Business M731
Marketing Research
Fall 2024 – Course Outline

Marketing @ DeGroote School of Business, McMaster University

COURSE OBJECTIVE

Marketing research is an applied management discipline that is critical to understanding markets and customers in order to make better marketing decisions. The key objective of this course is to provide a rich learning environment for acquiring the essential working knowledge of when and how to conduct marketing research and the most effective way to communicate marketing insights to support marketing decisions.

Prerequisites: M650 or equivalent and I602 or equivalent.

INSTRUCTOR AND CONTACT INFORMATION

Anomitra Bhattacharya
Instructor
bhatta1@mcmaster.ca
Office Hours: After class and by appointment physically or virtually through Zoom **(Please make an appointment for any meeting in advance)**

Shayan Abbasi
Teaching Assistant
abbass44@mcmaster.ca
Office Hours: By appointment physically or virtually

Course Website: http://avenue.mcmaster.ca

Policy regarding using LLMs – Students are allowed to use LLMs like ChatGPT to help them in their research projects. Please acknowledge where you have used it. The ability to intelligently use such tools are a skill you should muster through trial and error. Note that ChatGPT need not always give correct answers.

COURSE ELEMENTS

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

COURSE DESCRIPTION

This course guarantees you a hands-on opportunity to learn about a critical marketing management activity. You will have the chance to conceive of a research project for a real client, design the study, execute it, and report on the findings in a professional manner that will make you proud of your efforts. This will be a rare university learning experience that will stay with you long after you have graduated. Be enthusiastic about the challenge ahead. This course will be enjoyable and rewarding to you.

The course project will reinforce and integrate the concepts learned through the course videos, readings and assignments. This exposure should give you an appreciation of marketing as it is really practiced. You will gain experience preparing written marketing research reports and working within a research team. In this environment, you will continue to develop your time management and organization skills while enhancing your communication skills.

LEARNING OUTCOMES

Upon completion of this course, you will have had the opportunity and training to:

- ✓ Understand the needs of marketing managers for marketing and market information;
- ✓ Determine the objectives of the marketing research project;
- ✓ Identify the type of research that will best help achieve the objectives;
- ✓ Learn how to write a good marketing research proposal;
- ✓ Discover how to develop great questionnaires;
- ✓ Understand how to manage and execute survey fieldwork;
- ✓ Determine how to best analyze survey data;
- ✓ Learn how to turn statistical findings into marketing information that gets attention;
- ✓ Learn how to write reports that convey marketing information simply and effectively and encourage marketing action; and
- ✓ Present marketing information to garner and maintain the attention of marketing decision makers.

COURSE MATERIALS AND READINGS

- **Required: Class PPT slides, R and Excel files shared on Avenue**
- **Required: Attending guest lecture** to learn perspectives from the industry. **Attendance at the guest lecture is required**. Absence from guest lectures may result in the loss of 5 marks from the final grade for the course.
- Recommended text book: Chakrapani, C., K. Deal and J. Levitin. *Practical Marketing Research: A Guidebook for Marketing Insights*, Standard Research Systems, 2022. Bookstore and https://www.amazon.ca/Practical-Marketing-Research- Guidebook-Insights/dp/0920219799
- Other useful book to consult: *Marketing Research Essentials* by Carl McDaniel, Jr., Roger Gates, Subramanian Sivaramakrishnan and Kelley Main (2nd Canadian Edition). Available as:

- Paperback (ISBN: 978-1-118-04317-2)
- Loose leaf (ISBN: 978-1-118-82300-2)
- An E-text (ISBN: 978-1-118-82336-1)

EVALUATION

Teaching Method

The main learning platform in this course will be your term project. In-person class lectures, virtual guest lectures, assignments and virtual office hours if necessary will complete the learning environment. It is important that you work according to the schedule and keep up to date with the course material.

All work will be evaluated on an individual basis except for the term project that will be done in teams. Group members will share the same term project grade adjusted by peer evaluation. Your final grade will be calculated as follows:

Components and Weights

Assignments	One individual assignment, but composed of at least 3 components	25%
Mid Term Exam	Dates to be finalized (Likely in mid or end of Nov)	30%
Research project	(80% report; 20% presentation), Due at the final exam time in Avenue	45%
Total		100%

Key Deadlines for Exam, Team Project and Individual Assignment:

Recruited Client	24 Sep 24
Project Proposal	1 Oct 24
Submit Questionnaire	1 Oct 24
Final Questionnaire	8 Oct 24
Individual Assignment	14 Nov 24
Midterm Exam (tentative date)	26 Nov 24
Project Presentation	3 Dec 24
Project Report	10 Dec 24

NOTE: These dates are tentative and may change based on circumstances

The Project and Assignment are due by 11:59 PM in the Avenue folder on the assigned dates. Assignments and the project will not be accepted after the deadline and will receive a score of zero.

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

http://www.mcmaster.ca/policy/Students-AcademicStudies/examinationindex.html

Grade Conversion

At the end of the course your overall percentage grade will be converted to your letter grade in accordance with the following conversion scheme.

LETTER GRADE	PERCENT	POINTS
A+	90 - 100	12
A	85 - 89	11
A-	80 - 84	10
B+	75 - 79	9
B	70 - 74	8
B-	60 – 69	7
F	00 - 59	0

Communication and Feedback

Students that are uncomfortable in directly approaching an instructor regarding a course concern may send a confidential and anonymous email to the respective Area Chair or Associate Dean: http://mbastudent.degroote.mcmaster.ca/contact/anonymous/

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 Administrative Assistant. Do not use Avenue to send emails to the instructor.

Instructors are encouraged to conduct an informal course review with students by Week #4 to allow time for modifications in curriculum delivery. Instructors should provide evaluation feedback for at least 10% of the final grade to students prior to Week #8 in the term.

Individual Assignment

This is an exercise that involves data analysis and interpretation. **The assignment will consist of at least 3 components. Choose you own dataset.** Data can come from publicly available sources such as UCI Machine Learning Repository, Kaggle, etc. **Try to get a business/marketing related dataset that has a combination of various types of variables. Get the data set approved by the TA ASAP (first come first serve basis). No two students can have the same dataset. This assignment must be done by each individual student without help from others.** The assignment must be placed in the appropriate Avenue Drop Box by 11:59 PM on the date when due. Late assignments will not be accepted. The analysis must be done correctly and the results must be interpreted to support better marketing/business decisions.

1) **You will be graded on how you summarize the data and use data visualization techniques.**
2) **You will be graded on the basis of the number of correctly done statistical tests that you can do for your assignment and which we have covered in class.**
3) **You will be graded on how you run and interpret linear AND/OR logistics regressions for your dataset.**
4) **You will be graded on how you translate the statistical findings to managerial implications.**
5) **You will be graded on how you present your work.**

Midterm term Exam
An exam will be held to gauge students' comprehension of the course material.

Term Projects
The term projects will be focused on providing commercial grade experiences in marketing research. Project clients will be found by the teams and the nature of these projects will be determined through consultation with the client and the instructor. It is expected that each team member contribute appropriately and equally to the end result. **There will be a vehicle for adjusting grades if a team member were to not participate adequately.**

ACADEMIC DISHONESTY

It is the student's responsibility to understand what constitutes academic dishonesty. Please refer to the University Senate Academic Integrity Policy at the following URL:

http://www.mcmaster.ca/univsec/policy/AcademicIntegrity.pdf

This policy describes the responsibilities, procedures, and guidelines for students and faculty should a case of academic dishonesty arise. Academic dishonesty is defined as to knowingly act or fail to act in a way that result or could result in unearned academic credit or advantage. Please refer to the policy for a list of examples. The policy also provides faculty with procedures to follow in cases of academic dishonesty as well as general guidelines for penalties. For further information related to the policy, please refer to the Office of Academic Integrity at:
http://www.mcmaster.ca/academicintegrity

COPYRIGHT

McMaster University has signed a license with the Canadian Copyright Licensing Agency (Access Copyright) which allows professors, students, and staff to make copies allowed under *fair dealing*. Fair dealing with a work does not require the permission of the copyright owner or the payment of royalties as long as the purpose for the material is private study, and that the total amount copied equals **NO MORE THAN 10 percent** of a work or an entire chapter which is less than 20 percent of a work. In other words, it is illegal to: i) copy an entire book, or ii) repeatedly copy smaller sections of a publication that cumulatively cover over 10 percent of the total work's content. Please refer to the following copyright guide for further information: http://library.mcmaster.ca/about/copying.pdf

MISSED ACADEMIC WORK

Missed Mid-Term Examinations / Tests / Class Participation

Where students miss a regularly scheduled mid-term or class participation for legitimate reasons as determined by the MBA Academic Services Office, the weight for that test/participation will be distributed across other evaluative components of the course at the discretion of the instructor. Documentation explaining such an absence must be provided to the MBA Academic Services Office within five (5) working days upon returning to school.

To document absences for health related reasons, please provide the Petition for Relief for MBA Missed Term Work and the McMaster University Student Health Certificate which can be found on the DeGroote website at http://mbastudent.degroote.mcmaster.ca/forms-and-applications/. Please do not use the online McMaster Student Absence Form as this is for Undergraduate students only. University policy states that a student may submit a maximum of three (3) medical certificates per year after which the student must meet with the Director of the program.

To document absences for reasons other than health related, please provide the Petition for Relief for MBA Missed Term Work and documentation supporting the reason for the absence.

Students unable to write a mid-term at the posted exam time due to the following reasons: religious; work-related (for part-time students only); representing university at an academic or varsity athletic event; conflicts between two overlapping scheduled mid-term exams; or other extenuating circumstances, have the option of applying for special exam arrangements. Such requests must be made to the MBA Academic Services Office at least ten (10) working days before the scheduled exam along with acceptable documentation. Instructors cannot themselves allow students to unofficially write make-up exams/tests. Adjudication of the request must be handled by the MBA Academic Services Office.

If a mid-term exam is missed without a valid reason, students will receive a grade of zero (0) for that component.

Missed Midterm or Final Examinations

A student who misses a midterm or final examination without good reason will receive a mark of 0 on the examination.

All applications for deferred and special examination arrangements must be made to the MBA Academic Services Office. Failure to meet the stated deadlines may result in the denial of these arrangements. Deferred examination privileges, if granted, must be satisfied during the examination period at the end of the following term. There will be one common sitting for all deferred exams.

Failure to write an approved deferred examination at the pre-scheduled time will result in a failure for that examination, except in the case of exceptional circumstances where documentation has been provided and approved. Upon approval, no credit will be given for the course, and the notation N.C. (no credit) will be placed on the student's transcript. Students receiving no credit for a required course must repeat the course. Optional or elective courses for which no credit is given may be repeated or replaced with another course of equal credit value.

Requests for a second deferral or rescheduling of a deferred examination will not be considered.

Any student who is unable to write a final examination because of illness is required to submit the Application for Deferred MBA Final Examination and a statement from a doctor certifying illness on the date of the examination. The Application for Deferred MBA Final Examination and the McMaster University Student Health Certificate can be found on the DeGroote website at http://mbastudent.degroote.mcmaster.ca/forms-and-applications/ Please do not use the online McMaster Student Absence Form as this is for Undergraduate students only. Students who write examinations while ill will not be given special consideration after the fact.

In such cases, the request for a deferred examination privilege must be made in writing to the MBA Academic Services Office within five business days of the missed examination.

Special examination arrangements may be made for students unable to write at the posted exam time due to compelling reasons (for example religious, or for part-time students only, work-related reasons):

- Students who have religious obligations which make it impossible to write examinations at the times posted are required to produce a letter from their religious leader stating that they are unable to be present owing to a religious obligation.
- Part-time students who have business commitments which make it impossible to write examinations at the times posted are required to produce a letter on company letterhead from the student's immediate supervisor stating that they are unable to be present owing to a specific job commitment.

In such cases, applications must be made in writing to the MBA Academic Services Office at least ten business days before the scheduled examination date and acceptable documentation must be supplied.

If a student is representing the University at an academic or athletic event and is available at an overlapping scheduled time of the test/examination, the student may write the test or examination at an approved location with an approved invigilator, as determined by the MBA Academic Services Office.

In such cases, the request for a deferred examination privilege must be made in writing to the MBA Academic Services Office within ten business days of the end of the examination period.

Note: A fee of $50 will be charged for a deferred exam written on campus and a fee of $100 for deferred exams written elsewhere. In cases where the student's standing is in doubt, the Graduate Admissions and Study Committee may require that the student with one or more deferred examination privileges refrain from re-registering until the examination(s) have been cleared.

STUDENT ACCESSIBILITY SERVICES

Student Accessibility Services (SAS) offers various support services for students with disabilities. Students are required to inform SAS of accommodation needs for course work at the outset of term. Students must forward a copy of such SAS accommodation to the instructor normally, within the first three (3) weeks of classes by setting up an appointment with the instructor. If a student with a disability chooses NOT to take advantage of an SAS accommodation and chooses to sit for a regular exam, a petition for relief may not be filed after the examination is complete. The SAS website is:

http://sas.mcmaster.ca

POTENTIAL MODIFICATIONS TO THE COURSE

The instructor and university reserve the right to modify elements of the course during the term. The university may change the dates and deadlines for any or all courses in extreme circumstances. If either type of modification becomes necessary, reasonable notice and communication with the students will be given with explanation and the opportunity to comment on changes. It is the responsibility of the student to check their McMaster email and course websites weekly during the term and to note any changes.

RESEARCH USING HUMAN SUBJECTS

Research involving human participants is premised on a fundamental moral commitment to advancing human welfare, knowledge and understanding. As a research intensive institution, McMaster University shares this commitment in its promotion of responsible research. The fundamental imperative of research involving human participation is respect for human dignity and well-being. To this end, the University endorses the ethical principles cited in the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans:

http://www.pre.ethics.gc.ca

McMaster University has mandated its Research Ethics Boards to ensure that all research investigations involving human participants are in compliance with the Tri-Council Policy Statement. The University is committed, through its Research Ethics Boards, to assisting the research community in identifying and addressing ethical issues inherent in research, recognizing that all members of the University share a commitment to maintaining the highest possible standards in research involving humans.

If you are conducting original research, it is vital that you behave in an ethical manner. For example, everyone you speak to must be made aware of your reasons for eliciting their responses and consent to providing information. Furthermore, you must ensure everyone understands that participation is entirely voluntary. Please refer to the following website for more information about McMaster University's research ethics guidelines:

http://reo.mcmaster.ca/

Organizations that you are working with are likely to prefer that some information be treated as confidential. Ensure that you clarify the status of all information that you receive from your client. You **MUST** respect this request and cannot present this information in class or communicate it in any form, nor can you discuss it outside your group. Furthermore, you must continue to respect this confidentiality even after the course is over.

COURSE SCHEDULE

M731
Marketing Research
Fall 2024 Course Schedule

WEEK	TOPICS	ASSIGNMENT
1 Sep 10	Course Overview Role of Marketing Research Marketing Research Process Ethics in Research Secondary Data	
2 Sep 17	Research Design in marketing Qualitative Research in marketing (including Focus Groups) Observation Research	**Groups to be finalized, email the TA with a cc to the instructor on your team composition by 11:59 PM**
3 Sep 24	**Survey Research for Marketing -** Measurement Scales and Errors Attitude Measurement Scales Types of Data Questionnaire Design Surveys Introduction to probability and uncertainty	**Client and Project to be finalized, email the TA with a cc to the instructor about your project details by 11:59 PM**
4 Oct 1	**Sampling for Marketing Research –** What is sampling Errors in sampling Data collection method Sampling Methods Determining Sample Size Margin of Error, Confidence Intervals, Sampling Distribution	**Project Proposal due by by 11:59 PM** **Project Questionnaire should be submitted for approval by 11:59 PM**
5 Oct 8	**Data Analysis Procedures for Marketing Research -** Coding, data entry, Cleaning data Frequency Tables and Cross Tabulations Descriptive Statistics Hypothesis Testing, Type 1 and Type 2 Errors, Chi-Square Tests, ANOVA, Z-test, T-tests, Wilcoxson Signed Rank Test, Mann Whitney Test, Correlation tests, Conjoint Analysis	**Project Questionnaire to be finalized by 11:59 PM** **Start collecting data ASAP**
6 Oct 15	**Linear Regression for Marketing Research –** Univariate and Multivariate Regression Regression Diagnostics	

7 Oct 22	**Logistic Regression for Marketing Research –** Binomial and Multinomial Logistic Regression Regression Diagnostics	
8 Oct 29	**Hands on Statistical Exercise using Excel and R on marketing data –** Exploratory data analysis, dealing with missing values, data summarization, data visualization, predictive modelling, interpreting output, etc.	
9 Nov 5	**Hands on Statistical Exercise using Excel and R on marketing data –** Exploratory data analysis, dealing with missing values, data summarization, data visualization, predictive modelling, interpreting output, etc.	
10 Nov 12	Hands on Statistical Exercise using Excel and R on marketing data Causal Research in marketing	**Individual Assignment due by 11:59 PM, 14 Nov**
11 Nov 19	Guest Lecture **OR** Social Media and Text Analysis in Marketing	**Attendance is Compulsory for Guest Lecture**
12 Nov 26	**Mid-term Exam In class**	
13 Dec 3	**Presentation of your Applied Marketing Research Group Projects**	**Project PPT due @ start of class**

Note that all dates are tentative and can be changed based on circumstances and mutual convenience.

The course outline that follows has been designed carefully to give you the needed lectures and practice when you need them in order to complete the individual assignment and in order to reach specific milestones in your research project. By staying on top of lectures and assignments you will be in good shape throughout the semester. **Once you fall behind in this course, it is extremely difficult to catch up. Don't even be tempted to fall behind.**

Note that the months of Nov and Dec will be the busiest for you. You have the individual assignment due by mid Nov and you have the midterm test in the last week of Nov. You have the group project presentation on Dec 3 and the final group project report due by 10 Dec. Do not leave everything for these 2 months. You will be overwhelmed.

RESEARCH PROJECT SCHEDULE

Above all else, keep in mind that everything you do in this research project for a client 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's foster it through conscientious work, competence, integrity and total honesty.

A. PROJECT TEAMS

1. Form a team of 5/6 members, **immediately,** and select a company name.
2. Select one member as **project leader**.
3. Questions about your project will be discussed **only if the project leader is present**. No exceptions.

B. PROJECT LEADER

1. Delegate the work on this semester-long project. Take on one-fifth of the workload. Assign one-fifth of the total effort to each of your colleagues.
2. Take a calendar and agree, in writing, with each member when, exactly, his/her component of the project will be due. Make each colleague specify, up front, any foreseen absences during the semester (a family wedding, a booked weekend, exam studies) so that you can plan around these. The last thing you want is a group member who does not deliver by a due date, leaving other members stranded without the component needed for the next phase of the project.
3. Be firm with any slackers. Don't tolerate sloppy work and bad behavior. It can damage the overall quality of your project. If a slacker doesn't get the message, assemble the group and confront the slacker, directly.
4. Your best friend in this course is a single-sheet calendar on which you have marked out key dates, key tasks, key people on each job, and phase-completion deadlines.

C. CLIENT

1. By **24 Sep 24**, your group must have obtained a client in need of survey research. **Avoid potential clients who say, "I think I can find something for you to work on."** Find a client who has a burning question and knows what type of market information will be needed to solve a clearly articulated problem.

2. Ensure that your prospective client is fully aware that you will be billing the client for your group's out-of-pocket costs for conducting the study (generally between $200 and $500). You may wish to bill the client for one-half of your expected costs at the beginning with the remainder billed after you have submitted your final report.

D. RESEARCH PROPOSAL

1. No later than **1 Oct 24**, the final draft of your group's research proposal must have been formally approved by me. It must be prepared in word, pdf or R Markdown (which one is easier for you). Following my approval, or any requested changes, you may proceed to revise the final draft. **Your client is not to see the final proposal until it has been approved and signed by me and the team.**

2. On the last page of **each** copy must be the **Agreement of Intent** form (see attachment at end), signed by every member in your **group**. I will also sign that form. **Lastly**, get your **client** to sign the agreement-of-intent form. After all parties have signed, distribute the signed proposal as follows:

    1. Client
    2. Professor
    3. Project Leader and team members.

3. The **Agreement of Intent** form asks you to insert the client's name and the consultant's name. As consultants, give your team a name (e.g., Classic Marketing Research).

4. 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, even if in Zoom. Don't show up to a meeting unprepared and disorganized. Have a list of clear objectives that you want to accomplish during every meeting with your client. Telephone calls and virtual meetings with 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, virtually, as a complete group--never individually. In addition, ten ears are better than two ears when investigating your client's problem and research needs.

5. When writing up your proposal, include the headings in the **Format for Research Proposals** guideline attached to this course guide.

E. SURVEY QUESTIONNAIRE

Tuesday, **8 Oct 24** is a crucial date for you. This is the last day by which I will approve questionnaires, so that your fieldwork can begin as soon as possible. Your questionnaire must be printed the way it will look to the respondent. The process for the questionnaire is as follows:

1. ask your client to meet with you and to discuss the questions that need to be asked of respondents;
2. the study team should develop a good draft questionnaire and meet with the client to discuss and modify the questionnaire as needed;
3. The **questionnaire should be submitted to me by 1 Nov 24 at the latest**. I'll review the questionnaire and provide feedback for any necessary modifications. The **final questionnaire including any revisions must be submitted to me by 8 Nov 24.**

F. IN-CLASS PRESENTATIONS (during the final exam period)

1. The final examination period will be devoted to formal virtual presentations of your research projects. You are encouraged to **invite your client to attend**.

2. Attendance at these presentations is mandatory. I will check attendance according to the class list. A student who skips class loses 2% of the final course mark. Only a documented medical reason will absolve you. **Job interviews will not count as a valid excuse**. Please, don't ask me for permission to miss a presentation, without penalty. Out of respect for those who are presenting, I will not grant it.

3. The order of group presentations will be alphabetical by client company name.

4. Each member of the study team must be involved in the final presentation. Be prepared to explain the complexities of your project interestingly and vividly to a class that has never before seen your work and has no idea of what your group did. Impress the class and you will impress me enough to be generous in my grading.

5. Your presentation must be professional. **Dress for the occasion.** Use PowerPoint and other appropriate audio-visual displays. Time the talk precisely. **You are allowed exactly 20 minutes.** I will cut you off if you go beyond that limit.

6. A week in advance of your presentation date, get your team members to prepare well- designed presentation material. Use a **few**, well-chosen exhibits to reveal to the class your most interesting and **valuable** findings to assist with marketing decisions.

7. As part of my evaluation of your group's research project, I will grade your in-class presentation.

8. Base your in-class presentation on the following outline:

BACKGROUND

* Who is the client? How was this client found?
* What is the product/industry/service/concept?
* What is the client's problem; why was the research needed?

RESEARCH IMPLEMENTATION

* What is the population of interest?
* What did you use as a sample frame?
* How did you sample? What was the sample size? What was the response rate?
* What were some of your team's first-hand experiences in the field (funny occurrences, frustrations, unexpected problems, and embarrassing moments)?

FINDINGS

* Provide a quick profile of respondents.
* What are the answers to your key **critical** questions? Don’t go through each of the research hypotheses.
* Most interesting and valuable findings?
* Any surprising findings? IMPLICATIONS
* What, exactly, should your client do now?
* Explain the importance of your findings for your client’s marketing?
* What did you learn from this research experience?

G. THE BIG DAY

1. **The final report date 10 Dec 24** is the day when several things must be delivered to Avenue by 11:59 pm:
   a. Your group project report;
   b. Your confidential **Peer Evaluation Sheets**.
   c. The questionnaires from your project on paper or in electronic format.

2. You will need to prepare an invoice for your expenses and present it to your client. See the attached SAMPLE INVOICE.

3. Submit a completed **Peer Evaluation Sheet** to the appropriate folder in Avenue.

4. Group-project reports will not be accepted beyond the deadline.

5. See the attached **Outline of Research Report** for the required format of your group project report.

6. Provide me with the survey questionnaire electronic responses, and the excel sheet where you coded the data and used it for statistical analysis

7. **Ensure data integrity of the collected data through surveys by filling up the data integrity form**

FORMAT FOR RESEARCH PROPOSAL

The research proposal lays out 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 listed):

COVERING LETTER

A letter to your client's contact person, giving the reason for submitting the proposal and reasons why the prospect should give the project to your consulting team. At the end of the letter, include <u>each</u> team member's telephone number**.**

TITLE PAGE

Include the title of the project, client's official name, contact person's name, date, full names and 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. Carefully explain <u>why</u> 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. Under each research question or hypothesis, list the key variables or measures on which data must be collected.

3.0 RESEARCH METHOD

Provide the following in as much detail as possible. Be prepared to defend your methodology.

* What type of research design is used?

Will the overall analysis be Exploratory/Descriptive/Causal? (Yours will likely be descriptive or exploratory.)

* What types of secondary data will you access, in order to clarify the research questions and/or determine your research design?

* What primary data collection procedures will you likely use?
  - Define the population from which you will be sampling.
  - Specify your sampling plan. Probability/Non-probability?
  - Specify method of data collection. Internet/Telephone /Mail questionnaire?
  - Specify the types of data analysis which will be needed.
  - The data will be analyzed using R and excel and other software that is convenient. Frequencies, cross-tabulations and other appropriate statistical analyses will be conducted. Don't promise any more than this since you don't actually have a completed questionnaire or data yet.

* Limitations of the project.

4.0 **ORGANIZATIONAL PROFILE OF YOUR TEAM**

Provide an organizational chart of the project team. Indicate the project leader and the functions of each team member. A <u>short</u> profile highlighting each team member's special skills and strengths is useful. You may provide links to your Linked-In sites.

5.0 PROJECT SCHEDULE

Provide a time schedule for the project. A Gantt chart or other visual diagram of your timeline is very useful. MS Project is handy for planning and presenting your timeline.

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.
* Execution of survey.
* Retrieval, coding, and editing of data.
* Analysis of the survey data.
* Interpretation of data for presentation and reporting.
* Written report and oral presentation of findings.

6.0 **PROJECT BUDGET**

Itemize an estimated budget for your anticipated out-of-pocket expenses (typing services, printing, telephone, stationery, postage, binding, paper, etc.) Use the current McMaster standard mileage charge for research use of your private automobile. Total costs can range between $200 and $500. **Typing and other 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. 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."

OUTLINE OF RESEARCH REPORT

Producing your research report provide many outstanding benefits. Your presentation can be in PowerPoint or some other slide app. Slide deck format puts a great deal of emphasis on ensuring that each slide is informative and that important material is not left out of the report because it does not conform to typical exhibits. You will need to be very creative to effectively communicate all important information in your report. **MAKE SURE TO FOLLOW A GOOD FORMAT FOR POWERPOINT REPORTS.**

The main body of the report must be readable and understandable by any person with a reasonable education. The intention of the appendix is to prove to me that you understood how to analyze the data and that your conclusions are well-founded.

Guidelines: The research report should include the following (use headings and sequence listed):

Cover

Directly on the cover of your report, give the project title, date the report was prepared, name of client's organization, by whom prepared, supervising professor.

Executive Summary

On a single slide, briefly summarize the major findings of your study, in point form.

- Objective
- Sampling: dates, responses, very brief profile (% males/females, % upscale …)
- Key findings with numbers or %s
- Use this to engage your audience

Table of Contents

Provide a listing of contents of the report and page numbers.

1.0 **Introduction**

The introduction provides background information which the reader needs, in order to appreciate the discussion in the body of the report. Mention should be made of your sponsor and the management problem that they are confronted with. It should give the background of the problem (for example, how and when it came into existence), the importance of the problem, the various dimensions of the problem, and whether any previous research was done which is pertinent to the specific project being reported. Unfamiliar terms or terms that are used in a specific way in the report should be defined here. Any history that would be pertinent to the problem should be mentioned (for example, history of business, industry, etc.)

2.0 **Statement of Research Objectives**
Begin the research report with a statement of your objectives and/or research hypotheses. These should be stated as clearly as possible. If possible, list them one by one. Indicate which the primary objectives are and which are secondary.

3.0 **Research Methodology**

Discuss your sampling and field procedures and any other pertinent methodological information. Include discussion of your secondary data search here. Following are some of the questions which should be answered here:

What type of research design was used? Why was this type of design used?
What data collection methods were used? (primary, secondary; survey, observation). What data collection devices were used? (internet, telephone, personal interviewing) Why were these devices appropriate for this project?
How was the population defined? What were its geographic, demographic, or other bounds?

What sampling units were employed? Were they business organizations or business executives? Were they dwelling units, households, or individuals within a household? Were they students or non-students?

Was a probability or non-probability sampling plan employed? Why? How was the sample actually selected? How large a sample was selected? Why was this size sample chosen? What were the dates of the fieldwork?

How was a list of sampling units generated? Why was this method used?

Were any difficulties experienced in contacting designated sample elements? How were these difficulties overcome and was bias introduced in the process? How was the fieldwork done?

Was any pretesting of the questionnaire done?

4.0 **Findings**

Remember, a client has paid money to have you ask certain questions. As a starting point, the client wants to know how the questions were answered. Provide a brief profile of the respondents' demographics. **Charts, tables and graphs** that are used in your word/pdf and SPSS report (as an appendix) can be used in the PowerPoint deck also. Make sure your findings are **understandable to a general audience**.

Absolutely no statistical or marketing research jargon should appear in the body of your report. There must be no statistics in the report body, only in the appendices. You will lose many marks if statistics and technical jargon are included in the report body.

Introduce and report the results of your analysis of the data (including findings from secondary data sources). Categorize your findings under the subheadings of your research objectives and/or hypotheses. Provide an interpretation for the results of whatever analysis you do. Omit any information that is interesting but irrelevant in terms of the specific research objectives and/or hypotheses. Tables and figures should be used **liberally** when presenting the results. While the exhibits in the appendix are complex, detailed, and apply to a number of problems, the exhibits in this findings section should be simple summaries of this information, directed to the specific research objective and/or hypotheses being discussed.

For each finding presented in this section, whether table, graph or number, insert at the bottom of the slide a reference to the appendix in which the extensive analysis resides.

You should have a "Key Findings" and "Supporting Findings" sections.

5.0 **Summary and Conclusions**

Make some final conclusions about the results of your analysis. Relate your conclusions/findings to the objectives/research questions you listed at the beginning of the report. A step-by-step development of the conclusions should be given. There should be a conclusion for each study objective or problem. The conclusions should be stated in greater detail than in the executive summary. Readers should be able to read the objectives, turn to the conclusion section, and find specific conclusions relative to each objective. If the study does not provide evidence sufficient to draw a conclusion about a problem, this should be explicitly stated.

Note: Marketing recommendations are not included in this section. This is only a summary of the analyses of your major research questions.

6.0 Marketing Recommendations

This section includes recommendations as to what action, if any, the firm should take. It can also be used to suggest future areas of research. It should be clearly demonstrated how each recommendation follows from the information presented earlier in the report. (For the learning process, you should make recommendations in both your Case Analysis and Term Project. Keep in mind that you are a consultant and do not know your clients' businesses as well as they do.)

7.0 Methodological Limitations

Discuss the limitations of the data in terms of your objectives (for example, indicate any crucial variables you found were missing from the data). Also possibly suggest some modifications for the study and questionnaire which you would recommend for a future study. Sources of non- sampling error and the suspected direction of their biases might be discussed. Readers should also be informed specifically as to how far the results can be generalized. Research design limitations could be discussed. For example, if the study is exploratory and designed to find new hypotheses, readers should be warned not to conclude that the results are an accurate measure of the phenomenon studied. If particular questions in a survey seem to have confused respondents, the readers should be warned to use particular care in interpreting the results of these questions. If many not-at-homes or refusals were encountered in the fieldwork and substitutions were made, readers should be cautioned as to the effect this could have on the results. In general, include anything which might qualify your findings, conclusions, and/or recommendations. In describing any limitations of the study, how much the limitations might affect the results and in what direction should also be indicated.

8.0 Appendix

The purpose of the appendix is to provide a place for those report items which would clutter up the Findings section, because they are either too detailed or too specialized. For example, the appendix may contain a detailed statement of the sample design, the formulas used to determine the sampling error, detailed statistical tables, and the various research forms used, such as the questionnaire.

Nothing should be relegated to the appendix if its absence from the Findings section will make it difficult for the reader to understand the results. If certain data are discussed in any detail, the tables containing such data should be INCLUDED IN THE FINDINGS, AT THAT POINT. In many cases, the main ideas can be presented graphically in the Findings section. In that case, the tables on which the charts are based should be included in the appendix. Following is a further list of things which can be included in the appendix (although it is not limited to these).

- Include general information from secondary data: tables, references or annotated bibliography, advertisements, etc.
- Maps used to draw the sample as well as a detailed explanation of the sample design used. Sample size determination.
- Detailed calculations for hypothesis testing or confidence-level determinations. Coding manual used in coding the data.
- Summary of responses to all questionnaire measures, written directly onto the answer spaces of a blank questionnaire.
- Completely blank questionnaire used in the study.

To make it easier for the reader to refer to these appendices**,** prepare a detailed table of contents. Never bury important findings in the appendices -- put them in the body of your report.

CLIENTS WANT TO READ MATERIAL THAT IS IMPORTANT FOR THEIR MARKETING DECISIONS, NOT STATISTICS! PUT IN ONLY THOSE ITEMS WHICH ARE PERTINENT!

Format for Findings Section - Extremely Important

Findings: Answers to Questionnaire Questions
Answers to each question must be provided, whether the findings were "significant" in a statistical sense or not. Some of these findings should be presented in graphs, some in charts, some in tables and some using two formats simultaneously. Basic findings can be stated very simply, for example, "46% of the respondents were male and 54% were female." Those findings that are important directly to the project objectives and will motivate key decisions should be placed in the “Key Findings” section. The remaining answers to questions, hypotheses and objectives should be located in the “Supporting Findings” section.

Findings: Marketing Hypotheses
Address each hypothesis in turn, providing a full business interpretation. Appropriate use should be made of graphs, tables and charts.

Format for Appendices

Appendices: Table of Contents for Appendices

Appendix 1: Glossary of Terms (including a basic explanation of the statistical tests used)

Appendix 2: Questionnaire

Appendix 3: Coding Manual

Appendix 4: Frequency Distributions (The frequency distributions for each question in the order in which the questions appeared in the questionnaire.)

NB: It is necessary to provide all the statistical information as explained below in "Appendix 5" for those relationships that are found to be **"statistically significant."** It is necessary to provide the detailed statistical output as described below in "Appendix 5" for only **two** hypotheses that are found to be **"not statistically significant,"** i.e., just two sets of results, not for everyone. For the "not significant findings," list the findings in a table similar to that presented below.

Hypothesis	Variables	Test	significance (p)	Conclusion
H1:-----	1 Intention to buy (Q.27) 2. Income (Q.32)	Chi-Square ANOVA	0.09 0.12	Not Significant Not Significant
H2:-----	1. Awareness (Q.12) 2. Income (Q32)	Chi-square	0.38	Not Significant

Appendix 5: Hypothesis 1 (State the hypothesis as HO and Ha and then provide all of the findings, analysis and interpretation that is relevant for the testing of that hypothesis. Statistical information, notation and terminology may be used here. Also include "business interpretations" of the analysis. Explain or state any manipulations of the data that you performed to prepare the data for each analysis.)

Appendix 6: Hypothesis 2 (Same as above.)

Appendix 7: Hypothesis 3,4 (Same as above.)

Appendix xx: Verbatim Comments (If important verbatim comments can be extracted from the questionnaire, summarize them in this appendix.)

Use a floating table of contents.

Report Requirements:

1. Communication is very important in research. Accordingly, the evaluation of your report will be based, in part, on the accuracy and clarity with which your findings are presented. Remember that this report must be understandable to your client (The appendix should include the more technical details).

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

3. Sections should be titled and numbering.

4. Use tables, graphs, and charts if they will summarize and clarify results. Don't leave exhibits alone without explanation in the text.

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

6. In the summary section of the report, use tables of data or statistics very carefully and, perhaps, exclude completely. New information should not be presented here.

7. The presentation of hypothesis tests or statistical analysis **MUST** be left in the appendix to the report.

8. Labelling the appendix for each type of information makes it easier to reference.

9. Correct all typographical errors. There is a spelling checker in word, R Markdown; make sure that you use it. Use correct grammar. A good report is discredited because of these errors even though the report is methodologically sound.

10. Refer to appendix numbers and table numbers within appendices from the main body of your report. This is made easier by using the 'captioner' package.

11. **Each member of your group, your client and your professor must have a copy of the final report. The final report will be in PDF. The presentation will be in PowerPoint.**

Important –

- **You will be graded on how you summarize the data and use data visualization techniques.**
- **You will be graded on the basis of number of correctly done statistical tests that you can do for your project and which we have covered in class (e.g. Chi-Square Tests, ANOVA, Z-test, T-tests, Wilcoxson Signed Rank Test, Mann Whitney Test, Correlation tests, Conjoint Analysis, etc.).**
- **Also, you will be graded on how you run linear and logistics regressions for your dataset and how you interpret these results.**
- **You will be graded on how you translate the statistical findings to managerial implications.**
- **You will be graded on how well you write and present the report**

BUSINESS M731 – WINTER 2024

MARKETING RESEARCH TERM PROJECT GROUP EVALUATIONS

INSTRUCTIONS:

1. You are to assign to each person in your group an amount of money which represents each individual's contribution to the project, including yourself.
2. Your total budget to distribute among the people in your group is $1,000 * (the number of people in your group). For example, if there are 5 people in your group, then pretend that you have $1,000 * 5 = $5,000 to pay out to the group.
3. If everyone contributed equally to the project, then pay each person $1,000.
4. Adjust the fee to each person according to your honest personal assessment of the value of each person's contribution. In our example, the fee could be as low as $0 or as high as
$5,000.
5. Your evaluation is to be done by you with no consultation with others in your group or from other groups.
6. In most cases, these evaluations will be valuable input to your professor in allocating marks. However, your professor might decide not to use the evaluations for some groups under unusual circumstances.
7. TREAT THIS EVALUATION SERIOUSLY.
8. MAKE SURE THAT THE FEES PAID ADD TO $1,000 * GROUP SIZE.

YOUR NAME: __

YOUR SIGNATURE: _____

GROUP NAME: _

CLIENT ORGANIZATION:________

GROUP MEMBER (alphabetical order)   FEE

GROUP MEMBER	FEE

SAMPLE INVOICE

To: Jack Jones Date: 0ct 19, 2024
Love Boat Cruises 123 Main Street Everywhere, Ontario L8R 2G1

Research expenses incurred by students completing a marketing research project in Business M731 (supervised by Dr. A. Bhattacharya) for the client.

Personal automobile mileage, 310 km @currency/ .... $ 170.50 Photocopying (questionnaires) 127.00
Long-distance telephone calls to client 8.35
Stationery for fieldwork (envelopes, clipboards, markers) 43.12
Typist's fee for preparation of report and graphs 120.00
Binding of reports <u>20.00</u>
Total <u>$488.97</u>

Please send reimbursement check to: Ms. Janet Smith
69 Anylane St. Ancaster, ON L4G 2B2
Tel. (416) 583-1186 <u>(Signature)</u>
Janet A. Smith, Project Leader

McMaster University DeGroote School of Business

* **AGREEMENT OF INTENT** *

Marketing Research Student Project

This agreement is made this____day of__, 202, between (CLIENT'S NAME) and the (PROJECT TEAM), hereinafter 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 "CONSULTANT'S" out-of-pocket costs. No consulting fees other than the "CONSULTANT'S" costs will be charged. The "CONSULTANTS" will endeavor 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 claims to have no professional expertise in this area.

Signatures: Client: _

Consultant:____(Project Leader)

____

____

____

____

____

Supervising
Professor: ____

Business M731 - Marketing Research, 2024 Project Team #

Client Company: ______

Company Contact Person:_____

Project Title:___

Project Leader:_

Team Members: **email addresses,** **phone numbers**

1.______

2.______

3.______

4.______

5.______

6.______

Business M731 - Marketing Research, 2024 Project DATA INTEGRITY DECLARATION

Client Company:

Company Contact Person Name and Signature:

Project Title:

Project Leader Name and Signature:

Declaration: We ascertain that the data was collected through surveys and no data fudging was done.

Date:

Team Members:	Email Addresses	Phone Numbers	Signature
1.			
2.			
3.			
4.			
5.			
6.			