# Commerce 3MA3
# MARKETING RESEARCH
# Winter 2021 Course Outline

## Marketing Area
## DeGroote School of Business
## McMaster University

## *COURSE OBJECTIVE*

Today's marketing environment presents managers with increasingly complex problems and opportunities and the ongoing need for current, accurate, pertinent information about their customers, competitors and the markets in which they operate. The purpose of this course is to provide a fundamental understanding of marketing research methods employed by well-managed firms. The course is aimed at the manager who is the ultimate user of the research and the one responsible for determining the scope and direction of research activities. The key learning objectives of the course are to help you develop skills (a) to become better supervisors and users of marketing research and (b) to conduct marketing research yourself. An overall goal is to develop an appreciation for the potential contributions and limitations of marketing research in making business decisions. This course is relevant to managers in marketing as well as non-marketing fields (e.g., consulting, HR, buy and sell-side analysis, investment banking).

## *INSTRUCTOR AND CONTACT INFORMATION*

CLASS SESSIONS
SEC 01: TUESDAY 11:30 A.M. - 2:20 P.M. – Class Location (Virtual Meeting)
SEC 02: TUESDAY 2.30 P.M. – 5.20 P.M. -- Class Location (Virtual Meeting)

TUTORIALS
SEC 01: FRIDAY 1:30 P.M. - 2:20 P.M. – Class Location (Virtual Meeting)
SEC 02: FRIDAY 2.30 P.M. – 3.20 P.M. -- Class Location (Virtual Meeting)

**Instructor: Dr. Manish Kacker**
mkacker@mcmaster.ca

**TA:**
TBD

Virtual Office Hours: Fri 3.30 – 4.30 p.m. and by appointment

**Course Website:** Avenue to Learn (http://avenue.mcmaster.ca). Please check the course website daily for announcements and content.

## Course Elements

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Credit Value: | 3 | Leadership: | Yes | IT skills: | Yes | Global view: | Yes |
| A2L: | Yes | Ethics: | Yes | Numeracy: | Yes | Written skills: | Yes |
| Participation: | Yes | Innovation: | Yes | Group work: | Yes | Oral skills: | Yes |
| Evidence-based: | Yes | Experiential: | Yes | Final Exam: | No | Guest speaker(s): | No |

## Course Description

The course is largely structured to follow the steps in the marketing research process. We first address the more qualitative and conceptual aspects of marketing research. Topics include problem definition, research design, sampling, data collection methods, questionnaire design, and measurement issues. We then focus on causal research and methods of data analysis, with an emphasis on hands-on data analyses and the interpretation and use of these data analyses.

The class sessions will only roughly parallel the text and readings. Rather than merely rehashing concepts discussed in the text, class sessions will be devoted to probing, extending, and applying the text material. Therefore, you must complete the assigned readings and think about them prior to the class session. We will use cases, videos, problems and discussion exercises to illustrate how different marketing research methods have been applied to solve real-world problems. The emphasis will be on the appropriateness and use of the research methodologies and techniques as well as on the larger strategic issues. Additional material (in the form of magazine and newspaper articles of current events) will also be distributed to you through links to websites. This will help you integrate concepts covered in class with real world events.

## Learning Outcomes

Upon successful completion of this course, students will be able to complete the following key tasks:

1) understand the needs of marketing managers for information;
2) develop specific marketing questions that can be addressed through research;
3) determine the specific objectives of the marketing research project;
4) select the appropriate research design to address the research problem and best achieve the objectives;
5) understand and critique various sources of secondary and internal data and be able to assess their quality and usefulness to management;
6) understand the stages of the marketing research process;
7) understand when NOT to conduct primary research;
8) learn how to design effective questions and questionnaires, using different (and appropriate) measurement scales;
9) determine how best to analyze survey data;
10) learn how to turn statistical findings into marketing information that gets attention and assists the manager in making decisions;
11) learn when and how to conduct causal research;

12) learn how to write reports and present findings and recommendations that convey marketing information simply and effectively and encourage marketing action;
13) be aware of and understand ethical issues related to marketing research; and
14) manage a reasonably complicated research project, work in a team, and make effective oral and written presentations.

## COURSE MATERIALS AND READINGS

**Required:**

- Textbook
  - Marketing Research Essentials by Carl McDaniel, Jr., Roger Gates, Subramanian Sivaramakrishnan and Kelley Main (2nd Canadian Edition). Available as:
    - A paperback (ISBN: 978-1-118-04317-2)
    - Loose leaf (ISBN: 978-1-118-82300-2)
    - An E-text (ISBN: 978-1-118-82336-1)

McMaster Campus Store permalink: https://campusstore.mcmaster.ca/cgi-mcm/ws/txsub.pl?wsTERMG1=211&wsDEPTG1=COMMERCE&wsCOURSEG1=3MA3&wsONG1=DAY%20C01&crit_cnt=1

- Additional Materials
  - Handouts, problem sets, discussion exercises and other readings distributed in class and/or the course website.

## COURSE OVERVIEW AND ASSESSMENT

| LEARNING ACTIVITIES | DELIVERY | DESCRIPTION | TOOLS |
|---|---|---|---|
| Live Lecture | Synch | Live session during regular class hours - opportunity to elaborate on content, present challenges, engage discussion. | Zoom |
| Group Discussions | Synch | Class discussion and breakout rooms during lecture | Zoom |
| Tutorials | Synch | 1 hour live session with instructor/TA – focus on problem sets and data analysis for project. | Zoom |
| Readings | Asynch | Assigned readings from text and material posted on the course website | Assigned textbook and readings posted on course website |

Learning in this course results from attendance at lectures, staying current on the readings, coming prepared to class sessions and contributing to class discussions, completing the problem sets, and being an effective team member of your group research project. Course components include work to be completed both individually and as a member of a group. Team members will share the same grade, adjusted by peer evaluation if warranted.

MISSED TESTS/EXAMS: Missed tests/exams will receive a grade of zero unless the student has submitted and been approved for a Notification of Absence or MSAF.

LATE ASSIGNMENTS: Late assignments will be penalized one grade level (e.g., from A- to B+) for each day they are late.

Your final grade will be calculated as follows:

## *Components and Weights*

| | | | | | |
|---|---|---|---|---|---|
| A. | Class Contribution | | | (Individual) | **15 %** |
| B. | In-Class Exams | | | (Individual) | **40 %** |
| | (i) | Exam 1 | 20% | | |
| | (ii) | Exam 2 | 20% | | |
| C. | Research Project | | | (Group) | **45 %** |
| | (i) | Research Proposal | 3 % | | |
| | (ii) | Survey Proposal | 10 % | | |
| | (iii) | Presentation | 12 % | | |
| | (iv) | Final Report | 20 % | | |
| TOTAL: | | | | | **100 %** |

NOTE: The use of a McMaster standard calculator is allowed during examinations in this course. See McMaster calculator policy.

## COURSE DELIVERABLES

## A. CLASS CONTRIBUTION (15%)

A large part of the benefit that you will derive from this course is related to your willingness to expose your viewpoints and conclusions to the critical judgment of the class, as well as of your ability to build upon and critically evaluate the judgments of your classmates. Participation in class discussion is extremely important and each student is expected to contribute. <u>Please display the full name with which you have registered for the course in virtual class sessions and tutorials</u>. For discussion exercises, it is strongly recommended that you do the relevant analysis prior to class and be prepared to discuss questions given to you. <u>I will "cold call" on you during class sessions.</u> If you do not feel adequately prepared and do not want to be called upon, please let me know at the beginning of class. My intention here is not to embarrass you, but rather to hear from you and incorporate your insights into the discussion. <u>15 % of your grade depends on class participation, with a greater emphasis on participation in discussions of exercises.</u>

Effective (i.e., quality as well as quantity of) participation can therefore mean the difference between a higher and lower grade. Some of the criteria used to evaluate class participation include:

1. Do comments go beyond facts and add to our knowledge and understanding?
2. Do comments reflect an understanding of theories and tools presented in class?
3. Are comments relevant to the discussion and points made by others?
4. Do comments move the discussion along through the provision of new perspectives?
5. Are comments concise and clear or are they confusing and rambling?
6. Do comments reflect a concern for maintaining a civil and constructive classroom atmosphere?

The key to high contribution grades is making quality contributions to every class discussion. <u>The participation grades will map to an assessment of the quality of the contribution by the T.A./Professor.</u> Participation marks will be posted on the course website on a regular basis. Please speak with me if your marks are low, or well before if you are concerned that they might be low. There are ways I can help you to participate more effectively. At the end of the term, an overall participation grade will be given according to your participation marks in all classes.

Please note the following regarding Class Contribution:

- The recording and the attendance list generated by Zoom will be used to facilitate accurate recording of your participation.
- I expect you to be <u>punctual</u>. When you arrive late, your action disrupts the class. Please do not leave the classroom in the middle of class for a few minutes and then return; this also is disruptive.
- When you are present in class, all mics should be turned off unless it is in the middle of discussion.
- Reading newspapers or magazines in class, sending or reading text messages/email in class, or using your cell phone, tablet or computer for activities other than those related to the day's class, is not permitted. These activities not only impede your learning but also distract and reduce the value gained by your classmates from the course and therefore constitute "<u>negative class participation</u>".
- I expect you to treat me, your TA and your fellow students with <u>respect</u> and in a professional manner at all times.
- <u>Absence</u> from class is a serious matter, since you obviously can't participate if you're not there. <u>If there are legitimate reasons for you to miss class, you need to follow procedures stipulated in the section 'REQUESTING RELIEF FOR MISSED ACADEMIC WORK.'</u> Absences may be penalized.

## B. In-Class Exams (40 %)

**Both in-class exams are <u>individual</u>, <u>closed-book</u> and <u>non-cumulative</u>. There will not be a final exam for this course.** Computers, cell phones and tablets are not permitted for the exams. You may use a McMaster standard calculator for each exam; however the calculator must not be able to store text. I will provide you with formulas for each exam – I plan to consult with you (in class sessions prior to the exam) about the formulas to be included in the exam.

The exams will be application oriented – they will be designed to assess your understanding of marketing research concepts and your ability to apply these concepts to marketing research problems and decisions. The exams will include multiple choice questions, quantitative problems, short answer and/or short essay questions. You will be responsible both for the material covered in class and for the material in the text and readings – both will be addressed by questions in the exams. Sample exams will be posted to the course website and discussed in class. Problem sets (along with solutions) will be made available through the course website. These problem sets should help you prepare for the exams. It is strongly recommended that you work on these problem sets as we cover the relevant topics through the term. You are welcome to work on them in groups. You are not required to turn in any of these problem sets.

***Please note the dates for the exams. Please do not schedule job interviews or other activities in a manner that prevents you from taking the exams on the scheduled dates. Relief for a missed exam for legitimate reasons (e.g., MSAF) will be in the form of a cumulative make-up exam during the final exam period.***

## C. RESEARCH PROJECT (45%)

The objective of the term-long research project is to provide you with some hands-on experience in applying concepts and methods of marketing research to a real-world marketing research problem. The project will be done in self-selected groups of about 5 persons and requires a collaborative team effort. At the end of the term, each student will evaluate the performance of each of his/her peers in the team. Peer evaluations will be considered in determining the final project grade assigned to each individual team member. Above all else, keep in mind that everything you do in the research project reflects on McMaster University, the DeGroote School of Business, your professor and your research team. Over the years, we have developed a good reputation with the business community and the public. Let us enhance it through conscientious work, competence, integrity and total honesty.

In summary, you will:

1. Begin to form a five-member team immediately. Upload a document to A2L containing team members' names, McMaster email addresses and phone numbers.

2. Submit a one-page memo identifying the client and your current understanding of the research problem to be addressed by the project.

3. Ensure that all contact with the client is conducted in a professional, business-like manner. This includes written as well as personal interactions.

4. Submit the Research Proposal for your Team Project. The final version of this proposal must be formally approved by me before being signed by the client.

5. Submit your Survey Proposal for your Team Project.

6. Each team will provide a formal in-class presentation of its research project. All teams must upload their slides to Avenue before the first presentation.

7. Submit your Final Report and your peer evaluation sheet.

8. See further description and details of the Team Project in the Appendix and/or theCourse Project folder in the course website.

It is important that you make progress on your project throughout the term. Waiting till the end of the term to undertake key project activities may put you in a difficult position. A suggested project activity schedule is as follows:

| WEEK | ACTIVITY |
|---|---|
| 1, 2, 3 and 4 | Form group<br>Identify potential projects<br>Select project |
| 4, 5 and 6 | Conduct Secondary/Exploratory research<br>Define problem<br>Select sampling approach<br>Select mode of data collection |
| 6, 7, 8 and 9 | Design questionnaire<br>Pretest questionnaire<br>Send out survey<br>Follow-up on survey |
| 10, 11, 12 and 13 | Code data<br>Analyze data<br>Prepare presentation and report |

## COMMUNICATION AND FEEDBACK

Students who wish to correspond with instructors or TAs directly via email must send messages that originate from their official McMaster University email account. This protects the confidentiality and sensitivity of information as well as confirms the identity of the student. Emails regarding course issues should NOT be sent to the Area Administrative Assistants. All students must receive feedback regarding their progress prior to the final date by which a student may cancel the course without failure by default.

- *For Level 1 and Level 2 courses, this feedback must equal a minimum of 20% of the final grade.*
- *For Level 3 courses and above, this feedback must equal a minimum of 10% of the final grade.*

Instructors may solicit feedback via an informal course review with students by Week #4 to allow time for modifications in curriculum delivery.

## REQUESTING RELIEF FOR MISSED ACADEMIC TERM WORK

In the event of an absence for medical or other reasons, students should review and follow the Academic Regulation in the Undergraduate Calendar "Requests for Relief for Missed Academic Term Work" and the link below:

http://ug.degroote.mcmaster.ca/forms-and-resources/missed-course-work-policy/

## ACADEMIC INTEGRITY

You are expected to exhibit honesty and use ethical behaviour in all aspects of the learning process. Academic credentials you earn are rooted in principles of honesty and academic integrity. **It is your responsibility to understand what constitutes academic dishonesty.**

Academic dishonesty is to knowingly act or fail to act in a way that results or could result in unearned academic credit or advantage. This behaviour can result in serious consequences, e.g. the grade of zero on an assignment, loss of credit with a notation on the transcript (notation reads: "Grade of F assigned for academic dishonesty"), and/or suspension or expulsion from the university.

For information on the various types of academic dishonesty please refer to the ***Academic Integrity Policy***, located at https://secretariat.mcmaster.ca/university-policies-procedures- guidelines/

The following illustrates only three forms of academic dishonesty:

- plagiarism, e.g. the submission of work that is not one's own or for which other credit has been obtained.
- improper collaboration in group work.
- copying or using unauthorized aids in tests and examinations.

## AUTHENTICITY/PLAGIARISM DETECTION

**Some courses may** use a web-based service (Turnitin.com) to reveal authenticity and ownership of student submitted work. For courses using such software, students will be expected to submit their work electronically either directly to Turnitin.com or via an online learning platform (e.g. A2L, etc.) using plagiarism detection (a service supported by Turnitin.com) so it can be checked for academic dishonesty.

Students who do not wish their work to be submitted through the plagiarism detection software must inform the Instructor before the assignment is due. No penalty will be assigned to a student who does not submit work to the plagiarism detection software.

**All submitted work is subject to normal verification that standards of academic integrity have been upheld** (e.g., on-line search, other software, etc.). For more details about McMaster's use of Turnitin.com please go to www.mcmaster.ca/academicintegrity.

## COURSES WITH AN ON-LINE ELEMENT

**Some courses may** use on-line elements (e.g. e-mail, Avenue to Learn (A2L), LearnLink, web pages, capa, Moodle, ThinkingCap, etc.). Students should be aware that, when they access the electronic components of a course using these elements, private information such as first and last names, user names for the McMaster e-mail accounts, and program affiliation may become apparent to all other students in the same course.

The available information is dependent on the technology used. Continuation in a course that uses on-line elements will be deemed consent to this disclosure. If you have any questions or concerns about such disclosure please discuss this with the course instructor.

## ONLINE PROCTORING

**Some courses may** use online proctoring software for tests and exams. This software may require students to turn on their video camera, present identification, monitor and record their computer activities, and/or lock/restrict their browser or other applications/software during tests or exams. This software may be required to be installed before the test/exam begins.

## CONDUCT EXPECTATIONS

As a McMaster student, you have the right to experience, and the responsibility to demonstrate, respectful and dignified interactions within all of our living, learning and working communities. These expectations are described in the *Code of Student Rights & Responsibilities* (the "Code"). All students share the responsibility of maintaining a positive environment for the academic and personal growth of all McMaster community members, whether in person or online.

It is essential that students be mindful of their interactions online, as the Code remains in effect in virtual learning environments. The Code applies to any interactions that adversely affect, disrupt, or interfere with reasonable participation in University activities. Student disruptions or behaviours that interfere with university functions on online platforms (e.g.. use of Avenue 2 Learn, WebEx or Zoom for delivery), will be taken very seriously and will be investigated. Outcomes may include restriction or removal of the involved students' access to these platforms.

## ACADEMIC ACCOMMODATION OF STUDENTS WITH DISABILITIES

Students with disabilities who require academic accommodation must contact Student Accessibility Services (SAS) at 905-525-9140 ext. 28652 or sas@mcmaster.ca to make arrangements with a Program Coordinator. For further information, consult McMaster University's *Academic Accommodation of Students with Disabilities* policy.

## Academic Accommodation For Religious, Indigenous Or Spiritual Observances (RISO)

Students requiring academic accommodation based on religious, indigenous or spiritual observances should follow the procedures set out in the RISO policy. Students should submit their request to their Faculty Office ***normally within 10 working days*** of the beginning of term in which they anticipate a need for accommodation or to the Registrar's Office prior to their examinations. Students should also contact their instructors as soon as possible to make alternative arrangements for classes, assignments, and tests.

## Copyright and Recording

Students are advised that lectures, demonstrations, performances, and any other course material provided by an instructor include copyright protected works. The Copyright Act and copyright law protect every original literary, dramatic, musical and artistic work, **including lectures** by University instructors.

The recording of lectures, tutorials, or other methods of instruction may occur during a course. Recording may be done by either the instructor for the purpose of authorized distribution, or by a student for the purpose of personal study. Students should be aware that their voice and/or image may be recorded by others during the class. Please speak with the instructor if this is a concern for you.

## Extreme Circumstances

The University reserves the right to change the dates and deadlines for any or all courses in extreme circumstances (e.g., severe weather, labour disruptions, etc.). Changes will be communicated through regular McMaster communication channels, such as McMaster Daily News, A2L and/or McMaster email.

## Research Using Human Subjects

All researchers conducting research that involves human participants, their records or their biological material are required to receive approval from one of McMaster's Research Ethics Boards before (a) they can recruit participants and (b) collect or access their data. Failure to comply with relevant policies is a research misconduct matter. Contact these boards for further information about your requirements and the application process.

McMaster Research Ethics Board (General board): https://reo.mcmaster.ca/

Hamilton Integrated Research Ethics Board (Medical board): http://www.hireb.ca/

## Acknowledgement of Course Policies

Your enrolment in Commerce 3MA3 will be considered to be an implicit acknowledgement of the course policies outlined above, or of any other that may be announced during lecture and/or on A2L. **It is your responsibility to read this course outline, to familiarize yourself with the course policies and to act accordingly.**

Lack of awareness of the course policies **cannot be invoked** at any point during this course for failure to meet them. It is your responsibility to ask for clarification on any policies that you do not understand.

## General Guidelines

1. All written work (e.g. case analysis report, project questionnaire, and final research report) will be word-processed using Microsoft Word (or comparable word processing software), supplemented by Excel/SPSS documents/exhibits as appropriate. <u>Back up all your word processing and data files with copies.</u> You are responsible for safeguarding your reports against possible loss after being submitted for grading or due to computer failure/loss or other unanticipated problems, by keeping a copy (recommend both hard and soft copies) as you are working on assignments as well as when they are completed).
2. All material to be handed in or approved by me must be word-processed on 8 ½" by 11" paper, double-spaced with 1.5" margins, using a reasonable font size (12 point). Nothing handwritten, with the exception of the exams, will be accepted or reviewed by me.
3. Effective communication is an essential component of success in the business world. This course emphasizes effective communication, be it written, oral or through the use of visual materials. All assignments – written as well as oral presentations – will be evaluated both in terms of their substantive content as well as their overall communication effectiveness.

## Feedback and Contact

Your feedback is important for the success of this course. I will collect feedback directly from you on a periodic basis. Of course, the provision of feedback is not restricted to these formal mechanisms. Please feel free to stop by my office, give me a call, drop me a note or send e-mail to share your views, questions or concerns you may have regarding the course. I will routinely use e-mail to communicate with you about various course-related issues. I check e-mail every weekday and generally respond to them within 24 hours.

## SUMMARY OF KEY DATES

Please note the dates and deadlines below. Failure to submit your assignment on time will have an adverse impact on your grade for that assignment.

| DATE | DESCRIPTION |
|---|---|
| Jan 15 | *Individual*: Submit to **Avenue Assignments Folder** by 1.00 PM – Information Form |
| Jan 18 | *Team*: Submit to **Avenue Assignments Folder** by 1.00 PM - the list of team members: Names, McMaster emails and phone numbers. |
| Jan 26 | *Team:* Submit to **Avenue Assignments Folder** by 1.00 PM - identify the team, the name of the company/organization and client contact person for the project, and briefly state the research problem/question (1 paragraph) as best you can at this point in time. |
| Feb 1 | *Team:* Submit to **Avenue Assignments Folder** by 1.00 PM: Draft Research Proposal. |
| Feb 9 | *Individual:* Exam # 1 |
| Feb 22 | *Team:* Submit to **Avenue Assignments Folder** by 1.00 PM - revised version of Research Proposal for approval. |
| Mar 5 | *Team and Individual*: Submit to **Avenue Assignments Folder** by 1:00 PM – Survey Proposal (Team), Signed Agreement of Intent (Team) and Interim Peer Evaluation (Individual). |
| Mar 16 | *Individual:* Exam # 2 |
| April 13 | *Team:* Project Presentations **in class:** Submit Powerpoint slides to **Avenue Assignments Folder** by 10 a.m. |
| April 20 | *Team:* Final Report, Peer evaluation forms, copy of Client Invoice (if applicable) by 4.00. p.m. (**Avenue Assignments Folder**). |

## CLASS SCHEDULE

Please note that the schedule may be modified to accommodate student feedback. An asterisk (*) indicates documents that will be made available from the course website (http://avenue.mcmaster.ca).

| Week | Session | Date | Topics | Readings | In-Class Exercises/Homework |
|---|---|---|---|---|---|
| 1 | 1 | Jan 12 | Course Overview<br>Role of Marketing Research | • Text Ch. 1, Appendix 1A | |
| | | | The Marketing Research Process<br>Problem Formulation<br>Internal and Secondary Data | • Text Ch. 2, 3, 9 (267-270) | |
| 2 | 2 | Jan 19 | Research Design<br>Exploratory Research: Focus Groups | • *'Backward' Market Research<br>• *Chapter on Research Design uploaded to Avenue<br>• Text Ch. 4 (83-98) | *Homework Problem Set #1: Problem Formulation<br>*Homework Problem Set #2: Research Design |
| | | | Exploratory Research: Focus Groups, In-Depth Interviews, Projectives | • Text Ch. 4 (99-113), 9 (271-275)<br>• *Sample FG Guide and Report | *Analysis of Projectives In-Class Exercise |
| 3 | 3 | Jan 26 | Exploratory Research: Observation<br>Survey Research: Survey Methods | • Text Ch. 5, 8, 9 (276-279) | |
| | | | Survey Research: Questionnaire Design, Measurement and Scaling | • Text Ch. 7, 6 (150-153; 163-185) | *Questionnaire Design In-class Discussion Exercise<br>*Examples of the Use of Scales In-class Discussion Exercise |
| 4 | 4 | Feb 2 | Survey Research: Sampling Design and Procedures | • Text Ch. 11 | *Homework Problem Set # 3: Sampling Design |
| | | | Survey Research: Sample Size<br>Brief Review for Exam 2 | • Text Ch. 12 | * Sample Design In-class Discussion Exercise<br>*Sample Size Example<br>* Homework Problem Set # 4: Sample Size |

**CLASS SCHEDULE (CONTINUED)**

| Week | Session | | Topics | Readings | In-Class Exercises/Homework |
|---|---|---|---|---|---|
| 5 | 5 | Feb 9 | **EXAM # 1** | | |
| | | | **Mid-Term Recess** | | |
| 6 | 6 | Feb 23 | Ethical Issues in MR<br>Data Analysis: Roadmap<br>Data Analysis: Single Variable Analyses, Cross Tabs | • Text Ch. 13 (401-423, 429-430), 14 (442 – 448), Appendix 1B<br>• Reread Text Ch. 6 (150-153) | *Data Analysis Planning Exercise<br>*Homework Problem Set # 5: Cross Tabs |
| 7 | 7 | Mar 2 | Data Analysis: Regression | • Text Ch. 14 (442 – 461)<br>• *Chapter on Regression uploaded to Avenue | *Homework Problem Set # 6: Regression |
| 8 | 8 | Mar 9 | Causal Research | • Text Ch. 10 (295 – 324) | * Experimental Design In-class Discussion Exercise<br>* Homework Problem Set # 7: Experimental Design |
| 9 | 9 | Mar 16 | **EXAM # 2** | | |
| 10 | 10 | Mar 23 | Overview of Project Presentation and Report;<br>Fieldwork & Preparation and Analysis Strategy;<br>Demo of Software for Single Variable Analyses, Cross Tabs and Regression<br>Data Analysis Exercise | • Text Ch. 13 (388 – 401), 15 | |

**CLASS SCHEDULE (CONTINUED)**

| Week | Session | | Topics | Readings | In-Class Exercises/Homework |
|---|---|---|---|---|---|
| 11 | 11 | Mar 30 | Data Analysis Exercise | | |
| | | | Data Analysis: Team Project | | |
| 13 | 12 | Apr 6 | Data Analysis: Team Project | | |
| 12 | 12 | Apr 13 | **PRESENTATIONS** | | *Upload Powerpoint presentation slides to Avenue by 10.00 a.m. on April 13.*<br>*Submit Final Report, Peer evaluation forms, and copy of Client Invoice (if applicable) by 4.00 p.m. on April 20.* |

## APPENDIX 1.1: DETAILS OF THE RESEARCH PROJECT

### A. PROJECT TEAMS

- To stay on schedule, you need to form a team of four or five members immediately. When forming groups, please bear in mind that you will probably need to meet outside of class one or more times a week.
- Identify roles, responsibilities and expectations for each team member. Make each team member specify, up front, any anticipated absences during the semester (e.g., a family wedding, a booked weekend, exam studies, etc.) so that the team can plan around these dates. The goal is to avoid having a team member's absence leave the team stranded without a component needed for the next phase of the project.
- Develop a single sheet calendar stretching from September through December, on which the team has marked key dates, key tasks, key people on each job, and phase-completion deadlines.
- **Be prepared to be held accountable by your team.** Be firm with slackers. Don't tolerate sloppy work or missed deadlines. It can damage the overall quality of the project. If a slacker doesn't get the message, assemble the group and confront the slacker directly, outlining the agreed upon responsibilities for each member.

### B. CLIENT

- Your group must have obtained a client in need of survey research. Avoid potential clients who simply want "some research done." Find a client in need of survey research to provide information to help answer a clearly articulated marketing problem and guide decision making.
- Submit a one-page memo identifying the client and your current understanding of the research problem to be addressed by the project. You will not be graded on this.
- The project you pick will have to be approved by me. The main reason for this is to make sure we have equal expectations from the project. All other things being equal, a project concerned with a realistic problem will be looked upon more favorably than one that deals with a trivial or contrived problem. The project should:
  - (a) be relevant to marketing
  - (b) require gathering descriptive, primary data through a survey.
- Since the research project requires a significant amount of time and effort on your part, pick a marketing research project in which all team members are interested.

### C. RESEARCH PROPOSAL

- You must have input from the client before drafting the proposal. It is most important that the research proposal clearly defines the research problem, research design and the deliverables, and that the client agrees with the content. I will review and provide comments where changes are needed. Following the incorporation of any requested changes and my approval, you may proceed to retype the draft to form the **final proposal** and make three copies for signatures. **Make sure the client agrees with the content but do not send the final proposal to the client for signature until it has been approved by me.**

- The last page of each copy must be the Agreement of Intent form (see Appendix 1.2). Prepare three copies of this document.
  - Enter the client's name and the consultant's name (the name the team chosen).
  - Have each copy signed by every member in your team.
  - Bring all three copies of your proposal to class and I will also sign these forms.
  - Lastly, get your client to sign all three copies.
  - After all parties have signed, distribute copies as follows:
    - Client
    - Professor
    - Team representative.
- Your team's research proposal must look **professional.** Remember that you are dealing with a business client. All of your contacts with your client must be conducted in a professional manner. Dress up whenever you visit your client. Don't show up unprepared and disorganized. Have a list of clear objectives that you want to accomplish during every meeting with your client. Even telephone calls to your client should be carefully thought out so that using your client's time achieves a very specific goal. This client contact experience is excellent training for your future career in the business world. Therefore, every group member should share the experience: visit your client as a complete group—never individually. In addition, ten ears are better than two ears when investigating your client's problem and identifying the research needs.
- When writing up your proposal, use the headings as indicated in the **Format for Research Proposals** guidelines (see Appendix 1.2).

## D. SURVEY PROPOSAL

Each group must email/submit a Survey Proposal (maximum 5 double-spaced pages plus Annotated Questionnaire). The purpose of this exercise is to "sell" your survey (explain how the "client" will benefit from your survey). In addition, this document will also be of help to you when you are writing your final report. The proposal should build on insights you have gained from your initial research (e.g., secondary and internal data research, your discussions with the client) and include the following:

- Background and Secondary data analyses – the goal here is to develop and present a general overview of the research issues - e.g., What is known about the marketing problem? What led to the decision to conduct research? Some possible sources of secondary data include electronic resources available from the Innis library. You can supplement this with online research of relevant websites. The purpose of this step is to help you formulate the problem and hypotheses. Please cite all sources.
- Problem formulation – Use this section to define the Managerial Decision problem and the Market Research problem as clearly and precisely as possible. The Marketing Research problem should be the basis for your hypotheses and information needs that you will address through the survey. Some of relevant issues to consider in this section are:
  a. What business decisions does the client face?
  b. What are the decision alternatives available to the client?
  c. What information is needed in order to evaluate these decision alternatives and recommend a course of action?
  d. What information will the survey provide?
  e. What hypotheses will you test through the survey?

- Survey research methodology – e.g., Brief description and justification of your proposed survey research design, with an emphasis on your choice of survey method, questionnaire and sampling.
  - Survey Method – What survey method(s) (e.g., telephone, personal interviewing) do you choose? Why are these methods appropriate for this project?
  - Questionnaire – How was the questionnaire developed? Where did the questions come from? What pre-testing of the questionnaire was done?
  - Sampling – How is your target population defined (e.g., what are its geographic, demographic, or other bounds)? What is your sampling frame? What sampling frame error do you anticipate? What sampling approach do you choose and why? How will you implement this sampling approach?
  - Sample Size -- What sample size are you aiming for? How large should your sample size ideally be, if you were not constrained by time? Calculate your ideal sample size for the three most important questions in your questionnaire.
- Annotated Questionnaire – The annotated questionnaire should include your cover letter, letter of information/consent form, questionnaire, and notes and rationales for your choice of questions and measurement scales as well as comments on how these questions relate to your research objectives and the overall 'research problem'.

  Following McMaster's guidelines for ethical student research, the opening paragraph of your questionnaire should indicate who is collecting the data, why it is being collected, how the data will be used, and the security they can expect with their answers. This paragraph will also act as a consent form for respondents. The following wording is suggested for your use.

  *This research is being conducted by a group of students in the marketing research course at the DeGroote School of Business, McMaster University. This survey is part of a term project to design, conduct and analyze a marketing research study with consumers. Your participation would be greatly appreciated. The information you provide will be kept anonymous and confidential. By completing the survey you are consenting to participate in this student project. You have the right to withdraw at any time or you have the right not to respond to questions as you choose.*

## E. IN-CLASS PRESENTATIONS

- You are encouraged to invite your client to attend the formal in-class presentation.
- **Attendance at these presentations, including all students not making a presentation, is mandatory.** I will take attendance—any student who has an unexcused absence loses 2% of the final course mark for each presentation day missed.
- The order of group presentations will be assigned in class prior to the presentation day.
- Each presentation will be timed. Specific allotments of time for the final presentation and for Q & A will be specified during the term.
- All groups will submit an electronic copy of the presentation before the first group makes its presentation.
- Your presentations must be professional. Dress for the occasion. Use appropriate audio/visual displays.
- Additional guidelines for this presentation will be provided in class/through Avenue.

**F. FINAL REPORT**

The final report should not exceed 20 double-spaced pages (not including your cover letter, letter of information/consent form, questionnaire and appendices). It is important to write concisely and well. The printed output should be neat. Please proofread your report after you type it – punctuation, grammar and spelling are important. The report is aimed at the project client and should be written with that in mind. If you desire, you can include a set of comments for me in an appendix. Additional guidelines for this report will be provided in class/through Avenue.

Your final report should use the following outline:

1. TITLE PAGE

2. TABLE OF CONTENTS

3. EXECUTIVE SUMMARY – Description of the decision problem, the research methodology, and the recommendations to the client based on the results of your analysis.

4. BACKGROUND

5. OBJECTIVES - Define the management decision and marketing research problems to be studied. What is the benefit to the client? What is the value of the research project?

6. RESEARCH DESIGN AND METHODOLOGY

   I. RESEARCH METHOD
   II. SAMPLING
   III. DATA COLLECTION PROCEDURE
   IV. TABULATION AND ANALYSIS PROCEDURE

   Justify the choice of the research strategy (in terms of strengths and weaknesses relative to alternative research designs) and your specific choice of survey method. Define your target population, identify the sampling frame, the type of sample, and how it was selected. Indicate your actual sample size and calculate the 'ideal' sample size for the project. Report on your findings from the exploratory research stage and how they informed the quantitative analysis. Discuss the development of the survey instrument. Describe the pretest questionnaire, how many respondents were involved (as far as possible pretest respondents should be from the same population as the sample), and how the pretest led to questionnaire changes.

7. RESULTS

    I. DESCRIPTION OF THE SAMPLE
    II. FINDINGS TIED TO EACH OBJECTIVE

    Provide an outline of the analysis strategy and the results of your analysis tied to each objective. The kinds of analysis you perform are guided primarily by your research objectives and the nature of the data you choose to collect. Ideally, you would have thought about how you are going to analyze the data when you framed the questionnaire.

8. CONCLUSIONS AND RECOMMENDATIONS - Describe how the results of the research can be used. Focus on the decision-making implications and/or strategic considerations involved. What recommendations can you make based on your research findings?

9. LIMITATIONS AND LEARNING EXPERIENCES
   Are there any limitations to the study that should be taken into account? What did you learn from the project – if you had to do the project over again, what would you do differently? Why?

10. COVER LETTER, LETTER OF INFORMATION/CONSENT FORM AND QUESTIONNAIRE

11. APPENDICES

I will evaluate your report on the basis of
(a) usefulness to the client (as an aid to decision- making) and
(b) methodological quality, in terms of:

- Problem Formulation: Decision problem; Research problem
- Research Design
- Exploratory Research
- Descriptive Research: Survey method; Questionnaire design; Measurement and Scaling; Sampling Approach and Sample Size
- Data Analysis: Single-Variable Analyses, Cross-tabs; Regression

**G. THE BIG DAY**

- April 20 is the day when several things must be delivered, by 4.00 p.m:
    - Your **Final Report.**
    - Your confidential **Peer Evaluation Sheet.** You are not obliged to submit this sheet if you feel that each group member participated equally in the workload. If I do not receive a sheet, I will make that assumption.
    - If applicable, a copy of the **final invoice** to your client. See the attached SAMPLE INVOICE.
    - Project reports that are received late will be graded with the following penalty scale: one grade level (e.g., from A- to B+) for each day beyond the deadline.

## APPENDIX 1.2: FORMAT FOR THE RESEARCH PROPOSAL

The research proposal outlines your plan of research for this project. It answers the questions:
1. What is the problem being investigated?
2. How will this problem be studied?
3. What can the client expect to get at project completion?

It should include the following (use the same headings and sequence as listed):

**TITLE PAGE**

Title of the project, client's official name, contact person's name, date, and full names and home and alternate telephone numbers of all project team members.

**1.0 THE PROBLEM**

Describe your client's company/organization very briefly. Describe the problem, the suspected cause of the problem, and the company's present situation. Briefly explain **why the research is needed.**

**2.0 OBJECTIVES OF THE PROJECT**

State your research questions or research hypotheses. These should be listed and worded as exactly as possible at this stage.

**3.0 RESEARCH METHOD**

Briefly describe your research method:
- What type of research design?
    - Exploratory? Descriptive? Causal?
- What types of secondary data will you use in order to clarify the research questions and/or determine your research design?
- What primary data collection procedures will you probably use?
    - Specify method of data collection. Telephone? Personal interview? Mail questionnaire?
    - Define the population from which you will be sampling.
    - Specify the types of data analysis that will be needed. The data is typically analyzed using SPSS/Excel. Frequencies, descriptives, cross-tabulations, regressions and other appropriate statistical analysis will be conducted.
- Limitations of the Project.

## 4.0 PROJECT SCHEDULE

Provide a time schedule for the project. A Gantt chart or other visual diagram of your timeline is very useful.

Schedule the following key tasks or stages in your project:

- Secondary data collection.
- Design, pre-test, and revision of questionnaire.
- Drawing of sample frame and identification of respondents.
- Data collection.
- Retrieval, coding, and editing of data.
- Analysis of the survey data
- Interpretation of data for final report and identification of key, critical findings for in-class
- presentation.
- Written report and oral presentation of findings.

## 5.0 PROJECT BUDGET

If applicable, itemize a budget for your anticipated out-of-pocket expenses (e.g. typing services, printing, telephone, stationary, postage, binding, paper, etc.). The standard mileage charge for research use of your private automobile is $0.45 per kilometre. Total costs can range between $300 and $600. **Typing and duplication services must not be done by your client, even if the client offers to do this.** Experience has shown that this does not work out and can severely disadvantage your project. It is important that you keep control of everything that you can.

## AGREEMENT OF INTENT

The **Agreement of Intent** form should be retyped for your specific client. Give your project team a name (e.g. KPCG Group) and insert it where it says “project team.”

**McMaster University**
**DeGroote School of Business**

## AGREEMENT OF INTENT (Page 1 of 2)
## Commerce 3MA3 - Marketing Research
## Marketing Research Student Project

This agreement is made in triplicate this __________day of ______, 2021, between (Type in the CLIENT"S NAME) and the (PROJECT TEAM NAME), hereby called the "CLIENT" and the "CONSULTANT".

The undersigned parties are in agreement with the intent and nature of the research as described in the proposal. The "CLIENT" agrees to assume responsibility for the "CONSULTANTS" out-of-pocket costs of designing and conducting the research project. No consulting fees other than the "CONSULTANTS" costs will be charged. The "CONSULTANTS" will endeavour to provide a meaningful analysis of the subject matter by the date stated in the proposal, and otherwise adhere to the schedule of activities.

The "CLIENT" recognizes that the "CONSULTANT" is a group of students from McMaster University's DeGroote School of Business and that this project is a requirement of their marketing research course. Their course mark will depend heavily on the success of this project. The "CONSULTANT" is in most cases executing a marketing research project for the first time and clams to have no professional expertise in this area.

Signatures:

Client: ____________________________________

Consultant ____________________________________ (Project Leader)

____________________________________

____________________________________

____________________________________

____________________________________

Supervising Professor: ____________________________________

Dr. Manish Kacker

# AGREEMENT OF INTENT (Page 2 of 2)
# Commerce 3MA3 – Marketing Research

**Section:______ Project Team: ____________________________________________**

**Client Company/Organization and Address:**

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

**Client Contact Person: __________________________________________________**

**Project Title: __________________________________________________________**

**Project Leader: ________________________________________________________**

**Team Members: Email Addresses Phone Numbers**

**1.** ______________________________________________________________

**2.** ______________________________________________________________

**3.** ______________________________________________________________

**4.** ______________________________________________________________

**5.** ______________________________________________________________

**Supervising Professor:** **Dr. Manish Kacker**
**mkacker@mcmaster.ca**

## GENERAL REPORT WRITING TIPS

1. Communication is very important in research, thus, the evaluation of your reports will be based, in part, on the accuracy and clarity with which your rationales and findings are presented. Appendices should include the more technical details. The report must be understandable to your client.

2. Use subheadings and headings where appropriate to improve the communication of your findings. Underline to emphasize. Headings should be presented consistently throughout your report (either centered or left-justified).

3. Sections should be titled and a numbering system used (e.g. 2.0, 2.1, 2.1.1, etc.).

4. Use tables, graphs, and charts if they will summarize and clarify results.

5. Present general findings from secondary information in the main body of the report. Detailed secondary information should be located in the appendix.

6. In the Executive Summary and in the Conclusions and Recommendations sections of the report, no new information or tables of data or statistics should be presented.

7. Presentation of hypothesis tests or statistical analysis MUST be left in the appendix of the report.

8. Labelling the appendix for each type of information makes it easier to reference (e.g. Appendix A, Appendix B…, Appendix H). Be sure to number these pages in sequence with the report.

9. Make the report look professional: use only one type of paper, use only one printer, use a good binder, and be neat. Draw all graphs and charts carefully, neatly and accurately.

10. Correct all typographical errors. Use correct grammar. It should read as though one person wrote it. A good report is discredited because of these errors even though the report is methodologically sound and the findings are interesting.

11. Refer in the main body of the report to appendix numbers and table numbers within the appendices.

12. Final Reports are not returned to students. They can be reviewed by appointment.

## MARKETING RESEARCH GROUP PROJECT

## INTERIM PEER EVALUATION FORM

Please fill out the following form to determine each person's contribution to the team project. **Please note that this is a diagnostic exercise and your evaluations will not affect the final grades for you and/or your group members.**

Rate each member of your group, using a 1-7 scale where:

- 7 represents '*Contributions were well above group expectations*'
- 6 represents '*Contributions were above group expectations*'
- 5 represents '*Contributions were somewhat above group expectations*'
- 4 represents '*Contributions matched group expectations*'
- 3 represents '*Contributions were somewhat below group expectations*'
- 2 represents '*Contributions were below group expectations*'.
- 1 represents '*Contributions were well below group expectations*'.

In rating group members, please consider the following:

1. ATTITUDE: Cooperativeness, receptiveness to criticisms/suggestions, ability to work with others.
2. ORIGINALITY AND INITIATIVE: Creative ability, imagination, soundness of ideas
3. DEPENDABILITY: Ability to get results, reliability, promptness, attendance

| Group Members (List by name) | Group Project (Please circle the appropriate rating) |
|---|---|
| Yourself | 1 2 3 4 5 6 7 |
| | 1 2 3 4 5 6 7 |
| | 1 2 3 4 5 6 7 |
| | 1 2 3 4 5 6 7 |
| | 1 2 3 4 5 6 7 |

Comments (Use an additional sheet if necessary):

## MARKETING RESEARCH GROUP PROJECT

## FINAL PEER EVALUATION FORM

Please fill out the following form to determine each person's contribution to the team project. **Please note that your evaluations may affect the final grades for you and/or your group members.**

Rate each member of your group, using a 1-7 scale where:

- 7 represents '*Contributions were well above group expectations'*
- 6 represents '*Contributions were above group expectations'*
- 5 represents '*Contributions were somewhat above group expectations'*
- 4 represents *'Contributions matched group expectations'*
- 3 represents '*Contributions were somewhat below group expectations'*
- 2 represents *'Contributions were below group expectations'*.
- 1 represents *'Contributions were well below group expectations'*.

In rating group members, please consider the following:

4. ATTITUDE: Cooperativeness, receptiveness to criticisms/suggestions, ability to work with others.
5. ORIGINALITY AND INITIATIVE: Creative ability, imagination, soundness of ideas
6. DEPENDABILITY: Ability to get results, reliability, promptness, attendance

| Group Members<br>(List by name) | Group Project<br>(Please circle the appropriate rating) |
|---|---|
| Yourself | 1 2 3 4 5 6 7 |
| | 1 2 3 4 5 6 7 |
| | 1 2 3 4 5 6 7 |
| | 1 2 3 4 5 6 7 |
| | 1 2 3 4 5 6 7 |

Comments (Use an additional sheet if necessary):