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Marketing Research Within a Changing Information Environment

市场调查：面对不断变化的信息环境

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市场调查

面对不断变化的信息环境

Marketing Research

(Within a Changing Information Environment)

(美) Joseph F. Hair, Jr., Robert P. Bush, David J. Ortinau. 著



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Joseph F.Hair,Jr., Robert P.Bush, David J.Ortinau.

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世纪的竞争是人才的竞争，是全球性人才培养机制的较量。

如何培养面向现代化、面向世界、面向未来的高素质的人才成为我国人才培养的当务之急。为此，教育部发出通知，倡导在全国普通高等学校中使用原版外国教材，进行双语教学，培养适应经济全球化的人才。

为了响应教育部的号召，促进统计教材的改革，培养既懂统计专业知识又具备较高英语语言能力的统计人才，全国统计教材编审委员会在国家统计局领导的大力支持下，组织引进了这套“外国优秀统计学教材”。

为了做好“外国优秀统计学教材”引进工作，全国统计教材编审委员会将其列入了“十五”规划，并成立了由海内外统计学家组成的专家委员会。在对国外统计学教材的使用情况进行了充分了解，对国内高等院校使用外国统计学教材的需求情况进行了仔细分析，并对从各种渠道推荐来的统计教材进行了认真审定的基础上，制定了引进教材书目。在确定引进教材书目的过程中，我们得到了国内外有关专家、有关院校和外国出版公司及其北京办事处的支持和帮助，在此致谢。中国人民大学统计学系的吴喜之教授不仅推荐了大量的优秀候选书目，而且校译了影印教材的翻译目录，为这套教材的及早出版作了大量的工作，我们表示衷心的感谢。

这套引进教材多数是国外再版多次、反响良好，又比较适合国内情况、易于教学的统计教材。我们希望这套引进教材的出版对促进我国统计教材的改革和高校统计学专业双语教学的发展能够起到重要的推动作用。

全国统计教材编审委员会

2002年8月28日



d e d i c a t i o n

This book is dedicated to my wife, Dale, and my son, Joe III.

—J.F.H. Jr., Baton Rouge, LA

This book is dedicated to my wife, Donny, and my two boys, Robert Jr. and Michael.

—R.P.B. Sr., Memphis, TN

I dedicate this book to my family for their love and continuous support. To Carol Livingstone for her enduring encouragement and love during the writing of the book's second edition. And to all my past and present students for enriching my life as an educator on a daily basis.

—D.J.O., Tampa, FL



about the authors

Joseph F. Hair Jr. earned a B.A. in Economics and an M.A. and Ph.D. in Marketing at the University of Florida. He began his teaching career at the University of Mississippi and then moved to Louisiana State University in 1977. He continues to teach at LSU, where he is the Director of the Institute for Entrepreneurial Education and Family Business Studies, and where he holds the Alvin C. Copeland Endowed Chair of Franchising. He has acted as a management consultant and/or expert witness for a variety of industries and has served on the board of directors of numerous organizations. He has been an officer for a long list of academic organizations, and he is a past President and Chairman of the Board of Governors of the Academy of Marketing Science. He has been a regular contributor and reviewer, and occasionally a member of the editorial board, for such publications as *The Journal of Marketing Research*, *The Journal of Business Research*, and *Marketing Education Review*. The list of his scholarly publications runs to a dozen pages.

Robert P. Bush earned a B.A. in Psychology and Economic History from St. Mary's University and an M.A. and Ph.D. in Marketing at Louisiana State University. He began his teaching career at the University of South Florida, moved first to the University of Mississippi, and then to The University of Memphis, where he has taught since 1993. He was chairman of the committee on Grants and Research for the Fogelman College of Business from 1991 to 1997 and Director of the Ph.D. program at Memphis from 1995 to 1997. He has been a consultant for a wide range of corporations and institutes, as well as for the U.S. Department of Defense. He is the coauthor of *Retailing for the 21st Century* (Houghton Mifflin, 1993) and a coeditor of *Advances in Marketing* (LSU Press, 1994). He is a regular contributor to such academic publications as *Journal of Advertising*, *Journal of Consumer Marketing*, *Journal of Marketing Education*, *Journal of Direct Marketing*, *Journal of Health Care Marketing*, and *Marketing Education Review*.

David J. Ortinau earned a B.S. in Management from Southern Illinois University—Carbondale, an M.A. in Business Administration from Illinois State University, and a Ph.D. in Marketing from Louisiana State University. He began his teaching career at the University of South Florida, where he continues to win awards both for outstanding research and for outstanding teaching. He has a wide range of research interests—from attitude formation and perceptual differences in services marketing to interactive electronic marketing technologies and their impact on information research problems. He consults for a variety of corporations and small businesses, with specialties in customer satisfaction, customer service quality, customer service value, retail loyalty, and image. He continues to serve as a member of the editorial review board for *Journal of Academy of Marketing Science* and was coeditor of *Marketing: Moving Toward the 21st Century* (SMA Press, 1996). He was co-chair of the 1998 Southern Marketing Association's Doctoral Consortium in New Orleans, and he is a past President of the Southern Marketing Association. He also served as co-chair of the 1999 Society for Marketing Advances' Doctoral Consortium in Atlanta and was recognized as the 2001 SMA Fellow. He has presented numerous papers at academic meetings, and he has been a regular contributor to and referee for such publications as *The Journal of Business Research*, *The Journal of Retailing*, *Journal of Marketing Education*, *Journal of Health Care Marketing*, and *Journal of Services Marketing*.



p r e f a c e

All marketing research books are designed to introduce students to the concepts and practices that make up the field of marketing research. Building on the success of our first edition of *Marketing Research: Within a Changing Information Environment*, this second edition goes well beyond that basic idea to show how marketing information research tools, skills, and understanding can be applied in solving marketing problems and creating business opportunities within a rapidly changing information environment. With the growing availability, acceptance, and use of (1) the Internet and its related advanced technologies and communication systems, (2) gatekeeper technologies such as caller ID, electronic answering devices, and voice messengers to protect people's privacy, (3) continuous changing of internal organizational structures to improve the cross-functional sharing of information, and (4) the movement of both large and small businesses toward globalization of marketing practices, tomorrow's information requirements will be more challenging than those of yesterday. Although the first edition was well received in the marketplace, it was the positive comments made by adopters of the book and reviewers (both adopters and nonadopters) as well as students which encouraged us to write this second edition. We sincerely believe that we have identified several critical learning needs that other marketing research textbooks are not addressing well or not addressing at all.

Objectives and Approach

Similar to those of the first edition, our objectives in this second edition of *Marketing Research* remain basically threefold. First, we want to continue to provide students with a body of knowledge and a set of facts that are easy to read and understand and that will facilitate *practical self-learning* of the basics of information research. Second, we want to provide students with solid tools and skills necessary to solve business problems and exploit business opportunities. And finally, we intend to provide a solid educational learning resource for instructors who strive to bring understanding to frequently complex subject matter. As students develop information acquisition skills and an understanding of available research tools, they will quickly see how they can be applied to a changing marketing environment, to other academic courses, and to their personal lives.

Rapid changes in the business world are creating new decision situations that demand creative solutions and better skills for the acquisition and use of information. As a result of many recent advances in the Internet, computer technologies (both hardware and software), high-speed communication systems, and other electronic technologies, business decision makers and the marketing research industry have been forced to rethink their notions of information and of the practices used to acquire and generate data and information. A unique feature of this second edition is the continual detailed treatment of and significantly greater emphasis placed on identifying, searching, gathering, analyzing, and interpreting secondary data and information. Another unique feature is the book's detailed and expanded coverage of *customer relationship management* (CRM) and the integrative role that marketing information research plays in making CRM one of the hottest topics in information research today. In addition, this edition offers students expanded coverage of the latest *online* research techniques, database development and

maintenance, and data mining activities. Finally, students and instructors will have the opportunity to engage with the book's new *interactive website* (www.mhhe.com/hair) linking students to a wide variety of additional practical marketing research examples, exercises, applications, learning modules, cases, and points of interest relevant to better understanding marketing information research tools, skill, and practices.

This second edition of *Marketing Research: Within a Changing Information Environment* provides detailed insights into alternative ways of dealing with new information needs and demands brought about by environmental changes. These changes have had direct impact both on marketing research practices and on the operating environments of business practitioners. Additionally, there have been many changes in the educational environment that have implications for how people acquire knowledge and master the skills and tools customarily associated with the practice of marketing research. Given the strong acceptance of the information research process presented in the first edition, we again use that process not only to cover the traditional marketing research concepts, but also to provide insights for meeting the information challenges of the 21st century. The second edition is written for people at a fairly basic level; it does not require a strong background in statistics or any prior knowledge of marketing research. It is not intended for people who wish to teach advanced multivariate data analysis procedures, yet it could serve as a very good supplement text for those procedures.

We continue to believe that self-learning is a critical and necessary component of a student's overall educational experience. To that end we have incorporated the following characteristics into this second edition to enhance the self-learning process:

- Easy-to-understand writing style and organization.
- Clearly presented and informative exhibits, tables, and boxes that provide real business applications.
- Integrated examples that illustrate the links between various research concepts.
- End-of-chapter Marketing Research Illustrations that demonstrate how researchers integrate concepts discussed within that chapter.
- Detailed treatment of critical information skills and tools.
- In-depth treatment of secondary data/information as well as customer relationship management and database practices.
- New in-depth treatment of the latest online research methods.
- A new interactive book website that links the students and instructors to additional examples and discussions on many different research topics, databases, and software tools.

Content and Organization

The second edition provides significantly new and expanded content on a number of marketing research topics that were covered in the first edition. Given all the positive comments and acceptance from reviewers, adopters, and students of the previous edition, we were encouraged to maintain the overall organization for the second edition. Part 1 of this book covers marketing research and technology and contains five chapters. Chapter 1 provides an overview of the role of marketing information research in a strategic marketing planning process. It offers current discussions and illustrations for the various research requirements, tasks, and functions within today's complex business environments. Chapter 2 takes an information approach to explaining the marketing research process and sets the tone for the remaining chapters. It presents an overview of

the four stages of the process and discusses the major steps that researchers and decision makers must take to ensure successful results. There is an important discussion of the critical role marketing research information plays in decision making and what environmental factors have greatest impact on marketing research practices.

Chapter 3 provides in-depth treatment of the most critical step in the process—*determining the “right” information research problem and deciding on the appropriate research objectives*. It also offers a discussion of the important ethical dilemmas and issues faced by both researchers and decision makers. Chapter 4 integrates strategic management and customer relationship issues involved in conducting secondary data gathering research. It places heavy emphasis on the search strategies needed to acquire, analyze, and use both traditional and online approaches. The original Chapter 5, which provided detailed coverage of the use of the Internet, has been completely moved to the book’s interactive website (www.mhhe.com/hair). The new Chapter 5 in this edition provides a detailed discussion of customer relationship management (CRM) and explores various research strategies using CRM software for data acquisition and for intraorganizational sharing of data and information.

Part 2 covers the various research designs used to collect accurate data and information and contains five chapters. Chapter 6 continues the integration of CRM activities and offers detailed information on the application of secondary data sources and databases for solving business problems. It places heavy emphasis on the importance of secondary data and on knowing how to develop and maintain databases as well as how to undertake data mining and conduct segmentation activities. Chapter 7 focuses uniquely on how research-driven decision support systems (RDSS) are created and used to support researchers and decision makers. Through the exclusive partnership with the Matrix Technology Group, Inc., a CRM software company in Clearwater, Florida, students and instructors can link to a variety of CRM software, tutorials and applications through the book’s new interactive website (www.mhhe.com/hair).

Chapter 8 moves from research designs that are strictly for secondary data to those aimed at collecting primary (i.e., firsthand) data and their conversion to useful managerial information. A number of qualitative methods used in exploratory research situations are discussed, with heavy emphasis placed on two widely practiced designs—in-depth interviews (also known as depth interviews) and focus groups. There is a new expanded discussion dealing with online focus group practices. Chapter 9 presents an overview of survey research designs along with other quantitative data collection methods (both traditional and online approaches) that are normally associated with descriptive research objectives. It also introduces the various types of error associated with survey research designs, including their impact on the quality of the data collected. Students and instructors will find additional discussions and examples of survey research errors offered through the book’s interactive website. Chapter 10 provides detailed treatments of observation techniques and experimental and quasi-experimental designs, along with in-depth treatment of test marketing and field simulations practices. It also explores the issues of validity and reliability.

Part 3 covers the process of gathering accurate data and contains four chapters. Chapter 11 introduces readers to sampling and defined target populations. It provides detailed coverage of sampling distributions, sampling frames, sample size determination, and different types of probability and nonprobability sampling procedures. This chapter shows how to develop a sampling plan and discusses each step of the process. Chapter 12 introduces the procedures used in construct development and provides an overview of scale measurements. The critical issues underlying the development of basic scale measurements and information properties are discussed in detail, and earlier discussions of validity and reliability are revisited.

Chapter 13 advances the concept of scale measurement to more complex attitude, emotional, and behavioral scale formats, and it goes on to provide a basic overview of other types of comparative and noncomparative specialty scales used in marketing research practices. More examples of scale measurements are provided through links on the book's website. Chapter 14 offers a detailed treatment of how to develop and format a scientific-based survey instrument (i.e., questionnaire). Exclusive to this book, we use the "flowerpot" framework and demonstrate how this framework integrates and has an impact on the various procedural steps of the design process. In addition, there is a detailed treatment of how to develop cover letters and letters of introduction and their importance to increasing response rates. Discussions are also provided on the development of critical supplement documents associated with survey instrument designs and conducting field work (i.e., supervisor instructions, interviewer instructions, screening forms, quota sheets, rating cards, call record sheets). The book's website offers students and instructors additional examples of good and bad questionnaires, cover letters, and pre- and posttest questionnaire design changes.

Part 4 covers data preparation, data analyses, and the communication of research findings and contains five chapters. Chapter 15 begins this section by offering an overview of the fundamental principles of coding requirements, the editing of data, and the preparing of raw data for statistical analysis. Chapter 16 builds on earlier discussions of basic sampling statistics and begins to illustrate how fundamental descriptive statistical analyses are used to transform raw data into more complex data structures. It provides the *how*, *when*, and *whys* for performing *t*-test and *z*-tests, and it explains the importance of means, standard deviations, and standard error values. Chapter 17 expands the discussion of data analysis to include testing for associations using correlation, covariance, regression, and analysis of variance (ANOVA) statistical procedures.

Chapter 18 presents a somewhat simplified overview of multivariate statistics. It provides *how*, *when*, and *why* discussions of discriminant analysis, cluster analysis, and conjoint analysis procedures. Chapter 19 discusses the important issues that underlie the preparation of research reports and presentations. It shows students how to develop computerized presentations (e.g., PowerPoint slides) of data structures results and research findings. Each chapter in Part 4 offers SPSS data analysis exercises developed for a fictional fast-food restaurant (Back Yard Burgers). The disk with this material can be found inside the back cover of the textbook. As an available option, the second edition can be packaged with the Back Yard Burger data set and the student version of *SPSS Student Version 11.0*. This student version will last for one year from the time it is first loaded on a student's computer.

Pedagogy

Most marketing research books are readable, but a more important question might be "Can students comprehend what they are reading?" This book offers a wealth of pedagogical features, all aimed at answering that question in the affirmative. Here is a list of the major elements.

- **Learning Objectives.** Each chapter begins with clear learning objectives that students can use to gauge their expectations and the importance of the chapter material.
- **Vignettes.** Each chapter begins with an interesting story that describes a real-world business example that illustrates the focus and importance of the chapter's material.
- **Basic Concepts and Terms.** These are boldface in the text and are also defined again in the page margins to make reviewing easier. They are also listed at the ends of chapters and included in a glossary at the back of the book.

- **A Closer Look at Research.** These boxes, which are found in each chapter, come in three varieties—Using Technology, Small Business Implications, and In the Field. They are intended to expose students to real-world issues.
- **Ethics.** This text provides extensive treatment of ethical issues early in the book (Chapter 3) and revisits ethical issues throughout the remainder of the book. There are carefully designed “ethics boxes” selectively placed in other chapters that provide excellent real-life examples of unethical research practices, and there are ethics-oriented discussion questions at the ends of other chapters.
- **Global Insights.** These boxes, scattered throughout the book, are intended to encourage students to see the international implications of and opportunities for marketing research.
- **Chapter Summaries.** These detailed summations, organized by learning objectives, will help students remember key facts, concepts, and issues, and will serve as an excellent study guide in preparation for in-class discussions and exams.
- **Questions for Review and Discussion.** These questions were carefully designed to enhance the self-learning process and to encourage the application of the concepts to real business situations. There are one or two questions in each chapter (**Experience the Internet**) that directly relate to the World Wide Web to provide students with opportunities for sharpening their electronic data gathering and interpretive skills.
- **Marketing Research Illustration.** This illustration, found at the end of each chapter, provides students with additional insights as to how key concepts from that chapter can be applied to a real business situation.

Supplements

This book offers a rich ancillary package. Here is a brief description of each element in that package.

- **Instructor’s Resource CD-ROM.** This CD includes a thoroughly revised Instructor’s Manual and PowerPoint slides prepared by Kevin Bittle. A wealth of extra student projects and real-life examples provide additional classroom resources. The electronic test bank files, prepared by Tom Quirk of Webster University, are also thoroughly revised and included on the CD. Each chapter has 60 multiple choice, 15 true-false, and 4 essay questions.
- **Videos.** The video program contains two hours of material on marketing research from the McGraw-Hill/Irwin video library.
- **Website.** Students can use their Internet skills to log on to this book’s dedicated website (www.mhhe.com/hair) to access additional information about marketing research and evaluate their understanding of chapter material by taking the sample quizzes. Students can also prepare their marketing research projects with our online support system, developed by Les Dlabay of Lake Forest College. Additional resources are offered for each chapter—look for prompts in the book that will guide you to the website for more useful information on various topics.
- **Back Yard Burgers and Deli Depot Data Sets.** Standard copies of the book contain a CD-ROM that provides two nationwide data sets in SPSS file format. They can be used for a research project or with exercises in Chapter 15 that focus on preparing primary

data for analysis and actual data analysis procedures (Chapters 16, 17, 18). The database is rich with data and covers topics that all students can easily identify with.

- **SPSS Student Version.** Through an arrangement with SPSS, we offer the option of purchasing the textbook packaged with a CD-ROM containing an SPSS Student Version 11.0 for Windows. This powerful software tool allows for the analysis of up to 50 variables and 1,500 cases. It contains the complete Back Yard Burgers data set and can be used in conjunction with the data analysis procedures covered in the text.

Acknowledgments

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