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教育部高校工商管理类教学指导委员会双语教学推荐教材

工商管理经典教材·市场营销系列

BUSINESS ADMINISTRATION CLASSICS

基于Excel的营销调研

英文版·第3版


阿尔文·C·伯恩斯 (Alvin C. Burns)

罗纳德·F·布什 (Ronald F. Bush)

著

BASIC MARKETING RESEARCH
USING MICROSOFT® EXCEL DATA ANALYSIS

..... Third Edition

 中国人民大学出版社

全新版

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· 北京 ·

图书在版编目(CIP)数据

基于Excel的营销调研：第3版：英文/伯恩斯等著. —北京：中国人民大学出版社，2013.6

教育部高校工商管理类教学指导委员会双语教学推荐教材. 工商管理经典教材. 市场营销系列

ISBN 978-7-300-17729-8

I. ①基… II. ①伯… III. ①表处理软件-应用-市场调查-双语教学-高等学校-教材-英文

IV. ①F713.52-39

中国版本图书馆CIP数据核字(2013)第140269号

教育部高校工商管理类教学指导委员会双语教学推荐教材

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出版发行 中国人民大学出版社

社 址 北京中关村大街31号

邮政编码 100080

电 话 010-62511242（总编室）

010-62511398（质管部）

010-82501766（邮购部）

010-62514148（门市部）

010-62515195（发行公司）

010-62515275（盗版举报）

网 址 <http://www.crup.com.cn>

<http://www.ttrnet.com>（人大教研网）

经 销 新华书店

印 刷 三河市汇鑫印务有限公司

规 格 215mm×275mm 16开本

版 次 2013年7月第1版

印 张 24插页2

印 次 2013年7月第1次印刷

字 数 684 000

定 价 55.00元

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总 序

随着我国加入 WTO,越来越多的国内企业参与到国际竞争中来,用国际上通用的语言思考、工作、交流的能力也越来越受到重视。这样一种能力也成为我国各类人才参与竞争的一种有效工具。国家教育机构、各类院校以及一些主要的教材出版单位一直在思考,如何顺应这一发展潮流,推动各层次人员通过学习来获取这种能力。双语教学就是这种背景下的一种尝试。

双语教学在我国主要指汉语和国际通用的英语教学。事实上,双语教学在我国教育界已经不是一个陌生的词汇了,以双语教学为主的科研课题也已列入国家“十五”规划的重点课题。但从另一方面来看,双语教学从其诞生的那天起就被包围在人们的赞成与反对声中。如今,依然是有人赞成有人反对,但不论是赞成居多还是反对占上,双语教学的规模 and 影响都在原有的基础上不断扩大,且呈大发展之势。一些率先进行双语教学的院校在实践中积累了经验,不断加以改进;一些待进入者也在模仿中学习,并静待时机成熟时加入这一行列。由于我国长期缺乏讲第二语言(包括英语)的环境,开展双语教学面临特殊的困难,因此,选用合适的教材就成为双语教学成功与否的一个重要问题。我们认为,双语教学从一开始就应该使用原版的各类学科的教材,而不是由本土教师自编的教材,从而可以避免中国式英语问题,保证语言的原汁原味。各院校除应执行国家颁布的教学大纲和课程标准外,还应根据双语教学的特点和需要,适当调整教学课时的设置,合理选择优秀的、合适的双语教材。

顺应这样一种大的教育发展趋势,中国人民大学出版社同众多国际知名的大出版公司,如麦格劳-希尔出版公司、培生教育出版公司等合作,面向大学本科层次,遴选了一批国外最优秀的管理类原版教材,涉及专业基础课,人力资源管理、市场营销及国际化管理等专业方向课,并广泛听取有着丰富的双语一线教学经验的教师的建议和意见,对原版教材进行了适当的改编,删减了一些不适合我国国情和不适合教学的内容;另一方面,根据教育部对双语教学教材篇幅合理、定价低的要求,我们更是努力区别于目前市场上形形色色的各类英文版、英文影印版的大部头,将目标受众锁定在大学本科层次。本套教材尤其突出了以下一些特点:

- 保持英文原版教材的特色。本套双语教材根据国内教学实际需要,对原书进行了一定的改编,主要是删减了一些不适合教学以及不符合我国国情的内容,但在体系结构和内容特色方面都保持了原版教材的风貌。专家们的认真改编和审定,使本套教材既保持了学术上的完整性,又贴近中国实际;既方便教师教学,又方便学生理解和掌握。

● 突出管理类专业教材的实用性。本套教材既强调学术的基础性，又兼顾应用的广泛性；既侧重让学生掌握基本的理论知识、专业术语和专业表达方式，又考虑到教材和管理实践的紧密结合，有助于学生形成专业的思维能力，培养实际的管理技能。

● 体系经过精心组织。本套教材在体系架构上充分考虑到当前我国在本科教育阶段推广双语教学的进度安排，首先针对那些课程内容国际化程度较高的学科进行双语教材开发，在其专业模块内精心选择各专业教材。这种安排既有利于我国教师摸索双语教学的经验，使得双语教学贴近现实教学的需要；也有利于我们收集关于双语教学教材的建议，更好地推出后续的双语教材及教辅材料。

● 篇幅合理，价格相对较低。为适应国内双语教学内容和课时上的实际需要，本套教材进行了一定的删减和改编，使总体篇幅更为合理；而采取低定价，则充分考虑到了学生实际的购买能力，从而使本套教材得以真正走近广大读者。

● 提供强大的教学支持。依托国际大出版公司的力量，本套教材为教师提供了配套的教辅材料，如教师手册、PowerPoint 讲义、试题库等，并配有内容极为丰富的网络资源，从而使教学更为便利。

本套教材是在双语教学教材出版方面的一种尝试。我们在选书、改编及出版的过程中得到了国内许多高校的专家、教师的支持和指导，在此深表谢意。同时，为使后续推出的教材更适于教学，我们也真诚地期待广大读者提出宝贵的意见和建议。需要说明的是，尽管我们在改编的过程中已加以注意，但由于各教材的作者所处的政治、经济和文化背景不同，书中内容仍可能有不妥之处，望读者在阅读时注意比较和甄别。

徐二明

中国人民大学商学院



Preface

What Makes Basic Marketing Research: Using Microsoft® Excel Data Analysis, 3rd Edition, Unique?

This book provides:

- a concise presentation of the fundamentals of marketing research
- an improved software package, XL Data Analyst™, which runs using Microsoft® Excel 2010 or earlier versions
- input from many professionals in the marketing research industry
- an integrated case complete with a data set that gives students an experiential learning exercise throughout the course

What's New in the 3rd Edition?

- Significantly more information about qualitative research with a new section in the chapter on research design covering qualitative vs. quantitative research and new material discussing several methods used in qualitative research.
- Secondary data analysis is now combined with standardized information into one chapter and we have extensive coverage of the new, annual census information available through the American Community Survey. The text features a complete illustration of how to use the ACS for a marketing research objective.
- New Chapter (Chapter 10) on data issues and inputting data into XL Data Analyst, describes data matrices and data coding plus data quality issues. We also describe the organization of data and variables in the XL Data Analyst.
- New flow charts on data analysis identify key considerations such as categorical or metric data and provide guides to the selection of proper analyses.
- *iReportWriting Assistant* is an online tool to help students with the report writing process. It contains PowerPoints, templates for various aspects of a marketing research report, grammar and citation help, and an example marketing research report to use as a model. The *iReportWriting Assistant* can be accessed through any chapter by clicking on the Companion Website at <http://www.pearsonhighered.com/burns>.
- Numerous tweaks and small improvements to make the presentation as understandable and useful as possible have been made after a careful examination of every section of the text.

Why Excel for Data Analysis?

Most students will not become marketing researchers and only a small percentage of them, in their future careers, will have access to powerful software programs designed specifically for data analysis. By having this book, they will continually have access to our Excel add-in program, XL Data Analyst™. In this course students will learn how to use this powerful software program, which they can access as long as they can access Excel. Instructors told us they want to teach students a software program they will have and use in the future. Once students learn to use XL Data Analyst™ they can use it with their Excel programs for years to come.

Microsoft Excel is a powerful computing tool that is widely used and understood by students. Developers commonly program applications, called add-ins, that simplify Excel spreadsheet operations. Our add-in, XL Data Analyst™, opens up Excel's computing capabilities for marketing research applications in an easy-to-use format. Many features of XL Data Analyst™ make it more desirable than some of the most widely used dedicated stat packages because it takes the mystery and confusion out of data analysis.

Who Should Use This Textbook?

This book is written for the introductory marketing research course at the undergraduate level. We assume students have not had a prior course in marketing research, and that they have had at least one elementary statistics course. We focus on teaching the process of marketing research so that students will be better users of marketing research. They should be able to evaluate the need for marketing research and also determine the adequacy of research proposals. At the same time, we give the students of this book the tools to conduct basic analysis techniques on their own.

A Concise Presentation

We wanted to provide a book with the basics of marketing research. Adopters have told us they want to teach the basics of marketing research in depth as opposed to covering a large amount of material superficially. Many professors desire to teach a course with less text material, allowing them to supplement the course with projects or to spend more time on the basics. *Basic Marketing Research: Using Microsoft® Excel Data Analysis* is shorter in length but covers the essential, basic components of marketing research. We made every effort to write a shorter book without sacrificing knowledge on what we consider the "basics."

Features of XL Data Analyst™

XL Data Analyst™ is unique in that it only requires Excel, to which many students have access, and it is written expressly for the purpose of conducting marketing research data analysis. When we wrote the first edition of this book we knew we didn't want to just write a shorter version of a marketing research book. We wanted a new approach to data analysis. Specifically, we wanted a program that would operate without statistical terms that are difficult for students to navigate. We wanted the program to operate in a user-friendly format that was intuitive. Secondly, with many years of teaching marketing research experience, we wanted our program to offer output in a way that allowed students to interpret the output correctly and more easily. Those who have studied statistics realize that many of the presentations of statistical output are based upon tradition. We offer users an alternative. The XL Data Analyst™ has both traditional and classical statistical format as well as output in our new easy-to-interpret format. However, the essence of our new software is output that students can immediately interpret without a need to consult the statistical values: our program generates polished tables with "plain English" presentations of the various findings. This allows students to have greater focus on using marketing research to make decisions; the purpose of marketing research. The XL Data Analyst has been tested and is fully compatible with Excel 2010. Students may download XL Data Analyst™ at <http://www.xldataanalyst.com>.

About the Text: Key Strengths

Aside from being the first marketing research text to fully integrate Excel for data analysis, this book offers several key strengths.

Time-Tested, 11-Step Approach

The framework of our best-selling SPSS® text is the same framework for our Excel version. Our logical 11-step process is a time-tested process used throughout this book.

New Examples

In every chapter we searched for new examples for opening vignettes that would wake the students' interest and understanding of marketing research. Several of these vignettes were supplied from our professional contacts in the marketing research industry. Several of them reflect current marketing research practice. In addition to these all-new chapter-opening vignettes, new examples, many from marketing research industry sources, are integrated throughout the text.

(New) Integrated Case with Data Set

As with our previous textbooks, we wanted an integrated case which relates to students' interests and which was realistic. Consequently, for the 3rd edition, we developed "Advanced Automotive Concepts," a fictitious case about a major automobile manufacturer attempting to develop fuel-efficient and environmentally friendly vehicles. The case addresses consumer concerns about rising gasoline prices, global warming, and their reactions to automobile concepts the company is capable of manufacturing. The case is integrated throughout the textbook. The case resonates with students' interests and, at the same time, is an excellent example of teaching the marketing research process. The cases and topics covered are:

- **Chapter 1, Case 1.2:** The Need to Conduct Marketing Research
- **Chapter 2, Case 2.2:** Searching for a Marketing Research Firm
- **Chapter 3, Case 3.2:** Putting It All Together Using the Integrated Case for This Textbook: Defining Problems and Research Objectives
- **Chapter 4, Case 4.2:** Understanding Research Design
- **Chapter 5, Case 5.2:** Using Secondary Data
- **Chapter 6, Case 6.2:** Advanced Automotive Concepts Data Collection
- **Chapter 7, Case 7.2:** Turning Measurement Principles into Survey Questions
- **Chapter 8, Case 8.2:** Questionnaire Design
- **Chapter 9, Case 9.2:** Balancing Sample Error with Sample Cost
- **Chapter 10, Case 10.2:** The Advanced Automotive Concepts Survey Data Quality
- **Chapter 11, Case 11.2:** Advanced Automotive Concepts Summarization Analysis
- **Chapter 12, Case 12.2:** The Advanced Automotive Concepts Survey Generalization Analysis
- **Chapter 13, Case 13.2:** The Advanced Automotive Concepts Survey Differences Analysis
- **Chapter 14, Case 14.2:** The Advanced Automotive Concepts Survey Relationships Analysis
- **Chapter 15, Case 15.1:** Advanced Automotive Concepts: Using *iReportWriting Assistant*
- **Chapter 15, Case 15.2:** Advanced Automotive Concepts: Making a PowerPoint® Presentation

Also, we use the Advanced Automotive Concepts case data set to illustrate all of our data analyses procedures discussed in our four data analyses chapters. Of course, we have an Advanced Automotive Concepts XL Data Analyst data set for students to use in applying the various types of data analysis covered in the textbook.

Our Approach to Teaching Data Analysis

When we introduced the first edition of this book we said “Finally there is an alternative!” After many years of teaching marketing research and talking with dozens of colleagues who do the same, the authors decided it was time to do some things a different way. Weary of students struggling with levels of measurement, we present measurement in terms of categorical or metric variables. Instead of having students baffled by data analysis, we present data analysis in an easy-to-learn process. In this edition, we have provided flow charts that instruct students on the key factors to consider when deciding what analysis to use. In addition, data analysis keystrokes are illustrated through colorful, annotated screen captures. Experience has shown us that the students, using XL Data Analyst™, quickly learn the tools of data analysis and complete their projects much faster than with traditional software programs. They focus more on getting the answers and writing their reports instead of staring at hard-to-interpret output.

Datasets

In addition to the Advanced Automobile Concepts dataset (AAConcepts.xlsm), we have a dataset on retail store target marketing, Case 14.1, “Friendly Market Versus Circle K” (Friendlymarket.xlsm). Chapter 10 describes how students can set up their own datasets, such as those obtained with a team marketing research project, in the XL Data Analyst.

Ethics, Global Marketing Research, and Practical Applications

In our Marketing Research Applications, when we touch on ethical issues or give examples of the global use of research, we use icons to alert readers to these special topics. When we illustrate a practical application we denote this with an icon as well.

Marginal Notes, Key Terms, Review Questions, Application Questions, and Case Studies

These proven pedagogical aids are included in *Basic Marketing Research: Using Microsoft® Excel Data Analysis*, 3rd Edition.

Teaching Aids

PowerPoint Presentations (0135078261)

A comprehensive set of PowerPoint slides that can be used by instructors for class presentations or by students for lecture preview or review.

Instructor's Manual (0135078245)

A complete instructor's manual, prepared by the authors, can be used to prepare lecture or class presentations, find answers to end-of-chapter questions and case studies, and even to design the course syllabus.

Test Item File (0135078253)

The test bank for the 3rd Edition contains over 50 questions for each chapter. Questions are provided in both multiple-choice and true/false format. Page numbers corresponding to answers to the questions are provided for each question.

This Test Item File supports Association to Advance Collegiate Schools of Business (AACSB) International Accreditation. Each chapter of the Test Item File was prepared with the AACSB learning standards in mind. Where appropriate, the answer line of each question indicates a category within which the question falls.¹ This AACSB reference helps instructors identify those test questions that support that organization's learning goals.

¹Please note that not all test questions will indicate an AACSB category.

What Is the AACSB?

AACSB is a not-for-profit corporation of educational institutions, corporations, and other organizations devoted to the promotion and improvement of higher education in business administration and accounting. A collegiate institution offering degrees in business administration or accounting may volunteer for AACSB accreditation review. The AACSB makes initial accreditation decisions and conducts periodic reviews to promote continuous quality improvement in management education. Pearson Education is a proud member of the AACSB and is pleased to provide advice to help you apply AACSB Learning Standards.

What Are AACSB Learning Standards?

One of the criteria for AACSB accreditation is the quality of the curricula. Although no specific courses are required, the AACSB expects a curriculum to include learning experiences in such areas as:

- Communication abilities
- Ethical understanding and reasoning abilities
- Analytical skills
- Use of information technology
- Dynamics of the global economy
- Multicultural and diversity understanding
- Reflective thinking skills

These seven categories are AACSB Learning Standards. Questions that test skills relevant to these standards are tagged with the appropriate standard. For example, a question testing the moral questions associated with externalities would receive the Ethical understanding and reasoning abilities tag.

How Can I Use These Tags?

Tagged questions help you measure whether students are grasping the course content that aligns with AACSB guidelines noted above. In addition, the tagged questions may help to identify potential applications of these skills. This, in turn, may suggest enrichment activities or other educational experiences to help students achieve these goals.

Instructor's Resource Center

All your teaching resources in one place. Electronic versions of the instructor's manual, test item file, TestGen test generating software, plus PowerPoints are available online at <http://www.pearsonhighered.com/burns>. (Select Instructor Resources.)

Companion Website for Students

At <http://www.pearsonhighered.com/burns>, students should go to the "Companion Website." Here, by clicking on a chapter, they can take the self study quiz. The self study quizzes are automatically graded. To get the most out of the self study quizzes, students should study the chapter *first*, and then take the sample test to assess how well they have learned chapter material.

Also, at the "Companion Website" students will have access to: a. *iReportWriting Assistant*, b. a link where they can download the XL Data Analyst™ software, and c. find information about careers in marketing research.

CourseSmart for Students

CourseSmart goes beyond traditional expectations providing instant, online access to the textbooks and course materials students need at lower cost. They can also search, highlight and take notes anywhere at anytime. See all the benefits to students at www.coursesmart.com/students.

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- Multicultural and diversity understanding
- Reflective thinking skills

These seven categories are AACSB Learning Standards. Questions that test skills relevant to these standards are tagged with the appropriate standard. For example, a question testing the moral questions associated with externalities would receive the Ethical understanding and reasoning abilities tag.

How Can I Use These Tags?

Tagged questions help you measure whether students are grasping the course content that aligns with AACSB guidelines noted above. In addition, the tagged questions may help to identify potential applications of these skills. This, in turn, may suggest enrichment activities or other educational experiences to help students achieve these goals.

Instructor's Resource Center

All your teaching resources in one place. Electronic versions of the instructor's manual, test item file, TestGen test generating software, plus PowerPoints are available online at <http://www.pearsonhighered.com/burns>. (Select Instructor Resources.)

Companion Website for Students

At <http://www.pearsonhighered.com/burns>, students should go to the "Companion Website." Here, by clicking on a chapter, they can take the self study quiz. The self study quizzes are automatically graded. To get the most out of the self study quizzes, students should study the chapter *first*, and then take the sample test to assess how well they have learned chapter material.

Also, at the "Companion Website" students will have access to: a. *iReportWriting Assistant*, b. a link where they can download the XL Data Analyst™ software, and c. find information about careers in marketing research.

CourseSmart for Students

CourseSmart goes beyond traditional expectations providing instant, online access to the textbooks and course materials students need at lower cost. They can also search, highlight and take notes anywhere at anytime. See all the benefits to students at www.coursesmart.com/students.



An Introduction to Marketing Research

LEARNING OBJECTIVES

- To know the relationship of marketing research to marketing, the marketing concept, and marketing strategy
- To define marketing research
- To understand the purpose and uses of marketing research
- To classify different types of marketing research studies
- To describe a marketing information system (MIS) and understand why marketing research occupies a place in an MIS

Why and How We Conduct Marketing Research at the Sports & Leisure Research Group

SPORTS LEISURE RESEARCH GROUP

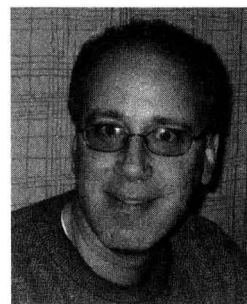
What do organizations like Callaway Golf, Unilever, Carnival Cruises, Time Inc., and the PGA of America have in common? They are all actively seeking to efficiently communicate with their target market, many of whom are heavily involved in sports or recreation activities. As these organizations seek to optimize their product offerings, and the ways in which they communicate the benefits of these offerings, they face numerous marketing decisions. At the Sports & Leisure Research Group (SLRG) we help our clients make these decisions and devise optimal marketing strategies, going "beyond the numbers" by using marketing research to better understand what customers want and how to position their products and services most effectively to meet those needs.

Marketing research is the tool that we use to bring information to our clients which allows them to make the best decisions. At SLRG we use a variety of marketing research: qualitative and quantitative techniques such as focus groups, one-on-one interviews, telephone interviews and online surveys, and purchase diaries. We custom design research studies so our clients receive the best value from our service. In this book you will learn about these and other marketing research techniques.

Jon Last has over twenty years in marketing research including experience with Conde Nast's Golf Digest Publications Division, PGA of America, and a major cruise ship line. He holds an MBA from the Wharton School of the University of Pennsylvania and graduated magna cum laude from Tufts University. Last has served as president of the Marketing Research Association and is a recipient of the MRA's Award of Excellence.

Visit Sports & Leisure Research Group at www.sportsandleisureresearch.com.

Source: Jon Last, Sports & Leisure Research Group.



Jon Last, Founder
and President, Sports
and Leisure Research
Group

We wish to welcome you to the world of marketing research! Any time business managers need to make decisions and they lack adequate information, they are likely to need marketing research. In our opening vignette, Jon Last, CEO of Sports & Leisure Research, collects marketing research information that is needed by magazine executives, advertisers, manufacturers of sports equipment, and service providers such as the lodging and restaurant business to make better decisions. In this chapter we introduce you to marketing research by (a) examining how marketing research is a part of marketing, (b) exploring definitions, purposes, and uses of marketing research, (c) learning how to classify marketing research studies, and (d) providing you with an understanding of how marketing research fits into a firm's marketing information system.

You will find in this book a successful statistical analysis software program that is easy to use and interpret. The program runs off Microsoft's Excel® spreadsheet program, so as long as you have access to Excel® you will be able to use this. We have developed XL Data Analyst™ to allow you to easily tap the power of Excel for purposes of marketing research analysis.

Now, we will show you *why* you conduct marketing research analyses by introducing you to the field of marketing research.

Marketing Research: Part of Marketing?

Before we discuss marketing research, we need to first discuss marketing. The reason is, marketing research is part of marketing, and you cannot fully appreciate marketing research and the role it plays in the marketing process unless you know how it fits into the marketing process. What is **marketing**?

Because marketing research is part of marketing, you cannot fully appreciate marketing research and the role it plays in the marketing process unless you know how it fits into the marketing process.