



世界工商管理名典系列（影印版）

Marketing Research

An Applied Orientation

Second Edition

市场调研

（第二版）

Naresh K. Malhotra



清华大学出版社

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Preface

The motivation in writing *Marketing Research* was to provide a college text that is comprehensive, practical, applied, and managerial and that presents a balanced coverage of both qualitative and quantitative material. This book is written from the perspective of users of marketing research, and it reflects the current trends in international marketing, ethics, and the integration of microcomputers and mainframes into this field. Several unique features in terms of the content and presentation of the material make this book distinctive from others.

The response to the first edition was truly gratifying, and more than 100 universities adopted the book. I want to express my sincere thanks and appreciation to all the professors and students who, as users, reviewers, and providers of valuable feedback and encouragement, have contributed to the success of the book. This second edition attempts to build on this success to make the book even more current, contemporary, illustrative, and sensitive to user needs.

AUDIENCE

This book is suitable for use at both the undergraduate and graduate levels. This positioning is confirmed by the response to the first edition, which included adoptions at both levels. The coverage is comprehensive and the depth and breadth of topics encompass both levels. Yet the material is presented in a manner that is easy to read and understand. Diagrams, tables, pictures, illustrations, and examples explain the basic concepts. Special features designed for undergraduate students include acronyms, extensive exercises (questions, problems, and microcomputer and mainframe exercises), and activities (role playing, field work, and group discussion). Features that will appeal to graduate students include extensive notes and comprehensive coverage. An *Instructor's Manual* offers specific suggestions for teaching each chapter at the undergraduate and graduate levels. Activities (role playing, field work, and group discussion) have been moved to the *Instructor's Manual*. Not only is the book suitable for use in courses on marketing research, but it can also be effectively used in courses on marketing data analysis. All the commonly used univariate and multivariate data analysis techniques are discussed extensively yet simply.

ORGANIZATION

The book is organized into six parts, based on a six-step framework for conducting marketing research. Part I provides an introduction and discusses problem definition, the first and the most important step. The nature and scope of research undertaken to

develop an approach to the problem, the second step in the marketing research process, is also described. Part II covers research design, the third step, and describes in detail exploratory, descriptive, and causal research designs. The types of information commonly obtained in marketing research and the appropriate scales for obtaining such information are described. Several guidelines for designing questionnaires and explaining the procedures, techniques, and statistical considerations involved in sampling are also presented. Part III presents a practical and managerially oriented discussion of field work, the fourth step in the marketing research process.

Part IV is devoted to data preparation and analysis, the fifth step of the marketing research process. Here the basic and advanced statistical techniques are discussed in detail, with emphasis on explaining the procedures, interpreting the results, and uncovering the managerial implications, rather than on statistical elegance. Communicating the research by preparing and presenting a formal report constitutes the sixth step in the marketing research process and forms the subject of Part V. Finally, Part VI is devoted to the complex process of international marketing research and the ethical issues that arise in marketing research. Throughout the book, the orientation is applied and managerial.

NEW FOR THE SECOND EDITION

While retaining the desirable features, this second edition of *Marketing Research* contains major revisions. Several significant changes, identified by conducting surveys of professors (users and nonusers) and students and by obtaining critical reviews and detailed evaluations, were made, including the following.

1. *Integrated coverage of international marketing research.* A section on international marketing research has been added to each chapter. This section discusses and illustrates how the concepts in that chapter can be applied when conducting international marketing research. This section takes the form of a major heading, including at least one blocked example, in each of Chapters 1 through 14, 22, and 24. The data analysis chapters, 15 through 21, each contain a Research in Practice box that illustrates the use of the technique in an international context. The capstone chapter on international marketing research has been retained from the first edition, although in modified form. It now appears as Chapter 23 and presents only material not covered elsewhere in the text.
2. *Integrated coverage of ethics in marketing research.* A section on ethics in marketing research has been added to each chapter. This section discusses and illustrates the ethical issues that arise when implementing the concepts in the chapter. This section also takes the form of a major heading and includes one blocked example in each of Chapters 1 through 14, 22, and 23. The data analysis chapters, 15 through 21, each contain a Research in Practice box that illustrates the use of the technique in a marketing research ethics context. A capstone chapter on ethics in marketing research has been added as Chapter 24, which presents the various codes of ethics and develops a framework for ethics in marketing research. This framework incorporates various approaches: teleology—egoism and utilitarianism, deontology, hybrid, and objectivism.
3. *Newly revised sections entitled "Computer Applications."* These sections have been rewritten for Chapters 1 through 14, 22, and 23. Each section now discusses in detail a major software program and illustrates its use with one or more exhibits. The data analysis chapters, 15 through 21, retain the emphasis on the microcomputer and mainframe programs for SPSS, SAS, and BMDP packages.
4. *New figures, tables, exhibits, Research in Practice boxes, and text.* Where appropriate, new material has been added to either present new ideas (e.g., the changing nature of marketing research in Chapter 1, database marketing in Chapter 4) or clarify the subject (e.g., problem definition and approach development process in Chapter 2, cohort analysis in Chapter 3, a comparative evaluation of observation methods in Chapter 6). Such additions have been made throughout the text.

5. *New and updated examples and cases.* Several new examples have been added, some old ones have been deleted, and the remaining examples have been updated as appropriate. Some new cases have been added, and all the rest have been updated to reflect the current marketing and marketing research environment.
6. *Updated references.* Each chapter contains at least some references from 1993 or later.

FEATURES OF THE TEXT

The book has several salient and unique features, both in terms of content and pedagogy.

Content Features

1. A separate chapter has been devoted to problem definition and developing an approach. These important steps in the marketing research process are discussed thoroughly and extensively (Chapter 2).
2. A separate chapter covers secondary data analysis. In addition to the traditional sources, computerized databases and syndicate sources are also covered in some detail (Chapter 4).
4. Qualitative research is discussed in a separate chapter. Focus groups, depth interviews, and projective techniques are discussed in detail, with emphasis on the applications of these procedures (Chapter 5).
5. A separate chapter presents survey and observation methods (Chapter 6), and another discusses experimentation (Chapter 7). Thus, descriptive and causal designs are covered in detail.
6. Two chapters have been devoted to scaling techniques. One chapter is devoted to the fundamentals and comparative scaling techniques (Chapter 8), and another covers noncomparative techniques, including multiitem scales, and procedures for assessing their reliability, validity, and generalizability (Chapter 9).
7. A separate chapter discusses questionnaire design. A step-by-step procedure and several guidelines are provided for constructing questionnaires (Chapter 10).
8. Two chapters cover sampling techniques. One chapter discusses the qualitative issues involved in sampling and the various nonprobability and probability sampling techniques (Chapter 11). The other chapter explains statistical issues as well as final and initial sample size determination (Chapter 12).
9. A separate chapter presents field work. It provides several guidelines on interviewer training, interviewing, and supervision of field workers (Chapter 13).
10. The book is unique in the treatment of marketing research data analysis. Separate chapters have been devoted to:
 - a. Frequency distribution, cross-tabulation, and hypothesis testing (Chapter 15)
 - b. Analysis of variance and covariance (Chapter 16)
 - c. Regression analysis (Chapter 17)
 - d. Discriminant analysis (Chapter 18)
 - e. Factor analysis (Chapter 19)
 - f. Cluster analysis (Chapter 20)
 - g. Multidimensional scaling and conjoint analysis (Chapter 21)
11. To supplement the discussions throughout the text, an additional chapter explains international marketing research. The environment in which international marketing research is conducted is described, followed by a discussion of some advanced concepts (Chapter 23).
12. In addition to discussions throughout the text, another chapter has been devoted to ethics in marketing research. Some of the guidelines that aid managers and researchers alike in ethical decision making are described. A framework for ethics in marketing research is then proposed. The way in which ethics influence each step of the marketing research process is explained (Chapter 24).

Pedagogical Features

1. Scholarship is appropriately blended with a highly applied and managerial orientation. The application of marketing research findings by managers to improve marketing practice is illustrated throughout.
2. Several real-life examples, which have been boxed for clarity and impact, are given. These examples describe in some detail the kind of marketing research used to address a specific managerial problem and the decision that was based on the findings. Where appropriate, the sources cited have been supplemented by additional marketing research information to enhance the usefulness of these examples. Additional examples have been integrated throughout the text to explain and illustrate the concepts in each chapter further.
3. In addition, a real-life project is used as a running example to illustrate various concepts throughout the text. These illustrations, entitled "Department Store Patronage Project," are highlighted using a colored background. To make the running example comprehensive so that it covers all aspects of marketing research, an actual department store project is supplemented with other similar projects with which I was involved, although several aspects of these projects have been disguised. In other instances, as in the case of causal research design, how the relevant concepts can be applied in a department store setting are shown. Thus, the department store example spans the whole book and is easy to pick up in any chapter.
4. Each chapter contains Research in Practice boxes. These provide a further illustration of how marketing research concepts are being implemented in practice.
5. Another way in which a contemporary focus is achieved is by integrating the coverage of international marketing research and ethics in marketing research throughout the text. Discussions include how the concepts discussed in each chapter can be applied in an international setting and the ethical issues that may arise when implementing those concepts domestically and internationally.
6. The use of microcomputers and mainframes has also been integrated throughout the text. Each chapter has a section entitled "Computer Applications," which shows how microcomputers and mainframes can be integrated in each step of the marketing research process. Both types of computers are considered because both systems are used in practice, and abundant software has been developed to facilitate interaction between both.
7. Data analysis procedures are illustrated with respect to mainframes as well as microcomputers. SPSS, SAS, and BMDP mainframe and microcomputer packages are used, along with other popular programs. Thus, this book can be used as a text, regardless of the statistical package being used by the instructor.
8. Each chapter contains one or more helpful acronyms that summarize the salient concepts. Acronyms are the most popular mnemonic technique used by college students. Theoretical and empirical evidence supporting the effectiveness of mnemonic techniques and their usefulness as a pedagogical tool has been discussed in a paper I published in the *Journal of the Academy of Marketing Science* (Spring 1991): 141-150.
9. Each part contains Practitioner Viewpoints that feature articles by some of the leading marketing research practitioners, including practitioners from Market Facts, Burke, and Elrick and Lavidge. These articles complement the material in the chapters and further strengthen the applied orientation of the book.
10. Short and long real-life cases. Each part of the book contains some short cases that illustrate the concepts discussed. The conciseness of the cases will allow for their use in examinations. Some long cases are also provided, including some cases with statistical data. These cases are current and deal with topics of interest to students.
11. Extensive exercises and activities sections include questions, problems, microcomputer and mainframe exercises, role playing, field work, and group discussion and are found at the conclusion of each chapter. These provide ample opportunities for learning and testing the concepts covered in the chapter.
12. A complete set of learning aids, including an *Instructor's Manual*, tailor-made *Instructional and Tutorial Software* (for presentation of materials in class and for tutorials), *Test Item File*, and *Study Guide* have been provided.

INSTRUCTIONAL SUPPORT

- *Instructor's Manual.* Personally written by me, the entire *Instructor's Manual* is very closely tied to the text. The manual shows how to tailor the material in each chapter to the undergraduate and graduate levels. Each chapter contains transparency masters, chapter objectives, author's notes, a chapter outline, teaching suggestions, and answers to all end-of-chapter exercises and activities (questions, problems, microcomputer and mainframe exercises, role playing, field work, and group discussion). In addition, solutions are provided to all the questions in the cases, including those that involve data analysis. A disk containing statistical data for some of the cases is provided.
- *Test Item File.* Available for both IBM and Macintosh computers, this valuable test item file contains a wide variety of tests for each chapter that allow instructors to "create" their own exams.
- *Instructional and Tutorial Software.* This software, available for both IBM and Macintosh computers, covers the key material in each chapter including examples, figures, tables, and Research in Practice boxes. It can be used by the instructor for presenting the book material in the class as well as by students in the computer lab or at home as a tutorial.
- *Exercises in Marketing Research.* Written by Naresh K. Malhotra and Chulwan Kim, this guide is designed to give students practice in marketing research. It presents four real-life scenarios, with exercises framed on all the phases of the marketing research process, from problem definition to report presentation. A questionnaire and statistical data are provided for each case, and solutions to exercises are discussed.

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Most of all, I want to acknowledge and thank my Savior and Lord, Jesus Christ, for the many miracles He has performed in my life. This book is, truly, the result of His grace. "This is the Lord's doing; it is marvelous in our eyes" (Psalm 118:23).

Naresh K. Malhotra

About The Author

NARESH K. MALHOTRA is Regents' Professor at the Georgia Institute of Technology. He is President of the Academy of Marketing Science, Distinguished Fellow of the Academy of Marketing Science, and Fellow of the Decision Sciences Institute. He has published more than 60 papers in major refereed journals including the *Journal of Marketing Research*, *Journal of Consumer Research*, *Marketing Science*, *Journal of Marketing*, *Journal of the Academy of Marketing Science*, *Journal of Retailing*, *Journal of Health Care Marketing*, and other leading journals in the fields of statistics, management science, and psychology. In addition, he has also published numerous refereed articles in the proceedings of major national and international conferences.

Malhotra has published nine papers in the prestigious *Journal of Marketing Research*. In an article by Wheatley and Wilson (*AMA Educators'*

Proceedings, 1987), Malhotra was ranked first in the United States based on articles published in the *Journal of Marketing Research* from 1980 to 1985. He is also ranked first in the country based on articles published in the *Journal of Health Care*

Marketing from its inception to 1994. (This analysis was conducted by William Gombeski, Jr., editor of that journal.) Malhotra is the recipient of numerous awards for research, teaching, and service to the profession.

He is also an active marketing and marketing research consultant and has consulted for private, public, nonprofit, and government organizations in the United States and abroad. He has served as an expert witness in regulatory and

legal proceedings.

Dr. Malhotra is a member and deacon of the First Baptist Church of Atlanta. He lives in the Atlanta area with his wife, Veena, and children, Ruth and Paul.



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