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BASIC MARKETING RESEARCH

营销调研基础

[第6版]

小吉尔伯特·A. 丘吉尔 (Gilbert A. Churchill, Jr.) 著
汤姆·J. 布朗 (Tom J. Brown)



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Basic Marketing Research, 6th edition

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出版者说明

进入 21 世纪,市场营销科学在中国开始向纵深发展,一方面,广大营销学者继续追踪国际学术界在市场营销研究前沿的探索和深化,另一方面,学者们也在致力于发展对中国现实更具解释力的营销理论,并且在这两个方面,都取得了非常实质性的进步和成果。营销学是一门应用科学,随着社会和经济的发展,许多新问题、新现象不断出现,新的营销理论和观点也纷纷出现,国内外学术界的研究兴趣点也就相应发生变化。在中国,营销现实日渐变得丰富多彩,理论研究逐步规范化和科学化,高等院校的教学内容和方式也随之发生了很大变化,教师和学生都不再满足于 20 世纪 80 年代引进的一批偏重管理学的“营销学理论”教科书。营销学科在中国的日渐成熟和发展,迫切要求具有更高学术水平和更强现实指导能力的教科书,不但能够带给学生最前沿、最深刻的学术思想和从事研究的科学方法,而且教给学生在实际工作中进行正确决策的科学指导。

基于此,北京大学出版社引进出版了《营销学精选教材》系列丛书(本丛书包括影印版和翻译版,个别影印版有局部删节),在选择这些书的过程中,我们得到了北京大学光华管理学院郭贤达老师,西安交通大学管理学院庄贵军老师,武汉大学经济管理学院汪涛老师,大连理工大学管理学院董大海老师,中国人民大学商学院李先国老师等学者的真诚帮助,在此,对他们表示最诚挚的感谢!我们希望这些书带给广大读者的是对营销科学的兴趣和激情,是深刻的学术思想和科学的研究方法,是从事营销实际工作时最好用的工具,同时也是广大教师和学生最好用的教科书。

《营销学精选教材》是一个开放的系列,根据现实情况的发展和需要,我们还会陆续引进其他品种,在此,诚邀各位专家学者热情推荐优秀的营销学图书(em@pup.pku.edu.cn)。此外,真诚欢迎广大读者在使用过程中对我们的图书提出宝贵的意见和建议。

北京大学出版社
经济与管理图书事业部
2005 年 12 月

20世纪80年代,市场营销学开始在我国迅速传播和发展。80年代以来,设立该专业或开设市场营销学课程的高等院校数量显著增多,研究工作亦有显著的进展。尤其是90年代以来,随着中国市场化改革进程的加快,社会急需大量的受过专业训练的市场营销人才,更是推动了我国高等院校中市场营销专业教育的迅猛发展。自此以后,市场营销学可以说是基本上实现了在我国的启蒙和普及。

随着第一阶段启蒙和普及目标的实现,当前国内对于市场营销的研究和教育开始向两个方向发展:其一就是对当前国际学术界在市场营销研究前沿的追踪和深化;其二就是结合国内市场环境的特点和经济发展的需要,实现市场营销理论的本土化,发展对中国现实更有解释力的市场营销理论。我想,这两个方向会在相当长一段时间内影响国内市场营销学的研究和教育。

营销研究的转型必然要求营销知识的传播机构,主要包括高等教育机构以及出版机构,也要做相应调整。以出版为例,在20世纪营销知识的传播和普及中,出版机构扮演着非常重要的角色。实际上,正是菲利普·科特勒博士的《营销管理》教材的引入(我印象中最早的版本是科学技术文献出版社出版的第6版)奠定了国内营销研究的学科基础,而该书从第6版直到第11版的先后引入,也见证了国内市场营销学科快速发展的历程。可以说,在国内其他领域,还很少看见一本教材会对一个学科的教学和研究能产生如此巨大和广泛的影响。然而,从另一个角度,这也许同样暴露出当前国内营销知识传播中所面临着的尴尬境地:如果说一门学科可以只用一本教科书来概括,至少说明我们对这个学科的理解和解说还缺乏足够的甚至是必要的张力和活力。

首先,按照美国市场营销学会会刊主编瓦格纳·卡马库拉的观点,市场营销学是在管理学、行为科学(心理学和社会学)和定量分析(数学和计量经济学)这三门较成熟学科的基础之上发展起来的独立学科。因此,市场营销学之中有三个侧重:侧重于管理学的叫做“市场营销学理论”,侧重行为科学的称为“消费者行为学”,而侧重营销方法论以及由此延伸出的定量分析手段的则是“市场营销科学”。所以,在市场营销的知识体系中,科特勒博士的《营销管理》只是涉及市场营销理论部分(我个人认为,本书只是营销学的入门读物,对于研究生以上层次并不适用),而营销科学(研究方法)以及消费者行为理论却没有得到同样的重视。

其次,不可否认,科特勒博士的《营销管理》确实是一本非常好的教材,他为市场营销学构建了一个较为全面的分析框架,但是他更强调一个完善的理论体系的勾勒,强调对众家之言的兼容并包,对该体系中的很多主题,却缺乏更详细的扩展和讨论。例如,渠道策略和价格策略是该书公认的薄弱章节。

最后,有些新的营销理论和观点,由于研究视角和范式的不同,很难被该书兼容,因而得不到全面的体现,如服务营销、关系营销以及组织市场营销等。

因此,也许除了科特勒,我们还应该再看点别的。

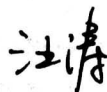
所以,我们迫切需要更加丰富和高质量的市场营销出版物。

北京大学出版社所引进出版的“市场营销学精选教材”则很好地顺应了这一要求。目前入选该套丛书的著作有三本,分别是 Roland T. Rust, Katherine N. Lemon 和 Das Narayandas 合作撰写的 *Customer Equity Management*, Roger J. Best 教授撰写的 *Market-based Management: Strategies for Growing Customer Value and Profitability* 以及 James C. Anderson 与 James A. Narus 撰写的 *Business Market Management: Understanding, Creating, and Delivering value*。这是一个开放性的书系,以后还将根据需要,陆续引进其他的品种,欢迎各位专家学者的推荐。

这些入选著作有一些共同特点:其一,这些作者均系出名门,具有深厚的理论素养,在各自领域中均为蜚声世界的大家。其二,虽然这些著作都具有极强的学术价值,但全然不是“书斋的学问”。由于这些作者在理论研究之余,均具有丰富的咨询和实践经验,这就决定了这些著作不会耽于说教、“语言无味,面目可憎”,而是深入浅出,令人耳目一新。

一般说来,一本好的营销学教材应该具备如下的重要特点:首先,一本好书应根植于对某一领域的实际研究,而许多书籍只是给学生提供了一个基于抽象的理论基础上的简单的提纲。另外,一本好书应该让学生和营销实践者们很容易看懂,并能在其指导下制定成功的策略,为此,好的教材应列举大量的相关案例,分析具有创造性的策略并结合实际进行评述。而很多书籍要么在论述时缺乏丰富的案例,要么在分析时缺乏理论的深度。

而在这两方面,该套丛书均表现出优秀教材的素质:大度、深刻且平易近人,相信它不仅对于市场营销理论的研究和学习,而且对于营销实务的操作和实践,都是极好的指南。



武汉大学市场营销系教授
2005年10月于珞珈山

关于本书

适用对象

本书适合做市场营销专业本科生和研究生营销调研课程的教材,也可用做营销管理人员的培训教材和参考书。

内容简介

《营销调研基础》(第6版)以实用性为宗旨,通过将研究问题的过程分成几个基本步骤,为优秀的营销经理和市场研究人员作选择和决策提供了一个清晰的框架,这些步骤包括:(1)形成问题;(2)确定研究方法;(3)确定数据收集方法;(4)设计数据收集形式;(5)选择样本并收集数据;(6)分析数据;(7)形成研究报告。

作者简介

小吉尔伯特·A. 丘吉尔(Gilbert A. Churchill, Jr.)

美国威斯康星州立大学营销学教授,印地安那州立大学管理学博士。丘吉尔教授曾被美国市场营销协会授予“杰出营销教育者”称号,以表彰他在营销教育方面的卓越成就。鉴于丘吉尔教授在营销领域作出的重要学术贡献,美国市场营销科学学会于1993年授予他终身成就奖。他还于1996年获得了Paul D. Converse奖,该奖项由来自全世界多所知名大学、企业和政府机构的评委评定,只授予那些最有影响力的营销学者;同年他还获得了美国市场营销协会授予的Charles Coolidge Parlin终身成就奖。2002年美国市场营销协会专门设立了Gilbert A. Churchill, Jr.终身成就奖,该奖项每年评选一次,授予一名在营销调研领域作出重要贡献的营销学者。丘吉尔教授曾在JMR等营销领域的权威学术期刊上发表多篇文章,并曾获得William O'Dell奖,也曾与他人合著多本深受欢迎的营销学教材。

汤姆·J. 布朗(Tom J. Brown)

威斯康星州立大学博士,俄克拉荷马州立大学营销学教授。布朗教授一直为本科生讲授营销调研课程,并领导学生为非营利组织和世界500强企业做了多个营销调研项目。他曾在JMR等营销领域权威学术期刊上发表论文多篇。

本书特色

书中除了在每章的开始明确本章学习目的、以章末小结回顾本章重点,每章最后还附有本章术语的解释,章末设有复习题、讨论题及调研实践问题,此外,还设有以下颇具特色的专栏:

- 经理关注:让读者更好地理解营销经理是如何处理特定信息的。
- 调研之窗:讲述现实中公司面临的营销调研问题,并给出解决建议。
- 调研技巧:在谈及营销调研技巧性问题时,适时地为读者进一步提供有关该技巧的具体信息。

● 部分综合案例:第一部分到第六部分的末尾都附有本部分的综合案例,帮助读者提高其评价和分析能力。

本版更新

《营销调研基础》(第6版)对全书进行了全方位的修改和完善,更贴近现实,可读性更强,也更容易被读者理解和接受。

- 对原有的案例、图片、数据等进行了修正和更新
- 增加了“经理关注”专栏,使读者能更好地理解营销经理是如何处理相关信息的
- 增加了25个新的“调研之窗”

教辅资源

- 教师手册
- 教学用PPT
- 试题库

出版声明

本书是对国外英文原版教材的直接影印,由于各个国家政治、经济、文化背景的不同,对原作者所持观点,还请广大读者在阅读过程中加以分析和鉴别。

To our grandchildren

Kayla Marie

Johnathan Winston

Kelsey Lynn

Sean Jeffrey

Ethan Thomas

Averie Mae

(Gilbert A. Churchill, Jr.)

**To DiAnn, Drew, Taylor, Avery, and Brady
(Tom J. Brown)**

Preface

Basic Marketing Research, 6th edition provides an introductory look at marketing research for undergraduate students, managerially oriented graduate students, or anyone who wants an appreciation of the marketing-research process. Our goal was to produce a readable book that overviews the information-gathering function from the perspective of both researchers who gather the information and marketing managers who use the information. The book can be used in either one- or two-quarter sequences or in semester courses.

Marketing research can be a complex topic. It involves a number of questions that need to be answered and a number of decisions that need to be made in order to develop valid, usable information. *Basic Marketing Research* provides a framework for the choices and decisions that must be made. This is important, because decisions made in one stage of the research process have consequences for other stages. Managers and marketing researchers both need to appreciate the interactions among the parts of the research process so they can have confidence in a particular research result.

Organization

Basic Marketing Research, 6th edition is intended to serve both aspiring managers and aspiring researchers by breaking the research process down into the basic stages that must be followed when answering a research question. These stages are

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

Organizing the material in this book around the stages in the research process has 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. Readers can easily see, for example, the relationship between problem definition and an appropriate research design, or between the type of research design and the different data collection forms that might be used. Third, the organization permits the instructor some flexibility with respect to the order in which the parts of the marketing-research process may be covered.

Key Features

Basic Marketing Research has several special features to enhance the teaching and learning experience. The general approach used to discuss topics is to provide readers with the pros and cons of the various methods used to address a research problem and then to develop an

appreciation of why these advantages and disadvantages arise. Our hope is that managers and researchers will be able to creatively apply and critically evaluate the procedures of marketing research. Other important features include the following.

Learning Objectives. A set of learning objectives in each chapter highlights the most important topics covered in the chapter. The learning objectives are repeated in the margins in the chapter where the topics are discussed, and are then reinforced point by point in the chapter summary.

The Manager's Focus. These short sections throughout each chapter provide insights into how the information in a particular section is relevant to marketing managers. The goal is to emphasize the role of marketing managers in the research process and to offer guidelines for achieving the most usable results. Some examples include how to determine if a focus group is useful (Chapter 5), understanding different levels of measurement (Chapter 12), and how nonsampling errors enter a study (Chapter 17).

Jon Austin, who teaches marketing research at Cedarville University and has a strong background working with clients in industry, provided the inspiration—and most of the writing—for “The Manager’s Focus.”

Key Terms with Definitions. 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. A complete **Glossary** is also included at the end of the text.

Research Windows. The Research Windows provide a view of what is happening in the world of marketing research, describe what is happening at specific companies, and offer some specific how-to tips. They serve to engage the readers’ interest in the chapter topic and to provide further depth of information. Some examples include *Data Security Issues Heating Up* (privacy breaches, various companies, Chapter 2), *VISA: Using Strategy-Oriented Research to Select a New Brand Mark*, (Visa, Chapter 4), *The Naked Truth about Shower Heads* (Moen, Inc., Chapter 9), and *Me, Doctor Mullet, and a Market-Research Mess*, (professional marketer completes a survey, Chapter 10).

Technically Speaking Features. These are placed where appropriate to provide readers with additional detailed information about some of the technical topics presented, such as *Brand-Switching Analysis* (Chapter 6) and *Operation of the Randomized-Response Model* (Chapter 14).

Photos and Cartoons. Visual reinforcement serves to stimulate interest and to bring concepts. Throughout the book, photos provide readers with a look at how various aspects of the research process are conducted.

End-of-Chapter Reinforcements. Discussion questions, problems, and/or projects are found at the end of each chapter. These features provide the opportunity to apply the chapter topics to focused situations, thereby honing readers’ analytical skills and developing first-hand knowledge of the strengths and weaknesses of various research techniques.

End-of-Part Cases. Case analyses for Parts 1 through 6 deal with each stage in the research process. These cases assist readers in developing their own evaluation and analytical skills. They are also useful in demonstrating the universal application of marketing-research techniques. Marketing-research methods 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. Cases include diverse entities and issues, and many represent real-life situations, though some of them have been disguised to protect the proprietary nature of the information. Additional cases are available for download from our Web site, www.thomsonedu.com/marketing/churchill.

Raw Data. Data are provided for several of the cases to allow readers to perform their own analyses to answer questions. These data are available to adopters on the text Web site.

Changes to the Sixth Edition

This sixth edition of *Basic Marketing Research* brings with it several changes. The structure of the book remains largely the same; however, we have streamlined, reworked, and rearranged the chapters where appropriate to make it more accessible and appealing to our

readers. At the same time, however, we maintain the scholarly standards the book has created throughout its previous editions. We have focused our efforts on the practical aspects of conducting marketing research—the general “how-to,” including key issues and possible problems and their solutions. Through extensive examples, we demonstrate how the concepts and techniques presented are put into practice.

The most obvious change in this edition is an explicit focus on what the content means for managers. Many of our readers will not go on to careers in marketing research, but virtually everyone who reads our book will encounter marketing research or public opinion polling results in their business careers or everyday lives. Dozens of newly developed short sections entitled “The Manager’s Focus” appear throughout the book, each offering an insight into what the associated information means for managers.

Of the twenty-two cases included in this edition, five are new. In the process of streamlining the book, twenty-five cases appearing in the previous edition were moved to the book’s Web site. Instructors who want to use those particular cases still have complete access to them.

Existing examples, exhibits, figures, and so on, have been revised and updated throughout the book—and many new ones have been added. For example, we have added twenty-five new Research Windows. Here are a few highlights of other changes we have made.

- All chapters have been updated and streamlined where possible to make the book current and accessible to its intended audience.
- In Chapters 11 and 21, we’ve added interviews with Don Schultz, who offers a strong recommendation for using behavioral research techniques (Chapter 11), and gives his views on the current state of marketing research within the organization based on his consulting experiences worldwide (Chapter 21).
- Chapter 4 includes a presentation of the marketing research process that Visa managers used to devise and test a new brand mark. Visa managers worked with us to develop a thorough overview of the process they employed. In this chapter we also include an example of a research request agreement used in a project for a not-for-profit organization.
- We listened to our reviewers and worked diligently to improve the flow of the book. As a result, we shifted content from one chapter to another, expanded on certain points, and reduced content as necessary. Some of the changes include
 - Moving the discussion of projective techniques to Chapter 5 with the discussion of exploratory research techniques
 - Combining the discussion of different methods of sampling into a single streamlined chapter (Chapter 15)
 - Reordering the chapters in Part IV (Chapters 12 through 14) on data collection forms
 - Extensively rewriting Chapter 10 to more clearly present advantages and disadvantages of different methods of collecting communication data, including a new focus on using Internet-based approaches.
 - The sources of secondary information (Chapter 7) and its appendix have been carefully reviewed and updated.
 - We’ve added Internet addresses where possible, to enhance reader access to the sources.

Supplements

Instructor’s Resource CD-ROM (IRCD)

The **Instructor’s Resource CD-ROM (IRCD)** is a new supplement to the text that includes everything instructors need for teaching the marketing research course. On the IRCD you’ll find complete files for the Instructor’s Manual, the Test Bank in Microsoft Word, the Exam-View testing software, the PowerPoint Presentation slides, and the data sets. In addition, all supplements are available on the text Web site.

Text Web Site

(www.thomsonedu.com/marketing/churchill)

For Instructors

Completely new for this edition of the text, you'll find all instructor's resources on the text Web site.

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Also on the text Web site for students are

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- Book Resources (Career Topics, Market Topics, News Room)
- Course Resources (Marketing Careers, Marketing Resources, Marketing in the News)

Visit us at www.thomsonedu.com/marketing/churchill.

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Gilbert A. Churchill, Jr.

Madison, Wisconsin

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Tom J. Brown

Stillwater, Oklahoma

About the Authors

Gilbert A. Churchill, Jr., received his D.B.A. from Indiana University in 1966 and joined the University of Wisconsin faculty upon graduation. Professor Churchill was named Distinguished Marketing Educator by the American Marketing Association in 1986, the second individual so honored. This 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, which is given to the most influential marketing scholars, as judged by a national jury drawn from universities, businesses, and government. Also in 1996, the Marketing Research Group of the American Marketing Association established the Gilbert A. Churchill, Jr., lifetime achievement award, which is to be given each year to a person judged to have made significant lifetime contributions to marketing research. In 2002, he received the Charles Coolidge Parlin lifetime achievement award from the American Marketing Association for his substantial contributions to the ongoing advancement of marketing research practice.

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 is a co-author of the most and third most influential articles of the past century in sales management as judged by a panel of experts in the field. He has served as consultant to a number of companies including Oscar Mayer, Western Publishing Company, and Parker Pen.

Professor Churchill's articles have appeared in such publications as the *Journal of Marketing Research*, *Journal of Marketing*, *Journal of Consumer Research*, *Journal of Retailing*, *Journal of Business Research*, *Decision Sciences*, *Technometrics*, and *Organizational Behavior and Human Performance*, among others.

In addition to *Basic Marketing Research*, Professor Churchill is the co-author of several other books, including *Marketing Research: Methodological Foundations*, 9th ed. (Mason, OH: Southwestern, 2005); *Marketing: Creating Value for Customers*, 2nd ed. (Burr Ridge, IL: Irwin/McGraw-Hill, 1998), *Sales Force Management: Planning, Implementation, and Control*, 6th ed. (Burr Ridge, IL: Irwin/McGraw-Hill, 2000); and *Salesforce Performance* (Lexington, MA: Lexington Books, 1984). He is a former editor of the *Journal of Marketing Research* and has served on the editorial boards of the *Journal of Marketing Research* and *Journal of Marketing*, among others. Professor Churchill is a past recipient of the Lawrence J. Larson Excellence in Teaching Award.

Tom J. Brown, received his Ph.D. from the University of Wisconsin-Madison in 1994. Prior to joining the marketing faculty at Oklahoma State University, he served on the faculty at Southern Methodist University. Professor Brown teaches marketing research and has supervised dozens of student research projects for industry clients ranging from not-for-profit service organizations to Fortune 500 companies.

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Professor Brown'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 the Academy of Marketing Science*, the *Journal of Retailing*, the *Journal of Service Research*, the *Journal of Services Marketing*, *Marketing Health Services*, the *Cornell Hotel and Restaurant Administration Quarterly*, and *Corporate Reputation Review*. His research interests include the development of corporate image and its influences on various constituent groups, as well as aspects of services marketing. He has served on the editorial review boards of the *Journal of the Academy of Marketing Science* and *Corporate Reputation Review* and is cofounder of the Corporate Associations/Identity Research Group.

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