# Marketing Research
# Course Syllabus and Schedule

*Instructor:*    Professor Gal Zauberman
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*Administrative*
*Coordinator:*    Karen Ressler; resslerk@wharton.upenn.edu

*Teaching Assistant*    Kyu Kim; bkyu@wharton.upenn.edu

*Office Hours:*    Tuesday 3:00pm-5:00pm, and by appointment

*Required Text:*    Aaker, Kumar, and Day (AKD), Marketing Research (9th Ed., 2007)
Wiley (**ISBN:** 978-0-470-05076-7)

*Required Bulkpack:*    Please obtain.  There are cases and assigned readings.

*Required Software*:    SPSS, 'Graduate Pack' (version 15 or 16)
available in computer labs and at http://www.e-academy.com/

*Course Website:*    WebCafé

*Group Assignments:*    *(i)* There will be 6 main group assignments due during the semester.
*(ii)* All assignments are due as **hard-copy in class** and will be returned within two weeks following the assignment due date (unless other instructions are given).
*(iii)* Group formation is discussed below.
*(iv)* The due dates are indicated on the schedule:
*(v)* Assignments will be posted on WebCafé on the day that they are "handed out".
*(vi)* Graded assignments will be available for pickup from the area assistant in the marketing department (JMHH 7th floor).

*Guest Speakers*:    We will have 2 Guest Speakers during the semester that will focus on the implementation of marketing research.

*Final Examination:*    "Takehome examination."  Exam will be available for pick up on Wednesday December 10 through Friday December 12, and Monday December 15 through Wednesday December 17.  It is open-book, open-notes.  You must complete the exam in a single contiguous three-hour time period.  The honor code applies.  Do not speak to anyone about the exam until after the final due date has passed.

## Overview and Objectives

The goal of the course is to familiarize students with the fundamentals of Marketing Research. Marketing Research involves developing research questions, collecting data, analyzing it and drawing inferences, with a view to <u>making better business decisions</u>. To this end the course is organized into two basic parts: (1) Data Collection and Research Design, and (2) Tools and Applications of Market Research.  In both parts, we will focus on inference from Marketing Research data to improve decision making.

## Course Materials and Approach

In the course we will use a variety of readings, cases, and computer-based exercises. The most important readings and complete list of cases are contained in the course bulkpack. Lecture notes and additional readings and handouts will be made available throughout the semester. The readings are designed to introduce marketing research concepts and principles. Cases will allow us to examine, in detail, the application of particular marketing research approaches and techniques. For all of the cases in the course, I will provide you with a set of questions to help focus your preparation.  The textbook will serve as background and general readings that will allow you to better understand the material discussed in class.

The computer and data-based exercises are designed to give you "hands-on" experience with marketing research analyses. Here also, the main goal is to help you become an intelligent consumer of marketing research (but to this end, you must understand how marketing research is produced).

## Course Software

Statistical analyses in lecture will be demonstrated using the SPSS statistical software package.  SPSS is a menu and command driven statistical analysis package and is widely used in the industry and is integrated into the textbook.  Other software, like JMP, is capable of the types of analyses that we will cover; however, note that I can't promise you quality (technical) support.

**Assessment**

Your final grade in the course will be based on class participation (case preparation and general contribution), written assignments, and a final examination. The evaluation is as follows:

A. Class Participation                10%
B. Group Assignments                  40%
C. Final Examination (individual)     50%

Please note that <u>no late assignments will be accepted</u>. All written work is due on the specified date. The due dates for the assignments are listed on the course schedule. A more detailed outline of the evaluation procedure and requirements is included at the end of this document. Please refer to this detailed section before preparing for each assignment.

**Group Formation**

Students must organize themselves into **groups of 4-5** in order to do the group assignments.  I will allocate time in the first class for you to start the process.  This will be important for our first class exercise and case discussion on the second class.

I understand that there will be some movement due to drop/add, so the final group assignment is not due until the end of the second week.  You should email the TA (and copy me) the names of the persons in your group by **Sunday, September 14th; 5:00pm** (one email per group; any unassigned student will be assigned by me). .

# Schedule of Class Meetings

*--- Schedule is subject to change ---*
*- You are responsible any changes announced in class ---*

| Class | Date | Topic, Bulk-pack Readings (BP), Cases, Assignment Due Dates | Reading Text (AKD) |
|---|---|---|---|
| 1 | Thursday Sep 4 | **Course Introduction and Research Design** <br> BP 1: *READING:* "'Backward' Market Research" <br> **Assignment # 1 Handed Out** <br><br> ➢ **Form Groups** | Ch. 1 <br> Ch. 2 skim |
| 2 | Tuesday Sep 9 | **The Value of Marketing Research** <br> **Problem Definition and Information Needs** <br> BP 2: *CASE READING and PREPARATION:* <br> Southwest Conquistador Beer Case (SCBC) <br><br> **Assignment # 1 (Part A) Due** | Ch. 3 <br> Ch. 4 skim |
| 3 | Thursday Sep 11 | **The Value of Information (Cont.)** <br> **Secondary Sources of Marketing Data** <br> BP 3: *READING:* "The Value of Information" <br> BP 4: *READING*: "Cost Conscious Marketing Research" | Ch. 5, 6 |
| 4 | Tuesday Sep 16 | **Primary Data Collection Explanatory Research** <br> BP 5: *CASE READING and PREPARATION:* <br> "Boston Fights Drugs (A)" <br> **Assignment # 1 (Complete) Due** | Ch. 8 |
| 5 | Thursday Sep 18 | **Primary Data Collection from Explanatory Research to Causality** <br> BP 6: *READING*: "Causal Inference" <br> BP 7: *CASE READING and PREPARATION:* <br> "Boston Fights Drugs (B)" | Ch. 13 |
| 6 | Tuesday Sep 23 | **Causality and Experimentation** <br> BP 8: *READING:* "EDLP, Hi-Lo and Margin …" <br> **Assignment # 2 Handed Out** | |
| 7 | Thursday Sep 25 | **Questionnaire Design, Measurement, and Scaling** | Ch. 11, 12 |
| 8 | Tuesday Sep 30 | **Questionnaire Design, Measurement, and Scaling, and Sampling and Sample Size** <br> BP 9: *READING*: "Nonsampling vs. Sampling …" | Ch. 14, 15 |
| 9 | Thursday | **Guest Speaker # 1: Donna Tinari-Siegfried** | |

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|---|---|---|---|
| | Oct 2 | President, Fundamental Research Group, Inc. | |

**Assignment # 2 Due**
**Assignment #3 Handed Out**

| 10 | Tuesday Oct 7 | **Fundamentals of Data Analysis** (See textbook Appendix A-5 & A-6, p. 738-752 for notes on SPSS analysis) | Ch. 16 |
|---|---|---|---|
| 11 | Thursday Oct 9 | *No Class meeting: Yom Kippur* | |
| | Tuesday Oct 14 | *No Class: Fall Break / Interview Period* | |
| 12 | Thursday Oct 16 | **Hypothesis Testing + Making Comparisons** | Ch. 17, 18 |
| 13 | Tuesday Oct 21 | **Regression Analysis I** BP 10: *READING*: "Forecasting with Regression Analysis"  **Assignment #3 Due** | Ch. 19 |
| 14 | Thursday Oct 23 | **Regression Analysis II + ANOVA** BP 11: *READING*: "Using a Natural.." BP 12: *CASE READING and PREPARATION:* Nopane Advertising  **Assignment # 4 Handed Out** | |
| 15 | Tuesday Oct 28 | **Logistic Regression – regression with nominal dependent variable** | |
| 16 | Thursday Oct 30 | **Conjoint Analysis I** BP 13: *READING*: "New way to measure ..." BP 14: *READING*: "Conjoint Analysis…" | Ch. 22 (p. 603-611) |
| 17 | Tuesday Nov 4 | **Conjoint Analysis II** BP 15: *CASE READING and PREPARATION*: Clark Materials  **Assignment # 4 Due** **Assignment # 5 Handed Out** | |
| 18 | Thursday Nov 6 | **Cluster Analysis (Segmentation)** | Ch. 21 (p. 574-585) |
| 19 | Tuesday Nov 11 | **Factor Analysis I** | Ch. 21 (p. 561-574) |

| 20 | Thursday<br>Nov 13 | **Factor Analysis II (complete analysis)** | |
| | | **Assignment # 5 Due**<br>**Assignment # 6 Handed Out** | |
| 21 | Tuesday<br>Nov 18 | **Guest Speaker #3: John Sanchez**<br>Vice President of Slot Operations<br>Harrah's Atlantic City | |
| | Thursday<br>Nov 20 | **Perceptual Maps (Multidimensional Scaling)**<br>BP 16: *READING*: "Perceptual Mapping: A Manager's…" | Ch. 22<br>(p. 592-603) |
| 22 | Tuesday<br>Nov 25 | **Discriminant Analysis (credit scoring)** | Ch. 20<br>(p. 540-553) |
| 23 | Thursday<br>Nov 27 | *No Class: Thanksgiving Break* | |
| 24 | Tuesday<br>Dec 2 | **Case Discussion: The Entire Marketing Research**<br>  **process and Application of Multivariate Data Analysis**<br> BP 17&18: *CASE READING and PREPARATION*:<br>Ocean Spray Cranberries, Inc. (A) & (B)<br><br>**Assignment # 6 Due** | |
| 25 | Thursday<br>Dec 4 | **Course Summary and Wrap-Up** | |

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# Assessment Details

A. Contribution to Class Discussion (10%)

Every session of the course will involve interaction in the form of class discussion. I expect each class member to be prepared at all times to comment in any class session. To reinforce this expectation, I will at times "cold call" throughout the ensuing discussion.

Some class sessions in this course follow a case discussion format. The assigned cases are intended to give you practice in assembling data to support a decision. Further, the case method provides a vehicle by which to apply the theories, concepts, and analytical techniques discussed in a class or in the reading materials. Finally, the discussion forum provides an opportunity to argue your position and to learn from others by listening to their comments and criticisms.

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


B. Group Assignments (40%)

The assignments will be put in Webcafe. There will be six assignments, each of equal value addressing the following six topics:

   (1) Backward Marketing Research
   (2) Exploratory Research Design
   (3) Survey Design and Implementation
   (4) Hypothesis Testing / Regression
   (5) Conjoint Analysis
   (6) Multivariate data analysis (Factor Analysis)


C. Final Examination (50%)

It is open-book and open-notes. The final examination will be available for pick up from the marketing department (JMHH 700) on Wednesday December 10 through Friday December 12, and Monday December 15 through Wednesday December 17. . Once you pick up the exam, you will have three hours to complete the exam and return it to the marketing department.

We will discuss this in detail at the end of the semester.