



# 商业研究方法

(第8版)

## Business Research Methods

Eighth Edition

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China Student Edition

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# 出 版 说 明

为了适应经济全球化的发展趋势,满足国内广大读者了解、学习和借鉴国外先进管理经验和掌握经济理论前沿动态的需要,清华大学出版社与国外著名出版公司合作影印出版一系列英文版经济管理方面的图书。我们所选择的图书,基本上是已再版多次、在国外深受欢迎、并被广泛采用的优秀教材,是该领域中具有权威性的经典之作。

本书是在全球深受好评且广泛流行的商业研究方法教材,迄今已再版至第8版。本书向读者全面介绍了各种可应用于营销、财务、管理和会计等商业部门的研究方法,其中包含大量案例,是商学院本科生和 MBA 学生的理想教材。本书的中文翻译版也将由我社出版。

根据国内的教学实际,我们删去了本书的第24章(多变量统计分析)和第7部分,以及附录的部分内容,由此给读者带来的诸多不便,我们深表歉意。

由于原作者所处国家的政治、经济和文化背景等与我国不同,对书中所持观点,敬请广大读者在阅读过程中注意加以分析和鉴别。

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# 英/双语教学的成功路径与商科英文原版教材的效用

(代序)

在我国高校,用英语或双语教授专业课程(以下简称:英/双语教学)始于改革开放引进热潮,历经30年,虽发展不快,仍在缓慢推进。20世纪80年代,改革开放后留学归来的教育界学者们不仅引进了各学科先进的研究成果,也随之引进了西方高校的教材。以清华大学出版社领军的国内出版社适时地引进了西方优秀教材的影印版,推动了一些高校开始在专业课程中开展英/双语教学。2007年以来,国家教育质量工程专设的“国家高校双语教学示范课程建设点”的评定项目被视为政府教育发展的政策风向标,正有力地推动着高校英/双语教学的发展。

但对英/双语教学的必要性,我国高校内部一直争议不断。争议首先围绕着中国人用英语教学的必要性。在公认英语是目前世界通用语言的前提下,英/双语教学的必要性取决于我国高校师生是否有必要及时汲取世界最新的知识和研究成果。答案是不言而喻的。况且英/双语教学省却了翻译过程,可以避免常见的信息减损和曲解问题。不过,信息发布者——教师的英语演讲能力和信息接收者——学生的英语解读能力不足又成为开展英/双语教学的障碍。因而常见的反对意见是,开展英/双语教学,课堂教学内容就会缩水,因为讲授者和听众都得花费精力和时间解译内容。如此看来,我国开展英/双语教学的高校教师必须应对挑战,洞察在我国现有条件下用英文原版教材开展英/双语教学的利和弊,并找到可行的扬长避短的路径。

在经济开放和全球化的大趋势推动下,我国中小学英语教学分量加重,英语普及程度逐年提高,高校新生的英语基础愈益扎实;教师的英语能力也随着师资的新陈代谢而日见增强。这一趋势无疑在为英/双语教学营造越来越有利的条件。尽管如此,不同于英语为主要语言或官方语言的一些国家,英语在我国的普及率仍较低。在青少年中,英语的普及程度和英语应用能力还仅处于初级水平;高校中能用英语演讲的教师尚属少数,且熟练程度还有待大幅提高。这样的师生英语基础,使得英/双语教学面临巨大的挑战。

同时,在多数的中国高校课堂里,教学任务多被视为逐章讲解某本教材的内容。本土中文教材通常是400~500页的32开本,含理论框架、主要知识点、计算方法和习题,但案例和故事不在其中,多由教师在讲解时添加,以演示和诠释理论要点。迄今仍然普遍盛行的“填鸭式”、“满堂灌”的传统教学法侧重于传授知识,从多数评教指标可见,只要学生感觉教师讲得精彩、有条理、能解惑,就算教学成功。

而引进的国外教材篇幅通常较长,16开大本,500~800页。习惯于上述传统教学法和评价标准的人们自然会产生一个疑问:在有限的课时内,这么厚的教材,怎么讲得完?其实,发达国家多数高校对学生阅读量的要求远远大于我国高校(即使是中文课本和资料),名校更是如此。它们的教材不仅涵盖理论框架和基本概念,而且富含长短不一、详简各异的演示性案例、故事和大量习题,总之它便于学生自学。课堂讲解只占一半课时,其余课时常被用于师生讨论和互动。于是,教师的讲解主要是勾勒理

论框架,阐释重点和难点,还需针对事先布置的阅读资料和讨论题,引导学生展开讨论。可见,大厚本的教材适合于能力培训教学法。两者相辅相成,致力于调动学生的主动性:他们必须大量阅读和思考,才能在课堂上有上好的表现,真正成为学习的主人。结果,他们的能力获得了必要和切实的磨练。

由此可见,英/双语教学不只是教学语言的改变,它可以达到三重效用:传授专业知识;传授英语知识;同时训练专业方法和英语的应用技能。也因此,一些非英语国家的高校不惜成本,开展英/双语教学,使用与之相配的教材。对我国高校来说,要想成功开展英/双语教学,恐怕首先需要改变传统的教育思想和教学方法。换言之,如果高校想要使教育、教学接近世界先进水准,用英文原版影印教材开展英/双语教学是有效的途径。

迄今为止,原版英文教材的缺点也很明显。鉴于发达国家的作者是以其母国为背景,多数教材不涉及中国国情。教师必须在教学中紧密结合中国国情,提供相关案例、资料和思考讨论题,适时引导师生思辨现有理论的普适性,激励师生发现和创作适合我国国情的经济学、管理学、营销学规律。在我国作者编写和出版足量的优质英文教材之前,这些额外的工作必须由开展英/双语教学的教师来承担。

古今中外,成才之士都乐于阅读和探索,而这种氛围却在当今我国的大学校园里愈见淡化。加之中国学生相对薄弱的英语基础,目前英/双语教学仍面临很大的挑战:“填鸭式”的讲授与之相悖;仅靠课堂讲授和互动也很难奏效。但如能培养学生阅读和探索真理的兴趣,并营造一个全方位的孵化温床或生态环境,英/双语教学是有望成功的。根据能力培育过程的所需,这个生态环境包含师生对教育、教学的共识,好学求知的校风,富有挑战和师生互动的课堂教学,从课外讲座、项目操作到校园竞赛等第二课堂活动,便于师生交流的校园互联网等。

要做到这些,教师亟待与时俱进。随着师资的年轻化和高学历化,如年轻教师的英语基础更好。但逆水行舟,不进则退。英语能力的进退取决于使用频率的多寡,其实英/双语教学过程既是加强英语使用、提高英语能力,也是汲取世界新知的最佳机会。不过,这一过程通常比用汉语教学的付出大得多,且因学生也需成倍地付出,英/双语教学的课程不容易像汉语教学课程那样容易在短期内获得学生的好评。因此给予英/双语教学的教师足够的激励成为生态环境的首要组成部分;缺乏对教师的足够激励,上述英/双语教学的生态环境就无法营造。

诚然,在教育体制和环境不够理想的情况下,教师和学生仍然有个人自训和奋斗的条件。英语原版教材影印版在我国的出版和更新就是对英/双语教学的及时支持。清华大学出版社近期又有一批英文原版影印教材出版,相信必将更进一步推动英/双语教学的发展。如今,已有一些本土高校的教师与英语国家的教师合著英文教材;在可见的将来,还会有中国教师编写发行到世界各地的英文教材。总之,及时用好英文原版影印教材,编写优质的英文教材是我国高校教师的历史责任。

愿英/双语教学的师资队伍愈益壮大,愿英/双语教学更加有力地推动我国教学方法与国际接轨,愿我国高校各级学生在英/双语教学中受益良多,茁壮成长!

对外经济贸易大学  
傅慧芬



# PREFACE

The world of business is certainly changing at a very fast rate. Businesses can't assume that continuing to produce the same old products, by the same old process, with the same old technology, managed in the same old way will continue to produce the same old good result. The need for intelligence supported by a connection to the real world is more important than ever. Business researchers are challenged with the job of producing just this type of intelligence. The eighth edition of *Business Research Methods* addresses the dynamic nature of today's business world while conveying the essential elements of the business research process.

Most readers understand that managers want answers to questions. What is not so obvious is that the search for the correct questions can be just as important as finding the right answers. After all, search is the biggest part of "research." The researcher must have some idea of how to begin the search process, how to best search through what is now terabyte after terabyte of information to pick out those elements which best hold the possibility of turning into intelligence, and then how to communicate that intelligence in a way that helps managers make decisions. When it works right, business research is a win-win proposition. The process enables a company to identify its customers and design products and processes that maximize value for all. In return, the company receives value as the customer spends their hard earned money. As a result, customers win *and* businesses win! All are better off.

Trying to find just the right piece of business information via the Internet can be like searching for a needle in a haystack. This information may well be hidden beneath piles and piles of irrelevant stuff! Or how about trying to find a key piece of business information that may be hidden in the mind of a consumer or some employee? A customer may not even be consciously aware of all his or her reasons for some preference or some behavior and, consequently, can't identify or talk about it. An employee may not even realize that he or she possesses important vital information. How do you go about finding this information that could be so crucial to making a good business decision? Effective business research is like applying a CAT scan to a business problem.

That's where this text comes in: *Business Research Methods* equips students with the knowledge and skills involved in this basic research process; these will simplify and provide more accuracy to their search for business intelligence. The process we describe includes six steps. Researchers must first work together with decision makers to decide what they are looking for—that metaphorical needle in the haystack. The next two stages plot out the way to go about finding the needle. Next are two stages that focus on the actual search for the needle. The process concludes when the business researcher communicates the benefits of finding "pointed" information that can help mend problems or create something really new and special for the decision maker. Success in this process usually merits the researcher a reward that is a bit more valuable than that needle!

## New to *Business Research Methods*

To ensure that students are able to conduct business research with an understanding of all the latest theories and techniques available to them, the eighth edition is very much revised and updated. Certainly, the research field is dynamic both in terms of the demands placed on it by business and in terms of the technological advances that enhance and expand the capable researcher's toolbox.

The Internet has revolutionized and is still revolutionizing research. The Internet has affected all phases of research by altering information systems, ways of gathering secondary data, survey processes, sampling, questionnaire design, primary data collection, qualitative analysis, and communication, among other things. Practically every chapter includes significant coverage of Internet-related topics, and most chapters also include review questions and activities that get students involved with the Internet in a relevant way. The "Survey This!" feature gets students and instructors directly involved with one important way that the Internet has changed research. This particular feature provides first-hand experience with the process and advantages and disadvantages of using online questionnaires. Additionally, students can then analyze data that they actually helped to create.

Overall, here is a summary of some of the key features new to the eighth edition of *Business Research Methods*.

- **Survey This! Feature**—Students respond to an online questionnaire hosted with Qualtrics software. The questionnaire involves students' opinions, activities, and interests regarding matters related to studying business and careers in business. The resulting data are made available to instructors and students. In the early chapters, this feature is useful for critiquing the way questionnaires are constructed and how research hypotheses are addressed in a questionnaire. In later chapters, students can use the data to respond to real research questions. Students also get access to Qualtrics to design their own questionnaires.
- **Tips of the Trade**—Each chapter contains a useful list of important tips that correspond to the particular stage of the research process covered. The tips provide information addressing practical questions such as interview length, question wording, interviewer involvement, sample size requirements, guides for data reliability and validity, as well as useful tips for testing hypotheses using inferential statistics.
- **All New Chapter Vignettes**—All of the chapter vignettes are new to the eighth edition. The vignettes set the stage for each chapter by introducing topics taken from both well-known and lesser-known companies, topical areas of interest in the current business literature, and slice-of-life business situations. The vignettes help frame the material included in each chapter and put core course concepts into a real-life and current context.
- **Comprehensive Cases**—The end of the book now includes a set of comprehensive cases that allow the student to get real hands-on experience doing research. Selected cases also include data that can be downloaded from the companion Web site for the text. The data are ready to be analyzed using Excel, SPSS, or SAS, or other software capable of reading data from a spreadsheet. Shorter and more-to-the-point cases are included at the end of each chapter. Several of these cases involve simple data analyses and are accompanied by data also available on the instructor resource disk or the book Web site.
- **Greater Breadth of Business Coverage**—The eighth edition includes examples across a broader spectrum of business activities and touches on practically all areas of business including marketing, management, finance, business ethics and accounting. The examples better reflect the diversity of today's business world. Many of these examples are captured in the new Research Snapshot features, which tie business research together with current events, ethics, technology, and topics of particular interest to the business research student.
- **A New Author Team**—The new authors help bring greater breadth of coverage. Together, the team represents decades of experience performing all manner of research with particular expertise in marketing and consumer research, organizational behavior, managerial strategy, and human resources.

In addition to these new features, the eighth edition also is characterized by:

- **A Simplified Approach and Style**—The Research Snapshots, chapter Learning Objectives, and End-of-Chapter materials are now presented in a simplified form that allows greater focus



on the truly important information. The Learning Objectives ensure an important coherence and structure to the chapters that culminate with the end-of-chapter materials.

- **New Layout**—A more engaging layout adds interest to the book, provides more illustrations and photos, and helps to keep students involved.
- **Tagged End of Chapter Exercises**—The end of chapter materials now contain an increased number of questions that pertain to either ethical issues in business research or exercises requiring students to get involved with research via the Internet. These items are each uniquely tagged with a visual symbol, making these particular exercises stand out with a clear, identifying mark.
- **Increased Coverage of International Business Issues**—The examples and illustrations make greater use of examples from countries around the globe. Readers of this book may end up working outside the United States or Canada, so the prevalence of international examples will increase awareness of research issues beyond North America and open up domestic students to global dynamics. This is a particularly important addition to the text since cultural and language barriers often present challenges for the business researcher.
- **Greater Attention to Qualitative Research**—More and more companies are realizing the benefits of qualitative research. In response to this important phenomenon, Chapter 7, *Qualitative Research Tools*, is almost entirely rewritten in the eighth edition. The chapter focuses more exclusively on qualitative research and the corresponding interpretative techniques that turn data without numbers into meaning. Phenomenology, grounded theory, ethnography, and case study approaches are now all covered. Several other chapters also emphasize qualitative research to a greater extent. For example, the Internet is not just a way of collecting quantitative data. Qualitative research is being dramatically changed by the Internet as consumers leave more and more artifactual data behind on social networking Web sites, company chat rooms, blogs, micro-blogs (such as tweets left on Twitter), and more. Thus, qualitative research tools and approaches are highlighted throughout the text.

## Organization of the Book



The organization of the eighth edition of *Business Research Methods* follows the logic of the business research process itself. The book is organized into six parts, and each part presents the basic research concepts for one of the stages in the research process; each part also discusses how these concepts relate to decisions about conducting specific projects.

**Part 1: Introduction** emphasizes the interplay between research and business and how the importance and scope of research varies with different business situations. Included in this discussion is an overview of computerized data management and information systems, an outline of the entire business research process, and an explanation of how all of this is changing due to the Internet. In addition, research is a way that theory is tested and research contributes to theory. Chapter 3 is devoted to theory development and explains why theory is important to effective research.

Without high ethical standards, no business is a “good business.” Thus, the introductory materials also include an emphasis on business ethics and the special ethical problems associated with business research. Chapter 5 focuses exclusively on business ethics and the interplay between organizational dynamics and research.

**Part 2: Beginning Stages of the Research Process** covers the essentials involved in starting to study business problems. This part emphasizes decision making, problem definition, and the process of how the business problem must be translated into research questions and/or research hypotheses. Research proposals are covered in some detail, and the reader is encouraged to see these as the written agreement that helps put the decision maker and the researcher on the same page.

Chapter 7 emphasizes qualitative research applications. One role played by qualitative research is helping to separate problem symptoms from true issues that can be attacked with business research. However, qualitative research extends far beyond problem definition; it allows greater potential for discovery as well as deeper and potentially more meaningful explanations in business research.

Part 2 concludes with a detailed discussion of secondary data and emphasizes its increasing importance in a data-rich world. Chapter 8 focuses on finding and using secondary data in today's digital age.

**Part 3: Research Methods for Collecting Primary Data** examines the topics involved in collecting new data for the specific problem at hand. For example, the chapters describe issues related to planning, conducting, and administering surveys, which remain a mainstay for collecting consumer and employee opinions, attitudes, and behaviors.

Additionally, Chapter 12 focuses specifically on experimental research. Experiments allow causal inferences and therefore can provide strong inferences. They can, however, be intricate to design and implement; conducting experiments that provide valid results is no simple matter. When done correctly, they provide effective business intelligence.

**Part 4: Measurement Concepts** are critical to research. This part of the text discusses the foundation of measurement theory. Key topics include descriptions of the different levels of scale measurement and how this affects analysis and the interpretation of results. Basic ways to measure human attitudes and practical matters dealing with questionnaire design are also discussed. An increased emphasis is placed on the use of new technologies for conducting interviews. For instance, how does asking a question in an electronic format expand the options for respondents and the researcher? Topics such as these are highlighted in Part 4.

**Part 5: Sampling and Fieldwork** explains the difference between a population and a sample. The reasons why sampling is needed and how it can be used to confidently allow predictions about larger numbers of people are covered. The fieldwork process is also discussed, including the importance of supervision of fieldwork. This section shows how to avoid sloppy sampling and poor field supervision which can lead to error in the business research process.

**Part 6: Data Analysis and Presentation** covers important processes necessary in translating raw data into business intelligence. Included among these topics are the editing and coding of the data. The coded data are then ready for analysis, and this section presents the most commonly used methods for analyzing data. For instance, basic descriptive statistics are discussed as ways of portraying key results including central tendency and dispersion.

Inferential statistics are discussed, including often-used univariate and bivariate approaches such as *t*-tests. The final chapter brings everything together by including a discussion of how to effectively communicate research results via a report and/or presentation.

## Superior Pedagogy

More than other research textbooks, the eighth edition of *Business Research Methods* addresses students' need to comprehend all aspects of the business research process. The following features facilitate learning throughout the book:

- **Learning Objectives.** Each chapter begins with a concise list of learning objectives that emphasize the major areas of competency that students should achieve before proceeding to the next chapter. The key is to avoid labeling everything a major learning objective and to provide instructors with flexibility for emphasizing additional material as they see fit.
- **Major Headings Keyed to Learning Objectives.** First-level headings, with the exception of those labeled "Introduction," are keyed to learning objectives. This should be an aid in developing assessment rubrics and makes the book more user friendly in terms of identifying key material.
- **Research Snapshots.** All of the box materials share a common title, Research Snapshots. Each chapter contains multiple Research Snapshots. The boxes explore business research processes in a variety of modern businesses situations, ranging from international considerations to research ethics. Some boxes also illustrate research techniques and applications in a step-by-step fashion. Every attempt is made to make the box material lively and relevant to the subject matter of the chapters.
- **Writing Style.** An accessible, interesting writing style continues to be a hallmark of this book. With a careful balance between theory and practice and a sprinkling of interesting examples and



anecdotes, the writing style clarifies and simplifies the business research process. In addition, the text offers a comprehensive treatment of important and current topics.

- **Statistical Approach.** A review of statistical theory provides students with an overview of the basic aspects of statistics. However, since this text stresses managerial applications more than statistical theory, students are given tools to perform the most common business research data analysis. More sophisticated data analysis approaches are left for further reference. Thus, the readers can learn how to test simple hypotheses involving differences between means or relationships among variables. Cross-tabulation, *t*-tests, ANOVA, and regression are covered in sufficient depth to allow students to use these techniques. In addition, easy-to-follow, click-through sequences can walk students through most basic approaches to producing statistical results.
- **Key Terms.** Learning the vocabulary of business research is essential to understanding the topic, and *Business Research Methods* facilitates this with key terms. First, key concepts are boldfaced and, completely defined when they first appear in the textbook. Second, all key terms and concepts are listed at the end of each chapter, and many terms are highlighted in a marginal glossary. Third, a glossary summarizing all key terms and definitions appears at the end of the book for handy reference. A glossary of frequently used symbols is also included.
- **Ethics Questions.** Identified by a special icon, **ETHICS**, ethics questions are included in most chapters. Among the compelling issues students are asked to explore is redefining the right to privacy in light of new technology. The ethical issues also provide a great opportunity for building critical thinking skills.
- **Internet Questions.** Internet questions also are identified by a special icon, **NET**. Nearly all chapters include multiple questions and research activities that illustrate advances in Internet applications common to business research.
- **Research Activities.** The end-of-chapter materials include real-world research activities intended to provide actual research experience for the student. Most provide an opportunity for the student to gain experience in multiple content areas. Some involve ethical aspects of research, and some involve Internet usage.
- **Cases.** Cases, often taken from real-life situations, illustrate business research concepts and build knowledge and research skills. These cases offer students the opportunity to participate actively in the decision-making process, one of the most effective forms of learning.

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## Comprehensive Instructor Resources

It is important for any text to develop comprehensive supplemental materials to support instructors in their vital teaching function. Because of this pedagogical philosophy, there is an extensive learning package provided with *Business Research Methods*.

- The text web site, [www.cengage.com/international](http://www.cengage.com/international), contains valuable instructor resources: the test bank, ExamView testing software, the instructor's manual (includes comprehensive lecture outlines, solutions to all assignments, and case solutions), PowerPoint presentation slides, video instructor's manual, and data sets for cases.
- Data Sets are provided that match several end-of-chapter exercises and different case analyses. The data are provided both in Excel files, allowing great flexibility to be used with many programs, and in SPSS files, which are ready to use with either the student or full version of SPSS. Students may download the data sets at [www.cengage.com/international](http://www.cengage.com/international) by clicking on the textbook and then on "Data Sets."
- Web Resources at [www.cengage.com/international](http://www.cengage.com/international) provide the latest information about what's new and what's cool in marketing research. The instructor's manual, test bank, PowerPoint slides, and video cases can also be found here. The site also features links to other research-related sites.
- The Qualtrics Research Suite was built for researchers by researchers. Enclosed with each new copy of *Business Research Methods* is an access code that provides access to an extremely elegant tool that makes survey creation easy enough for an intern while at the same time sophisticated enough for the most demanding academic or corporate researcher. Qualtrics allows students to create and deploy surveys, and provides data for analysis. A survey included in the book can be taken by students and they can access the data collected from adopters of *Business Research*

*Methods* from around the globe. Qualtrics is also a perfect solution for instructors who have students conduct a survey project as part of a term project.

- Preloaded with content and available free via PIN code when packaged with new texts, WebTutor ToolBox pairs all the content of the text's rich Book Companion Web site with all the sophisticated course management functionality of a Blackboard or WebCT product. Instructors can assign materials (including online quizzes) and have the results flow automatically to their gradebooks.



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