

清华营销学系列英文版教材

营销调研精要

Essentials of Marketing Research

Sixth Edition

[美] 巴里·J. 巴宾 (Barry J. Babin) 著
威廉·G. 齐克芒德 (William G. Zikmund)

第6版

清华大学出版社

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ESSENTIALS OF MARKETING RESEARCH, 6th Edition

Barry J. Babin, William G. Zikmund

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总序

世纪之交，中国与世界的发展呈现最显著的两大趋势——以网络为代表的信息技术的突飞猛进，以及经济全球化的激烈挑战。无论是无远弗届的互联网，还是日益密切的政治、经济、文化等方面的国际合作，都标示着 21 世纪的中国是一个更加开放的中国，也面临着一个更加开放的世界。

教育，特别是管理教育总是扮演着学习与合作的先行者的角色。改革开放以来，尤其是 20 世纪 90 年代之后，为了探寻中国国情与国际上一切优秀的管理教育思想、方法和手段的完美结合，为了更好地培养高层次的“面向国际市场竞争、具备国际经营头脑”的管理者，我国的教育机构与美国、欧洲、澳洲以及亚洲一些国家和地区的大量的著名管理学院和顶尖跨国企业建立了长期密切的合作关系。以清华大学经济管理学院为例，2000 年，学院顾问委员会成立，并于 10 月举行了第一次会议，2001 年 4 月又举行了第二次会议。这个顾问委员会包括了世界上最大的一些跨国公司和几家顶尖企业的最高领导人，其阵容之大、层次之高，超过了世界上任何一所商学院。在这样高层次、多样化、重实效的管理教育国际合作中，教师和学生与国外的交流机会大幅度增加，越来越深刻地融入到全球性的教育、文化和思想观念的时代变革中，我们的管理教育工作者和经济管理学习者，更加真切地体验到这个世界正发生着深刻的变化，也更主动地探寻和把握着世界经济发展和跨国企业运作的脉搏。

我国管理教育的发展，闭关锁国、闭门造车是绝对不行的，必须同国际接轨，按照国际一流的水准来要求自己。正如朱镕基同志在清华大学经济管理学院成立十周年时所发的贺信中指出的那样：“建设有中国特色的社会主义，需要一大批掌握市场经济的一般规律，熟悉其运行规则，而又了解中国企业实情的经济管理人才。清华大学经济管理学院就要敢于借鉴、引进世界上一切优秀的经济管理学院的教学内容、方法和手段，结合中国的国情，办成世界第一流的经管学院。”作为达到世界一流的一个重要基础，朱镕基同志多次建议清华的 MBA 教育要加强英语教学。我体会，这不仅因为英语是当今世界交往中重要的语言工具，是连接中国与世界的重要桥梁和媒介，而且更是中国经济管理人才参与国际竞争，加强国际合作，实现中国企业的国际战略的基石。推动和实行英文教学并不是目的，真正的目的在于培养学生——这些未来的企业家——能够具备同国际竞争对手、合作伙伴沟通 and 对抗的能力。按照这一要求，清华大学经济管理学院正在不断推动英语教学的步伐，使得英语不仅是一门需要学习的核心课程，而且渗透到各门专业课程的学习当中。

课堂讲授之外,课前课后的大量英文原版著作、案例的阅读对于提高学生的英文水平也是非常关键的。这不仅是积累相当的专业词汇的重要手段,而且是对学习者思维方式的有效训练。

我们知道,就阅读而言,学习和借鉴国外先进的管理经验和掌握经济理论动态,或是阅读翻译作品,或是阅读原著。前者属于间接阅读,后者属于直接阅读。直接阅读取决于读者的外文阅读能力,有较高外语水平的读者当然喜欢直接阅读原著,这样不仅可以避免因译者的疏忽或水平所限而造成的纰漏,同时也可以尽享原作者思想的真实表达。而对于那些有一定外语基础,但又不能完全独立阅读国外原著的读者来说,外文的阅读能力是需要加强培养和训练的,尤其是专业外语的阅读能力更是如此。如果一个人永远不接触专业外版图书,他在获得国外学术信息方面就永远会比别人差半年甚至一年的时间,他就会在无形中减弱自己的竞争能力。因此,我们认为,有一定外语基础的读者,都应该尝试一下阅读外文原版,只要努力并坚持,就一定能过了这道关,到那时就能体验到直接阅读的妙处了。

在掌握大量术语的同时,我们更看重读者在阅读英文原版著作时对于西方管理者或研究者的思维方式的学习和体会。我认为,原汁原味的世界级大师富有特色的表达方式背后,反映了思维习惯,反映了思想精髓,反映了文化特征,也反映了战略偏好。知己知彼,对于跨文化的管理思想、方法的学习,一定要熟悉这些思想、方法所孕育、成长的文化土壤,这样,有朝一日才能真正“具备国际战略头脑”。

以往,普通读者购买和阅读英文原版还有一个书价的障碍。一本外版书少则几十美元,多则上百美元,一般读者只能望书兴叹。随着全球经济合作步伐的加快,目前在出版行业有了一种新的合作出版的方式,即外文影印版,其价格几乎与国内同类图书持平。这样一来,读者可以不必再为书价发愁。清华大学出版社这些年在这方面一直以独特的优势领先于同行。早在1997年,清华大学出版社敢为人先,在国内最早推出一批优秀商学英文版教材,规模宏大,在企业界和管理教育界引起不小的轰动,更使国内莘莘学子受益良多。

为了配合清华大学经济管理学院推动英文授课的急需,也为了向全国更多的MBA试点院校和更多的经济管理学院的教师和学生提供学习上的支持,清华大学出版社再次隆重推出与世界著名出版集团合作的英文原版影印商学教科书,也使广大工商界人士、经济管理类学生享用到最新最好质优价廉的国际教材。

祝愿我国的管理教育事业在社会各界的大力支持和关心下不断发展、日进日新;祝愿我国的经济建设在不断涌现的大批高层次的面向国际市场竞争、具备国际经营头脑的管理者的勉力经营下早日中兴。

赵纯钧 教授

清华大学经济管理学院

出版说明

CONTENTS

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的管理经验和掌握经济理论的前沿动态,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,绝大部分是该领域中较具权威性的经典之作。在选书的过程中,我们得到了很多专家、学者的支持、帮助和鼓励,在此表示谢意!

我们根据国内的教学实际,删去了原版图书第2章、第4章、第13章和第15章以及附录的部分内容。我们在对原版图书进行删节的同时保留了原书的页码,采用双页码标识。由此可能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。

我们期望这套影印书的出版对我国经济科学的发展能有所帮助,对我国经济管理专业的教学能有所促进。

欢迎广大读者给我们提出宝贵的意见和建议;同时也欢迎有关的专业人士向我们推荐您所接触到的国外优秀图书。

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PREFACE

Never before has marketing research been more exciting or offered more and better career opportunities. Today's decision makers are under more pressure than ever to act, and to act fast. To take effective actions, they need intelligence, and intelligence begins with information. That's where research steps in. Research provides insight that leads to better decision-making. Researchers have access to more data than ever before to help provide that insight. Tracking consumers is easy today as virtually every move we make leaves some type of data trail. Also, never before has communicating with consumers been easier in a world where so many consumers are connected all the time. Now, finding gems of insight amidst the colossal amounts of intelligence seems a lot like searching for a needle amidst a mountain of hay. Complicating the search further is the fact that markets change more quickly than ever, meaning that in the search for the needle, the hay keeps shifting around. Thus, "search" cannot be removed from "research."

Decision-making in so many industries, both for-profit and not-for-profit, depends on input from research. The research process described in this text helps provide that input. The process enables a company to identify its customers and design products that maximize the value they receive from a purchase. In return, the company receives value as the customers spend their hard-earned money. The result: customers win and businesses win! All are better off.

A lot has changed since the first edition of this text. One thing that has not changed though is that businesses succeed by coming together with customers to create value that addresses real consumer needs. Although addressing needs remains the *raison d'être* for business, the way consumer needs get addressed is ever changing. Value creation today involves all sorts of technologies. Today, value creation involves much more than computers and the Internet. Smartphones mean billions of consumers can access your business at their fingertips, GPS systems point consumers to market offerings, drones help provide information and may even make deliveries, tap and pay systems involving iPay or Google Wallet make transactions faster and easier than ever. For the market researcher, the key advantage is that all of these systems leave behind a trail of information ready to mine for insight. That's where this text comes in: *Essentials of Marketing Research* equips students with the knowledge and skills involved in this basic research process. By mastering this process, students will know how to frame questions to get valuable answers, where to look for those answers, and know how to use tools that help convert raw data into intelligence.

Chapter 3 introduces this process, which includes six stages. Researchers must first work together with decision makers to decide why 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 market researcher communicates the benefits of finding "pointed" information that can help mend problems or create something really new and special to the decision maker. Success in this process usually merits the researcher a reward that is a bit more valuable than that needle!

New to *Essentials of Marketing Research*

To ensure that students are able to conduct market research with an understanding of all the latest theories and techniques available to them, the sixth edition is substantially revised and updated. The earlier parts place emphasis more on describing research designs and different sources of data and data processes. The latter part focuses more specifically on modern tools that help form a basis for marketing analytics. But, in larger firms and on larger projects, the function of the analyst is specifically focused on data analysis, often using inferential statistical tools.

The revisions in the text also better reflect data collection approaches suitable to the information age. Technological and social developments of the last few decades are revolutionizing information systems, sources of and ways of gathering secondary data, survey processes, sampling, questionnaire design, qualitative analysis including focus group interviews, and communication of results. Practically every chapter includes significant coverage of technology-related topics. Most chapters also include review questions and activities that get students involved with the latest research technologies in a hands-on way. For example, “The Survey This!” feature provides firsthand experience with the advantages and disadvantages of using online questionnaires and then analyzing the data that this approach provides.

Key features of the sixth edition include:

- **Survey This!**—Students respond to an online questionnaire using Qualtrics software. The questionnaire involves students’ opinions, activities, and interests regarding numerous everyday behaviors ranging from involvement with social networking media to study habits. In the early chapters, this feature is useful for critiquing the way questionnaires are constructed and how research hypotheses are addressed in a survey. In later chapters, students can use data from the ongoing survey to get experience with marketing analytics tools. Students also get access to Qualtrics to design their own questionnaires as described below.
- **Increased coverage of big data and analytics.**
- **Tips of the Trade**—Each chapter contains a useful list of important tips that correspond to the particular stage of the research process discussed in the chapter. The tips provide information addressing practical questions such as interview length, question wording, interviewer involvement, sample size requirements, and guides for data reliability and validity, as well as useful tips for testing hypotheses using inferential statistics.
- **Chapter Vignettes**—All chapters open with a story relevant to the material featured in that particular chapter. Some of these vignettes involve famous brands and companies, so the reader may well be familiar with some of the topics. Other vignettes involve “slice of life” stories describing a businessperson’s struggle to make smart decisions and demonstrate how research is intertwined with this struggle.
- **More emphasis on “how to”**—The boxed material, chapter objectives, and end-of-chapter materials seek to emphasize research in action or steps used to perform different approaches illustrated in the text. Boxed materials take the form of Research Snapshots that cover ethical angles of research, provide illustrations of research in practice, and offer relevant tips or detailed “how-to” examples. The chapter learning objectives provide coherence and structure to the chapters, each culminating with objective-directed end-of-chapter materials. In later chapters, the Research Snapshots provide step-by-step guides describing how to perform many of the marketing analytics approaches.
- **Software Friendly**—*Essential* recognizes that different students and instructors interact with multiple software platforms. Here, the illustrations do not focus on a single software platform. Rather, the how-to guides illustrate how to perform different analysis routines in multiple platforms. Most advanced analytical/statistical tools are illustrated in SPSS, SAS, and JMP (a fast growing analytical tool). The more basic tools also include illustrations for EXCEL.

- **Substantial Coverage on International Business Issues**—The examples and illustrations make much greater use of international business. Readers of this book may end up working or dealing with issues anywhere in the world, so the increased international examples will increase awareness of research issues beyond North America and open up domestic students to global market dynamics. This is a particularly important emphasis because cultural and language barriers often present challenges for the researcher.
- **Substantial Attention to Qualitative Research**—Big data also creates a big demand for qualitative research tools. In response, several chapters provide insight into how to gather and use data not expressed in the form of quantities. Chapter 5 focuses exclusively on qualitative research. Phenomenology, grounded theory, ethnography, and case study approaches are all covered. Qualitative research is dramatically being changed by the Internet as consumers leave more and more artifactual data behind on social networking websites, company chat rooms, blogs, social networks, micro-blogs (such as tweets left on Twitter), and more. Just think about the potential gold mine of data available in all of the online consumer feedback, ratings, and recommendations.

Organization of the Book

The sixth edition of *Essentials of Marketing Research* follows the logic of the marketing research process. The book is organized into 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 the type of business orientation that characterizes a company. Included in this discussion is an overview of computerized data management and information systems, an overview of the entire marketing research process, and an explanation of how all of this is changing due to the Internet.

Without high ethical standards, no business is good. Thus, the introductory materials also include an emphasis on business ethics and the special ethical problems associated with marketing research.

Part 2: Designing Research Studies, covers the essentials involved in starting to study business problems. This part emphasizes decision-making, problem definition, and the process of how researchers translate business problems into research questions and perhaps even research hypotheses. The part includes coverage of research proposals 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 5 emphasizes qualitative research applications. One role played by qualitative research is helping to separate business problem symptoms from true issues that researchers can attack with marketing 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 marketing research.

Other chapters in this part include other ways of obtaining data. This includes a detailed discussion of secondary data and emphasizes its increasing importance in an increasingly data-rich world. Other chapters include descriptions of survey designs (how to conduct, administer, and design survey instruments) observational studies (data on actual consumer behaviors) and causal designs involving marketing experiments.

Part 3: Measurement, gives readers working knowledge of building blocks absolutely critical to effective marketing research. This part describes the basics of measurement theory. Key topics include descriptions of the different levels of scale measurement and how this affects 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 change options for respondents and the researcher? Students can again get firsthand experience with state-of-the-art questionnaire design and surveying tools with the Qualtrics assignments.

Part 4: Sampling and Sample Statistics, explains the difference between a population and a sample. Two chapters cover important issues that provide a basis for statistical inference. One important topic describes reasons why sampling is needed and why samples can be used to confidently allow predictions about larger numbers of people (i.e., populations). Another chapter provides useful guides for determining how large a sample is needed to make inferences with desired levels of confidence. Basic issues related to sampling distributions also are covered.

Part 5: Basic Data Analytics (and Reporting), covers basic processes necessary in translating raw data into market intelligence. The part presents some of the most commonly used methods for analyzing data. For instance, basic descriptive statistics related to central tendency and dispersion are discussed in detail as a basis for understanding approaches that follow. The chapters also cover inferential statistics including often-used univariate and bivariate approaches such as the chi-square test, *t*-tests, and simple regression. Elementary ANOVA applications are discussed in the context of analyzing experiments. Last, but certainly not least, the part concludes with a chapter on presenting research results. The chapter includes the outline useful in creating a student (individual or group) marketing research project. Also, basic guidelines for constructing research reports and presentations that are delivered orally or presented online are discussed.

The cases provide more variety and include some that involve analysis of internal marketing problems as well as an opportunity to use qualitative research. When quantitative data are included, they can be easily analyzed with basic statistical tools like SPSS or JMP. Excel files are also included with the same data. These files can be read directly by statistical programs like SAS, SPSS, JMP, or other programs. The sixth edition includes a new comprehensive case suitable for application of multivariate data analysis tools.

Superior Pedagogy

More than other marketing research textbooks, the sixth edition of *Essentials of Marketing Research* addresses students' need to comprehend all aspects of the marketing 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 the student should achieve before proceeding to the next chapter. The key is to avoid labeling everything a major learning objective and to provide the instructors with flexibility for emphasizing additional material from each chapter as they see fit.
- **Major Headings Keyed to Learning Objectives.** All 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. Example assessment rubrics are available in the instructional resources.
- **Research Snapshots.** All of the box materials share a common title, Research Snapshots. Each chapter contains three Research Snapshots. The boxes explore marketing research processes in a variety of modern businesses situations, ranging from international considerations to research ethics. In later chapters in particular, boxes illustrate research techniques and step-by-step instructions for producing statistical results across multiple platforms.
- **Writing Style.** An accessible, interesting writing style continues as 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 market research process. In addition, the text offers a comprehensive treatment of important and current topics.

- **Statistical Approach.** Given the increased emphasis in industry on marketing analytics, the sixth edition provides balanced coverage of data analytics. That said, the emphasis remains one that takes a simple approach to give full coverage to basic tools like those used to test hypotheses involving differences between means or relationships among variables. Cross-tabulation, *t*-tests, ANOVA, and regression are covered in sufficient depth to allow a student to master these techniques. The text includes screen shots to get students started running statistics using EXCEL, SAS, JMP, or SPSS, (check for software availability with this text) with easy-to-follow, click-through sequences.
- **Key Terms.** Learning the vocabulary of marketing research is essential to understanding the topic, and *Essentials of Marketing Research* 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.
- **Research Activities.** The end-of-chapter materials include a few real-world research activities intended to provide actual research experience for the student. Most provide an opportunity for the student to gain experience with multiple content areas. Some involve ethical aspects of research, and some involve Internet usage.
- **Cases.** Cases taken from real-life situations illustrate marketing 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. Video cases are also available via the instructor section of the book's website (www.cengagebrain.com).

Resources for Students

To promote learning and competency, it is also important to provide students with well-crafted resources. In addition to covering the latest information technology, the sixth edition includes the following student resources:

- To access additional course materials and companion resources, please visit www.cengagebrain.com. At the Cengage Brain home page, search for ISBN 9781305263475 using the search box at the top of the page. This will take you to the product page where free companion resources can be found.
- The Dedicated Website www.cengage.com/marketing/zikmund, developed especially for the new edition, includes chapter quizzes that allows you to test and retest your knowledge of chapter concepts. Each chapter has a quiz to encourage retesting. In addition, the website features downloadable flashcards of key terms, the very best online marketing research resources available, and much more.

Survey and analytical skills are essential to effective marketing research. Survey skills include an ability to translate research questions into survey items that respondents, usually consumers, answer. These answers produce data and analytics turns that data into market intelligence! *Essentials* provides students with real experience in both state of the art survey and analytical technologies. Students gain access to commercial quality survey creation and data analysis software with student versions of two market-leading products: The Qualtrics Research Suite for building surveys and *JMP* point and click statistical software from the SAS Institute. One access card (see the front of the book) provides a code and instructions for downloading *JMP* statistical software while another access card provides access to the Qualtrics Research Suite, the premier survey software tool in the industry, is bound inside the back cover of the book. Note that e-book versions of this title will not have access to these products. As well, some instructors might want to expose and assign the SPSS Statistical Software as part of their course. An optional packaging option providing students with access to SPSS is available with *Essentials of Marketing Research*. Contact your Cengage

Learning consultant for procedures for adding SPSS to your bookstore order. Following are descriptions of all of these products:

- *JMP* is a statistics software package for Windows and Mac computers from SAS, the market leader in analytics software and services. Unlike the traditional SAS interface, *JMP* provides point-and-click accessibility and integrates easily with Excel spreadsheets. *JMP* student edition is a streamlined, easy-to-use version that provides extensive marketing analytics capabilities and easily produces graphical output. The textbook provides many *JMP* illustrations. Once data is imported, students will find that most procedures require just two or three mouse clicks. *JMP* provides an interface to explore data visually and interactively, which enhances students' engagement with the data and enables them to tackle difficult statistical problems with ease. *JMP* can import data from a variety of formats, including Excel and other statistical packages, and you can easily import or copy and paste graphs and output into documents and presentations. *JMP* functions in the same way on both Windows and Mac platforms and instructions contained with this book apply to both platforms.
- The Qualtrics Research Suite was built for marketing researchers by marketing researchers. Enclosed with each new copy of *Essentials of Marketing Research* is an access code that gives you access to a tool that makes survey creation easy enough for a beginner while at the same time sophisticated enough for the most demanding academic or corporate researcher. Qualtrics allows you to create and deploy surveys, and provides data for analysis. A survey included in the book in the Survey This! box on page 4 invites users to respond to a sample survey. Then the sample survey data collected from students who have used *Essentials of Marketing Research* around the globe are made available for learning exercises throughout learning experience. Exercises and questions stemming from the survey engage students in critically evaluating survey items and questionnaire construction in the early chapters and in the later chapters, actual data provide a resource for hands-on analytics revealing insights into actual students' attitudes and behaviors. Qualtrics access requires the code provided in the access card available with each new copy of the book.
- SPSS Statistics Student Version provides real-world software for students to do data analysis with one of the world's leading statistical software packages. This student-friendly version is virtually identical to the professional version in function and appearance. Marketing faculty around the world have relied on SPSS for decades. SPSS Student Version promotes better decision-making and productivity through faster performance, accurate results, increased productivity and effectiveness using a range of specialized techniques. SPSS Student Version integrates with other technologies and tools, making it easy to access common data types, external programming languages, and file types. Access is available only when bundled with text. IBM SPSS Statistics Student Version for Windows (ISBN-10: 1285838033 | ISBN-13: 9781285838038)

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