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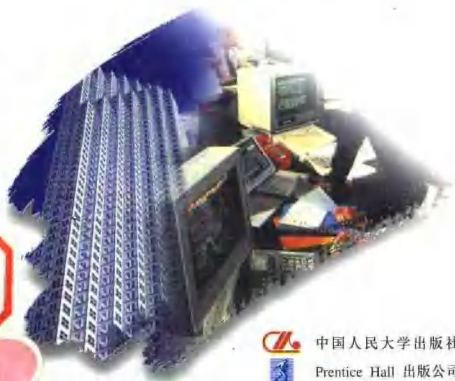
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市场营销调查

MARKETING RESEARCH

彼得·M·奇斯耐尔 著

Peter M. Chisnall



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《工商管理精要系列·影印版》

出版说明

《工商管理精要系列·影印版》是中国人民大学出版社和西蒙与舒斯特国际出版公司继《工商管理经典译丛》之后，共同合作出版的一套大型工商管理精品影印丛书。

本丛书由欧洲著名管理学院和管理咨询公司的教授和专家撰写，它将 90 年代以来国际上工商管理各专业的最新研究成果，分门别类加以精练浓缩，由享誉世界的最大教育图书出版商 Prentice Hall 出版公司出版。每一本书都给出了该专业学生应掌握的理论框架和知识信息，并对该专业的核心问题和关键理论作了全面而精当的阐述。本丛书虽然篇幅不长，但内容充实，信息量大，语言精练，易于操作且系统性强。因此，自 90 年代初陆续出版以来，受到欧洲、北美及世界各地管理教育界和工商企业界读者的普遍欢迎，累计发行量已达数百万册，是当今国际工商管理方面最优秀的精品图书之一。

这套影印版的出版发行，旨在推动我国工商管理教育和 MBA 事业的发展，为广大师生和工商企业界读者，提供一套原汁原味反映国外管理科学研究成果的浓缩精品图书。有助于读者尽快提高专业外语水平，扩大知识面，掌握工商管理各专业的核心理论和管理技巧。

本丛书可作为管理院校的专业外语教材和各类企业的培训教材，对于那些接受短期培训的企业管理者、MBA 学生，以及想迅

速了解工商管理各专业核心领域的师生来说，本丛书更是极具价值的藏书和参考资料。

为了能及时反映国际上工商管理的研究成果，中国人民大学出版社今后将与 Prentice Hall 出版公司同步出版本丛书的其他最新内容并更新版本，使中国读者能借助本丛书，跟踪了解国际管理科学发展的最新动态。

1997 年 8 月

Preface

Marketing research has a specific function: to aid effective planning and decision making in markets. These may be of many kinds and involve consumer, industrial, commercial and institutional activities.

In my well-established (and lengthier) book on marketing research (McGraw-Hill, 3rd edition, 1986), I proposed that marketing research should be viewed as a form of applied research which, while imposing on its practitioners the rigours and discipline of scientific enquiry, has a pragmatic purpose. Hence, an objective posture and systematic methods of enquiry are vital constituents of marketing research.

This text aims to give concise yet comprehensive information about the nature, scope, tools and techniques of marketing research. Deliberately, academic references are minimal; the focus has followed the title of this publishing series, namely to concentrate on the essence of this versatile and indispensable approach to the development of successful marketing strategies. To illustrate some of the many applications of marketing research I have, through the goodwill of the Market Research Society and the Managing Editor of *Survey*, Ms Phyllis Vangelder, and with the ready cooperation of the authors, included some short case histories. I am very grateful for their generous and professional help. I should also thank the executives of one of the leading North West research companies who kindly provided the case history entitled *Evaluating Direct Selling Effectiveness*.

This book is distilled in part from my larger academic text, and I am grateful to McGraw-Hill for their pleasant cooperation and willing agreement.

I must also thank the following leading market survey organ-

Preface

izations: IPA (JICNARS), CACI International, Research International (RBL) and Research Services Ltd ('Sagacity') which have kindly allowed me to reproduce details of some of their services. In addition, the extracts from the *Standard Industrial Classification* (Revised 1980) are given by permission of the Controller of Her Majesty's Stationery Office. I also acknowledge with pleasure the friendly and professional help of my publishers with whom I have earlier collaborated in the production of *Strategic Industrial Marketing*, and last, but certainly not least, my thanks are given to Mrs Mary Mason of Dublin Business School for her secretarial expertise in producing, at short notice, a typescript of high standard.

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Introduction

The successful development of a business calls for entrepreneurial flair and good organizing ability. Without entrepreneurial energy and leadership, businesses are unlikely to prosper, particularly in the highly competitive environment which typifies most industries today. The function of marketing is to assume the role and responsibilities of the entrepreneur whose traditional role has been to interpret market requirements and to relate these to the resources which are currently available, or which it may be feasible to acquire within the medium and long term.

These tasks are common to all organizations, whether they are primarily motivated by profits generated through competitive activities, or they are active in providing, for example, health, social or educational services in the public sector.

In all these diverse activities, customer or client orientation should be the motivating force; the precept, as Adam Smith observed over two hundred years ago, is simple but the practice is frequently complex. This sequential approach is outlined in Figure 1.1.

Vital inputs to business success

When businesses were small and their customers few, specialized functions of management were largely unnecessary. The sturdy founders of these early enterprises knew their customers well and had almost daily contact with them. But as businesses grew bigger and markets expanded geographically as well as in total sales, distinct functions of management evolved. In modern business practice the specialized functions of management are interdependent; expertise

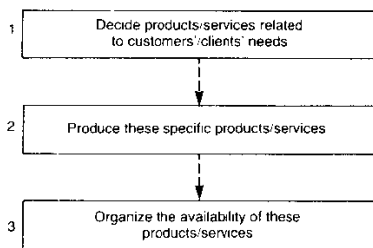


Figure 1.1 Sequential approach to principal tasks of management

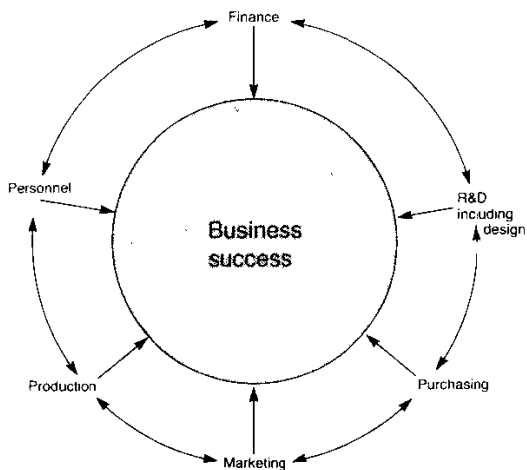


Figure 1.2 Vital inputs to business success

from production, purchasing, personnel, research and development (R and D) (including design) and finance contribute to business success. These vital marginal inputs and relationships are shown in Figure 1.2.

Marketing expertise is a necessary but not sufficient condition for success in competitive environments. Linkages between management specialisms should be actively forged; marketing management should make sure that everyone in their company is aware of the nature of their markets, for example customers' needs and competitors' activities, so that a real team effort takes place through every department of the firm.

Information about markets, i.e. market research data, should be discussed with designers, production engineers, purchasing officers and so on. Marketing research should not be hoarded and used merely by marketing departments; full value should be extracted from such important data so that, for example, product improvements and innovations can be planned to coincide with the needs of specific market segments.

Marketing: a business philosophy and a management function

Marketing has two important aspects: it is a basic philosophy of business which is inspired by the wish to serve customers well so that they will buy (and continue to buy) the goods and services offered to them by individuals and competing suppliers. Customer orientation is the motivating force behind such businesses; no customers: no business.

Marketing is also a specialized function of management and has a key role in building profitable businesses. It has already been seen that in small businesses the owner or general manager will undertake many responsibilities, including those of marketing management, but as companies grow larger marketing becomes more sophisticated and specially trained management is necessary.

Critical facets of marketing management

Three special areas of activity are involved in successful marketing management:

1. Analysis.
2. Planning.
3. Control.

In real life these functions overlap, but they are distinguished here for purposes of discussion.

Analysis

This is a particularly critical responsibility of marketing management: it relates to finding out about the markets in which a company operates at present or which it is planning to enter. Through systematic market research present and emergent needs will be identified, analysed and evaluated. Both quantitative and qualitative assessments should be involved so that a comprehensive view can be taken of market behaviour and opportunities.

Planning

Planning follows logically from the analytical approach, which is the hallmark of professional marketing. From the data derived from the marketing research process, management should be in a position to select markets suitable for exploitation; products and services designed to satisfy the identified needs of specific markets should then be developed – as discussed earlier under the heading ‘Vital inputs to business success’.

Apart from developing new products and services, existing ones can be improved as the result of information gathered through objective market enquiries. Many companies are alert to the need to improve and update their products from time to time. Fundamental changes in technology also underly the urgency of keeping closely in touch with market behaviour; technological change and planned obsolescence affect not only consumer products but, increasingly, industrial demand. New competitors may also enter markets and challenge the long-held supremacy of traditional suppliers.

In general, there is no shortage of production capacity in modern industrialized economies; there is certainly a dearth of really talented

Introduction

marketing skills, particularly in organizational supplies (this will be further discussed later). Strategic planning sets the direction and pace of a business and maps the route it should take for its long-term success.

Control

Control – the third area of successful marketing – is vital to the productivity of a business or, indeed, any type of organization. Standards of performance (for example cost/sales ratios, market share, territory quotas, product performance, etc.) need to be set and closely monitored.

Cost effectiveness measures the performance and progress of a business in many ways. For example, distribution as well as production needs to be carefully investigated for its relative contribution to overall success. Continuous monitoring of sources of supply of essential raw materials and components ensures that the final products are produced to consistently high standards. Marketing management, as previously mentioned, should recognize that success in markets depends substantially on total commitment to management control throughout the business and an awareness of the need for specialists in marketing, production, design, finance, purchasing, personnel, etc. to work creatively together to achieve the objectives of the organization to which they all belong.

SUMMARY

Business success is built up from identifying and serving the needs of customers efficiently. Marketing management has three distinct aspects: analysis, planning and control. Market research is the crucial analytical approach and provides management with vital strategic and tactical information for decision making.

Marketing research

Nature of marketing research

Marketing research is concerned with the systematic and objective collection, analysis and evaluation of information about specific aspects of marketing problems in order to help management make effective decisions. Marketing research is not an end in itself; it is a means to an end – the improvement of decision making. These decisions may affect the nature and range of products, pricing policy, distribution strategy, promotional activities and so on; in fact, virtually every aspect of serving customers or clients well – from the idea stage onwards.

The complexity of modern business decisions calls for reliable knowledge of diverse markets. Managerial experience and judgement are, or course, important ingredients of decision making, but they should be reinforced and expanded by objective data from systematic field investigations.

Perhaps the term 'marketing research' (or 'market research' – a popular synonym) has discouraged wider adoption of this management technique. To commercial management it may, perhaps, have overtones of pure academic research, such as that conducted in a research laboratory under controlled conditions, divorced from 'reality' and perceived to be of little direct help in making difficult business decisions. However, this is not so, for marketing research, while adopting a scientific approach and using some of the well-tested methodologies of scientific investigations, is nearer to the function of

field intelligence than of the research laboratory. Indeed, it would be more appropriate to consider marketing research as a form of applied research which, while imposing on its practitioners the rigours and discipline of scientific enquiry, has a pragmatic purpose. Without this scientific orientation, marketing research would have little validity; it would degenerate into subjective assessments of market behaviour.

Liberal roots of marketing research

Marketing research has borrowed liberally from other disciplines; this is not surprising, as research methodologies and techniques have application over many fields of study. Like other emerging disciplines, marketing research theory has been developed by creative adaptation rather than blind adoption. For example, from statistics marketing research has taken the theory of sampling which is fundamental to the whole process of objective enquiry; from economics have been borrowed descriptive analyses of the structure of industries, business trends and general economic data; psychology, sociology and cultural anthropology have contributed concepts of human behaviour which have enriched earlier economic projections of buying behaviour. Concepts such as social class structure, group behaviour, social trends and cultural influences leading to customs, conventions and taboos have been assimilated by marketing researchers. This process of selective borrowing, adaptation and synthesis has enabled marketing research to make a unique contribution to management decision making; it should be the core element of marketing strategy.

Importance of relevant data

Managers should not expect too much from marketing research; objective data need skilful interpretation. It is feasible for the data to be of exceptional quality but for the wrong decisions to be taken, perhaps because the data have been misinterpreted and/or wrong prognoses have been made. The fact that techniques such as marketing research reduce the element of risk in management decisions does not absolve managers from exercising skill, judgement and initiative. The interpretation of market research data may give rise to different opinions which may be hotly argued (this aspect will be discussed more fully later).

Often, there is no shortage of information in organizations; the

trouble is that it is frequently the wrong kind of information – excessive, irrelevant, incompatible and outdated. Relatively simple but up to date market information is more useful to management than sophisticated analyses which have lost most of their value because of excessive delay in collection and presentation. Discrimination should be exercised in the selection of data; sheer abundance merely leads to computerized confusion. Management information should not be gathered indiscriminately or as a ‘play-safe’ strategy; before seeking information marketing management should discipline their search by defining with care the nature of the problem facing them. Too frequently, managers appear to be trying to solve problems which they have not identified accurately or adequately.

The dynamic nature of many markets underlines the need for managers to keep their information up to date. In a rapidly changing environment, it is folly to rely on data gathered years ago; regular monitoring of trends is essential – this enables significant developments to be spotted in time to take vital decisions.

Categories of information needs

Good information is the raw material needed by management in deciding a company's policy and day-to-day operations. Information for marketing decision making may be broadly classified as (i) strategic; (ii) tactical and (iii) ‘data bank’. The first type refers to information needed for strategic decisions, for example whether to enter a specific overseas market or to diversify into new markets; the second type relates to information for tactical decisions, such as the planning of sales territories; the third type provides essential background knowledge about, for example, competitors’ activities, market trends, VAT requirements and so on. Such information needs regular updating.

In practice, of course, these categories of information tend to become blurred and companies often require a ‘mix’ of information.

Two-way flow of marketing information

Marketing management information has a two-way flow: from the organization to the environment (that is, the market) and from the environment to the organization; the principle of feedback is an essential element (see Figure 2.1). Successful companies keep closely in touch with their customers and monitor carefully competitors’