Business M731
Marketing Research
Winter 2025 – 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.

INSTRUCTOR AND CONTACT INFORMATION

Instructor: Dr. Yang Pan
Email: pany66@mcmaster.ca
Office Hours: Fri 1pm – 2pm. Zoom
(Please book by email in advance)

TBD
Teaching Assistant

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

Course Prerequisites: M650 or equivalent and I602 or equivalent.

COURSE ELEMENTS

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

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.

REQUIRED COURSE MATERIALS AND READINGS

- *Marketing Research: Methodological Foundation, 13th edition* by Churchill and Iacobucci. This is the latest edition. You may use an earlier edition if you wish.
    - Bookstore and Amazon

- Course videos, PowerPoint files, R, and Excel documents in Avenue.

EVALUATION

Learning in this course results primarily from in-class discussion and participation of comprehensive business cases as well as out-of-class analysis. The balance of the learning results from the lectures on strategic concepts, from related readings, and from researching your presentations, cases, assignments, simulation decisions and projects.

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

Midterm Exam		30%
Case analysis		25%
Research project	(80% report; 20% presentation), Due at the final exam time in Avenue	45%
Total		100%

Key Deadlines for Team Project

- Recruited Client .... Jan 26th
- Project Proposal .... Feb 9th
- Submit Questionnaire .... Feb 24th
- Final Questionnaire .... Mar 2nd
- Project Report & Presentation .... Apr 7th and 13th

Each part of the project must be placed in the appropriate Avenue Drop Box by 4pm on the date when due. The dropbox will lock as of 4pm and late assignments will not be accepted.

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

Course Deliverables

Case Analysis (Assignments)

Exercises that generally include data analysis and marketing interpretation will be assigned. These assignments must be done by each individual student without help from others and submitted to the Avenue Drop Box when required. The assignments will be scrutinized for cheating and appropriate steps will be taken if collaboration is discovered. Each assignment must be placed in the appropriate Avenue Drop Box by 4pm on the date when due. The dropbox will lock as of 4pm and **late assignments will not be accepted**. This is a marketing research course, i.e., the research must be done correctly and to the proper extent and the results must be interpreted to support better marketing decisions. The lack of either of these two essential components will cause a reduction in grades.

Midterm

A midterm 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 professor. It is expected that each team member contributes appropriately and equally to the end result. There will be a vehicle for adjusting grades if a team member were to not participate adequately. The term projects will be presented orally during the scheduled final exam period.

Final Marks in M731

A passing mark in M731 indicates that the professor attests that the student has at least an adequate proficiency in marketing research and should be able to contribute to the research functions of the marketing department of an organization. If the professor is not able to attest to this achievement, the student will receive a grade of F.

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.

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.

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.

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.

It is your responsibility to understand what constitutes academic dishonesty. For information on the various types of academic dishonesty please refer to the Academic Integrity Policy, located at:

www.mcmaster.ca/academicintegrity

Students are responsible for being aware of and demonstrating behaviour that is honest and ethical in their academic work. Such behaviour includes:

- following the expectations articulated by instructors for referencing sources of information and for group work;
- asking for clarification of expectations as necessary;
- identifying testing situations that may allow copying;
- preventing their work from being used by others (e.g., protecting access to computer files); and
- adhering to the principles of academic integrity when conducting and reporting research.

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 ONLINE ELEMENT

All courses use some online 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.

Students may be required to use the Respondus LockDown Browser and Respondus Monitor. The Respondus LockDown Browser is a downloadable program that allows a student to take an Avenue to Learn quiz in a secure environment.

For more details about McMaster's use of Respondus Lockdown Browser please go to https://avenuehelp.mcmaster.ca/exec/respondus-lockdown-browser-and-respondus-monitor/

The available information is dependent on the technology used. Continuation in a course that uses online 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, Teams, 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.

ATTENDANCE

Arriving late or missing class disrupts the learning experience for both you and your peers. Punctuality and attendance are crucial to maintaining a respectful, professional, and productive environment for everyone, including our faculty.

MISSED ACADEMIC WORK

Missed Mid-Term Examinations / Tests / Class Participation

Please do not use the online McMaster Student Absence Form (MSAF) as this is for Undergraduate students only. The MBA program will not accept an MSAF.

When students miss regularly scheduled term work which contributes 10% or more to the final grade, for legitimate reasons as determined by the Student Experience – Academic Office (SEAO (Student Experience Academic Office)), the activity necessary to compensate for the missed work will be determined by the course instructor. The compensatory activities assigned will vary with the nature of the course and the missed requirement. They include, but are not restricted to, an alternative assignment, a rescheduled midterm exam, or re-weighting the marks for the missed component to other mark components. Documentation explaining such missed work must be provided to the SEAO (Student Experience Academic Office) within five (5) working days of the scheduled date for completion of the work.

Acceptable reasons for missed work, along with the Petition for Missed Term Work and the MBA Student McMaster University Student Health Certificate, can be found on the DeGroote MBA Student website (mbastudent.degroote.mcmaster.ca). Please direct any questions about acceptable documentation to the MBA Academic Advisors (askmba@mcmaster.ca).

University policy states that a student may submit a maximum of three (3) Petition for Missed Term Work per academic year, after which the student must meet with the Director of the program.

If term work is missed without an approved reason, students will receive a grade of zero (0) for that component.

Missed Final Examinations

Students must be available for the duration of the posted exam period regardless of their personal exam schedule. This is to ensure student availability throughout the entire exam period in the event that an exam must be rescheduled due to unforeseen circumstances (university closure, power outage, storm policy, etc.). A student who misses a final examination without valid reason will receive a mark of 0 on the examination.

Students who have missed a final exam for a valid reason can apply to the SEAO (Student Experience Academic Office) to write a deferred examination by submitting an Application for Deferring a Final Exam with supporting documentation. The application must be made within five days of the scheduled exam.

The Application for Deferring a Final Exam and the MBA Student McMaster University Student Health Certificate can be found on the DeGroote MBA Current Student website

(mbastudent.degroote.mcmaster.ca)

Deferred examination privileges, if granted, are normally satisfied during the examination period at the end of the following semester. In select cases, the deferred examination may be written at a time facilitated by the SEAO (Student Experience Academic Office) (Student Experience Academic Office) and agreed to by the course instructor.

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

ACADEMIC ACCOMMODATION FOR STUDENTS WITH DISABILITIES

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

Use of Test Accommodations at McMaster University Burlington Campus Ron Joyce Centre

Whereas Student Accessibility Services (SAS), on Main Campus, determines all MBA student accommodations, the MBA Faculty Office manages the coordination of accommodations for tests, midterms, and exams at the Ron Joyce Centre in Burlington.

Process for Students

- Students must activate their accommodation(s) (e.g., extra-time, memory aid, etc.) for each upcoming test, midterm, or exam, at least two weeks in advance. Students can do this by emailing their Instructor and the DeGroote MBA SAS scheduling office at DSBSAS@mcmaster.ca. If a student cannot meet this deadline, they should contact DSBSAS@mcmaster.ca to discuss alternative arrangements. The program is committed to exploring flexibility where possible to support students.

- All tests, midterms, and exams are booked synchronously with the class's start time. Any deviations from the start time (e.g. start earlier than the class to enable completion at the same end time) requires a discussion with their instructor on protocol at the time of accommodation activation.

- Students will leverage the accommodation (e.g., extra-time, memory aid, etc.), in a designated testing room. Rooms will be booked according to the student's SAS accommodation. Unless the accommodation states otherwise, students should expect that they will be writing in a room with other students. One or more invigilators will always be in the room.

- Following the request to activate the accommodation(s), dsbsas@mcmaster.ca will reach out to the student with their test, midterm, or exam details, including the date, time, and room number.

As there may be other students writing tests in the room, we ask that students enter the room quietly and leave all personal items at the front of the room.

All policies and procedures, including restroom access, how extra-time is allocated for assessments under Universal Design, and the submission of memory aids in advance, are consistent with those of SAS on Main Campus. The only variance in procedure is communication around, and physical location of, assessment. There is not a dedicated testing space at RJC. Existing classrooms and lecture halls will be used for most testing. All SAS-approved accommodations will be honoured by our staff; however, core testing elements are not eliminated in alternative testing formats. Students should expect and plan for invigilation, incidental noise, and other potential distractions.

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 the SEAO (Student Experience Academic Office) **normally within 10 working days** of the beginning of term in which they anticipate a need for accommodation. 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.

POTENTIAL MODIFICATION 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.

ACKNOWLEDGEMENT OF COURSE POLICIES

Your registration and continuous participation (e.g. on A2L, in the classroom, etc.) to the various learning activities of MBA XXXX 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.

ARTIFICIAL INTELLIGENCE

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 SCHEDULE

Please note that the schedule may be modified to accommodate student feedback.

Week / Date	**Topic**	**Activity / Deadline**
Week 1 Jan 8	• Course Overview	
Week 2 Jan 15	• Role of Marketing Research • Marketing Research Process • Ethics in Research • Secondary Data	**Due Jan 20th, 4pm:** Team Contract
Week 3 Jan 22	• Research Design in marketing • Qualitative Research in marketing (including Focus Groups) • Observation Research	**Due Jan 26th, 4pm:** Client Profile
Week 4 Jan 29	• Case 1	
Week 5 Feb 5	• Survey Research: Survey Methods • Survey Research: Questionnaire • Design, Measurement, and Scaling	**Due Feb 9th, 4pm:** Project Proposal
Week 6 Feb 12	• Survey Research: Sampling Design and Procedures • Survey Research: Sample Size	
Week 7	Midterm Recess	
Week 8 Feb 26	Data Analysis: • Coding, data entry, Cleaning data • Frequency Tables and Cross Tabulations • Descriptive Statistics • Hypothesis Testing	**Due Feb 24th, 4pm:** Project Questionnaire **Due Mar 2nd , 4pm:** Final Questionnaire
Week 9 Mar 5	• Data Analysis: Regression Causal Research	
Week 10 Mar 12	• Mid-term Exam in class	
Week 11 Mar 19	• Hands on Statistical Exercise using Excel and R on marketing data	
Week 12 Mar 26	• Case 2	
Week 13 April 1	• Guest Speaker	

Week 13 Apr 8	• **Presentations**	**Due April 7th, 4pm:** Powerpoint Slides **Due April 13th, 4pm:** Final Report, Peer evaluation forms, Copy of Client Invoice (if applicable)

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 behaviour. 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 **Jan 26th**, 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 **Feb 9th**, the final draft of your group's research proposal must have been formally approved by me. It must be prepared in word or pdf (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

Mar 2nd is the last day by which I will approve questionnaires, so that your fieldwork can begin. Your questionnaire must be printed the way it will look to the respondent. This is done easily using Sawtooth Software. 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 Feb 24th 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 Mar 2nd.**

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 exam date** is the day when several things must be delivered to Avenue by 4pm:
   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, whichever is appropriate.

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 analysed using R. 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 short 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

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 are primary objectives 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 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' business 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. Sawtooth Software will provide this.

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)		0.12	Not Significant
H2:-----	1. Awareness (Q.12) 2. Income (Q32)		0.38	Not Significant

Appendix 5: **Hypotheses:** (State the hypothesis as H_O and H_a 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 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 centered 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; 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 or .MS Word. The presentation will be in PowerPoint.**

BUSINESS M731 – WINTER 2025

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
______________________________	______________
______________________________	______________
______________________________	______________
______________________________	______________
______________________________	______________

SAMPLE INVOICE

To: Jack Jones
Love Boat Cruises
123 Main Street
Everywhere, Ontario
L8R 2G1

Date: April 19, 2025

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

Personal automobile mileage, 310 km @current¢	$ 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	20.00
Total	$488.97

Please send reimbursement cheque to: Ms.

Janet Smith
69 Anylane St.
Ancaster, ON L4G
2B2
Tel. (416) 583-1186 (Signature)
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 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 claims to have no professional expertise in this area.

Signatures: Client: ___________________________________

Consultant:___________________________________(Project Leader)

____

____

____

____

____

Supervising
Professor: ___________________________________

Business M731 - Marketing Research,

2025 Project Team #

Client Company: ______________________________________

Company Contact Person:______________________________

Project Title:____

Project Leader:_______________________________________

Team Members: email addresses, phone numbers

1.____

2.____

3.____

4.____

5.____

6.____