

Department of Marketing  
The Wharton School  
University of Pennsylvania

***Marketing Research: MKTG 212–920/756–920***  
**Summer 2010**

**William M. Madway, MBA**  
**Lecturer in Marketing**

**Course Info**

Day/Time: Monday – Thursday, 1:00 p.m. to 2:35 p.m.  
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Office Hours: Tuesdays and Thursdays, 3:00 – 4:30; other hours by appointment.

**Instructor Bio**

I have over 20 years of experience in marketing, including running my own marketing consulting firm (now), running my own marketing research firm, and serving as vice president of marketing research for a major media company. In addition to running my own marketing company and teaching at Wharton, I'm extremely active in a number of marketing-related professional associations. I am the Program Chair for the Student Outreach Committee of the Philadelphia Advertising Club. I also do *pro bono* work for the Advertising Research Foundation.

Prior to joining the Wharton faculty in the summer of 2009, I taught marketing for 7 years at the Villanova School of Business. I was also the faculty advisor for the Villanova Advertising Society, a student chapter of the American Advertising Federation. While at Villanova, I was a finalist for the 2009 *Gerald Dougherty Award for Teaching Excellence*, and a semi-finalist for the 2007 *Lindback Award for Teaching Excellence*. In 2008, I was selected by the leaders of the student professional societies in the business school to receive the first-ever *Faculty Advisor of the Year*, for my work with the Villanova Advertising Society.

I have an MBA in Marketing and Entrepreneurship from Wharton (1985), and a BS in Accounting from Wharton (1979). I was the Director of the Wharton Small Business Development Center from 1984 to 1986. I also taught graduate courses in Entrepreneurship for the Management Department at Wharton from 1985 to 1990.

**Course Materials**

The textbook will be using is *Marketing Research: An Applied Orientation* (6<sup>th</sup> edition) by Naresh Malhotra, published by Prentice Hall. The book comes bundled with the student version of SPSS, a leading data analysis program. Prentice Hall offers a number of online resources for students using textbooks by Professor Malhotra at <http://www.pearsonhighered.com/malhotra/>. I suggest using the resources for both the 4<sup>th</sup> edition (sample test questions) and the 6<sup>th</sup> edition.

Given the cost of the textbook I do not anticipate using a custom course pack for the course. Instead, additional materials for the course, such as articles, cases and reference material, will be posted on our WebCafé eRoom.

## **Course Objectives and Structure**

This overall objectives of this course are to teach you how marketing research supports and enhances the marketing decision-making process, and how to use marketing research to solve marketing problems and make better marketing decisions. I realize that most of you do not intend to pursue marketing research as a career. But at the very least, all of you will use the results of marketing research personally, such as when making a major purchase or deciding which position to take on an important issue, and/or professionally, such as deciding whether or not to introduce a new product. And some of you will even commission others to conduct marketing research on behalf of the organizations you work for.

So even if you are not responsible for conducting marketing research in the future, you need to understand the research process and be able to distinguish good research from bad research. With this in mind, here is what you expect to accomplish through the successful completion of this course:

- Develop an understanding of the marketing research process and the most commonly utilized research techniques;
- Enhance your problem analysis skills, and develop the ability to translate a business problem into an actionable research question and design a feasible research plan to answer the question;
- Develop the ability to perform basic research tasks, including designing a research plan, writing a questionnaire, and selecting an appropriate sample;
- Develop an understanding of the various errors inherent in data collection and analysis, and learn how to avoid and/or overcome them;
- Develop a basic proficiency in analyzing and interpreting research data, and preparing research reports and recommendations;
- Learn how to use the Internet to conduct various forms of research and carry out various research-related tasks;
- Develop your oral and written presentation skills; and
- Become more sophisticated consumers/users of marketing research.

The course content is divided into the following four sections:

1. Introduction to marketing research and the research process;
2. Market research design and formulation;
3. Survey research design and implementation; and
4. Data analysis and reporting.

## **Method of Instruction**

Before explaining how I conduct class, let me explain my teaching philosophy. Whether teaching an introductory course or an advanced course such as *Marketing Research*, I believe the learning process is greatly enhanced through “experiential learning,” that is, by giving students an opportunity to apply what they’re learning. Not only is this the best way to learn, in my opinion, but it also offers an effective way to assess what a student is actually learning.

To achieve this balance in *Marketing Research*, our classes will consist of a combination of 1) instructor presentations to explain the key concepts, and 2) interactive tasks, such as case discussion, problem-solving exercises, and group activities. To reap the most benefit from this “hands on” teaching approach, it is imperative that you complete the assigned readings prior to class. While I will spend some time in class explaining and elaborating on the textbook material, I prefer to do this in an interactive manner, i.e., by posing questions to the class.

To help you begin applying the textbook material as you're reading it, I will be assigning various tasks to be performed or questions to be answered related to the readings. These tasks/questions are similar to the case analyses used by other instructors, but they tend to be less time-consuming and more focused. They will be the focus of our class discussions and other in-class activities. The tasks/questions for our first 10 class sessions are listed in the *Class & Assignment Schedule* section of the syllabus (see Pages 8 – 9). I will update the schedule about a week into the semester with the tasks/questions for the remainder of the term. This will give me an opportunity to assess the course workload.

*Please note that I typically don't require students to hand in the work they do for these reading-related tasks. However, if I find that many students are coming to class unprepared, I reserve the right to require students to hand in this material.*

To help you identify the concepts in the textbook that I want you to concentrate on, i.e., the material you will ultimately be tested on, and facilitate your note-taking in class, I will provide you with PowerPoint slides summarizing the main concepts and my own observations. For most chapters, I will post the slides on our WebCafé eRoom prior to our coverage of the material in class. Please keep in mind that the slides are **not** a substitute for reading the textbook or attending class.

### **Course Requirements**

Detailed below are the specific deliverables for the course. The due dates can be found in the *Class & Assignment Schedule* section.

#### Exams:

To evaluate your understanding of the fundamentals concepts of marketing research, we will have a mid-term and a final exam. Both tests will be administered in class. The mid-term will take place on Thursday, July 22, and will cover Chapters 1 – 7 of the textbook. It will be worth 15% of your grade for the course. The final will take place on Monday, August 9, and will cover Chapters 8 - 17. As this is more material than the mid-term, the final exam will be worth 25% of your grade for the course.

For each exam, you will be permitted to use a test-taking aid. For the mid-term, you can prepare three pages of notes to use as a reference. For the final exam, you can bring up to five pages of notes.

#### Group Exercises:

Tests are an effective way to determine whether or not you understand the fundamental concepts of marketing research. But to give you an opportunity to demonstrate your ability to apply these concepts in a realistic business/marketing setting, you will work with a small group of your fellow classmates and complete three exercises. The first exercise is worth 10% of your grade for the course, the second is worth 15%, and the third is worth 20%, as it will also involve an in-class presentation. The due dates for the assignments are shown in the *Class & Assignment Schedule* section.

You will receive the instructions for the first assignment one week before the due date. For the other two assignments, you will receive the instructions about 10 days before the due date. The instructions will be sent via email; they will also be posted in our eRoom. All assignments are to be turned in as **hard-copy**, and will be returned with your grade and comments within two weeks following the assignment due date.

Regarding the group formation process, students must organize themselves into groups consisting of 3 or 4 students—the exact group size will depend on the number of students in the class—during the first week of class. We will do a group exercise the first day of class to help students begin to get acquainted

with one another. Group lists are to be submitted by 5:00 p.m. on Friday, July 9. One member of the group should email the list to me by that time. Any unassigned students will be placed in a group by me.

I understand that there will be some movement in the class due to the drop/add period, which ends Friday, July 9. That is why the first group exercise accounts for a smaller portion of your overall grade.

The grades for the group exercises are team grades. However, each student will be asked to complete a **peer evaluation** form at the end of the term, which will be used to assess the contribution of each group member to the group's performance. Your grade for the group exercises can be adjusted up or down depending upon the results of the peer evaluation process.

#### Class Participation:

The benefit that you will derive from the course depends in large part upon the extent to which you expose your own viewpoints or conclusions to the critical judgment of the class through class participation. You should view class participation as an opportunity to ask questions that enhance your understanding of the course material, as well as an opportunity to suggest examples that demonstrate your knowledge of the material.

Class participation counts for 15% of your overall grade for the course. Speaking in class is an important factor that goes into the determination of your class participation grade, but it is only **one** of the **four** factors I consider. The four factors I look at are as follows:

- Attendance: You can't participate in you're not in class. You are expected to attend **all** classes and arrive on time. I don't distinguish between excused and unexcused absences, except in the case of documented illnesses and family emergencies. Nevertheless, if you must miss a class for non-medical or non-emergency reasons, I encourage you to email me in advance.
- Preparation: To be prepared for class, you must read all of the material assigned for the day and be ready to answer questions about it. I also suggest that you come with questions and/or comments about the material that you think will be interesting/helpful to the class. Lastly, be sure you have completed any reading-related tasks assigned for the day and are prepared to discuss what you came up with.
- Demeanor: This concerns how well you comply with the standards of good classroom conduct, such as paying attention, not talking with your classmates while someone else is talking, not texting or surfing the Web, etc.
- Engagement: You respond to questions when called on, ask pertinent questions, and volunteer to answer questions and provide comments. When it comes to speaking in class, you will be evaluated not just on the frequency of your contributions, but more importantly, on the **quality**.

To begin our class discussions, I will typically call on students at random, rather than seek volunteers. Once a particular conversation is underway, I will seek volunteers as well as continue to call on students at random. So please be prepared at all times.

Class participation will be evaluated at the end of the semester. If you have any questions along the way about how you're doing as far as your class participation is concerned, you are welcome to meet with me.

One last point. Please try to remember to bring your name cards to class every day.

**Grading**

To summarize, grades for the course will be based on the following components:

<b>COMPONENT</b>	<b>TOTAL PERCENT</b>
Mid-term.....	15%
Final exam .....	25%
First group exercise .....	10%
Second group exercise.....	15%
Third group exercise (including the in-class presentation) .....	20%
Class Participation.....	15%
<b>TOTAL</b>	<b>100%</b>

The percentages above will be used to arrive at a **weighted final grade percentage**. For undergraduates, your grade for the course will be based on where your weighted grade percentage falls on the following scale:

- A+ 97-100%; A 94-96.9%; A- 90-93.9%
- B+ 87-89.9%; B 84-86.9%; B- 80-83.9%
- C+ 77-79.9%; C 74-76.9%; C- 70-73.9%
- D 60-69.9%; F 0-59.9%

For MBA students, the weighted final grade percentages will be curved to the following grade distribution:

- A+, A, and A- .....25%-35%
- B+, B, and B-..... 60%
- C+ and below.....5%-15%

Your grades on the various course deliverables will be posted periodically to the Grade Book tool on WebCafé, so you can track your progress throughout the course.

**Course Communication Tools**

I pride myself in being highly accessible to my students. You are encouraged to use whatever method of communication works best for you—email, office hours (to be announced), scheduling an appointment, and/or phone—to communicate with me. I will do my best to reply to any voice mails or e-mails by the next business day. If you need to hear back from me earlier than that, please indicate so in your voice mail or the subject line of your email, and I will do my best to respond quicker.

As far as communicating with the class as a whole, I want to do so in a way that is most efficient for you. Making announcements in class is convenient, but it can take up a lot of valuable time. Therefore, I will rely mainly on email to get information out to the class as a whole. I will typically send out an email each weekend with relevant announcements for the coming week, as well as on an ad hoc basis as needed. I will also be using WebCafé to disseminate information and post PowerPoint slides and other class materials, so please get in the habit of checking WebCafé on a regular basis.

Hopefully these methods of communicating with the class as a whole will be effective and efficient. If you have any suggestions on how to improve class communications, please feel free to pass them along. This applies to other aspects of the course as well.

## Course Policies

### Academic Integrity:

In order to ensure fairness, students suspected of cheating, including plagiarism, will be referred to the Office of Student Conduct. The Office of Student Conduct will determine if there is cheating, and if so, what punishment will be administered. There are no exceptions to this policy under any circumstances. Please familiarize yourself with the University's Code of Academic Integrity, which is available at: <http://www.vpul.upenn.edu/osl/acadint.html>.

### Make-up Tests:

Students are expected to take the mid-term and final exam when they are given. However, in the case of a **documented** medical or family emergency, students will be permitted to take a make-up test at a time to be determined by the course instructor.

### Late Assignments:

All written work is due on the date specified in the *Class & Assignment Schedule*. As the written assignments will be discussed in class on the due date, **no late assignments will be accepted**.

### Cell/Smart Phones and Laptops:

Cell/smart phones are to be turned off during class except in the case of emergencies. (If that is the case, please notify me at the beginning of class.) Any student found to texting, checking email, surfing the web, or otherwise using a cell/smart phone during class will be asked to leave class for the day.

Regarding laptops, I realize some students use laptops to take notes and for other legitimate academic purposes. So you are welcome to bring a laptop to class. Indeed there are some days where will be using laptops for a class activity and I will ask you to bring your laptop to class.

That being said, I expect you to limit your use of a laptop to legitimate academic purposes. Any student found to be checking email, surfing the web, or otherwise using their laptop for non-academic purposes, will be asked to leave class for the day and will not be able to bring a laptop to class in the future unless required to for a class activity by the course instructor. In addition, I reserve the right to revisit the laptop policy in the event I observe that students are generally not respecting the ban on non-academic use.

This is essentially a "trust" issue. I don't expect to have to walk around the classroom to monitor your usage of cell phones and laptops. You're all adults and I will treat you that way, unless you give me reason not to treat you in this fashion. So please abide by my rules on the usage of cell phones, laptops, and other mobile technology.

### Changes to the Course Syllabus and Class & Assignment Schedule:

I will do my utmost to adhere to all of the elements discussed in the course syllabus and the *Class & Assignment Schedule*. However, time and other circumstances may necessitate changes in the course requirements, grading formula, daily class activities, due dates, or other elements of the course. Rest assured that I am extremely sensitive about the impact that changing the terms of the course can have on students, particularly changes in assignment due dates, and will fully consider your needs before making any changes.

Academic Accommodations:

The University of Pennsylvania is committed to making reasonable academic accommodations for students who self-identify as having disability. Students desiring academic accommodations need to register with the University's Office of Student Disabilities Services (SDS). After documentation of a student's disability has been approved by SDS and accommodations proposed, SDS will contact the appropriate instructor(s) to explain what type of accommodations are needed. Once notified, the instructor(s) will work with the student to reach agreement on the appropriate accommodation(s). For more information, please visit: [http://www.vpul.upenn.edu/lrc/sds/cs\\_academic\\_accommodations.php](http://www.vpul.upenn.edu/lrc/sds/cs_academic_accommodations.php).

Open Door:

If you have any questions about the course material, your assignments, or career-related issues, or are experiencing any difficulty related to the course or anything else for that matter, I encourage you to seek me out. I am here to help you get the most of your experience in the course and college in general, and I take this responsibility very seriously. Try not to wait until the last minute, however, because by then there might not be much I can do to help. But even then, I encourage you to talk to me to see if I can help.

### Class & Assignment Schedule

*Items to be handed in and exams are highlighted in bold, blue text.*

Class	Date	Topics/Classroom Activities	Readings	Assignments Due
1	Tuesday, July 6	<ul style="list-style-type: none"> <li>Course Introduction</li> <li><i>July 4 Challenge</i> group exercise</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>
2	Wednesday, July 7	<ul style="list-style-type: none"> <li>Defining Marketing Research &amp; The Marketing Research Process</li> <li>De-brief the <i>July 4 Challenge</i></li> </ul>	<ul style="list-style-type: none"> <li>Chapter 1</li> </ul>	<ul style="list-style-type: none"> <li>Tie the <i>July 4 Challenge</i> to concepts in Chapter 1</li> </ul>
3	Thursday, July 8	<ul style="list-style-type: none"> <li>Defining the Marketing Research Problem &amp; Developing an Approach</li> <li>Instructions for 1<sup>st</sup> Group Exercise</li> </ul>	<ul style="list-style-type: none"> <li>Chapter 2</li> </ul>	<ul style="list-style-type: none"> <li><i>Accenture</i> case (in Chapter 2)</li> <li>Final groups</li> </ul>
4	Monday, July 12	<ul style="list-style-type: none"> <li>Research Design</li> <li>Exploratory vs. Descriptive vs. Causal Research</li> </ul>	<ul style="list-style-type: none"> <li>Chapter 3</li> </ul>	<ul style="list-style-type: none"> <li><i>National Football League</i> case (in Chapter 3)</li> </ul>
5	Tuesday, July 13	<ul style="list-style-type: none"> <li>Exploratory Research Design: Secondary Data</li> </ul>	<ul style="list-style-type: none"> <li>Chapter 4</li> </ul>	<ul style="list-style-type: none"> <li><i>Mayo Clinic</i> case (in Chapter 4)</li> </ul>
6	Wednesday, July 14	<ul style="list-style-type: none"> <li>Exploratory Research Design: Qualitative Research</li> </ul>	<ul style="list-style-type: none"> <li>Chapter 5</li> </ul>	<ul style="list-style-type: none"> <li><i>Nike</i> case (in Chapter 5)</li> </ul>
7	Thursday, July 15	<ul style="list-style-type: none"> <li>Descriptive Research Design: Survey &amp; Observation</li> <li>Instructions for 2<sup>nd</sup> Group Exercise</li> </ul>	<ul style="list-style-type: none"> <li>Chapter 6</li> </ul>	<ul style="list-style-type: none"> <li><i>Starbucks</i> case (in Chapter 6)</li> </ul>
8	Monday, July 19	<ul style="list-style-type: none"> <li>Discuss Group Exercise No. 1</li> <li>Descriptive Research Design: Survey &amp; Observation (continued)</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li><b>Group Exercise No. 1 Due</b></li> </ul>
9	Tuesday, July 20	<ul style="list-style-type: none"> <li>Causal Research Design: Experimentation</li> <li>Review key concepts from Chapters 1 – 7</li> </ul>	<ul style="list-style-type: none"> <li>Chapter 7</li> </ul>	<ul style="list-style-type: none"> <li><i>AFLAC</i> Case (in Chapter 7)</li> </ul>
10	Wednesday, July 21	<ul style="list-style-type: none"> <li>Measurement and Scaling—Part 1</li> </ul>	<ul style="list-style-type: none"> <li>Chapter 8</li> </ul>	<ul style="list-style-type: none"> <li>Questionnaire Development case (specifics to be announced)</li> </ul>
11	Thursday, July 22	<ul style="list-style-type: none"> <li><b>MID-TERM EXAM on Chapters 1 – 7</b></li> <li>Measurement &amp; Scaling—Part 1 (continued)</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li><b>Prepare 3 pages of notes</b></li> </ul>



Class	Date	Topics/Classroom Activities	Readings	Assignments Due
12	Monday, July 26	<ul style="list-style-type: none"> <li>• Measurement &amp; Scaling—Part 2</li> <li>• Questionnaire and Form Design</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter 9</li> <li>• Chapter 10</li> </ul>	<ul style="list-style-type: none"> <li>• Questionnaire Critique (specifics to be announced)</li> </ul>
13	Tuesday, July 27	<ul style="list-style-type: none"> <li>• Sampling Design and Procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter 11</li> </ul>	<ul style="list-style-type: none"> <li>• To be announced</li> </ul>
14	Wednesday, July 28	<ul style="list-style-type: none"> <li>• Sample Size Determination</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter 12</li> </ul>	<ul style="list-style-type: none"> <li>• To be announced</li> </ul>
15	Thursday, July 29	<ul style="list-style-type: none"> <li>• Discuss Group Exercise No. 2</li> <li>• Instructions for 3<sup>rd</sup> Group Exercise</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Group Exercise No. 2 Due</b></li> </ul>
16	Monday, August 2	<ul style="list-style-type: none"> <li>• Data Preparation</li> <li>• Basics of Data Analysis: Frequencies, Cross-Tabs &amp; Hypothesis Testing</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter 14</li> <li>• Chapter 15</li> </ul>	<ul style="list-style-type: none"> <li>• To be announced</li> </ul>
17	Tuesday, August 3	<ul style="list-style-type: none"> <li>• Analysis of Variance and Covariance</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter 16</li> </ul>	<ul style="list-style-type: none"> <li>• To be announced</li> </ul>
18	Wednesday, August 4	<ul style="list-style-type: none"> <li>• Correlation and Regression Analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter 17</li> </ul>	<ul style="list-style-type: none"> <li>• To be announced</li> </ul>
19	Thursday, August 5	<ul style="list-style-type: none"> <li>• Report Preparation and Presentation</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter 23</li> </ul>	<ul style="list-style-type: none"> <li>• To be announced</li> </ul>
20	Monday, August 9	<ul style="list-style-type: none"> <li>• <b>FINAL EXAM on Chapters 8 – 12, 14 – 17, and 23</b></li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Prepare 6 pages of notes</b></li> </ul>
21	Tuesday, August 10	<ul style="list-style-type: none"> <li>• Factor Analysis</li> <li>• Cluster Analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter 18</li> <li>• Chapter 19</li> </ul>	<ul style="list-style-type: none"> <li>• To be announced</li> </ul>
22	Wednesday, August 11	<ul style="list-style-type: none"> <li>• Multidimensional Scaling and Conjoint Analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Chapter 20</li> </ul>	<ul style="list-style-type: none"> <li>• To be announced</li> </ul>
23	Thursday, August 12	<ul style="list-style-type: none"> <li>• In-class presentations of Group Exercise No. 3</li> <li>• Discussion and feedback</li> </ul>	<ul style="list-style-type: none"> <li>• None</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Group Exercise No. 3 Due</b></li> <li>• <b>In-class Presentation of Group Exercise No. 3</b></li> </ul>

**Note: Please do not make any plans to depart campus prior to August 12. All group members are expected to participate in the group presentations during our final class session.**