Foster School of Business
UNIVERSITY OF WASHINGTON

Research for Marketing Decisions **Spring 2018**

MKTG 560 C/D M 6:00-9:20

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Required Course Materials

- **Textbook**: *MR^2 (2nd edition)* by Brown and Suter.
- **Course Pack**. Available through the UW bookstore (hereafter referred to as **CP**).
- **SPSS Statistics**. You can either use the software in the computer labs, at Odegaard or use the UW cloud-based SPSS via the CSDE cluster. It's free for student use and can be accessed from any PC: https://csde.washington.edu/services/computing/access.shtml. SPSS is also available as a 14-day, fully-functional, free trial: https://www.ibm.com/analytics/data-science/predictive-analytics/spss-trials
- **Course website at http://canvas.uw.edu** (hereafter referred to as **Canvas**). You should check this website regularly. Some readings, announcements, class handouts, assignments, data sets, and grades will be posted here.

Course Prerequisites

Strategic Marketing Management (BA501 or MKTG 501) and Statistical Data Analysis for Management (either BA 500 or QMETH 500) or their equivalents are required. Given the quantitative nature of the material covered in the course, ***please make sure that you feel comfortable with the material in the basic statistics course***. You are required to conduct basic statistical analyses using SPSS, which is one of the most commonly used and easiest statistics packages. I will teach you how to use SPSS.

Course Objectives

The broad objectives of this course are to teach you the ART of marketing research and to provide you with a fundamental understanding of marketing research methods as employed by better-managed firms and proposed by leading academicians. The course is aimed at the manager who is the ultimate consumer of the research and the one responsible for determining the scope and direction of research activities. The techniques of research design, data collection, and data analysis occupy an important space in the work of a marketing manager as well as many other business professionals, such as entrepreneurs (in deciding whether and how to launch new products), and human resource managers (for workforce sizing decision). Indeed, these tools, although tied to the marketing research domain, are broadly applicable across a range of research settings. Overall, this course focuses on helping managers recognize the role of systematic information gathering and analysis in order to make better decisions.

Thus, the ultimate goals of this course are that at the end, you will be able to:

- Determine what type of marketing research should (vs. should not) be conducted
- Effectively implement all stages in the marketing research process
- Develop and refine your research design, collection and analytical skills
- Critically evaluate others' research, analyses and strategic recommendations.

Course Content and Organization

Marketing research is simply an organized way of developing and providing information for decision-making purposes. The quality of the information, for example its validity and reliability, depends on the care exercised in executing the various steps of the marketing research process. The steps include problem definition, research design (qualitative, descriptive and causal), data collection methods, and data analysis. For descriptive and causal research, additional steps include questionnaire design, attitude measurement, sampling schemes, and data analysis. Although we will cover both secondary and primary research as well as qualitative and quantitative aspects of marketing research, emphasis is given to primary quantitative research.

You will learn how to collect reliable data efficiently and effectively and how to analyze "real life" data using statistical software. It is imperative that you have a strong understanding of the techniques and issues involved in collecting and analyzing data to judge the adequacy of the information with which you are presented. You will gain hands-on experience in collecting and analyzing data.

Class Format

Each class session will be a combination of lecture and discussion, with some classes incorporating computer-based exercises. The textbook is used as a guide and as a reference. The most relevant sections of the book are indicated on the class schedule. Class sessions will be devoted to probing, extending, and applying the concepts covered in the assigned readings. Lecture notes and additional handouts will be made available throughout the quarter on Canvas. The computer and database exercises are designed to give you "hands-on" experience with cleaning, analyzing and interpreting marketing research data. Students are expected to have read and analyzed all assigned readings thoroughly prior to coming to class as well as to make progress on the group project.

Group Work

We will divide the class into teams, and the marketing research project will be done within that team. I expect class members to select their own teams. The best group size is four to six people. Each team should strive for diversity. ***You should submit to me a list of the persons comprising your group by the end of the first class session.***

Everyone in a team is expected to contribute equally to the group assignments. Both quantity and quality matter, and everyone should complete an online assessment of each member's contribution to the group assignments at the end of the quarter. This information will be used as part of the class participation grade (see below).

Grading Criteria

Your grade in the course will be based on both individual and group work. Grades will be computed as follows:

A.	Midterm Exam	20%
B.	Marketing research project	40%
C.	Case analyses	20%
D.	Class participation and project contribution	20%

Please note that ***late assignments will not be accepted (unless you have made a prior arrangement with the professor), and the exam will be administered only during the scheduled time/date.*** Please ensure that you will be in town during the dates of the exam, case discussions and presentation.

Grades will be assigned on the following basis:

>94%	4.0
94%	3.9
93%	3.8
Etc.	

A. Midterm Exam (20%)

The midterm exam is an in-class exam administered only during the scheduled time/date and is designed to test your ability to apply material from the assigned readings, class discussion, and any supplementary readings and exercises presented during the first half of the course. The exam is closed book and closed notes, although you may use one 8 ½ x 11" double-sided page of notes (typed and/or handwritten). This page of notes must be individually prepared. You must turn in a hard copy of this page along with your exam.

B. Marketing Research Project (40%)

A marketing research field project is an important component of this course. This project will give you an opportunity to design and conduct a full-fledged piece of marketing research in an area of your own choosing that has qualitative and quantitative research components: **you will (1) gather secondary data, (2) conduct primary/qualitative research (focus groups or in-depth interviews), <u>and</u> (3) conduct primary/ quantitative research (survey or experiment).** Because the research project will involve a considerable amount of time and effort throughout the quarter, it is vitally important that you work on a project that you find interesting. You are expected to meet outside the class throughout the quarter with your group with the purpose of designing, conducting and reporting on an original research project. Note that ***MKTG560 projects successfully completed on behalf of external clients (those outside the University) qualify as one of the "practical experience activities" required for graduation***.

For this project, your team will act in the role of a marketing research supplier working for a client. Clients can be for-profit or non-profit organizations here on campus, in Seattle or the surrounding areas. There must be an actual person or persons acting as your client(s) with whom you negotiate the details of the research. In working on the project, you will complete all aspects of the marketing research process we discuss in class. There are three graded deliverables for this project (see course schedule for due dates).

<u>Specifics of Deliverables</u>

1. <u>Research request agreement (5% of final grade)</u>. Your research request agreement (2 double-spaced pages maximum with 1" margins and 12 point font) ***should include your secondary research findings***. In the two-page agreement, you should provide background for the decision problem as well as clearly identify the decision problem, research problem, use, and population (see pp. 21-23). Be sure the project is do-able in the time frame you have, and involves original data collection through (1) focus groups or in-depth interviews and (2) a survey or experiment.

2. <u>Research proposal and presentation (10% of final grade)</u>. Your research proposal (5 double-spaced pages maximum with 1" margins and 12 point font) ***should include both your secondary research findings and your primary/qualitative research (focus groups or in-depth interviews)*** in addition to your proposed quantitative

research (see pp. 24-25)***. Before any quantitative (survey or experimental) research is undertaken, teams must prepare a project proposal that is approved by the professor.*** In addition to presenting your research and findings, you should explicitly state your hypotheses and specify how your research design and questionnaire will help you to test these hypotheses.

You should attach a copy of your proposed questionnaire for your survey/experiment to the end of your proposal (no more than 15 questions). For each question, you should identify (1) whether the scale is nominal, ordinal, interval or ratio, and (2) its purpose (e.g., needed to test your first hypothesis, to provide sample demographics, etc.). At the end, you should provide dummy tables that illustrate how you will analyze and present the results of your quantitative research when data collection is completed.

Your presentation should cover your secondary and qualitative research findings, and your proposed quantitative research. This presentation (and your final report presentation) allows all class members to learn from each of the various projects. ***You should submit your presentation slides via Canvas 30 minutes prior to the beginning of class***. No changes can be made to this presentation after this point. Your PowerPoint document should be saved as "group #_client." For example, if you are in group #3 and your client is Starbucks, your file would be saved as "group3_Starbucks." In addition to uploading your PowerPoint document to Canvas, ***you should give the professor a hard copy of your presentation (a handout with 3 slides per page)*** at the beginning of class. All students must participate in the presentation.

3. <u>Final written report, presentation, and peer evaluation (25% of final grade)</u>. At the end of the quarter, you will present your ***primary/quantitative research*** to the class (20 minutes for presentation and 5 minutes for Q&A), and should be engaging and memorable. Be creative—use music, videos, role-playing, etc. As with the previous presentation, all students must participate in the presentation. ***In addition, you should post on Canvas your presentation slides no later than 30 minutes before class begins***. No changes can be made to this presentation after this point. Your PowerPoint document should be saved as "group #_client." In addition to uploading your PowerPoint document to Canvas, you should give the professor a hard copy of your presentation (a handout with 3 slides per page).

   You are welcome to invite your client to hear these final class presentations. If your client is unable to attend class, you should arrange to present your research to your client outside class time. In addition, you should send your client your final written report (copy the professor and TA on this email).

   The written research report is due no later than June 6 at 8:30 PM. The written report should be professional and will be graded according to the criteria provided in the Appendix. The report should be no longer than 20 double-spaced pages in total (excluding appendices and references; 12-point Times New Roman font and 1" margins) and should follow the format provided in the Appendix (pp. 9-12 of this document).

Individually, you should submit by June 6 your peer evaluation of yourself and your teammates using the assessment form posted on Canvas.

C. Case Analyses (20%)

In addition to participating in the discussion of the in-class cases (which count as part of your class participation grade), there are four graded cases (each worth 5%). All assignments must be typed (12 point font, 1" margins) and are only accepted via Canvas prior to the start of class on the day that they are due. Assignment questions and guides are provided on Canvas. The four cases are:

1. Conquistador
2. Boston Fights Drugs
3. Political Polls
4. Gotham Giants

D. Class Participation and Project Contribution (20%)

A substantial part of the benefit that you will derive from this course is a function of your willingness to expose your viewpoints and conclusions to the critical judgment of the class, as well as your ability to build upon and critically evaluate the judgments of your classmates. In addition to completing the in-class cases and assignments, participation in class discussion is extremely important and each student is expected to contribute.

Please feel free to ask questions and to voice your ideas and opinions. In general, you should view preparing cases and exercises as an opportunity to practice using the concepts and tools you will be exposed to during this course. I expect each class member to be prepared at all times to comment in any class session. To reinforce this expectation, I will "cold call" throughout the ensuing discussion (whether or not your hand is raised).

Grading class participation is necessarily subjective. Some of the criteria for evaluating effective class participation include:

1. ***Is the participant prepared?*** Do comments show evidence of analysis of the readings? Do comments add to our understanding of the situation? Does the student go beyond simple repetition of facts without analysis and conclusions? Do comments show an understanding of theories, concepts, and analytical devices presented in class lectures or reading materials?
2. ***Is the participant a good listener?*** Are the points made relevant to the discussion? Are they linked to the comments of others? Is the participant willing to interact with other class members?
3. ***Is the participant an effective communicator?*** Are concepts presented in a

concise and convincing fashion?

4. ***Is the participant respectful of the learning environment?*** Disruptive behavior (e.g., talking with classmates when someone else is speaking, failing to turn off your phone, arriving late or leaving early) will have a negative impact on your participation grade. Furthermore, because I want to encourage your active involvement in this course and because laptops (and other electronic devices) can be distracting to both the user and those sitting nearby, I subscribe to the School's policy that expects you will not access email, surf the Internet, or instant message others during class.

Keep in mind that your grade for class participation is not simply a function of the amount of "air time" you take up. In general, I will evaluate you on how well you respond to questions and on how effectively you take into account the comments and analyses of your classmates.

As mentioned above, your participation grade will also reflect your contributions to group assignments outside of class. Peer evaluations are the basis for this and must be submitted on the day the final research report is due.

Academic Honesty

Everything that you submit is assumed to be your own, original work—work that has been done solely for the purposes of this class. Proper references are required whenever the ideas of another are used in your submissions (i.e., ideas of anyone other than the author(s) of the submitted work regardless of whether this person is a friend, co-worker and/or a published author). This includes citing the authors of the textbook whenever referring to concepts or examples from the book. Moreover, by submitting an exam, you are pledging that you have neither given nor received specific information about the exam from other students (e.g., answers, information about the difficulty of the exam or hints about the questions asked). You may prepare for the exam as a team. However, the one page of notes that you use during the exam must be completed independently. I employ the policies and procedures espoused by the Foster School of Business Honor Code to maintain academic integrity in the course. This Honor Code expressly prohibits cheating, attempted cheating, plagiarism, and lying to administration or faculty as it pertains to academic work. Suspected violations of the Honor Code will be referred to the Foster Honor Council as outlined within the Honor Code (http://www.foster.washington.edu/academic/mba/currentstudents/Documents/Honor%20Code/Honor%20Code%20Booklet%202011-12.pdf).

MKTG560 Spring 2018 Tentative Course Outline

To accomplish the objectives set forth, it is crucial that you read and be prepared to discuss the assigned readings before each class. All readings are from the textbook unless indicated otherwise in parentheses. Below is a tentative course outline. You are responsible for any change to the schedule that is announced during class.

Session and Date	Topics, Readings, Cases and Assignments
March 26 (M)	<u>Introduction to the Class and Marketing Research</u> • Ch. 1 • In-Class Case: Standard Grooming Products (Canvas) **Step 1: Identify Problems and Knowledge Gaps** <u>Problem Formulation and Secondary Research</u> • Ch. 2, 4 • "Backward Market Research" (CP) • Create a SimplyAnalytics account at http://guides.lib.washington.edu/business and watch 5-minute video tutorial on SimplyAnalytics (go to the Support tab at the top right on SimplyAnalytics) Project: Select teams, define roles, begin thinking about client
April 2 (M)	<u>Collecting Secondary Data and Primary Data</u> **<u>Due Case Analysis #1: Conquistador (Canvas)</u>** • Ch. 5, 6 **Step 2: Measure Qualitatively and Quantitatively** <u>Qualitative Research Methods</u> • Ch. 3.1-3.2 (pp. 27-33) • In-Class Case: Lincoln vs. BMW (Canvas and https://voyant-tools.org) • Planning for Focus Groups/IDIs (Canvas) Project: Define decision and research problems/questions with client. Gather secondary data to aid project.
April 9 (M)	<u>Quantitative Research Methods</u> **<u>Due Research Request Agreement</u>** • Ch. 3.3-3.5 (pp. 33-41)

(APRIL 9 READINGS CONTINUED ON NEXT PAGE)

	Measurement and Scales • Ch. 7 • "A Handy Statistical Reference" (Canvas) Project: Collect qualitative data.
April 16 (M)	Questionnaire Design **Due Case Analysis #2: "Boston Fights Drugs" (CP)** • Ch. 8 • Questionnaire design checklist (Canvas) Qualtrics Introduction • "How To: A Guide to Using Qualtrics" (Canvas) • Visit https://washington.qualtrics.com and ensure you have an account using your uwnet id Project: Use the results of the qualitative data to develop your hypotheses and draft your questionnaire to test these hypotheses
April 23 (M)	**Midterm Exam** Sampling and Sample Size • Ch. 9, 10 • In-Class Case: "Understanding Political Polls" (CP) Project: Finalize proposed questionnaire on paper and prepare dummy tables
April 30 (M)	**Step 3: Analyze Data Descriptively and Statistically** Introduction to SPSS and Data Analysis **Research proposal and presentation (with qualitative research findings and proposed questionnaire)** • Ch. 12 (pp.147-158) • "Quick SPSS Guide": pp. 1-8 (Canvas) • Working with IBM SPSS Statistics (after index and Qualtrics Quickstart Guide in textbook, pp. 235-236) Hypothesis Testing with Chi-Square • Ch. 12-5a (pp. 158-159), Ch. 13.1 (pp. 161-164) • In-Class Case: Miller Beer (Canvas) • "Quick SPSS Guide": pp. 8-10 (Canvas) Project: Outline sampling plan

May 7 (M)	Hypothesis Testing with T-Tests and ANOVA **Due Case Analysis #3: Political Polls** • Ch. 12-5b (p. 159), Ch. 13.2 (pp. 164-166) • "Quick SPSS Guide": pp. 10-16 (Canvas) Hypothesis Testing with Correlation and Regression • Ch 13.4-13.5 (pp. 167-171) • In-Class Case: T-Mobile (Canvas) • "Quick SPSS Guide": pp. 16-21 (Canvas) Project: Pretest and revise questionnaire, then collect data.
May 14 (M)	Data Preparation/Cleaning **Due Case Analysis #4: Gotham Giants (CP and Canvas)** • Ch 11 Project: Download and clean data, complete data analysis.
	Step 4: Present Oral and Written Report
May 21 (M)	Group Project Presentations and SPSS in the Lab **Due: Project presentation**. Handout and slide deck due at beginning of class. Powerpoint slides must be posted to Canvas no later than 30 minutes prior to start of class.
May 29 (M)	No class (Memorial Day)
June 6 (W)	**Final report and peer evaluation due by 8:30 PM**

Appendix

Organization and Grading of MKTG560 Marketing Research Report

Your research report should be organized as follows:

Title Page

Table of Contents

Executive Summary

I. Background

II. Overview of Methodologies for Qualitative and Quantitative Research

III. Qualitative Primary Research

- a. Method
- b. Results
- c. Conclusions and Motivation for Quantitative Research

IV. Quantitative Primary Research

- d. Method
- e. Results

V. Discussion

- f. Limitations
- g. Conclusions and Strategic Recommendations

References

Appendices

Each section of your report will be graded as follows:

Section in Report	Expectation	Max.
Executive Summary	You should provide a clear and concise summary of your research motivation, methods, results, and recommendations	__/2
I. Background • Identify the research purpose (decision problem and research problem) • Report secondary research • Identification of the research objective	The company you select does not need to have a “problem” but may need to make a decision. You should be clear on what the company will do once they have the research–introduce a new product, change prices, change advertising, etc. In this section, clearly state the company’s decision problem(s) and research problem(s) as well as the uses (i.e., the decision alternatives and how the research you conduct will help to choose between them). Identify what information you can get without incurring the cost of primary research by consulting a minimum of five different sources, at least one of which should be from SimplyAnalytics. Conclude by evaluating your secondary sources and from this, clearly state the gaps that primary data needs to fill by identifying what you already know and what you still need to find out. Explicitly state the research questions and hypotheses that you will address in the quantitative phase of your research as well as the boundaries of your study.	__/10
II. Overview of Methodologies for Qualitative and Quantitative Research	Evaluate the various research methods to identify which of those would be most appropriate and why. In justifying your choices, explain the role of all three research methods (qualitative, descriptive and causal) at various stages of your research project and mention one strong reason as to why you are using one method over another or are using a mix of methods.	__/ 3
III. Qualitative Primary Research • Method (and Appendix)	This could be two focus groups (with 4-5 participants per group) or in-depth interviews (with 8-10 participants). Explain what the primary goal of the qualitative research was (e.g., to identify later research directions, to get complementary data to help with understanding quantitative results, to assess whether a questionnaire to be fielded later is comprehensive in the issues it covers, to develop or refine hypotheses, etc.), and how this influenced your choice between focus groups or IDIs (avoid explaining your choice by stating what was “easier”). In the method section, describe in detail what you did and why, and provide the sample demographics. Include as an Appendix a	__/ 15

Section in Report	Expectation	Max.
	written script of the moderator/interviewer guide.	
• Results (and Appendix)	For the results, you should identify themes and provide a few quotes from the discussions/interviews that best illustrate each theme. You should include at least one word cloud in your results.	
• Conclusions and Motivation for Quantitative	At the end, evaluate what you learned from the qualitative research and how this will specifically help you design your descriptive or causal research.	
IV. Quantitative Primary Research		__/35
• Method: sample and sampling plan	Justify your choice of sampling method (convenience, mall intercepts, etc.). Be specific about your sample—how many were sampled, their demographic profile, and how your sample compares to your population.	
• Method: pretest the questionnaire	Use a small convenience sample (n = 2-5). Report the pretest results and the changes made (if any) to the questionnaire.	
• Method: final questionnaire (and Appendix)	Your final questionnaire (included as an appendix) should have an introduction, ask the right questions, in the proper order, worded correctly, using suitable open- and closed-ended scales. All questions should be relevant.	
• Results (and Appendix)	Use SPSS for descriptive statistics, frequencies and/or cross-tabulations (between two or more variables). You will be graded on the correctness and comprehensiveness of your analyses. You should analyze and report the descriptive statistics for all of your questions— otherwise, you are revealing that you included question(s) that were unnecessary and irrelevant to your research purpose and objectives. Hypothesis testing methods should include AT LEAST TWO of the following four tests: 1. Tests of mean differences (t-tests, ANOVA); 2. Tests of proportion/frequency differences (chi-squares). 3. Correlations (between two variables) 4. Regressions (between two or more variables)	

Section in Report	**Expectation**	**Max.**
V. Discussion • Limitations • Conclusions and Recommendations	 You are not expected to have conducted the perfect/error-free research, but you are expected to know its limitations, without which you will not know how much error there may be. List the limitations (both sampling as well as nonsampling errors) and what aspects of your conclusions this affects. You should also include areas of future research that address these limitations. Address to what extent and how the research helped answer the management problems and research questions identified earlier. Make recommendations to your client based on your research results.	__/15
Presentation	Your presentation and Q&A session should be engaging, memorable, professional and persuasive while within the time allotted. You should clearly present the methodology, findings and how these lead to your strategic recommendations. At the same time, your presentation should stand out and your recommendations "stick." Be creative!	__/15
Professionalism	All aspects of the final report should be turned in on time. Your report should be free from spelling and grammatical errors. The entire report should also be the appropriate page length, and follow the required formatting.	__/ 5
	TOTAL:	/100