive production technologies;
- b) satisfaction of consumer needs;
- c) stimulation of sales;
- d) there is no correct answer.

44. The concept of company "D" can be formulated as follows: success in the market can be achieved only if you offer consumers products that are of the highest quality, the best operational properties and characteristics. The named firm uses the concept of:

- a) marketing;
- b) social and ethical marketing;
- c) product improvement.

45. On the market, those enterprises that offer environmentally friendly products are becoming more and more popular. These firms apply the concept of:

- a) social and ethical marketing;
- b) marketing;
- c) intensification of sales;
- d) product improvement.

46. Sales agents of the "Surprise" store are convinced that without application of aggressive sales, the volume of sales of goods will significantly reduce. That's why they actively offer goods on the streets, in institutions, offices, etc. From the above, it can be concluded that the store adheres to the concept of:

- a) product improvement;
- b) improvement of production;
- c) intensification of sales;
- d) marketing.

47. The concept of the enterprise "Rosa" can be defined as social and ethical marketing if its activity involves the achievement of the following goals:

- a) satisfying the needs of consumers, making a profit and maintaining well-being of society;
- b) improvement of sales promotion measures and satisfaction of consumer needs;
- c) obtaining profit, development of environmentally friendly goods and improvement of sales promotion measures.

48. There are 5 concepts on the basis of which enterprises conduct their marketing activities. Claims that consumers will feel good about the products that are widely available and affordable, correspond to the concept of:

- a) improvement of production;
- b) product improvement;
- c) intensification of commercial efforts;
- d) marketing;
- e) social and ethical marketing.

49. Specialists believe that the basis of the success of the "LG" company is the definition of needs of the target markets and providing the desired satisfaction more efficiently and in more productive ways than their competitors. The named firm complies with the concepts of:

- a) social and ethical marketing;
- b) intensification of commercial efforts;

- c) marketing;
- d) product improvement.

50. What concept does the company use if it focuses primarily on meeting the needs of a certain group of consumers for which it constantly conducts market research, analysis and control of marketing activities:

- a) social and ethical marketing;
- b) marketing;
- c) intensification of commercial efforts;
- d) product improvement;
- e) improvement of production?

Content module 2. Marketing tools

Topic 4. Marketing product policy

Guidelines for studying the topic

In the process of studying this topic, it is necessary to pay attention to the following questions: Product as an attribute of the basket. The concept of an attribute and objective properties. Micro- and macro-attributes of the product, their significance and the degree of availability as perceived by consumers.

The essence, the purpose and the functional load of the marketing product policy.

Product strategy as a functional marketing branch. Formation of commodity policy. Marketing activities at different stages of the life cycle of goods. Strategic decisions in product policy: innovation, variation, product elimination.

Product assortment and its characteristics.

The concept of a new product. The main stages of development of new products. Generation and selection of ideas. Development and verification of the concept. Analysis of opportunities and sales. Product development. Trial marketing. Commercial launch. The process of distribution of new products. Reasons for the failure of new products.

Practical task 1. The multi-attribute model of Fishbein.

Research into the importance of attributes for consumer cars, as well as an assessment of the degree of perceived presence of these attributes for several competing brands was conducted.

Research results are shown in Table 9.

Using these results, determine:

the brand that will have the highest demand if the model of forming buyers' positions will be compensatory;

make recommendations to brands according to the existing strategies of changes in attitudes.

Table 9

The results of the consumer survey

Attribute	Importance of the attribute, %	Evaluation of the presence of the attribute in the competing car brands			
		Grant	Logan	Accent	Aveo
Eligibility: price-quality	39.4	3.2	4.8	4.3	4.1
Comfort	15.3	2	4	4.8	4.6
Security	14.5	2.4	3.6	4.2	4.1
Dynamic qualities	5.6	3	4	4.6	4.2
Design	9	3.1	3.7	4.7	3.2
Reliability	16.2	3	4.8	4.1	3.8

Guidelines for doing task 1

The compensation model provides for the formation of the position of buyers distinguishing the characteristics (attributes) of the trademark and forming a position towards it based on the assessment of the presence of these attributes in the brand. Such a model can be implemented in two ways:

simple addition, when the consumer chooses the product that has the largest number of positive sides; it is used with limited capacity or motivation to process information;

weighted composition, when the consumer takes into account relative importance of each trademark characteristic.

The multi-attribute model of Fishbein is used to measure the attitude of consumers towards the product brand. According to this model, the attitude towards the object is the sum of the products of opinions about the characteristics of the object and the relative importance of these characteristics:

$$A_o = \sum_{i=1}^n b_i e_i, \quad (1)$$

where A_o is the attitude to the object;

n is the number of significant indicators;

b_i is strength of opinion that the object has indicator i ;

e_i is evaluation of indicator i .

According to this model, the attitude towards a given object (product) is the sum of opinions about the object's indicators on the estimated value of these indicators.

First of all, it is necessary to find out which product indicators are the most significant for the target market. The most obvious and popular way to do this is to ask consumers themselves what they are guided by when evaluating products in this category. This assumes that consumers can be indicators of the product. The properties of the product that are mentioned most often or are considered the most significant ones are significant indicators.

We determine the values of b_i and e_i . The value e_i , which is an estimate of the corresponding characteristic, is usually determined on a 5-point scale with values from "very good" to "very bad" or a distribution of 100 % between all characteristics.

Such evaluations are made according to all the important characteristics defined earlier.

The value of b_i shows how confident consumers are that this brand of goods has a certain property. Opinions are also measured on a 5-point scale ranging from "very likely" to "unlikely".

It is necessary to evaluate the opinions of consumers based on each indicator for each brand.

To evaluate the attitude towards each brand using the formula, it is necessary to multiply each value of opinion by the corresponding rating.

The brand that in the end shows the greatest value is predominant.

Practical task 2. The ideal point method.

Using the given example of determining the ideal brand by measuring the ideal point, determine information about both the "ideal brand" of coffee (Table 10) and the opinions of consumers about the existing brands. For research, use hypothetical cupping* data.

*Cupping (from English "to cup" – to professionally taste coffee) is a professional term for coffee tasting, during which the characteristics of its taste and smell are determined. Cupping is a widespread and often daily practice in the global coffee professional community.

Table 10

Cupping results using multivariate analysis of the ideal point method

Indicator	Importance	Ideal point	Persuasion	
			Brand A	Brand B
Taste: Sour (1) bitter (7)				
Aftertaste: weakly perceptible (1) strongly perceptible (7)				
Aroma: Tender (1) rich (7)				
Acidity: Intensive (1) low (7)				
Emotions: Empty (1) sensual (7)				
Total:				

Guidelines for doing task 2

The ideal point method has a unique and very important feature: it allows you to get information both about the "ideal brand" and about the views of consumers on existing brands. The formula on which the ideal point method is based looks like this:

$$A_b = \sum_{i=1}^n W_i |I_i - X_i|, \quad (2)$$

where A_b is the attitude towards the brand;

Note that this potential limitation of importance measurements can be avoided if the measurements include an indicator score. If a characteristic is meaningful and desirable, consumers will give ratings close to "very good". If the characteristic is important because it is undesirable, the ratings will be close to "very bad". When consumers do not care whether a product has a given property or not, their ratings should be in the middle of the scale. In short, the evaluation of a characteristic is more informative because it simultaneously contains both importance and desirability.

The above limitation does not pose a problem when using the ideal point method. The desirability of this property can be determined from how the consumer places this property of the "ideal" product. For example, if carbonation is important because consumers prefer non-carbonated drinks, then the ideal points will be located at the very beginning of the corresponding scale.

Continuing to consider the example with soft drinks, we will assume that the survey gave us the following results (Table 11).

Table 11

A summary table of calculations using the ideal point method

Indicator	Importance, W_i	Ideal point, l_i	Persuasion, X_i	
			Brand A	Brand B
Taste: sweet (1) bitter (7)	6	2	2	3
Carbonation: high (1) low (7)	3	3	2	6
Calories: high (1) low (7)	4	5	4	5
Fruit juice content: intensive(1) low (7)	4	1	2	2
Price: high (1) low (7)	5	5	4	3
Total: $A_b = \sum_{i=1}^n W_i l_i - X_i $			16	29

The first column shows the indicators and their limit values (for example, from sweet to bitter).

The second column shows data on the significance of each indicator.

The third column is ideal the point, and the fourth and fifth are actual indicators for different brands.

In the given example, the most important characteristic is taste, and the least important is carbonation. According to the data on the ideal points, we can say that the "ideal" drink should be sweet in taste, slightly carbonated, with a small number of calories, high content of fruit juices (in practice, perhaps to evaluate the juice content, it would be better to use a scale with values from 0 up to 100 %). The price of such a drink should be relatively low (here you can also use another scale, for example, containing specific price values).

Consumers believe that brand A is very close to ideal. Brand B also has a good rating for some indicators (for example, calorie content), but clearly loses for others (for example, soda).

The final value of attitude towards the brand is determined in the following way. First, there is a difference between the ideal and the actual value of the indicator. To the taste, this difference is zero ($2 - 2$) for brand A, and -1 ($2 - 3$) for brand B. The absolute value of the difference is taken, then the modulus symbol is indicated in the formula. The resulting value is then multiplied by the importance value. According to the "taste" characteristic, brand A gets 0 (0×6), and brand B gets 6 (1×6). Further, the additions according to other characteristics and, finally, their sum are determined in a similar way. For brand A, it is equal to 16, for brand B it is 29.

Unlike the Fishbein model, in which the larger the value, the better, in this case the smallest results are preferred. The best attitude value a brand can have is zero, which suggests that the brand closely matches consumers' perceptions of an ideal set of attributes.

In contrast to the bipolar rating system used in Fishbein's multivariate model, the ideal point method uses unipolar scales to quantify responses. This is necessary to obtain correct importance values. After all, the indicators of the brand according to a characteristic that is not significant for the consumer should not affect the general attitude. That is why the answer "absolutely not important" is given a zero value. However, the bipolar system can be applied to evaluate ideal and real grades. The formula uses the absolute value of the difference between ideal and actual indicators, so both systems will give the same results. The unipolar scale is preferable because it is mathematically easier to work with.

The Fishbein model and the ideal point method are two completely different approaches to measuring opinion. In the ideal point method, measurements are based on the perception of the brand's position on a continuum of indicators. Fishbein measures the probability that a brand is located at some point on this continuum. For example, in this model, a question about sweet taste would read: "What is the probability that this drink tastes very sweet?" It is an understandable response from consumers who say that it is likely that the drink is very sweet, but what should the response mean, "It is unlikely that the drink tastes sweet?". This could mean that the person thinks the drink is bitter, but it could also mean that it doesn't taste good, and either option falls under the definition of "unlikely" in Fishbein's model. Therefore, the ideal point method can be useful for consumer beliefs. These models also evaluate the significance of indicators differently. For Fishbein, this is an assessment of the indicator itself (how good or bad it is), and the ideal point method produces a measure of actual importance. These two dimensions cannot be considered equivalent. Measuring importance can fully reveal a person's motivation. The fact is that the same indicators can be important for different reasons.

A characteristic may be important because consumers want it to be present in the product. Conversely, some property may not matter because it is undesirable.

Practical task 3. The structure of the product range.

Develop a structure of the commodity mix (nomenclature), in which the number of commodity lines is 3 and the total number of commodities is 12, the depth of commodity line A is 4, commodity line B is 2, commodity line C is 6. Give examples of commodity nomenclature with the corresponding structure.

Practical task 4. Formation of product policy.

The product policy of the enterprise can be carried out with the use of innovation, variation, diversification and elimination of goods. Each method of this policy or a combination of them can be effective depending on the goal set by the company. Fill in Table 12 depending on the importance of each method of product policy to achieve each of the possible goals of the firm.

Commodity strategies

Goal	Method			
	Innovation	Variation	Diversification	Elimination
Growth				
Profit				
Image				
Improvement of competitive position				
Risk reduction				
Downloading free capacities				
Rationalization				

Practical task 5. Formation of product policy.

Determine the depth of the assortment, if the company that wholesales products for industrial and technical purposes currently has 5 types of construction materials for sale, and each type of these materials is represented by 3 of their varieties.

Practical task 6. Formation of product policy.

Determine the degree of renewal of the assortment of the retail / wholesale according to the data: the retail / wholesale store sells 25 types of perfume products, of which 7 are new, that is, those that have not been sold before.

Practical task 7. Formation of product policy.

Determine the structure of the assortment of peach nectar with pulp in the "Smile" store in physical and monetary terms. Enter the obtained results in Table 13. Draw your own conclusions.

**The structure of the assortment of peach nectar with pulp
in the store "Smile"**

Peach nectar brand	Price for 1 liter, UAH	Sales volume (month), l	Cost, UAH / month	Assortment structure in physical terms, %	Assortment structure in monetary terms, %
J7	32.36	112			
Rich	38.9	119			
Sandora	36.75	104			
Biola	29.90	68			
Capri-SUN	46.80	65			
Galicia	49.95	97			
Total	–	565			

Guidelines for doing tasks 3 – 7

One of the most important merchandising characteristics of goods is the assortment characteristic, which determines the fundamental differences between goods of different types and names.

Assortment of goods is a set of goods united by some characteristic or set of characteristics.

The term comes from the French word "assortment", which means selection of different types and varieties of goods.

The concept of product nomenclature is also used in domestic and foreign practice.

Product nomenclature is a list of homogeneous and heterogeneous goods of general or similar purpose.

Thus, the above concepts are close to each other. They are united by the fact that they are both lists of goods. The differences are in the purpose: the assortment of goods is intended to meet the needs of consumers, the product nomenclature may have a different purpose – to regulate a certain professional activity or another field of application.

The assortment is quantitatively characterized by the following main indicators: structure, breadth, completeness, stability and degree of renewal.

Trade assortment is the assortment of goods presented in the trade network.

Unlike the industrial assortment, the trade assortment includes, as a rule, goods from different manufacturers. The exception is branded stores of manufacturing organizations, the strategy of which is based on the sale of goods of this company only.

The property of the assortment is a peculiarity of the assortment that manifests itself during its formation and implementation.

Range index is quantitative and/or qualitative expression of range properties; the number of groups, subgroups, types and names of goods is subject to this measurement.

When forming the assortment, the complex of its properties and indicators is adjusted, which requires an understanding of their essence and knowledge of the nomenclature of the properties and indicators of the assortment (Table 14).

Table 14

Properties and indicators of the assortment

Assortment properties	Indicators	Assortment indicators
1	2	3
Breadth is the number of groups, types, varieties and names of goods of homogeneous and heterogeneous groups. The breadth of the assortment is determined by the number of product groups and is estimated by the breadth coefficient	$K_b = G_f / G_t$, where G_f is the number of groups of goods at the time of determination, units; G_t is the total number of product groups, units	Valid. Basic. General. Group. Breadth factor
Completeness is the ability of a set of goods of a homogeneous group to satisfy the same needs	$K_c = V_f / V_n$, where V_f is the actual number of types of goods at the moment of examinations (checks), units; V_n is the number of species, provided by the assortment list, contract deliveries, standards, etc., units	Valid. Basic. Coefficient of completeness

Table 14 (continuation)

1	2	3
<p>Depth is the number of brands of goods of the same type and/or their modifications, and/or product articles. The unit of measurement of this indicator is the trademark, and in the presence of modifications, one of them</p>	<p>$K_d = D_f / D_n$, where D_f is the actual number of varieties of goods at the time of verification, units; D_n is the number of varieties provided for by the assortment list, the terms of the contract, price lists, etc., units</p>	<p>Valid. Basic. Depth coefficient</p>
<p>Stability is the ability of a set of goods to satisfy the demand for the same goods. Assortment sustainability. As a rule, assortment stability coefficient is determined for a specific period (month, quarter, year). It has been established that the optimal stability coefficient assortment should be expressed by the following values: 0.80 for department stores; 0.75 for specialized stores</p>	<p>$K_s = 1 - (P' f_1 + P' f_2 + \dots + P' f_n / P n \times n)$, where $P' f_1, P' f_2, \dots, P' f_n$ is the actual number of varieties (types) of products/goods from those provided by the assortment list and not on sale at the time of individual checks, units; P_n is the number of varieties (types) of product/goods provided for by the assortment list, units; n is the number of checks</p>	<p>Stability coefficient</p>
<p>Novelty is the ability of a set of goods to satisfy changing needs at the expense of new goods. Novelty characterizes the appearance of new varieties of goods for a certain period of time and is estimated by the coefficient novelty (K_n)</p>	<p>$K_n = N_t / N_f$, where N_t is the number of new varieties of goods that have appeared at the moment of verification, units; N_f is the average number of varieties, units</p>	<p>Valid update. Update rate. Novelty coefficient</p>
<p>Structure is the ratio of aggregates of goods in a set selected according to a certain characteristic</p>	<p>$K_i = A / S_i$ – the relative indicator of the structure (K_i) of individual goods (i), where A is the quantity of the separate goods in physical or monetary terms; S is the total number of all goods available in physical or monetary terms</p>	<p>Specific share of each species (name) of goods in the general set</p>

Table 14 (the end)

1	2	3
<p>Rationality is ability of a set of goods to fully satisfy the realistically justified needs of various consumer segments.</p> <p>When determining the rationality ratio of the assortment, all of the above indicators should be taken into account, as well as the degree of significance or weight coefficient for each indicator. The weighting coefficients are determined by an expert, they characterize the specific share of the indicator in the formation of consumer preferences that affect the sale of goods. The complexity of calculation of them lies in the fact that there are no common weight coefficients for all or at least for a group of goods</p>	$K_r = (K_b \times W_B + K_d \times W_D + K_n \times W_N + K_s \times W_S) / 4,$ <p>where W_B, W_D, W_N, W_S are coefficients of weighting indicators of depth, breadth, novelty, stability. ($W_B + W_D + W_N + W_S = 1$)</p>	Coefficient of rationality
<p>Harmony is the property of a set of goods of different groups, which characterizes the degree of their closeness in terms of ensuring the rational movement of goods, sale and/or use</p>		Coefficient of harmony

Practical task 8. Formation of product policy.

A pharmaceutical company has developed a new drug with technical and economic parameters listed in Table 15. Establish the possible competitiveness of the new drug in comparison with drug A, which is taken as a sample.

**Comparative assessment of technical and economic parameters
of drug A and a new drug**

Indicator	A new drug	Drug A	The coefficient of weight of the parameter
Technical parameters			
Dosage, mg	500	325	0.15
Number of dosage forms	3	1	0.18
Therapeutic efficacy, score	9.8	8.0	0.25
Security, score	7.8	6.7	0.22
Pharmacokinetics and pharmacodynamics, score	8	5	0.2
Economic parameters			
Price per package, UAH	450	130	0.4
The cost of treatment, UAH	800	540	0.6

Guidelines for doing task 8

To assess the level of competitiveness in terms of the product mass and marketing complex use a method based on the comparison of quality (technical and technical-and-economic) and cost parameters of the product.

By comparing the technical parameters of the evaluated and competing products determine the index of technical parameters (I_{tn}):

$$I_{tn} = \sum_{i=1}^n D_i \times q_i, \quad (3)$$

where n is the number of parameters selected for evaluation;

D_i is the coefficient of weight of the i -th parameter among the whole set of parameters;

q_i is the relative quality indicator of the product, which is determined by dividing the numerical value of the quality indicator of the product being evaluated by a similar indicator of the competing product selected for comparison.

The parameters of the technical group include:

design parameters (strength, speed, safety, functionality);

technical and economic (reliability, material consumption, energy consumption);

organizational and commercial (payment terms, marketing efficiency, level before and after sales service, product certification);
ergonomic and aesthetic parameters.

The index of economic parameters is determined by comparing the consumption prices of the assessed and competing goods (I_e):

$$I_e = S_1 / S_2, \quad (4)$$

where S_1 , S_2 is the price of consumption of the evaluated and competing goods.

The consumption price represents the sum of the selling price and all consumer costs during the product life. This price may include: selling price, transportation costs, debugging, packaging and storage costs, customer training costs, maintenance costs, repair and purchase of spare parts, disposal costs, taxes, insurance costs.

Based on indicators of technical and economic parameters, an integrated indicator (K), is calculated, which characterizes the level of competitiveness of the product:

$$K = I_m / I_e. \quad (5)$$

If the value K is more than 1, the evaluated product is competitive. The higher the value I_m , the higher the level of compliance of the evaluated product to consumer demands. The higher the value I_e , the less the evaluated product meets the requests (expectations) of the buyer.

Topic 5. Marketing price policy

Guidelines for studying the topic

In the process of studying this topic, it is necessary to pay attention to the following questions: the concept of market price. The value of price in the marketing system. Price functions as an economic category. Determination of pricing objectives and factors influencing price setting.

The essence and content of the marketing price policy. The stages of price policy formation. Choosing a pricing method and determining the base price. Development of a pricing strategy. Choice of pricing tactics and price adjustments. Price assessment and control. Cost-based pricing

methods. Demand elasticity and price determination methods based on demand analysis. Peculiarities of product value perception and price setting based on the perceived value. Types of competition and determination of prices taking into account competition. Pricing taking into account the quality and novelty of the product being sold. Pricing based on the geography of implementation.

Practical task 1. Calculation of price.

The firm "Mona", which produces dairy products, is planning to introduce a new product to the market – bifido-yogurt with natural ingredients (fruit additives). The planned volume of investments is 1.5 million UAH. The planned release of new products is 50,000 per year. Variable costs per unit of production make 12 UAH, fixed costs for the production and sale of products per month are 320,000 UAH.

Determine the price of the new product using the following methods of pricing:

1. The "cost+" method, provided that the firm wants to establish 20 % allowance:
 - a) from the cost price of the product;
 - b) from the selling price of the product.
2. The method of ensuring the target profit on invested capital if the firm wants to earn 20 % profit from of investments monthly.

Guidelines for doing task 1

The cost of production is the sum of costs associated with the production of a certain type of product.

Cost of production (C) is a monetary expression of the enterprise's costs for the production and sale of products. This is a complex economic indicator that combines costs of materialized labor (equipment and costs of consumed means of production) and costs of live labor (costs of wages):

$$C = BB / Q = (VC \times Q + FC) / Q, \quad (6)$$

$$C = VC + FC / Q, \quad (7)$$

where BB is the amount of gross expenses of the enterprise, UAH;

Q is the volume of production, units;

VC is variable costs per unit of production, UAH;

FC is the volume of fixed costs of the enterprise, UAH.

The final indicator of enterprise activity – profitability – depends on the cost of production.

Cost the value is the basis for calculating the price.

Price is a monetary expression of the value of the product, which fully satisfies the interests of the seller and the buyer, or one of the parties.

Price is a controlled element of the marketing complex that refers to income, others refer to costs (P).

Price is the sum of the values that the consumer gives in exchange for the right to own or use the product.

The mechanism of pricing in the conditions of market relations is revealed through prices and their dynamics.

Depending on which factor is being determined when calculating the price, pricing methods are divided into three groups: cost methods, demand-oriented methods, and competition-oriented methods.

The main advantage of cost methods is ease of use, and the main disadvantage is the lack of reaction to changes in the market environment: a decrease in demand, the solvency of the population, an increase in competition, etc.

With the "costs +" method price is calculated as the sum of all costs for the production and sale of the product and a certain markup. The markup is most often determined by the level of profitability established by the management or taken at the level, average for the industry. The price according to this method is calculated using the formula:

$$P = S + S \times R, \quad (8)$$

where P is the price of a product unit, UAH;

S is the unit cost of the product, UAH;

R is the profitability of production in fractions of a unit.

In order to determine the profitability of investments, yield or rate of return, it is necessary to calculate the ROI (return on investment) indicator.

A simple way to assess the effectiveness of an investment is to calculate the ratio of all the profit received during the period of ownership of the investment asset to the amount of the investment. This indicator is called profitability during the period of ownership of the asset. It expresses the extent to which the volume of investment has grown by the end of the period under consideration:

$$\text{HPR}_n = \text{ROI}_h = \frac{\sum_{i=1}^n \pi t}{P_0}, \quad (9)$$

where πt is the profit received every year during the period of ownership of the asset;

P_0 is the initial investment.

$\text{HPR} = ((\text{Value of the investment until the end of the period}) + (\text{Any income received during the period of ownership of the investment asset, such as dividends}) - (\text{Amount of investment made})) / (\text{Amount of investment made})$

$$\text{ROI}_h = \frac{\text{Income} + (P_{n+1} - P_n)}{P_n}, \quad (10)$$

where income is actual profit in monetary form that is not related to the growth of the asset's price;

P_n is initial price (or value) of the asset at the beginning of the period;

P_{n+1} is final price of the asset at the end of the period;

$P_{n+1} - P_n$ is change in the asset's price (gain or loss).

In order to simplify the comparison of investments made in different periods, the yield indicator for the period of ownership of the asset is converted to an annual calculation (recalculated by a year).

To get the annualized holding period return, divide it by the length of the holding period, then the holding period value appears in the denominator of the formula. This is how the return on investment is calculated:

$$\text{ROI}_a = \frac{\sum_{i=1}^n \pi t}{P_{0n}}, \quad (11)$$

where $\sum_{i=1}^n \pi t$ is the sum of all profits (π) for the periods from 1 to t ;

P_{0n} is the initial amount of investment in the n -th asset.

Practical task 2. Calculation of price.

Price elasticity of demand for the products of the company "Beta" is -0.75 . Determine the consequences of a price decrease of 1 UAH, if before this decrease the sales volume was 10 thousand units at a price of 17.5 UAH /unit, and the total costs were equal to 120,000 UAH (including permanent 20,000 UAH) for the entire volume of production.

Guidelines for doing task 2

Price elasticity of demand is the degree of sensitivity of demand to changes in price.

The coefficient of price elasticity is calculated according to the formula:

$$E = \frac{\Delta Q (\%)}{\Delta P (\%)} = \frac{\Delta Q}{Q_0} / \frac{\Delta P}{P_0}, \quad (12)$$

where Q is the volume of sales, units;

P is price, UAH.

When the price of a good rises, the quantity demanded falls for almost any good, but for some goods it falls more than for others. Price elasticity shows the percentage change in quantity demanded when there is a one percent increase in price, all else being held constant. If the elasticity is -2 , it means that a one percent increase in price leads to a two percent decrease in demand. Other elasticities measure how the quantity demanded changes with other variables (for example, the income elasticity of demand for changes in consumer income).

Practical task 3. Calculation of the break-even point.

The trading company "Alisa" plans to open a new store in Odesa. For this purpose, premises were rented at a cost of 2,000 UAH per month and three employees were hired: an administrator with the salary of 3,000 UAH and two salespeople with the salary of 2,500 UAH each. The initial range of products is shown in Table 16.

It is necessary to calculate the break-even point and build a corresponding graph.

The summary of results

No.	Name	Average price per unit, UAH	Average monthly quantity, pc	Average purchase price, UAH
1	Dish sets	586	50	424
2	Stuffed toys	266	30	189
3	Imitation jewelry	250	6	125
4	Clothing	695	6	348

Guidelines for doing task 3

The break-even point is the volume or level of operations at which total revenue equals total costs, that is, it is the point of zero profit or zero loss.

The break-even point is one of the indicators used to evaluate the efficiency of investment projects. Since the break-even point corresponds to the volume of product sales, starting from which its release should bring profit, the volume of sales (output) calculated to achieve it is compared with the design capacity of the enterprise being created.

Break-even analysis of the project reveals the dependence of the size of the profit on the determining factors: the volume of sales, changes in the price of products, expenses for the construction of the enterprise, prices for raw materials, etc. This information, taking into account the desired range of sales price values, company expenses, etc. can be used to assess the investment project and investment risk.

The break-even point is calculated according to the formula:

$$Q = FC / (P - AVC), \quad (13)$$

where Q is the break-even point (sales volume);

FC is the amount of fixed expenses;

P is the price per product unit;

AVC is variable costs per unit of production.

The size of the organization's profits and losses largely depends on the volume of sales of its products. It is precisely in order to find out what the sales volume of the organization's products should be in order to achieve profitability that a break-even analysis is carried out.

The break-even point characterizes a situation in which the total revenues from the sale of the organization's products fully cover the costs of production and sale (a situation when the organization does not receive profits, and does not have losses either).

Thus, the break-even point shows how many units of products the organization must sell in order to cover its costs with its revenues. The sale of each subsequent unit of products will bring profit to the organization. On the contrary, a decrease in the volume of product sales below the level determined by the break-even point means that the organization will incur losses.

To determine the break-even point, you need to know:
the selling price of a unit of the organization's products;
direct costs (variable costs) per unit of products;
general operating costs.

If the project involves the realization of not one, but several types of products, then the break-even point is determined in monetary terms according to the formulas:

$$Q = FC / K_m; \quad (14)$$

$$K_m = GM / TR; \quad (15)$$

$$GM = TR - VC, \quad (16)$$

where Q is the break-even point (sales volume);

FC is the amount of fixed expenses;

K_m is the gross margin coefficient;

GM is the gross margin;

TR is the revenue;

VC is variable costs for the total volume of production.

$$Q = (FC \times TR) / (TR - VC). \quad (17)$$

The break-even analysis makes it possible to reliably justify production tactics when market conditions change, in particular when production volumes change. Thanks to the graphical method of determining the break-even point, you can answer the following questions (Fig. 2):

How will an increase (decrease) in output affect the amount of profit?

What happens if output increases and price decreases?

What will be the consequences if price increases, costs decrease, output decreases, etc.?

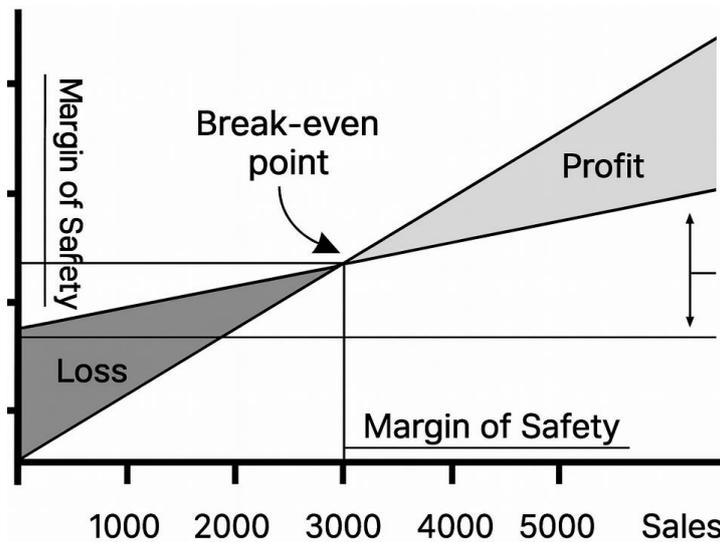


Fig. 2. The graphical method of determining the break-even point

Practical task 4. Determining the price strategy.

Manufacturers of footwear, clothing, tableware and other consumer goods often face the problem of by-products, namely is defective products whose quality does not meet the requirements of retailers and consumers. But there is a market for such defective goods.

What pricing strategy should be used?

Practical task 5. Determining the price strategy.

American Express offers three classes of "goods" at a price of the green card of 100 pounds, gold card of 200 pounds, platinum card of 300 pounds.

What pricing strategy did American Express choose?

Do you find this strategy effective?

Guidelines for doing tasks 4 – 5

Pricing strategy is a marketing strategy the implementation of which is associated with an impact on the price of a product or pricing system.

The types of pricing strategies are as follows:

Cream skimming strategy. Its essence lies in the fact that when a product is brought to the market, a deliberately inflated price is assigned for it. There is a group of consumers for whom it is important to purchase

this product first, and the price is not important for them. Sometime later, after the hype around the product subsides, its value drops to the objective price. For example, each fall, Apple releases a new model of its flagship smartphone. Its cost when entering the market, is overestimated by at least one and a half times. Already after 2 – 3 months, the cost of a smartphone drops by 15 – 20 %.

Low price strategy. A product is priced slightly below the average market price due to the maximum reduction in production costs. The goal of this strategy is to make big profits in the long run through sales volume, not quick profits through skimming.

Target price strategy. With this, the most important constant is profit. The price of a product changes depending on changes in the cost of production (changes in prices for raw materials, increased cost of logistics associated with an increase in the price of gasoline, etc.), but the value added (marginality) of the product remains unchanged.

Discounted pricing strategy is often used when you need to make a quick profit or to smooth out seasonal sales fluctuations. An example is discounts in supermarkets for certain groups of goods (often goods with an approaching expiration date), for pensioners on a social card, etc.

The strategy of following the leader is setting prices in accordance with the pricing policy of the industry leader. The price of a new released product may differ from the prices of competitors, but within limits depending on the technological or qualitative superiority of the product over competitors. The more the product differs (superior) from competitors, the more its price can differ.

A constant price strategy. The price of a product does not change for years, ideally it does not change at all. The type of product, packaging (for a cheaper one, for example), volume (weight) of the product may change, but the price remains unchanged. For example, for a long time, the 48 kopeck ice cream cost exactly 48 kopecks. The price was so fixed in the memory of consumers that the ice cream was recognized only by it, and subsequently the price became a name.

The psychological pricing strategy is a strategy that deceives the eyes of buyers. Seeing the price tag "999 dollars", many subconsciously round it up to "900", although it is more correct to round it up to "1000". Thus, at the subconscious level, 999 is 100 dollars cheaper for the buyer than 1000.

Topic 6. Marketing policy of distribution

Guidelines for studying the topic

In the process of studying this topic, it is necessary to pay attention to the following questions: The essence of the concept of distribution policy. Marketing communications system and its functions. Marketing communications process. Physiological and psychological barriers to communication. Means of marketing communications: advertising, personal selling, sales promotion, public relations and direct marketing.

Advertising communication. The nature and types of advertising. The main means and carriers of advertising and their characteristics. Psychological aspects of advertising. Planning an advertising campaign.

Personal sales. Sales promotion. New methods of sales promotion: leasing, franchising, telemarketing, etc. Establishing relations with the public (public relations). Direct marketing. CRM concept in the marketing communications system.

Practical task 1. The methodology for calculation and analysis of projects.

Complete Table 17, retail store services. Justify your answers.

Table 17

Types of retail store services

Pre-sale services	After-sales services	Additional services

1. Taking orders by phone.
2. Delivery of purchases.
3. Reference service.
4. Free parking.
5. Processing of the product.
6. Gift packaging.
7. Fashion show.
8. Showcase equipment.
9. Recreation room.

10. In-store displays.
11. Accepting orders or sending goods by mail.
12. Repair services.
13. Restaurants, cafes.
14. Application of inscriptions on products.
15. Usual packaging.

Practical task 2. The methodology for calculation and analysis of projects.

The head of the sales department determined the most likely duration of the next delivery of cargo in 12 days. In his assessment, based on the experience of previous projects, he took into account possible shifts in delivery dates and standard delays. Thus, an optimistic estimate of the duration of the delivery period is 7 days. But it can become real only if any risk, which will cause a delay in terms is not realized. Otherwise, the duration of solving the task can reach 29 days – this is a pessimistic estimate.

Estimate the duration of solving the task using the PERT method.

Practical task 3. The methodology for calculation and analysis of projects.

A steadily operating distribution company plans to sell 334,000 products in 2022. In 2023, it plans to sell 350,000 products. For this purpose, a number of marketing activities were carried out, and according to a survey of a group of specialists from the marketing and planning departments, the most likely forecasts are 340,000 products. But this is in the event that the inherent risks remain at the level they are. Otherwise, the pessimistic amount will be 300,000 products. An end-use analysis with 338,000 units and an assortment analysis with 332,000 units were also conducted.

Calculate the expected value of the sales forecast.

Guidelines for doing tasks 2 – 3

Quantitative methods of forecasting assess the future state of demand based on the data from past periods and current and future factors using mathematical methods.

The method of standard probability distribution (PERT method – program evaluation and review) involves determining the most probable range of forecast sales volume based on expert assessments:

1. Three types of sales forecasts are determined by the expert method:

O – optimistic forecast;

M, M1, Mn – the most likely forecast;

P – pessimistic forecast.

2. The expected value of the sales forecast (E) is calculated as:

$$E = \frac{O + 4M + P}{6} \quad (18)$$

or

$$E = \frac{O + M1 + \dots + Mn + P}{6}. \quad (19)$$

3. The standard deviation is calculated as:

$$S = \frac{O - P}{6}. \quad (20)$$

4. The sales volume is calculated as:

$$Q = E \pm 2S. \quad (21)$$

The forecast is considered correct if the difference between the forecast value and the actual level does not exceed 5 %.

Practical task 4. Determining the optimal order volume.

The company store "Vesela Korivka" sells pasteurized milk in PET bottles. The monthly sales volume is 2,000 bottles. The price of each bottle of milk equals 27.50 UAH. Transportation costs for the performance of one order is 280 UAH. Warehouse costs make up 14 % of the average cost of the warehouse stock. To preserve its taste qualities pasteurized milk should not be stored for more than 30 days.

Determine how often you need to make an order for the supply of milk in bottles to minimize inventory costs.

Practical task 5. Determining the optimal order volume.

Uninterrupted provision of domestic and foreign consumers with "Svitoch" sweets is carried out by a network of distributors, where you can buy the company's products at the manufacturer's prices, the volume of sales of candies in store for a year is 210,000 UAH, the amount of costs for placing an order, delivery of candies and their acceptance per batch is 450 UAH; sum costs for storage of a batch of goods is 10 UAH; the time interval between orders is identical; the number of working days is 350.

Develop a schedule for the delivery of candies from the distributor to the store by offering the optimal batch size (determine the order interval and optimal order volume).

Guidelines for doing tasks 4 – 5

The problem of optimization of the level of stocks in the management of stocks in links of supply chains is well-known and quite relevant at the moment. The relevance of this problem, despite the long history of the development of this direction in the economy, is due to the need to minimize warehouse and transport costs.

The main goal of inventory management is to minimize total costs for stock purchase, delivery and storage. At the same time, delivery costs and storage show multidirectional behavior. On the one hand, an increase in the delivery lot leads to a decrease in delivery costs in calculation per unit of reserves, and, on the other hand, it leads to the growth of storage costs per unit of inventory. To solve this problem, R. H. Wilson developed a method of calculation of the optimal delivery lot (Economic Order Quantity, EOQ), also known as the EOQ model or the Wilson formula.

At the heart of the EOQ model is the aggregate cost function, which reflects the costs of purchasing, delivering, and storing inventory. To do this, one should use the total cost formula in the classical Economic Order Quantity (EOQ) model.

$$TC = p \times D + (D \times K) / Q + (H \times Q) / 2, \quad (22)$$

where TC is total costs of purchasing, ordering, and holding inventory;

p is the purchase price or production cost of a unit of inventory;

D is annual need for reserves;

K is the cost of order organization (loading, unloading, packaging, transport costs);

Q is the volume of the delivery batch.

H is the cost of storing 1 unit of inventory during the year (cost capital, storage costs, insurance, etc.).

In order to calculate the size of the optimal delivery batch, it is necessary to differentiate the aggregate cost function with respect to the variable Q and equate it to 0.

$$0 = -(D \times K) / (Q^2) + H / 2, \quad (23)$$

$$Q^2 = -2 \times D \times K / H. \quad (24)$$

Solving the resulting equation with respect to the variable Q, we obtain the optimal delivery lot (EOQ):

$$EOQ = \sqrt{(2 \times D \times k) / H}. \quad (25)$$

In other words, the optimal delivery lot is such a volume, at which the value of the aggregate cost function is minimal.

The frequency of the order for the supply of products under the conditions of minimum costs, associated with warehouse stocks, can be determined by the formula:

$$TEOQ = \sqrt{((V \times P \times Cw) / (2 \times Ct))}, \quad (26)$$

where V is the number of orders, times;

P is the price of a product unit;

Cw (%) is warehouse costs (often given as a % of the average cost of inventory);

Ct is transport costs for the fulfillment of one order.

The order interval:

$$I = T / (V / EOQ), \quad (27)$$

where I is the order interval, days;

T is the number of working days.

Graphically, the EOQ model can be represented as given in Fig. 3.

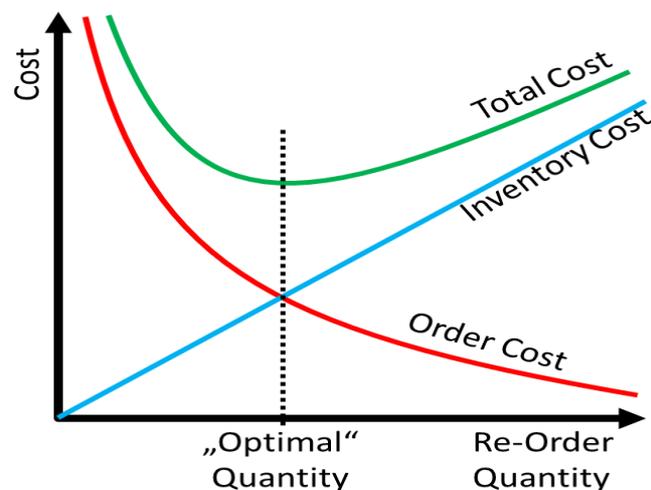


Fig. 3. **Graphic representation of the EOQ model**

The figure shows the relationship between the order cost, storage of stock, total costs and the optimal order volume.

Thus, the optimal order volume is the volume of the delivery batch, which is shipped by the supplier to the customer's order and provides for the consumer, the minimum value of the sum of two components: costs for formation and storage of stocks, and transport and procurement costs.

Practical task 6. Choosing the most profitable sales channel.

The company, which produces a variety of household chemicals, has decided to begin production of a new dishwashing detergent. The company produces a cleaning consistency, pours it into branded bottles that provide ease of use, and sells under its own brand. The marketing department evaluates two options for selling a new product: sales through its own sales agents (plan 1) and sales through wholesalers (plan 2). The main data collected by the marketer are presented in Table 18.

Using the given data, determine: the volume of sales at which the use of each of the sales channels will be equally beneficial for the company; profitability of each sales channel, if the expected sales of the enterprise make 2000 thousand money units.

Initial data on sales costs

Indicator	Plan 1	Plan 2
Costs of maintenance and servicing of warehouses, thousand money units	200	-
Transportation costs, % of sales volume	2.7	-
Other direct costs related to inventory management, % of sales	2	-
Advertising costs among distributors, % of sales	2.2	1.5
Wages of sales agents, money units	7200	-
Salaries of sales managers, money units	3100	2250
Trade discount for retailers, % of sales	5.5	-
Trade discount to wholesale intermediaries, % to the volume of sold products	-	20

Guidelines for doing task 6

In the case where the manufacturer itself incurs the costs of physical distribution of products (sales through its own sales agents), it must organize a system of warehouses, bear the financial costs associated with inventory management, have a sales department. Then the main part of the cost of sales will be fixed costs. This strategy provides greater control over the organization of sales and closer contact with end users.

If manufacturers choose plan 2, most of the physical distribution (storage and transportation) functions will be performed by wholesalers, so the costs will be covered by the wholesale markup. At the same time overhead costs of the manufacturer are reduced to a minimum. But with this sales organization, the manufacturer becomes dependent on distributors and has limited control over the sales process.

Comparison of costs when working with different sales channels can be done graphically (Fig. 4).

The graph shows that at a certain sales volume (critical point of intersection of direct costs) sales costs in different channels will be the same plan 2 will be preferable for the level of sales below the point of intersection of lines, and for the level of sales above the point of intersection of lines plan 1 should

be used. As a rule, the expected revenue from sales using different channels is different.

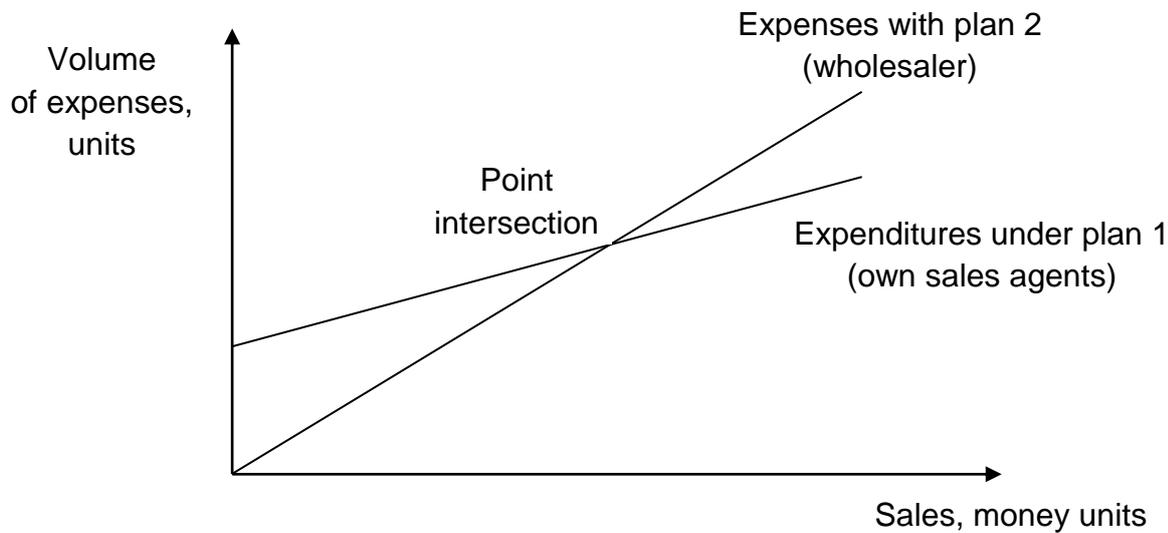


Fig. 4. **Comparison of the cost structure for the two sales channels**

The profitability of each is determined as follows:

$$R = (PS - SC) / SC, \quad (28)$$

where R is the expected rate of return, which takes into account all costs in the sales channel;

PS is proceeds from sales, money units;

SC is sales costs, money units.

Topic 7. Marketing policy of sales promotion

In the process of studying this topic, it is necessary to pay attention to the following questions: The essence and content of the marketing policy of sales (distribution), its main elements. The concept of the sales channel of goods. Types and selection of product sales channels. Factors affecting the structure of the sales channel. Main functions of sales channels.

The concept of sales marketing system: vertical and horizontal. Market intermediaries and their functions. Strategic decisions in distribution policy: selective, intensive, exclusive distribution.

Selection of distribution channel participants. Motivating distribution channel participants. Assessment of the activities of distribution channel

participants. Wholesale trade in the marketing system. Functions and organizational forms of wholesale trade. Retail. Merchandising. Direct marketing. The essence and types of direct marketing. Contract systems for the distribution of goods and services. Network marketing. Franchising. Leasing. Barter.

Practical task 1. Case "Way of the champion".

"Impossible is a chance to prove yourself. Impossible is not forever. Impossible is possible!", – these words of the Adidas advertising campaign have long been known throughout the world, including people who are far from sports, and the slogan "Impossible is nothing" regularly takes first places in various ratings of the best advertising slogans.

Adidas AG is an industrial concern specializing in production of sports shoes, clothes and equipment which occupies one of leading positions on both the European and world markets. Competent policies contributed to the company's success. In many ways it is promotion, the essence of which was active for a long time-sponsor support of the largest sports competitions and outfitters of talented athletes. Since 1952, Adidas shoes have been worn by many participants of the Olympic Games, who later became prize-winners and winners. Adidas became a sponsor of the Olympic Games (1972 – 1996 years), the German national team in Adidas boots has been European and world champion in football several times, Adidas ball is the official ball of several World Cups. Adidas' special attention to football competitions is largely due to the company's history, because it was Dassler Brothers Shoe Factory, from which Adidas later became a spin-off, that began producing the world's first football boots with spikes.

At the same time, the main competitor – the company Nike – implements the opposite policy. Nike puts the main emphasis on advertising of their products with the involvement of sports stars, thus forming in the minds of consumers an idea about their product as shoes for Champions. Moreover, famous athletes not only starred in television commercials for Nike products, but they also gave positive feedback about products in interviews with authority sports publications, thus contributing to increasing popularity of the brand. For example, in 1985, the brand signed a contract with the famous basketball player Michael Jordan, who not only advertised the brand, but also played only in Air Jordan sneakers specially designed for him.

However, recently the marketing campaigns of these two giants are becoming more and more similar – commercials with the participation of football and basketball stars and sponsorship contracts with the largest clubs and national teams, mainly in the field of football and tennis.

At the same time, the task of every large firm is to develop a unique marketing strategy, not similar to the strategies of competitors, with the aim of forming a stable market position – the image of the product in the mind of the consumer. Only in this case, the consumer's choice becomes conscious rather than dictated by random factors, and the firm has a segment of regular buyers who want to buy not just a product, but a product of a certain brand.

Therefore, the problem of finding new methods and forms of communication that will allow Adidas to become an unusual company for consumers, and not just one of the manufacturers of sportswear, becomes urgent though very large.

Questions and practical tasks

1. What tools of the promotion complex are used by companies Adidas and Nike?
2. Identify the main competitors of the Adidas company on the world market. Analyze their competitiveness.
3. Determine what positioning strategy the Adidas company uses.
4. Offer recommendations for improvement communication policy of the Adidas company under modern conditions.
5. Develop a plan to promote the Adidas brand in Ukraine in 2022 – 2023.

Guidelines for solving the case

A case is a description of a problem situation based on real facts that needs to be solved. The situation may be from the sphere of business or law, medicine or construction. They are united by the fact that in each case there is a package (case) of tasks that do not have an exact solution, and a certain course of action is required in the current conditions.

Any business structure daily faces tasks that do not have a specific solution and require managerial decisions on the part of the company's management. Each such case requires a comprehensive analysis of the

situation, the development of hypotheses, the proposal of effective measures to solve the problem, as well as the construction of a financial model for the solution.

To solve a case means to investigate the proposed situation, collect and analyze information, offer possible options for action and choose the most preferable option from them. Cases imitate real situations and are based on real facts. Through the analysis of real situations, the ability to analyze situations and independently make decisions in real life is formed.

The case method allows you to improve skills that are extremely necessary in real life (both professional and everyday), namely:

information skills, analytical skills, that is the ability to search for missing data, highlight essential and non-essential information, analyze and process large amounts of information in a short time, think in a structured and logical way, make hypotheses and assumptions, logically and structuredly draw up results;

creative skills. The solution of a case requires the ability to think outside the box and independently, be creative and be able to offer alternative solutions to the problem that cannot be found in a logical way;

soft skills – the ability to organize the work of the team, resolve conflicts, correctly formulate and defend one's opinion, convince, seek compromises, present one's decision to the public, lead a discussion, listen to opponents, control oneself, etc.

Practical task 1. Evaluation and calculation of an advertising campaign effectiveness.

The GreenWood company carried out an advertising campaign, within the framework of which various advertising initiatives were implemented.

Each expense item has its own cost budget:

outdoor advertising (250 000 money units);

advertising in the media (120 000 money units);

contextual advertising on the Internet (55 000 money units);

production of printed materials (15 000 money units).

By the time the advertising campaign began, the average quarterly revenue of the company "GreenWood" was 1.5 million money units. After the end of the advertising campaign, this figure reached 2.05 million money units.

The average margin per unit of products sold is 26 %. The general period of the advertising campaign is 1 quarter. On average, the daily turnover of the company during the period of advertising increased by 36.6 %.

The total number of advertising contacts is 10 534, the size of the audience of the advertising channel is 50 thousand people.

Calculate the effectiveness of advertising (communicative, commercial, economic).

Practical task 2. Calculation of an advertising campaign effectiveness.

Company "Tristan" has an average sales growth of 4 % per month. In October, they ran an advertising campaign with a budget of 100,000 UAH for a period of one month. Sales growth in October amounted to 150,000 UAH, of which 4 % relates to organic sales growth.

Calculate the advertising campaign profitability (ROI).

Practical task 3. Calculation of an advertising campaign effectiveness.

Calculate the effectiveness of promotional activities for a company with negative sales growth (ROI).

A manufacturing company loses an average of \$100,000 per month over a year. You run an ad for one month with a budget of \$50,000, which as a result slows down the decline in sales and stops at \$20,000 per month.

Practical task 4. Calculation of an advertising campaign effectiveness.

In the 4th quarter 2022, the volume of sales of the company's products "Alfa-M" amounted to 900,000 UAH. The price of a product unit is 85 UAH, variable costs per unit make 31 UAH, the amount of fixed costs is 142 thousand UAH monthly. At the end of 2022, an advertising campaign was held. Determine the effectiveness of the advertising campaign, if during the 1st decade of 2023 the company sold products in the amount of 140,000 UAH, and the advertising campaign budget is 15,000 UAH.

Guidelines for doing tasks 1 – 4

The effectiveness of advertising is a relative indicator of the degree of achievement of the goals set for advertising, provided that costs for implementation of advertising are minimized.

Currently, there is no unity of opinion regarding the definition of the essence of effectiveness in the field of advertising. Some suggest considering it from the point of view of the received quantitative and cost results of the advertising campaign. Others emphasize the profitability of advertising. Others generally evaluate its effectiveness from the point of view of its ability to solve the tasks set before it.

The effectiveness of advertising in the marketing system is conditionally divided into three types:

- commercial;
- communicative;
- economic.

Each of them has its own specifics, pursues certain goals and tasks.

The commercial effectiveness of advertising is manifested, first of all, in the growth of sales (sales volumes). The communicative effectiveness of advertising appears in the growth of digital communicative indicators, such as the quality of communication and subject marketing with the market.

Communicative effectiveness is reflected in the impact that advertising has on the ability to form a positive attitude towards products and the company that produces them, as well as on changing consumer knowledge and preferences. Otherwise, it is called psychological.

Commercial and economic efficiency is based on the change in quantitative indicators of the company's activity after the advertising campaign. First of all, it is the volume of sales, as well as the volume and level of profit.

The main summary indicators, according to which the assessment is carried out, as well as the methodology of calculation are generally presented in Table 19.

**The algorithm for calculating the commercial, communicative
and economic effectiveness of advertising**

Effectiveness of advertising	Formula for calculation
Communicative	<p>Coverage:</p> $C = N / A,$ <p>where N is the number of contacts. A is the audience size of an advertising contact (advertising carrier) in the period of advertising</p>
Commercial	<p>Trade turnover under the influence of advertising:</p> $T = (T_u \times D \times T') / 100,$ <p>where T is additional turnover caused by promotional activities, UAH; T_u is usual average daily turnover before the start of the advertising period, UAH; D is the number of days of accounting for turnover (in the period of active advertising), days; T' is relative increase in the average daily turnover in the advertising period compared to the pre-advertising period, %</p>
Economic	<p>Economic effect of advertising:</p> $E = (T_a \times M) / 100 - (C_t + C_a),$ <p>where T_a is additional turnover caused by promotional activities, UAH; M is trade markup per unit of goods, in % of the selling price; C_t is advertising costs, UAH; C_a is additional costs for the increase in turnover, UAH.</p> <p>Advertising campaign profitability (Return on Marketing Investment, ROMI) takes into account sales revenue in this advertising campaign and marketing expenses: $\text{ROMI} = ((\text{advertising campaign revenue} - \text{ad campaign expenses}) / \text{ad campaign expenses}) \times 100 \%$ </p> <p>If you need to calculate ROI for a certain period of time, you can use the following formula: $\text{ROI} = ((\text{income for the period} - \text{expenses for the period}) / \text{amount of investments in the period}) \times 100 \%$ </p>

Test questions for self-assessment according to content module 2

1. A package of the yogurt "Balance" has certain dimensions, weight, price, etc. The specified elements characterize:

- a) nomenclature unit;
- b) commodity unit;
- c) product with reinforcement.

2. Product competitiveness is:

- a) the highest level of quality in the world;
- b) the product's ability to compete on the world market;
- c) the product's ability to compete with similar types of products on the world market;
- d) the ability of the product to compete with analogues in a specific market for a certain period of time;
- e) the lowest cost.

3. Components of product competitiveness are:

- a) a set of aesthetic properties of the product;
- b) technical parameters;
- c) advertising effectiveness;
- d) economic parameters.

4. Choose the correct sequence of the product life cycle:

- a) growth, market entry, maturity, decline;
- b) market entry, maturity, growth, decline;
- c) market entry, decline, maturity, growth;
- d) market entry, growth, maturity, decline.

5. Establish the correct sequence of costs per customer according to product life cycle stages:

- a) very low;
- b) low;
- c) high;
- d) average.

6. Establish product strategies in the correct sequence according to the stages of the product life cycle:

- a) offer options for goods, services and guarantees;
- b) offer different brands and models of goods;
- c) offer the main product;
- d) remove "weak" products.

7. Is it true that the life cycle of a product reflects the process of manufacturing, selling and use of a specific unit of production:

- a) yes;
- b) no.

8. Goods that are often bought without much thought and with minimal effort in terms of comparing them with each other are goods of:

- a) special demand;
- b) passive demand;
- c) everyday demand;
- d) preliminary selection.

9. Increasing the assortment means:

- a) changing product characteristics to improve their parameters;
- b) changing the characteristics of the product in the direction of reducing their parameters;
- c) expansion of the total number of goods.

10. The breadth of the product range reflects:

- a) the number of options and varieties of an individual product within the assortment group;
- b) the total number of assortment groups;
- c) ensuring the company's profit.

11. The product range is highly harmonious if:

- a) the goods complement each other in use;
- b) the goods have a common storage technology;
- c) both answers are correct.

12. The corporate style system includes the following elements:

- a) logo;
- b) brand block and brand color;
- c) advertising;
- d) product;
- e) polygraphic constants.

13. The Odeska 161 winter wheat variety is in decline. What decision must the management of the trading house "Selena" make:

- a) slow down the stage, reduce marketing costs;
- b) speed up the stage;
- c) shorten the stage;
- d) extend the stage as long as possible by searching for new market segments, improving the characteristics of the variety.

14. A bakery bought out an agricultural enterprise and started cultivation of grain crops and production of flour from its own raw materials. What product strategy does this company use:

- a) horizontal diversification;
- b) vertical diversification;
- c) conglomerate (pure) diversification?

15. Elimination is:

- a) modification (improvement) of existing product properties;
- b) expanding the product range of the enterprise;
- c) removal of an obsolete product from the market.

16. The company "Torchyn Produkt" brought ketchup to the market at a minimum price. Gradually improving the product, it increased the price. In this case, the company implemented the strategy of:

- a) cheap goods;
- b) skimming;
- c) market penetration.

17. Cost-based pricing methods include:

- a) auction;
- b) tender;
- c) pricing based on the calculation of the break-even point and ensuring the target profit.

18. The upper limit of the "possible price" for a product is formed by:

- a) prices of competitors;
- b) product cost;
- c) market demand for the product.

19. "Franco" prices make it possible to:

- a) give a discount to the client;
- b) take into account different terms of delivery of goods;
- c) get additional profit from each product unit;
- d) all answers are correct.

20. The task of the price policy is related to the price increase in case of:

- a) excessive demand;
- b) lack of demand;
- c) inconstant demand;
- d) all answers are correct.

21. Demand can be considered elastic if:

- a) with an insignificant price decrease, demand increases significantly;
- b) with a significant price reduction, demand increases significantly;
- c) when the price changes, the demand does not change;
- d) demand changes regardless of price.

22. Demand can be considered inelastic if:

- a) with an insignificant price decrease, demand increases significantly;
- b) with an insignificant decrease in the price, the demand does not increase significantly;
- c) when the price changes, the demand does not change;
- d) demand changes regardless of price.

23. There are 5 producers working on the market of meat products (sausage and smoked products). The price policy of each of them largely depends on the competitors' price policies. What type of competitive markets does the one described belong to:

- a) oligopolistic competition;
- b) monopolistic competition;
- c) pure competition?

24. The market is characterized by the presence of a large number of sellers and buyers of a certain product, while the pricing policy of each seller is of minimal importance. This type of market is:

- a) pure monopoly;
- b) pure oligopoly;
- c) pure competition.

25. A cafe sets prices, focusing mainly on the prices of competitors, paying little attention to demand. What pricing method does the cafe use:

- a) average costs plus profit;
- b) pricing based on current price levels;
- c) pricing based on the calculation of the break-even point and ensuring the target profit?

26. A seller aims to win the maximum market share. What are the actions in this case that will give the greatest effect:

- a) approximation of prices to the prices of competitors;
- b) use of aggressive marketing;
- c) cost minimization?

27. The company "Kodak" sells cameras at a minimum price, and films for them at the maximum price. The company applies the strategy of:

- a) setting prices for mandatory accessories;
- b) setting prices within the range of goods;
- c) setting prices for complementary goods.

28. The wholesale base sells products to different intermediaries at different prices depending on the usefulness of the partner. These prices are:

- a) discriminatory;
- b) dumping;
- c) fixed.

29. In order to stimulate certain types of goods, the following discounts are established:

- a) preferential;
- b) sconto;
- c) quantitative;
- d) hidden.

30. The distribution channel level is:

- a) the type of sales intermediary involved in the movement of goods to the consumer;
- b) the number of transport hubs that the product passes through during its movement to consumers;
- c) quality of services provided by the manufacturer to its intermediaries;
- d) all answers are correct.

31. The width of the distribution channel means:

- a) the number of intermediaries at one level of the distribution channel;
- b) the number of product groups sold;
- c) the number of the distribution channel levels;
- d) all of the above.

32. Intensive distribution of goods is carried out:

- a) through deliveries to a network of specialized stores;
- b) due to a large number of mass retail outlets;
- c) by delivering goods directly to the consumer.

33. For a manufacturer, the configuration of a direct sales channel is most preferable if:

- a) he wants to increase sales markets, better cover them, to increase sales volumes of goods;

b) he wants to control his entire marketing program, maintains close contact with consumers, has limited markets and sufficient means for organization of sales.

34. A manufacturing enterprise plans to sell its product through its own network stores, while it will use:

- a) a one-level channel;
- b) a two-level channel;
- c) a three-level channel;
- d) a direct marketing channel.

35. In the case of selective distribution of goods, the company seeks first of all:

- a) how to reach the mass market;
- b) to exercise strict control over the sales channel;
- c) how to combine moderate channel control with sufficient sales volume.

36. Based on the ABC analysis, it was established that selling a significant amount of products the intermediary makes up an insignificant share in the total volume of sales. These types of goods include:

- a) group b;
- b) group c;
- c) group a.

37. The company "Torchyn produkt" sells its products through wholesale and retail stores, sales agents and other intermediaries. This distribution system is called:

- a) distribution channel levels;
- b) distribution channel objects;
- c) distribution channel factors.

38. Four retail stores of the same specialty joined together in an association to achieve common goals. Such a distribution system is called:

- a) vertical;
- b) multi-channel;
- c) horizontal.

39. Franchise systems include:

- a) multi-channel distribution systems;
- b) horizontal distribution systems;
- c) vertical distribution systems.

40. A distribution channel includes a manufacturer, a wholesaler, a retailer and a consumer. How many levels does the named distribution channel have:

- a) 4 levels;
- b) 3 levels;
- c) 2 levels.

41. A bakery sells baked goods through the city's department stores, food stores, and the network "Always Fresh Bread" kiosks, using:

- a) exclusive dealership;
- b) intensive distribution;
- c) selective distribution.

42. A manufacturer sells tableware through a wholesale base, three retail stores and two outlets. What is the width of this distribution channel:

- a) 3;
- b) 5;
- c) 6.

43. The following element can be best adapted to the requirements of individual consumers of the marketing communications complex:

- a) public relations activities;
- b) personal selling;
- c) sales promotion measures.

44. Advertising is:

a) marketing activity that stimulates the purchase of goods by consumers with the help of exhibitions, fairs and demonstrations;

b) impersonal stimulation of demand for a product or service through commercial introduction of important news on the radio, television, which are not paid for by a specific sponsor;

c) a paid form of non-personal representations and promotion of ideas of goods and services to a specified sponsor.

45. A company included competition in the program of communication activities and the use of coupons, which are typical of:

- a) public relations measures;
- b) advertisements;
- c) sales promotion measures.

46. The size of the advertising budget was determined by the marketing department at its own discretion. The method used in this case is:

- a) financial interest;
- b) from available funds;
- c) competitive parity.

47. The advertising decision-making process begins with:

- a) definition of the target market;
- b) determination of the advertising budget;
- c) selection of advertising media.

48. The "Doyarushka" store conducted a wide advertising campaign for the purpose of informing consumers and formation of their demand for new types of "President" desserts. What communication strategy did the trading company use in this case:

- a) the "push" strategy;
- b) the "attraction" strategy;
- c) the "conquest" strategy?

49. A research firm determined the level of knowledge of the product brand among consumers. It is clear that the research is aimed at establishing:

- a) commercial effectiveness of advertising;
- b) economic effectiveness of advertising;
- c) communication effectiveness of advertising.

50. Personal selling is:

- a) means of communication, informing the consumer about the product and the company;
- b) the method of carrying out sales operations;
- c) both a and b.

51. Near a department store, everyone was offered to taste coffee (free) or take a sample bag. At what stage of the product life cycle is this type of coffee:

- a) launching on the market;
- b) growing popularity;
- c) maturity?

52. Are experimental methods used in evaluating the effectiveness of advertising?

- a) yes;
- b) no.

53. Sales promotion measures may be aimed at such participants in the commodity exchange process:

- a) buyers, own sales staff and intermediaries;
- b) buyers and own sales staff;
- c) buyers.

54. A company sells sunflower seeds, about which consumers are not sufficiently informed, the main focus is on incentivizing intermediaries. It can be concluded that the seller applies:

- a) the "attraction" strategy;
- b) the "push" strategy;
- c) a combined strategy.

55. Analysis of the economic effectiveness of advertising involves the determination of the following indicators:

- a) the level of knowledge of the product brand;
- b) market share of the enterprise;
- c) advertising revenue;
- d) advertising profit.

56. A marketer of the "M" company calculated the advertising budget based on the definition of the necessary number of advertising contacts and taking into account the cost of each advertising appeal. The budget calculation method is based on:

- a) goals and objectives;
- b) available funds;
- c) percentage of the turnover.

Content module 3. Marketing management

Topic 8. Organization and control of marketing activities of the enterprise

Guidelines for studying the topic

In the process of studying this topic, it is necessary to pay attention to the following questions: Marketing management process. Organization of marketing at the enterprise. Marketing service in the enterprise management system. Construction of the organizational structure of the marketing service.

Typical organizational structures. Creation of marketing services in Ukrainian firms.

Control of marketing activities. Types and forms of marketing control. Operational control in marketing. Sales control. Market share control. Control of marketing costs. Profitability control. Control of the effectiveness of certain areas of marketing activity. Strategic control in marketing. Content of marketing audit.

Practical task 1. A discussion on the topic "Organization and control of marketing activities of an enterprise".

Questions for discussion:

1. Location of the marketing department at the enterprise. Its functions, capabilities and structure.
2. Types of organizational structures of the marketing service, their features.
3. The role of the head of the marketing service in organizing its effective activities.
4. Marketing control system, its components.
5. Directions of marketing control.
6. Control of the effectiveness of certain areas of marketing activity.
7. Content of marketing audit.

Guidelines for practical training

Discussion seminars are a consultative form of classes that help students understand the incomprehensible material contained in lectures and books.

They, as well as lectures, are mainly devoted to narrow but relevant topics. The main goal of this teaching method is to consolidate and finally understand the content of the studied material, which was previously presented at the lecture. The main thing in the seminar is the dialogue between the students and the teacher, which allows them to analyze the material from different angles, to correlate it with the experience and knowledge that the students have.

This increases the effectiveness of mastering the topic in question and ensures the continuity of the learning process. Seminars, in contrast to lectures, are held in small groups, involve greater student activity and are characterized by two-way communication during classes.

They allow the teacher to establish stronger connections between the material that the students received at the lecture and the knowledge and experience that they have at the present time, the most important place in them is given to the discussions and presentations of the students.

Practical task 2. The impact of the external and internal environment on the realization of the company potential.

Give examples (of your choice) of the most famous enterprises in the field of tourism business, public catering services (food industry), confectionery production, mechanical engineering, medicine, pharmaceutical industry, education, etc.

What factors of the macro- and microenvironment should they consider in the process of developing their business?

1. Assess the influence of the main factors of the macroenvironment using the REST analysis technique.

2. Analyze the microenvironment (competitors, target consumers, partners, suppliers, contact audiences) of the chosen business.

Draw reasoned conclusions.

Guidelines for doing task 1

1. PEST analysis (sometimes referred to as STEP) is a marketing tool designed to identify the political (P), economic (E), social (S) and technological (T) aspects of the external environment that affect the company's business (Table 20).

Politics is studied because it regulates power, which in turn determines the company's environment and the acquisition of key resources for its activities. The main reason for studying the economy is to create a picture of the distribution of resources at the state level, which is the most important condition for the activity of an enterprise. No less important consumer preferences are determined using the social component of PEST analysis. The last factor is the technological component. The purpose of his research is considered to be the identification of trends in technological development, which are often the causes of changes and market losses, as well as the emergence of new products.

Table 20 provides a list of macro factors and typical single factors (event factors) for further analysis using the PEST method.

Table 20

External macro factors and the list of single factors that belong to the corresponding group of macro factors according to the PEST (STEP) analysis method

<p style="text-align: center;">Political</p> <ul style="list-style-type: none"> • ecological/environmental issues; • current legislation home market; • future legislation; • international legislation; • regulatory bodies and processes; • government policies; • government term and change; • trading policies; • funding, grants and initiatives; • home market lobbying/pressure groups; • international pressure groups; • wars and conflicts 	<p style="text-align: center;">Economic</p> <ul style="list-style-type: none"> • home economy situation; • home economy trends; • overseas economies and trends; • general taxation issues; • taxation specific to product/services; • seasonality/weather issues; • market and trade cycles; • specific industry factors; • market routes and distribution trends; • customer/end-user drivers; • interest and exchange rates; • international trade/monetary issues
<p style="text-align: center;">Social</p> <ul style="list-style-type: none"> • lifestyle trends; • demographics; • consumer attitudes and opinions; • media views; • law changes affecting social factors; • brand, company, technology image; • consumer buying patterns; • fashion and role models; • major events and influences; • buying access and trends; • ethnic/religious factors; • advertising and publicity; • ethical issues 	<p style="text-align: center;">Technological</p> <ul style="list-style-type: none"> • competing technology development; • research funding; • associated/dependent technologies; • replacement technology/solutions; • maturity of technology; • manufacturing maturity and capacity; • information and communications; • consumer buying mechanisms/technology; • technology legislation; • innovation potential; • technology access, licencing, patents; • intellectual property issues; • global communications

The stages of the PEST (STEP) analysis:

Step 1. While assessing political, economic, socio-cultural and technological factors, it is necessary not only to take into account their actual state, but also to predict possible changes in each factor for several years ahead.

Identification of factors that may affect the company's sales and profits.

Information and understanding of the situation is the most important stage of any analysis. To get a realistic picture of changing market factors, interview people who look at the market from different points of view: independent market experts, sales managers, sellers (directly interacting with end customers), business owners, heads of various departments, top management of the company, marketers related industries. Study all open information on the market in the Internet and print media. See what development your industry has achieved in more developed countries, what problems it has faced in the markets of similar countries.

Step 2. Determination of importance (A_i) and scoring (lowest importance, min = 1; highest importance, max = 5) of each of the external macro-factors: political (P), economic (E), social (S), technological (T). The level of importance ($A_i = 1 \div 5$) depends on the level of influence on the functioning of the enterprise.

Step 3. Development of a list of single factors that belong to the corresponding group, assessment of their impact (probability of occurrence, R) on the company's activity by assigning it a certain weight: from -5 (the most negative impact, serious danger, significant threat) to +5 (the most positive influence).

Factors that do not affect the company's activity at all are simply not included in the table. The assessment of the influence of the factor is a subjective expert assessment.

Step 4. Assessment of the total degree of impact of each single factor-event (Q_i) on the activity of the enterprise as a result of multiplying the assessment of the importance of the macro factor by the assessment of the impact of the single factor: ($Q_i = A_i \times R_i$).

Step 5. Determination of the resulting estimate of the impact of the macro factor on the company's activity by summing up the estimates of the degree of influence of each single factor-event for each of the four macro factors. The higher the positive amount, the greater the positive impact of the opportunities of the external macro factor on the company's activities. The lower the negative amount, the greater the negative impact, danger and threat of the macro factor on the enterprise.

In Table 21, an example of PEST (STEP) analysis is given.

**An example of PEST (STEP) analysis of the domestic leisure market
and cultural development**

A group of macro factors	Assessment of the significance of the macro factor	Indicator	Evaluation of the influence of the factor		Overall impact assessment		The resulting assessment of the impact of a macro factor	
			-P _i	+P _i	-Q _i	+Q _i	Opportunity	Threats
Social	3	increasing the share of people interested in cultural development; urbanization processes; predominance of emotions in consumer behavior; growing attention to the history of the city	-1	+2 +1 +3	-3	+6 +3 +9	+18	-3
Technological	2	development of information and multimedia technologies; certification of a cultural and cognitive product; significant costs for the technical and technological support of the cultural and cognitive product; new technologies for the promotion of leisure and cultural development services		+3 +4 +4 +3		+6 +8 +8 +6	+28	0
Economic	4	economic instability; shadow economy; market capacity; increasing demand for cultural development projects and events; growth of the city's income; investment activity of the city; market conditions for leisure and cultural development	-1 -2	+3 +2 +2	-4 -8	+12 +8 +8	+36	-20
Political and legal	3	approaching elections; political situation; change in legislation; environmental protection	-3 -2 -2 -1		-9 -6 -6 -3		0	-24
Total							+82	-47

Based on the analysis of the external macro environment, the following conclusions can be drawn. The functioning of the market of leisure and cultural development is under the significant influence of socio-cultural factors, information and technological development, transformation of political and legal relations and the economy of the country as a whole.

2. The components of microenvironment analysis.

Analysis of the immediate environment of the enterprise (Table 22) is very important for the firm, it can enter into a dialogue with this part of the external environment (the firm has the opportunity to influence the balance of forces in the immediate environment).

In the strategic analysis, the priority factors of the microenvironment are:

consumers (CA);

competitors;

partners (intermediaries, suppliers);

contact audiences (state structures, public organizations, financial and credit institutions, etc.).

Table 22

**Assessment of micro-environment factors
(immediate environment)**

The group of factors	Factors	Manifestation (importance of the factor)	The nature of the impact of the factor on the enterprise (+; -)	Evaluation of the factor by the degree of influence, points
1	2	3	4	5
1. Consumers (target audience)	1.1. State and development trends of the target market			
	1.2. State and trends of demand			
	1.3. The degree of variability of the needs, requirements, tastes of the CA			
	1.4. Consumer power of buyers			
	1.5. The degree of commitment of buyers to the goods (services) of the enterprise			

Table 22 (the end)

1	2	3	4	5
2. Partners (suppliers, intermediaries)	Attractiveness, peculiarities of the activities of partners (suppliers, intermediaries)			
3. Contact audiences				
Total				

Topic 9. Planning of the enterprise marketing activities

In the process of studying this topic, it is necessary to pay attention to the following questions: Goals, tasks and content of the marketing planning process. Stages of the planning process and their main features. Basic aspects of strategic analysis. Formulation of the mission of the enterprise and its goals. Analysis of the internal and external environment of the enterprise. Analysis of competitiveness. Selection of the company's marketing strategy. Analysis of unforeseen situations (risk and uncertainty). Relationship between strategic and current planning. Sections of the marketing plan.

Practical task 1. SWOT analysis of an enterprise.

Make SWOT analysis of a well-known Ukrainian company (enterprise) that operates in the Kharkiv region or in all regions of Ukraine. Give the results in the form of a presentation.

Guidelines for completing task 1

A presentation is speaking in front of an audience to present certain achievements, the results of the group's work, a report on the performance of individual tasks and instruction.

SWOT analysis is a method of strategic planning, which consists in identifying factors of the internal and external environment of an organization and dividing them into four categories (Table 23):

- S (strengths);
- W (weaknesses);
- O (opportunities);
- T (threats).

Strong (S) and weak (W) sides are factors of the internal environment of the object of analysis, (that is, what the object itself can influence); Opportunities (O) and threats (T) are environmental factors (that is, those that can affect the object from the outside and are not controlled by the object). For example, an enterprise manages its own trade assortment – this is a factor of the internal environment, but trade laws are not controlled by the enterprise – this is an external environment factor.

The object of the SWOT analysis can be not only an organization, but also other socio-economic objects: sectors of the economy, cities, public institutions, the scientific sphere, political parties, non-profit organizations (NPOs), individual specialists, persons, etc.

Table 23

The abbreviation SWOT represented visually

	Positive impact	Negative impact
Internal environment	Strengths (properties of a project or team that give advantages over others in the industry)	Weaknesses (properties that weaken the project)
External environment	Opportunities (external probable factors that provide additional opportunities to achieve the goal)	Threats (external probable factors that may complicate the achievement of the goal)

SWOT analysis, through its elements, answers a number of questions, which help to avoid mistakes in strategic planning (Fig. 5).



Fig. 5. Issues addressed by SWOT analysis

The task of SWOT analysis is to give a structured description of the situation regarding which a decision needs to be made. The conclusions drawn from it are descriptive without recommendations or prioritization.

For a more complete return on the method, the construction of options for actions based on the intersection of fields is also used. For this, various combinations of environmental factors and internal properties of the company are consistently considered. All possible pair combinations are considered and those that should be taken into account when developing a strategy are highlighted. The algorithm for combinations of SWOT analysis elements is presented in Table 24.

Box 1 shows which strengths need to be used to capitalize on opportunities in the external environment.

Box 2 shows, due to which opportunities of the external environment the organization will be able to overcome the existing weaknesses.

Box 3 shows what strengths should be used to eliminate threats.

Box 4 shows which weaknesses need to be eliminated in order to try to prevent the threat.

Table 24

The algorithm for combinations of SWOT analysis elements

	Opportunities	Threats
Strengths	1	3
Weaknesses	2	4

SWOT analysis is effective in making an initial assessment of the current situation, but it cannot replace the development of a strategy or a qualitative analysis of the dynamics.

Strengths of the SWOT analysis are:

This is a universal method that is applicable in a wide variety of areas of economics and management. It can be adapted to the object of study of any level (product, enterprise, region, country, etc.).

It is a flexible method with a free choice of the analyzed elements depending on the set goals (for example, you can analyze the city only in terms of tourism or only in terms of transport, etc.).

It can be used for both operational assessment and long-term strategic planning.

The use of the method, as a rule, does not require special knowledge and narrow-profile education.

Flaws of SWOT analysis:

SWOT analysis shows only general factors. Specific measures to achieve the goals should be developed separately.

Often in SWOT analysis there is only a listing of factors without identifying the main and secondary ones, without a detailed analysis of the relationships between them.

The analysis gives a more static picture than a vision of development in dynamics.

The results of the SWOT analysis are usually presented as a qualitative description, while the assessment of the situation often requires quantitative parameters.

SWOT analysis is quite subjective and highly dependent on the attitude and knowledge of the person conducting it.

For a high-quality SWOT analysis, it is necessary to attract large amounts of information from a variety of areas, which requires significant efforts and costs.

Practical task 2. The Boston consulting group matrix.

The company specializes in the production of film cameras and high-precision optical instruments. In recent years, it has mastered the production of video cameras. The company's products have consumers in Ukraine, neighboring countries, developing countries. The main consumers of optical devices are medicine and agriculture, the defense industry. The volume of product sales in monetary units (MU) for the last four years and the market share of the enterprise and the strongest competitor for each type of product are presented in Table 25.

Characteristics of the enterprise's portfolio of proposals

Product types	Sales volume by years, thousand MU				Market share, 2022 year, %	
	2019	2020	2021	2022	enterprise	competitor
1	2	3	4	5	6	7
1. Cinema cameras for Ukraine and neighboring countries (cinema cameras RiBZ)	1650	1700	1850	2405	11	9
2. Cameras for developing countries (camera RS)	200	240	280	448	15	10
3. Video cameras for Ukraine and neighboring countries (video cameras)	–	–	60	100	1	7
4. Optical instruments for the army and navy (optical instruments A)	900	600	580	348	40	18
5. Optical devices for defense industry enterprises (OP optical devices)	1600	1200	900	400	2	4
6. Optical devices for medical organizations (optical devices MO)	1000	1000	980	686	16	16

Use the Boston Consulting Group's "Market Growth – Market Share" matrix to assess your company's market position and make recommendations for improving each brand's position.

Guidelines for completing task 2

The matrix "market growth – market share" of the Boston Consulting Group (Fig. 6) takes into account two criteria: the rate of growth of the base market (the indicator of market attractiveness) and the market share of the company in relation to the leading competitor (the characteristics of competitiveness).

Each of the four quadrants of the matrix corresponds to its competitive situation. Thus, brands in the "Cash Cow" quadrant usually bring in more money than is needed to support their market position. In view of this, they become a source of funds for diversification programs and development

of the enterprise in other markets. The priority strategy is "harvesting". "Dogs" occupy a small share of the slowly growing market. This is not the most advantageous position. Supporting such brands is usually a waste of money. The priority strategy is the liquidation or gradual reduction of investments. Brands belonging to the "Question Marks" quadrant have small market shares relative to their leading competitor and are in a fast-growing market. Despite lagging behind the leader, they still have a chance to increase their market share, because the market has not yet been fully formed. However, maintaining such brands requires significant funds. In the absence of support, "Question Marks" are transferred to the "Dogs" category. Thus, in this case there is an alternative: increasing market share or liquidation. Brands with a high growth rate and a large market share ("Stars") are leading brands. Such a position also requires financing, but "Stars" also brings significant profits.

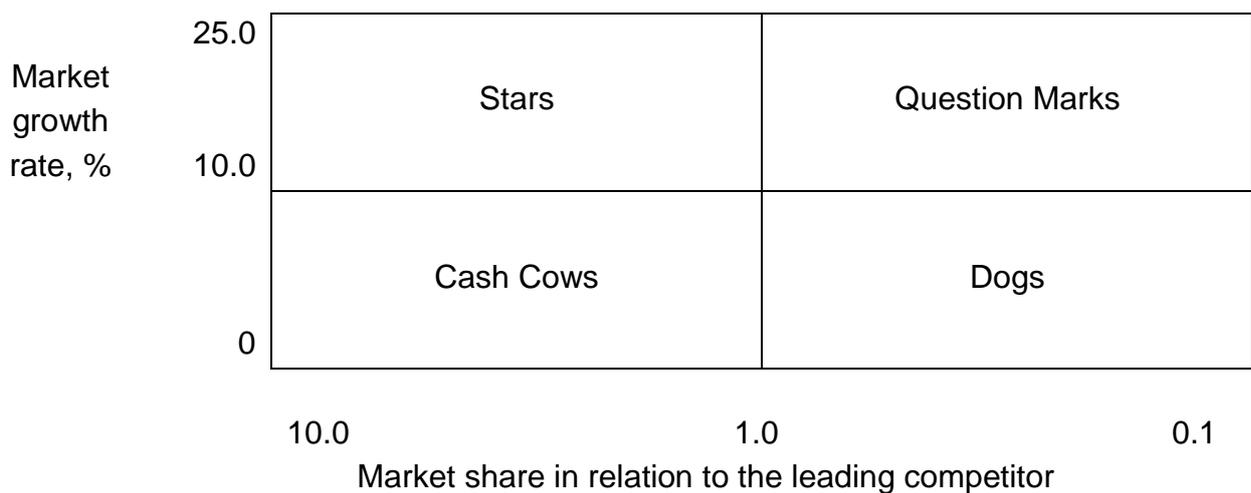


Fig. 6. The "market growth – market share" matrix of the Boston Consulting Group

The position of each trademark of the product portfolio in the matrix allows you to assess the company's position on the market and provide recommendations for improvement of the position of each trademark.

Practical task 3. Individual task. Making a marketing plan.

Choose any online store and draw up a classic marketing plan for it. Present the results in the form of a presentation.

Guidelines for doing practical task 3

An individual task is one of the forms of the educational organization process in institutions of higher education, which provides for the creation of conditions for full implementation of students' creative abilities and aims to deepen, generalize and consolidate the knowledge that students receive in the process of learning, as well as the application of this knowledge to practice.

Individual tasks include writing abstracts, essays, execution of calculations, graphic works, preparation of reports, analysis of practical situations, preparation of abstract materials from publications according to certain problems, research before the Olympiads, conferences, etc. A component of individual tasks is preparation of individual tasks.

The purpose of an individual assignment is to provide a deep and complete coverage of the topic based on a generalization and critical analysis of the theoretical foundations of the researched issue, as well as expressing one's point of view and substantiating the conclusions on the given issue.

A mandatory condition for the performance of an individual task is to direct it to the solution of the given problem, to highlight a personal attitude to the researched issue, and to be creative in general.

An individual task involves independent work with literature and Internet resources on the relevant subject. According to the results of the scientific analysis of the material, the student offers his own solution to the problem and reinforces his work with a presentation of research results.

A presentation is a speech in front of an audience describing certain achievements, results of the group's work, a report on the performance of individual tasks and instruction.

A marketing plan is a step-by-step guide to achieving both short-term and long-term goals of a project or company. Such a document contains a set of actions aimed at the implementation of brand strategies.

A marketing plan should consider several development strategies.

It can be created in any format. The main thing is that it is convenient for everyone to understand it. For example, you can create a detailed table in Excel, Word or PDF. There are no clear requirements here.

Thanks to the right (that's the key word) marketing plan, you will be able not only to systematize your work, but also to reduce costs decently.

For yourself, you need to note that such a set of clearly prescribed actions is important for any business. It will help to adapt to market changes and set priorities.

A marketing plan is needed for:

1. Determining where the company / project is at this stage.

2. Defining the future of the company. The plan should state the goals, and they should be clear. It is worth remembering a reasonable thought – without moving forward, work efficiency will decrease. The same marketing plan should contain information on how to achieve these goals. For example, it should indicate the tools used.

3. Setting deadlines. The plan should specify the exact dates when this or that task will be solved.

A classic marketing plan consists of an analysis, definition of the goal and strategy, as well as tactics for its achievement.

To make a plan correctly, keep to the following rules:

1. Define the goals.

2. Analyze the position of the brand in the market.

3. Study and analyze the target audience.

4. Set clear goals (with dates) and tasks.

5. Allocate the budget.

The structure of the marketing plan:

1. SWOT analysis. This analysis will determine the state of your company / project on the market. To correctly build such a matrix, you need to study the business in detail. And the first thing to do is to register your UTP. How will you solve customer problems, what makes you advantageously different from competitors, etc.

When conducting SWOT analysis, remember the following:

just rely on the facts;

do not use objective assessments;

choose your questions carefully.

As a result, such analysis will allow you to understand in which direction to develop your business, and what you still need to work on. Moreover, you will identify possible threats and be able to develop anti-crisis measures. That is, work ahead of time.

2. Company mission. Mission = goal. And in our question, the mission is what you work for.

Do you know the classic phrase: "Life suffocates without purpose"? So, it can be easily applied to our question. If your business doesn't have a goal and a mission, then in the end you won't get anywhere.

3. Competitive analysis. You must know your rivals in person. You should know their strengths and weaknesses, determine where the company receives traffic from. This data, useful for your business, will help you build your work competently.

4. Target audience. Target audience (TA) is a group of buyers of products and services. All marketing communications of the brand are aimed at TA. You work for them. If you have just started to develop your brand and have no idea who your buyer is, try to draw a portrait of him. To do this, you need to determine: gender, age, income level, place of residence, interests, education, etc.

5. Marketing strategy. At this point, you need to write a development plan for each element. Pay special attention to:

- quality improvement;
- diversification;
- promotion;
- communication with TA.

To be more specific, the complete model consists of 6 points:

- product;
- price;
- place;
- people;
- promotion;
- presentation.

6. Budget. It is important to include a budget in the marketing plan so as not to spend all your money at once. At the same time, each task must be correctly calculated. Enter the cost along with the task and do not deviate from the plan.

7. Selection of planning tools. You can write your marketing plan in a notebook. But it will be inconvenient and smeared. Since we live in the modern world, it is best to use special tools:

- Trello;
- Google Excel;
- Evernote.

These services are aimed at simplifying work. You can safely make changes, adjust the plan. A plus is that you can open access to several users.

Advantages and disadvantages of a marketing plan.

It is obvious that any business needs a marketing plan. Several advantages of this planning are:

saving time and money;

the ability to quickly achieve the goal;

everyone sees the task and acts according to the plan.

Disadvantages: most likely, there is the only one here – the time that needs to be spent on making this plan.

Test questions for self-assessment according to content module 3

1. A company has developed different types of plans depending on the term of coverage, namely:

a) strategic and tactical;

b) operational and current;

c) both answers together.

2. The process of determining the prospects for the development of individual areas of the company's activity, in accordance with which the general goals of the company's development and its individual ones will be formed, has the name:

a) planning;

b) forecasting;

c) development strategy.

3. A newly created strategic business unit needs a lot of investment, while not bringing the desired profits to the company. According to the matrix, this strategic business unit of the BCG is located in the square:

a) dog;

b) cash cow;

c) question marks.

4. The "Sony" store occupies a significant share of the radio equipment market, the pace of growth of sales volumes is low, but profits are sufficient to finance entry to the market of a new store. In which square of the BCG matrix is this store located?

a) cash cow;

b) question marks;

c) stars.

5. The relative market share of the strategic economic unit (SEU) is high, the rate of market growth is low. The optimal strategy for its development is:

- a) reinvestment of income in development;
- b) increasing the competitiveness of goods due to the improvement of their consumer properties;
- c) direction of investments to support other SHPs.

6. Analysis of the economic portfolio of the enterprise is carried out for:

- a) assessment of the financial state of the enterprise;
- b) identification of possible marketing dangers and opportunities that open before the company;
- c) evaluating the profitability of all units of the enterprise and making decisions about their further development or reduction.

7. A strategic business unit is the market leader that has high growth rate market, significant profits, but needs investment. It follows that it located in the BCG matrix sector:

- a) question marks;
- b) cash cow;
- c) stars.

8. A dairy store expands the purchase of dairy products and plans to sell them in a wide assortment. It follows that it applies:

- a) product integration strategy;
- b) product diversification strategy;
- c) product differentiation strategy.

9. Decisions can be attributed to the concentration strategy:

- a) to produce cars for the very rich;
- b) to improve the appearance of products;
- c) to introduce after-sales service;
- d) to strengthen control over the costs of production and sale of products;
- e) to produce standardized products that are easy to manufacture.

10. The management of the "Silpo" chain of stores decided to increase the sales volumes of products through more aggressive marketing. In this case, the firm applies the strategy:

- a) deep market penetration;
- b) progressive integration;
- c) horizontal integration.

11. The diversification strategy is:

- a) a strategy aimed at expanding the firm's spheres of activity at the expense of its new directions;
- b) expansion of the range of manufactured products;
- c) expansion of the market share.

12. Choose the correct sequence of stages of the planning process:

- a) development of general goals; definition of specific goals; determination of the ways and means to achieve the goals; control over the achievement of the set goals through analysis of the actual and planned indicators;
- b) development of common goals; determination of ways and means to achieve the goals; definition of specific goals; control over the achievement of the set goals through analysis of actual and planned indicators.

13. What factors determine the attractiveness of the target market (segment) for enterprises:

- a) the level of competition in the market;
- b) high price level;
- c) the size of the segments and the amount of profit that can be obtained;
- d) the resources of the enterprise, necessary for the development of the target market?

14. Expansion of the company's activities through taking over or joining other enterprises belongs to:

- a) intensive development;
- b) integrative development;
- c) diversification.

15. Under what conditions will a functional marketing structure be beneficial:

- a) the market situation is constantly changing;
- b) the market situation is stable;
- c) development and introduction of new products;
- d) a large range of manufactured products?

16. For an enterprise which focuses on work in various market segments, consumers which differ significantly in tastes and purchasing behavior, it is possible to recommend the following organizational structure of marketing management:

- a) functional organization of marketing;
- b) geographical organization of marketing;

- c) commodity organization of marketing;
- d) market organization of marketing.

17. Is it true that the market share of the enterprise is the specific weight of the most profitable consumers:

- a) yes;
- b) no.

18. Strategic control is:

- a) comparison of current indicators with control figures of the annual plan;
- b) determination of the actual profitability of various products, territories, market segments and trade channels;
- c) regular verification of the compliance of the firm's strategic institutions with existing market opportunities.

19. Specify the function of the head of the marketing service of the enterprise:

- a) setting prices for manufactured products;
- b) development of technology for warehouse storage of products;
- c) selection of goals and strategy of marketing activities;
- d) control of accounting and statistical reporting.

20. Strategic control at the enterprise is carried out with the help of:

- a) marketing audits;
- b) estimates of profitability in distribution according to specific goods and markets;
- c) financial control;
- d) management control.

Control questions for self-assessment of the acquired knowledge in the course "Marketing"

1. Define marketing. What factors determine its necessity?
2. What is the essence of the modern concept of marketing?
3. What are the stages of development of the marketing concept?
4. How does marketing identify and satisfy consumer needs?
5. How do consumers benefit?
6. What phases does the process of strategic marketing include?
7. Define how sociocultural factors affect marketing.

8. What role does competition play and how can the impact of competitors on the company's marketing activities be determined?
9. Name several criteria used to segment consumer markets.
10. Which law defines consumer rights in Ukraine?
11. Describe possible ethical problems in marketing activities.
12. Describe the process of making a purchase decision by a consumer.
13. What is the difference between information obtained through observation and survey?
14. What is the difference between panel studies and an experiment?
15. How does "mining" data differ from ordinary marketing research?
16. Describe different types of innovation in products and services.
17. Explain the goals of each stage of the process of creating a new product.
18. Explain the role of packaging in marketing.
19. Describe the concept of the product life cycle.
20. How does the type of competitive market in which a company operates affect opportunities to change prices?
21. What is the essence of the "cost plus standard markup" pricing method?
22. For what reasons might a seller prefer a flexible pricing strategy over a single price strategy?
23. What is meant by marketing sales channels?
24. Which channels and intermediaries can best reach the target market?
25. Describe the process of marketing communication.
26. Explain the difference between advertising and PR on television.
27. Describe the objectives of promotion programs at each stage of the product life cycle.
28. Name the four most common types of structural organization of the marketing department.
29. Name the types of marketing plans and provide their main characteristics.

A list of topics for preparation of presentations by students

1. Content analysis of the concept of marketing.
2. Concepts of marketing: The concept of production. The product concept. The sales concept. The marketing concept. The concept of society.
3. Marketing functions.
4. Classification of marketing.
5. Tasks of marketing.
6. Aspects of marketing.
7. History and evolution of marketing as a phenomenon.
8. Philip Kotler as the founder of the concept of marketing management.
9. Modern concepts of marketing.
10. Life cycle in marketing: what is it? The main stages and their management.
11. Theory of market segmentation.
12. Market strategy based on the results of segmentation (segmentation of undifferentiated marketing, segmentation of differentiated marketing, targeted marketing strategy).
13. Theory of market crystallization.
14. Marketing-mix.
15. Marketing practice.
16. Concepts in marketing.
17. Marketing research.
18. Advertising campaigns.
19. Marketing organization.
20. Pricing and assortment.
21. Sales and distribution.
22. Merchandising and promotion.
23. Marketing analysis.
24. Marketing management in companies.
25. Conducting marketing research.
26. Industry marketing.
27. Marketing communication policy.
28. The toolkit of marketing research.

Recommended literature

Main

1. Маркетинг [Електронний ресурс] : навч. посіб. / Н. Іванечко, Т. Борисова, Ю. Процишин та ін. – Тернопіль : Західноукраїнський національний університет, 2021. – 180 с. – Режим доступу : DSpaceZUNU.

2. Маркетинг [Електронний ресурс] : навч. посіб. / А. О. Старостіна, В. А. Кравченко, О. Ю. Пригара, Л. О. Ярош-Дмитренко ; за заг. ред. А. О. Старостіної. – Київ : НВП "Інтерсервіс", 2018. – 216 с. – Режим доступу : tkfk.te.ua.

3. Палига Є. М. Маркетинг [Електронний ресурс] : підручник / Є. М. Палига, О. М. Гірняк, П. П. Лазановський. – Львів : Українська академія друкарства, 2020. – 352 с. – Режим доступу : frk.in.ua.

4. Сенишин О. С. Маркетинг : навч. посіб. / О. С. Сенишин, О. В. Кривешко. – Львів : Львівський національний університет імені Івана Франка, 2020. – 347 с.

5. Філановський О. Головна маркетингова книга [Електронний ресурс] / О. Філановський. – Київ : Наш Формат, 2018. – 304 с. – Режим доступу : <https://nashformat.ua>.

Additional

6. Дудар В. Т. Управління маркетингом : навч. посіб. / В. Т. Дудар. – Тернопіль : Західноукраїнський національний університет, 2022. – 85 с.

7. Краус К. М. Менеджмент і маркетинг : посібник / К. М. Краус, Н. М. Краус, Ю. М. Радзіховська. – Київ : Аграр Медіа Груп, 2022. – 241 с.

8. France S. L. Marketing Analytics: Methods, Practice, Implementation, and Links to Other Fields / S. L. France, S. Ghose. – Singapore : Springer, 2018. – 316 p.

9. Kotler Ph., Armstrong G. Principles of Marketing / Ph. Kotler, G. Armstrong. – 18th ed. – London : Pearson, 2020. – 720 p.

10. Kotler Ph. Marketing 5.0: Technology for Humanity / Ph. Kotler, H. Kartajaya, I. Setiawan. – Hoboken : Wiley, 2021. – 272 p.

11. Kotler Ph. Marketing Management / Ph. Kotler, K. Keller, A. Chernev. – 16th ed. (Global Edition). – London : Pearson, 2022. – 832 p.

12. Kotler Ph. Retail Marketing 4.0 / Ph. Kotler, G. Stigliano. – Milan : Mondadori Electa, 2018. – 240 p.

13. Sarkar Ch., Kotler Ph. Brand Activism: From Purpose to Action / Ch. Sarkar, Ph. Kotler. – Miami : Idea Bite Press, 2018. – 232 p.

Information resources

14. ЛігаБізнесІнформ. Офіційний сайт. – Режим доступу : www.liga.net.

15. Маркетинг_eng_Бойко (051.130-А, 3 к.) [Електронний ресурс]. – Режим доступу : <https://pns.hneu.edu.ua/course/view.php?id=8885>.

16. Нормативні акти України. Офіційний сайт. – Режим доступу : www.nau.kiev.ua.

17. Право. Україна. Офіційний сайт. – Режим доступу : www.legal.com.ua/cgi-bin/matrix.cgi/pravo.htm.

18. Реклама, маркетинг, PR, SEO [Електронний ресурс]. – Режим доступу : www.proreklamu.com.

19. Сайт Державного комітету статистики України. Офіційний сайт. – Режим доступу : www.ukrstat.gov.ua.

20. Сервер Верховної Ради України. Офіційний сайт. – Режим доступу : www.rada.gov.ua.

21. Українська асоціація маркетингу. Офіційний сайт. – Режим доступу : www.uam.in.ua.

Contents

Introduction.....	3
Content module 1. Marketing and its modern concept	6
Topic 1. The essence of marketing	6
Topic 2. Fundamental theories of marketing	9
Topic 3. Marketing models.....	15
Test questions for self-assessment according to content module 1	23
Content module 2. Marketing tools	31
Topic 4. Marketing product policy	31
Topic 5. Marketing price policy.....	45
Topic 6. Marketing policy of distribution	54
Topic 7. Marketing policy of sales promotion	61
Test questions for self-assessment according to content module 2	68
Content module 3. Marketing management	76
Topic 8. Organization and control of marketing activities of the enterprise	76
Topic 9. Planning of the enterprise marketing activities	83
Test questions for self-assessment according to content module 3	92
Control questions for self-assessment of the acquired knowledge in the course "Marketing"	95
A list of topics for preparation of presentations by students	97
Recommended literature	98
Main.....	98
Additional.....	98
Information resources	99

НАВЧАЛЬНЕ ВИДАННЯ

МАРКЕТИНГ

**Методичні рекомендації
до практичних завдань
та завдань до самостійного виконання
для студентів спеціальності 051 "Економіка"
освітньої програми "Міжнародна економіка"
першого (бакалаврського) рівня
(англ. мовою)**

Самостійне електронне текстове мережеве видання

Укладач **Бойко** Наталя Олександрівна

Відповідальний за видання *Л. В. Гриневич*

Редактор *З. В. Зобова*

Коректор *З. В. Зобова*

Наведено методичні рекомендації до проведення практичних занять із навчальної дисципліни. Подано порядок підготовки та проведення практичних занять, визначений методичними рекомендаціями, а також тестові та контрольні запитання для самоконтролю.

Рекомендовано для студентів спеціальності 051 "Економіка" освітньої програми "Міжнародна економіка" першого (бакалаврського) рівня.

План 2023 р. Поз. № 93 ЕВ. Обсяг 101 с.

Видавець і виготовлювач – ХНЕУ ім. С. Кузнеця, 61165, м. Харків, просп. Науки, 9-А

*Свідоцтво про внесення суб'єкта видавничої справи до Державного реєстру
ДК № 4853 від 20.02.2015 р.*