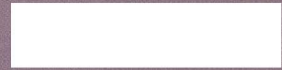


FOURTH
EDITION

BASIC MARKETING RESEARCH

GILBERT A. CHURCHILL, JR.

FOURTH
EDITION



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MARKETING RESEARCH

GILBERT A. CHURCHILL, JR.

Arthur C. Nielsen, Jr., Chair of Marketing Research
University of Wisconsin

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PREFACE

Basic Marketing Research is designed for the introductory, undergraduate course in marketing research and can be used either in one- or two-quarter sequences or in semester courses.

The topic of marketing research is a complex one. It involves a number of questions that need to be answered and a number of decisions that need to be made with respect to the choice of techniques used to solve a research problem. Without some overriding framework, which this book attempts to provide, it is easy for students to become lost in a maze; that is, to become so overwhelmed by the bits and pieces that they fail to see the interrelationships of the parts to the whole. Yet, an understanding of these interrelationships is essential both to the aspiring manager and the aspiring researcher, for in a very real sense, marketing research is one big trade-off.

Decisions made with respect to one stage in the research process have consequences for other stages. Managers need an appreciation of the subtle and pervasive interactions among the parts of the research process so that they can have the appropriate degree of confidence in a particular research result. Researchers also need to appreciate the interactions among the parts. The parts serve as the “pegs” on which to hang the knowledge accumulated about research methods. Researchers need to resist the temptation of becoming enamored of the parts to the detriment of the whole.

This book attempts to serve both the aspiring manager and the aspiring researcher by breaking the research process down into some basic stages that must be completed when answering a research question. The specific stages are

1. Formulate problem.
2. Determine research design.
3. Determine data-collection method.
4. Design data-collection forms.
5. Design sample and collect data.
6. Analyze and interpret the data.
7. Prepare the research report.

The organization of the book parallels these stages in the research process. Thus, the book is organized into seven corresponding parts. Each part (or stage) is then broken into smaller parts, so that a given stage is typically discussed

in multiple chapters. This modular treatment allows students to negotiate the maze. It also allows instructors some latitude with respect to the order in which they cover topics.

Organization

Part I consists of four chapters and an appendix. Chapter 1 provides an overview of the subject of marketing research and describes the kinds of problems for which it is used, who is doing research, and how the research function is organized. Chapter 1 also provides a perspective on career opportunities available in marketing research. Chapter 2 provides an overview of the various ways of gathering marketing intelligence. It emphasizes the increasingly important role played by decision support systems and the Internet in providing business and competitive intelligence and contrasts the information system approaches to the project emphasis taken in the book. Chapter 3 then overviews the research process. The appendix to Chapter 3 discusses various ethical frameworks for viewing marketing research techniques. Chapter 4 discusses the problem-formulation stage of the research process and explains the issues that must be addressed in translating a marketing decision problem into one or more questions that research can address productively. It also covers the preparation of a research proposal.

Part II concerns the choice of research design and consists of two chapters. Chapter 5 overviews the role of various research designs and discusses one of the basic types, the exploratory design. Chapter 6 then discusses the two other basic types, descriptive and causal designs.

Part III discusses the general issue of selecting a data-collection method and contains five chapters and an appendix. Chapter 7 focuses on secondary data as an information resource, while the appendix to Chapter 7 discusses the many sources of secondary data. Chapter 8 discusses the operations of and data supplied by standardized marketing information services. Chapter 9 describes the issues involved when choosing between the two primary means by which marketing information can be collected—through observing or questioning subjects. Chapter 10 then describes the main alternatives and the advantages and disadvantages of each when subjects are to be questioned. Chapter 11 does the same for observational techniques.

Part IV addresses the actual design of the data-collection forms that will be used in a study. Chapter 12 discusses a sequential procedure that can be used to design a questionnaire or observation form. Chapter 13 then discusses some basic measurement issues that researchers and managers

need to be aware of so that they will neither mislead others nor be misled themselves when interpreting the findings. Chapter 14 describes some of the most popular techniques marketers currently use to measure customers' attitudes, perceptions, and preferences.

Part V, which consists of four chapters, examines sample design and deals with the actual collection of data needed to answer questions. Chapter 15 overviews the main types of samples that can be used to determine the population elements from which data should be collected. It also describes the main types of nonprobability samples and simple random sampling, the most basic probability sampling technique. Chapter 16 discusses the use of stratified sampling and cluster sampling, which are more sophisticated probability sampling techniques. Chapter 17 treats the question of how many population elements need to be sampled for research questions to be answered with precision and confidence in the results. Chapter 18 discusses data collection and the many errors that can occur in completing this task from a perspective that allows managers to better assess the quality of information they receive from research.

Once the data have been collected, emphasis in the research process logically turns to analysis, which is a search for meaning in the collected information. The search for meaning involves many questions and several steps, and the three chapters in Part VI attempt to overview these steps and questions. Chapter 19 reviews the preliminary analysis steps of editing, coding, and tabulating the data. Chapter 20 discusses the procedures that are appropriate for examining whether the differences between groups are statistically significant. Chapter 21 describes the statistical procedures that can be used to examine the degree of relationship between variables.

Part VII, which consists of two chapters and an epilogue, discusses the last, yet critically important, part of the research process: the research report. Because it often becomes the standard by which any research effort is judged, the research report must contribute positively to that evaluation. Chapter 22 discusses the criteria a written research report should satisfy and a form it can follow so that it does contribute positively to the research effort. Chapter 23 provides a similar perspective for oral reports. Chapter 23 also discusses some graphic techniques that can be used to communicate the important findings more forcefully. The epilogue ties together the elements of the research process by demonstrating their interrelationships in overview fashion.

Organizing the material in this book around the stages in the research process produces several significant benefits. First, it allows the subject of marketing research to be broken into very digestible bites. Second, it demonstrates and continually reinforces how the individual bits and pieces of research technique fit into a larger whole. Students can see readily, for example, the relationship between statistics and marketing research, or where they might pursue additional study to become research specialists. Third,

the organization permits the instructor some flexibility with respect to the order in which the parts of the process may be covered.

Special Features

In addition to its pedagogically sound organization, *Basic Marketing Research* has several special features that deserve mention. First, the book is relatively complete with respect to its coverage of the most important techniques available for gathering marketing intelligence. The general approach employed when discussing topics is not only to provide students with the pros and cons of the various methods by which a research problem can be addressed, but also to develop an appreciation of why these advantages and disadvantages occur. The hope is that through this appreciation students will be able to creatively apply and critically evaluate the procedures of marketing research. Other important features include the following:

1. A set of learning objectives highlights the most important topics discussed in the chapter. The chapter summary then recaps the learning objectives point by point.
2. A "Case in Marketing Research" opens each chapter. These scenarios are adapted from actual situations and should prove to be very interesting to students. Furthermore, an end-of-chapter reference to the introductory case ("Back to the Case") illustrates how the scenario can be brought into sharper focus using the methods described in the chapter.
3. A running glossary appears throughout the text. Key terms in each chapter are boldfaced, and their definitions appear in the margin where the terms are discussed. Each key term is also indexed.
4. The "Research Windows" provide a view of what is happening in the world of marketing research. "Research Windows" describe what is going on at specific companies and offer some specific "how to" tips. Like the "Case in Marketing Research" features, they serve to breathe life into the subject and strongly engage the students' interest.
5. Extensive use of photos provides visual reinforcement to important concepts. Appearing throughout the book, the photos provide students with a tangible understanding of how various aspects of the research process are conducted.
6. Discussion questions, problems, and/or projects are found at the end of each chapter. This feature allows students the opportunity to apply the chapter topics to focused situations, thereby honing their analytical skills and developing firsthand knowledge of the strengths and weaknesses of various research techniques.

7. A worked-out research project is discussed throughout the book. This project is found at the end of each part and concerns retailers' attitudes toward advertising in various media. The project represents an actual situation faced by a group of radio stations in one community. It begins with a description of the radio stations' concerns and objectives. Each of the sections then describes how the research was designed and carried out, demonstrating the interrelationships of the stages in the research process and providing students with a real, hands-on perspective as to how research is actually conducted.
8. Several cases occur at the end of each part and deal with a stage in the research process. The 38 cases assist students in developing their own evaluation and analytical skills. They are also useful in demonstrating the universal application of marketing research techniques. The methods of marketing research can be used not only by manufacturers and distributors of products, as is commonly assumed, but also by the private and public sectors to address other issues. The cases include such diverse entities or issues as the Big Brothers program, education, banking, and theater, among others. All cases represent actual situations, although some of them have been disguised to protect the proprietary nature of the information.
9. Raw data are provided for eight of the cases to allow students to perform their own analyses to answer questions. The data are available on computer disk to adopters. The disk allows those who have statistical packages available to use them for analyses. To obtain a copy of the disk, which is available for the IBM platform, adopters must send the insert card in the *Instructor's Manual* to the nearest Dryden regional sales office.
10. The fourth edition also contains the description, questionnaire, coding form, and raw data for a ground coffee study conducted by NFO. The study was used to generate a number of discussion questions and problems for the chapters, which give students the opportunity to work with "live" data. This should hone their skills in translating research problems into data analysis issues and in interpreting computer output. Moreover, the database is rich enough for instructors to design their own application problems and exercises for their classes, thereby allowing even more opportunity for "hands-on" learning.

Distance Learning

For professors interested in supplementing classroom presentations with online content or who are interested in setting up a distance learning course, Harcourt College Publishers, along with WebCT, can provide you with the industry's leading online courses.

WebCT facilitates the creation of sophisticated Web-based educational environments by providing tools to help you manage course content, facilitate online classroom collaboration, and track your students' progress. If you are using WebCT in your class but not a Harcourt Online Course or textbook, you may adopt the *Student's Guide to the World Wide Web and WebCT* (ISBN 0-03-045503-0). This manual gives step-by-step instructions on using WebCT tools and features.

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Changes in the Fourth Edition

Although it looks similar to the first three editions, the new edition contains some major changes. The primary change is increased emphasis in the use of the Internet for marketing research. The emphasis is most clearly reflected in Chapter 2, Gathering Marketing Intelligence, where there is expanded discussion of the Internet, the Intranet, the role of the chief information officer, and the networking of modern information systems. However, it can also be seen throughout the book in the discussion of issues and the new examples.

Another major change involves the cases. More than 20 percent of the cases are new and over 25 percent of the others have been revised. At the same time, the video case that was added to the third edition has been retained. The video case, which uses an original script and professional actors, allows students to view short segments illustrating the points being discussed. There is a special icon at the end of the chapters in the *Instructor's Manual* that indicates the questions that might be asked after students view a segment of the video case. The video case makes for a very interactive learning environment.

Finally, all of the chapters have been subjected to thorough scrutiny and rewrite.

Acknowledgments

While writing a book is never the work of a single person, one always runs the risk of omitting some important contributions when attempting to acknowledge the help of others. Nonetheless, the attempt must be made because this book benefited immensely from the many helpful comments I received along the way from interested colleagues.

I especially wish to acknowledge the following people who reviewed the manuscript for this or one of the earlier editions. While much of the credit for the strength of this book is theirs, the blame for any weaknesses is strictly mine. Thank you one and all for your most perceptive and helpful comments.

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Finally, I once again owe a special debt of thanks to my wife, Helen, and our children. Their unyielding support and generous love not only made this book possible but worthwhile doing in the first place.

Gilbert A. Churchill, Jr.

Madison, Wisconsin
July 2000

THE AUTHOR

Gilbert A. Churchill, Jr., received his DBA from Indiana University in 1966 and joined the University of Wisconsin faculty upon graduation. Churchill was named Distinguished Marketing Educator by the American Marketing Association in 1986—only the second individual so honored. The lifetime achievement award recognizes and honors a living marketing educator for distinguished service and outstanding contributions in the field of marketing education. Professor Churchill was also awarded the Academy of Marketing Science's lifetime achievement award in 1993 for his significant scholarly contributions. In 1996, he received a Paul D. Converse Award, given to the most influential marketing scholars as judged by a national jury drawn from universities, business, and government. Also in 1996, the Marketing Research Group of the American Marketing Association established the Gilbert A. Churchill, Jr., lifetime achievement award, to be given each year to a person judged to have made significant lifetime contributions to marketing research.

Professor Churchill is a past recipient of the William O'Dell Award for the outstanding article appearing in the *Journal of Marketing Research* during the year. He has also been a finalist for the award five other times. He was named Marketer of the Year by the South Central Wisconsin Chapter of the American Marketing Association in 1981. He is a member of the American Marketing Association and has

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Professor Churchill's articles have appeared in such publications as the *Journal of Marketing Research*, the *Journal of Marketing*, the *Journal of Consumer Research*, the *Journal of Retailing*, the *Journal of Business Research*, *Decision Sciences*, *Technometrics*, and *Organizational Behavior and Human Performance*, among others. He is co-author of several books, including *Marketing: Creating Value for Customers*, Second Edition (Burr Ridge, IL.: Irwin McGraw Hill, 1998), *Sales Force Management: Planning, Implementation, and Control*, Sixth Edition (Burr Ridge, IL.: Irwin McGraw Hill, 2000), and *Salesforce Performance* (Lexington Books, 1984); and he is also the author of *Marketing Research: Methodological Foundations*, Seventh Edition (Fort Worth, TX.: Dryden 1999) in addition to *Basic Marketing Research*, Fourth Edition (Fort Worth, TX.: Harcourt College Publishers, 2001). He is a former editor of the *Journal of Marketing Research* and has served on the editorial boards of *Journal of Marketing Research*, *Journal of Marketing*, *Journal of Business Research*, *Journal of Health Care Marketing* and the *Asian Journal of Marketing*. Professor Churchill is a past recipient of the Lawrence J. Larson Excellence in Teaching Award.

Introduction to Marketing Research and Problem Definition

Chapter 1 Role of Marketing Research

Chapter 2 Gathering Marketing Intelligence

Chapter 3 Process of Marketing Research

Chapter 4 Problem Formulation

Part One gives an overview of marketing research. Chapter 1 looks at the kinds of problems for which marketing research is used, who is doing it, and how it is organized. Chapter 2 discusses alternative ways of providing marketing intelligence: through marketing information systems, decision support systems, or projects designed to get at specific issues. Chapter 3 provides an overview of the research process, and the appendix to Chapter 3 discusses some of the ethical questions that can arise when gathering information. Chapter 4 discusses in detail problem formulation, the first stage in the research process.

SOMETHING TO "YAHOO!" ABOUT Here's an ambitious corporate vision: becoming "the only place anyone in the world would have to go to find and get connected to anything or anybody." It sounds like a description of the Library of Congress, AT&T, and the world's greatest singles bar all rolled into one. Yet these words, taken from the company's 1998 annual report, may become a fitting description of one of the nation's fastest-growing businesses.

That business is an Internet portal site called Yahoo!. (The exclamation point, according to company cofounder Jerry Yang, is simply "pure marketing hype.") Travelers in cyberspace use Yahoo! as a starting point, where they can find links to weather reports, maps, news stories, e-mail, stock prices, real estate listings, on-line retailers, chat rooms, and much, much more.

Yahoo!'s strategy requires it to get as many Internet users as possible to visit its World Wide Web site, then keep them there as long as possible. This helps the company's bottom line in several ways. First, Yahoo! gets most of its revenues from selling advertising space on its Web site. The more users that visit, the more advertising dollars Yahoo! can attract. Likewise, the longer people stay on the site, the more valuable the advertising space is, because consumers who stick around for a while are more likely to spend more time noticing the advertising.

Heavy traffic also helps an area of revenue that is expected to be increasingly important in the future: e-commerce. Yahoo! enters partnerships with on-line vendors. The vendors get links on the Yahoo! site, so consumers can easily find and purchase their products. Yahoo! in exchange gets a share of their sales dollars. A greater number of site visitors should translate into more buyers generating commissions for Yahoo!. And because a customer who buys is more valuable than a Web visitor who merely glances at an ad, companies pay more for this service. For example, Yahoo! might get 2 cents whenever someone clicks on a link that causes a banner advertisement to pop up and 30 cents whenever someone fills out a loan application.

The number of Web users and on-line advertising dollars are both growing at a breathtaking rate (the 1998

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