Rotman Commerce
UNIVERSITY OF TORONTO

Course Outline

RSM 352 H1F
Marketing Research
Fall
Course Meets: Thursday \ 12:00 pm – 2:00 pm \ WW119

Instructor: Inez Blackburn
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Office Hours: Thursday 2-3 or by appointment
Secretary: Ms. Holly Peterson (Fifth floor)

Course Scope and Mission

This course advocates marketing decision making based on customer insights. The main objective is to transform students into bi-model thinkers – people who understand both data and business problem. The course covers the initiation, design, implementation, and interpretation of research as an aid to marketing decision making.

The main course objectives include

1. Develop business problem analysis skills and ability to identify critical information needs.
2. Provide a working knowledge of common qualitative and quantitative marketing research methods.
3. Increase sensitivity to the biases and limitations of marketing research tools.
4. Familiarize with research methods commonly used in advertising, branding, product development, pricing, and promotion decisions.

Teaching Approach

The course will involve a combination of lectures, case analysis, and practical research assignments. We will use cases to illustrate and discuss marketing research procedures and techniques. Students will also conduct research projects to gain hands-on experiences.

Course Prerequisites

ECO220Y1/ECO227Y1/(STA220H1, STA255H1)/(STA257H1, STA261H1)

Course Co-requisites

RSM 350H1/RSM 251H1

Course Exclusions

RSM452H1.

Required Readings

<u>Course Package:</u> This course package includes a set of required readings and cases.

1. Robert L. Dolan (1991), "Marketing Research," HBS Note (592034-PDF-ENG).
2. Alan R. Andreasen, "Backward Market Research", Harvard Business Review, May-June 1985, 176-182.
3. Chapter 12 (Designing the Questionnaire, page **308**-335) from book: Marketing Research (8th Edition) by D. Aaker, V. Kumar, and G. Day, John Wiley and Sons, ISBN: 0-471-23057-X.
4. Case: The **Springfield** Nor'easters: Maximizing Revenues in the Minor Leagues (HBS Case 2510)
5. Case: TruEarth Healthy Foods: Market Research for a New Product Introduction (HBS Case 4065)
6. James Raymondo, "Confessions of a Nielson Household," American Demographics, March 1997, 24-31.
7. Horst Stipp, "How to read Nielson ratings," American Demographics, March 1997, page 28-29.
8. Reynolds, Thomas and Jonathan Gutman (1988), "Laddering theory, method, analysis, and interpretation," Journal of Advertising Research, Feb/March.
9. "Red Auerbach on Management – interview by Alan Webber," Harvard Business Review, March-April 1987. (No. 87201)
10. Gerald Zaltman and Robin Coulter (1995), "Seeing the voice of the customer: Metaphor-based advertising research," Journal of Advertising Research, July/August, 1995, 35-51.
11. Case: Boston Beer Company: Light Beer Decision (HBS Case 9-899-058)
12. Chapter 5 (Observation, page 203-219) from book: Effective Marketing Research in Canada, by William G. Zikmund and H. Onur Bodur, Nelson Education Ltd. (2008), ISBN: 0-17-625208-8.
13. Almquist, Eric and Gordon Wyner (2001), "Boost Your Marketing ROI with Experimental Design," Harvard Business Review, October.

Evaluation and Grades

The course grade will be determined on the basis of:

	Points	Due Dates
Course Project	35 points	November 27th
1 Case Reports and one assignment Wine Horizons assignment	30 points	October 16th /November 6th
1 Individual Practice Assignment	15 points	November 20th
Class participation (individual)	17 points	Ongoing
Research participation (individual)	3 points	Ongoing
Total	100 points	

(Individual) Written case analysis plus one assignment (30 Points = 2 × 15 Points)

Due: Case assignments have to be handed in before the beginning of the class.

Grading: Your TA will grade your case assignments. Each write up will be graded on a 50-point scale. You can appeal for a grade only if there is a clear misreading of your report. Write a memo explaining your disagreement, and re-submit to the grader.

> For the first case, if you hand in two case assignments, both assignments will be graded and the maximum of two scores will be counted towards final grade.

Late submissions *will not be accepted because the case will be discussed in class*. If the delay is the result of illness or domestic affliction, the individual involved must contact the instructor BEFORE the assignment is due to explain the position. A medical certificate or other supporting evidence will be required, although if necessary these may follow after the due date. Email submission before class is acceptable only if the student cannot attend the class.

(Individual) Practice Assignment (15 Point)

Each student needs to hand in a depth interview report. Detailed instructions will be available in class.

Late submissions *will be accepted but your grades will be discounted at the rate of 10% each day.*

Grading: The write up will be graded on a 50-point scale.

Class Participation (17 Points)

These class participation points are given to encourage your active participation in class discussions. The final participation grade will be an average of scores for Attendance and Contribution during the entire semester. *Each student should display a name card in first three classes.*

Attendance: Being present in class is a minimum requirement. Being absent from the lectures, arriving later to the lectures, or leaving early will lower the attendance grades, unless the students have legitimate reasons and notify the instructor in advance.

Contribution: Are you a good listener? Do your comments help advance everyone's learning? Are you willing to interact with others in the classroom? Do your comments show evidence of assimilating and integrating what has been discussed in the course so far?

Research Participation (3 Points): Detailed requirement will be available in first class. This assignment requires that you undertake research with human participants. Please note that research of this nature requires treating participants ethically, according to established standards and practices. Please consult with your instructor before commencing your research to ensure that your research activities comply with the applicable policy and procedure.

Group Project: Survey (35 Points):

Students will work in groups to complete a survey project during a semester. Detailed instructions will be available in class.

Learning to work together in teams is an important aspect of your education and preparation for your future careers. That said, project-based teamwork is often new to students and you are therefore reminded of the following expectations with respect to behaviour and contributions to your team project.

1. Read the document entitled, "Working in Teams: Guidelines for Rotman Commerce Students" which is available on the RC portal under the Academic Services tab.

2. When working in a team, Rotman Commerce students are expected to:

- Treat other members with courtesy and respect;
- Honour the ground rules established by the team;
- Contribute substantially and proportionally to the final project;
- Ensure enough familiarity with the entire contents of the group project/assignment so as to be able to sign off on it as original work;
- Meet the project timeline as established by the team.

3. Resolving conflicts:
Conflicts are part of the team's process of learning how to work together effectively and when handled well can generate creativity and bring-multiple perspectives to the solution.

Student teams are collectively expected to work through their misunderstandings as soon as they arise (and prior to submission of the final project). In cases where teams are unable to arrive at a solution that works for all members, the team must meet with the Rotman Commerce Team Coach** as soon as possible. The Coach will listen to the team and help develop options for improving the team process. All members of the project team must commit to, and, utilize their action plans.

** For an appointment with a Rotman Commerce Team Coach, please contact Nikoleta Vlamis at nikoleta@nikoletaandassociates.com or Elaine Zapotoczny at elaine@nikoletaandassociates.com. Nikoleta and Elaine are highly skilled at facilitating team dynamics and collaboration. Note that the Team Coach's s role is to provide guidance, support and advice on team matters – not to formally evaluate or assess teamwork for academic purposes.

POLICY AND PROCEDURE

Missed Assignments

Students who miss an assignment for reasons entirely beyond their control (e.g. illness) may submit a request for special consideration. Provided that notification and documentation are provided in a timely manner, and that the request is subsequently approved, no academic penalty will be applied.

Note that the physician's report must establish that the patient was examined and diagnosed at the time of illness, not after the fact. Rotman Commerce will not accept a statement that merely confirms a report of illness made by the student and documented by the physician.

In such cases, students must notify Rotman Commerce on the date of the missed test (or due date in the case of course work) and submit supporting documentation (e.g. Verification of Student Illness or Injury form) to the Rotman Commerce Program Office within **48 hours** of the originally scheduled test or due date. Students who do not provide Rotman Commerce or the instructor with appropriate or sufficient supporting documentation will be given a grade of 0 (zero) for the missed test or course deliverable.

For case assignments, the weights of missed assignments will be assigned to other cases. For project, the weights will be assigned to final delivery.

Accessibility Needs

The University of Toronto is committed to accessibility. If you require accommodations for a disability, or have any accessibility concerns about the course, the classroom or course materials, please contact Accessibility Services as soon as possible: disability.services@utoronto.ca or http://www.accessibility.utoronto.ca/.

Course Work & Academic Integrity

Academic Integrity is a fundamental value essential to the pursuit of learning and scholarships at the University of Toronto. Participating honestly, respectively, responsibly, and fairly in this academic community ensures that the UofT degree that you earn will continue to be valued and respected as a true signifier of a student's individual work and academic achievement. As a result, the University treats cases of academic misconduct very seriously.

The University of Toronto's Code of Behaviour on Academic Matters http://www.governingcouncil.utoronto.ca/policies/behaveac.htm outlines the behaviours that constitute academic misconduct, the process for addressing academic offences, and the penalties that may be imposed. You are expected to be familiar with the contents of this document. Potential offences include, but are not limited to:

In papers and assignments:

- Using someone else's ideas or words without appropriate acknowledgement.
- Submitting your own work in more than one course without the permission of the instructor.
- Making up sources or facts.
- Obtaining or providing unauthorized assistance on any assignment (this includes collaborating with others on assignments that are supposed to be completed individually).

On test and exams:

- Using or possessing any unauthorized aid, including a cell phone.
- Looking at someone else's answers
- Misrepresenting your identity.
- Submitting an altered test for re-grading.

Misrepresentation:

- Falsifying institutional documents or grades.
- Falsifying or altering any documentation required by the University, including (but not limited to), medical notes.

All suspected cases of academic dishonesty will be investigated by the following procedures outlined in the *Code of Behaviour on Academic Matters*. If you have any question about what is or not is permitted in the course, please do not hesitate to contact the course instructor. If you have any questions about appropriate research and citation methods, you are expected to seek out additional information from the instructor or other UofT resources such as College Writing Centres or the Academic Success Centre.

Email

At times, the course instructor may decide to communicate important course information by email. As such, all UofT students are required to have a valid UTmail+ email address. You are responsible for ensuring that your UTmail+ email address is set up AND properly entered on the ROSI system. For more information please visit http://help.ic.utoronto.ca/category/3/utmail.html

Forwarding your utoronto.ca email to a Hotmail, Gmail, Yahoo or other type of email account is not advisable. In some cases, messages from utoronto.ca addresses sent to Hotmail, Gmail or Yahoo accounts are filtered as junk mail, which means that important messages from your course instructor may end up in your spam or junk mail folder.

Blackboard and the Course Page

The online course page for this course is accessed through Blackboard. To access the course page, go to the UofT Portal login at https://portal.utoronto.ca/ and log in using your UTORid and password. Once you have logged in, look for the My Courses module where you'll find the link to all your course websites. If you don't see the course listed here but you are properly registered for the course in ROSI, wait 48 hours. If the course does not appear, go to the Information Commons Help Desk in Robarts Library, 1st floor, for help, or explore the Portal Information and Help at www.portalinfo.utoronto.ca/students and review the Frequently Asked Questions.

Recording Lectures

Lectures and course materials prepared by the instructor are considered by the University to be an instructor's intellectual property covered by the Canadian Copyright Act. Students wishing to record a lecture or other course material in any way are required to ask the instructor's explicit permission, and may not do so unless permission is granted (note: students who have been previously granted permission to record lectures as an accommodation for a disability are, of course, excepted). This includes tape recording, filming, photographing PowerPoint slides, Blackboard materials, etc.

If permission is granted by the instructor (or via Accessibility Services), it is intended for the individual student's own study purposes and does not include permission to "publish" them in anyway. It is absolutely forbidden for a student to publish an instructor's notes to a website or sell them in any other form without formal permission.

Course Timetable

Class	Date	Topic	Notes
1	September 11th Introduction	• Introduction	Read: (1.) Note on Marketing Research (2). Backward marketing research
2	September 18th Stats Review	• Basic data analysis for customer insights • Database marketing	Case: PG Bank (Blackboard) Read: Note on data analysis (Blackboard).
3	September 25th Survey (1)	• Survey design	Read: Book chapter on questionnaire design
4	October 2rd Survey (2)	• Survey data analysis • Survey application 1: Pricing	Read: Note on data analysis (Blackboard).
5	October 9th Survey (3)	• Guest Speaker Daniel Berkal • Survey application 2: demand forecasting	
6	October 16th Survey (4)	• Case Discussion • Sampling and media rating	Read: 2 articles on Nielsen rating **Wine Horizons questions 1-4**
7	October 23rd Interview (1)	• Depth interview • Motivation research	Due: Group project summary (1-page, email) Read: Reynolds and Gutman (1988) on laddering technique.
8	October 30th Interview (2)	• Language analysis • Guest Speaker NPD Group Keith Barber	Exercise: "Red Auerbach on Management"
9	November 6th Interview (3)	• Application of motivation research • Projective techniques/ZMET	Read: Zaltman's article on ZMET Due: Case 2 (Boston Beer Company) Reading: Book chapter on Observation
10	November 13th Interview (4)	• No Class will be rescheduled	
11	November 20th Question (5)	• Ethnography research • Experimentation	Read: Marketing experiment to increase ROI. Due: Individual Interview Assignment
12	November 27th	• Project presentation • Summary	Due: Group Project

Assignment 1 Wine Horizons Course Handout

Due date: October 23th 15 points

1. **Please discuss whether the proposed questionnaire and research design will achieve the intended objectives and suggest additional questions that could be used to assess intent to purchase.**
2. **What other research could be conducted to assist with a successful launch as well as help the company understand where to position the new product in the store.**
3. **Discuss current industry trends with respect to popularity of small size packaging and emerging demographics and provide a profile of the target consumer for the new product.**
4. **Discuss how social media could be used to conduct research and help with packaging and positioning decisions.**

Appendix 1: Case Assignments for RSM352 (15 points)

Report format: Your case report should discuss the following issues:

(1). What marketing decisions, and what alternatives, were facing the managers?

(2). Based on information presented in the case, what would you recommend? Why?

(3). Did the company conduct the market research properly? Were the results valuable to the managers? Why?

You may write the report in essay format with proper subtitles. For each case, there are 3 suggestions that you may pay particular attention to.

Format: Font size 11 points, 1.5 line space, 1 inch margin at each side.

Page limit: Maximum 3 pages in total, excluding graphs and tables in appendix.

Case 2: Boston Beer Company: Light Beer Division

Due date: November 6th 2014

Suggestions:

1. The case has several detailed summary of ZMET studies. I suggest you choose one of them, the main summary in Exhibit 8A, and carefully analyze the (a) key constructs about light beer experience and (b) the relationship between these constructs. You may have to refer back to Exhibit 8A to describe the constructs, and may use visual aids (e.g., a map) to help illustrate the relationship.
2. You may visit the websites of light beer brands, e.g., Bud Light and Corona (www.corona.com), and study their brand images. Can you relate these imagines to the results you find in Question 1? For example, can you find a part of your map that explains the positioning for each of these two brands?
3. In this case the researchers planned and executed a rather complex research program. You will need to base your recommendations from the research results of entire program. Make sure to examine all the research conducted, including taste test, retail audit, etc.

Appendix 2: Interview Practice Exercise (15 Points)

The purpose of this assignment is to practice personal interview as a motivation research. Specifically, the objective of personal interview for this assignment is to uncover needs and values that motivate consumer choice behaviour.

Please read instructions carefully.

Step 1: Identify Market and Participants

This stage consists of two tasks.

First, you need to identify a market with at least two competing brands. Both product and service markets will work. Examples of product market include cola (Coke vs Pepsi), video games (Xbox vs. Wii), (Apple versus Samsung) brand-name handbags (LV vs. Prada), expensive watches, cars, pets, and PDAs (iPhone vs. Blackberry). Examples of service market include senior houses, schools, grocery stores, churches, and clubs.

Second, you need to identify TWO willing participants to be interviewed. Both participants should be familiar with the market and have made choices. If possible, find two participants who are currently using different brands.

Step 2: Research Design: Interview guide

The interview guide shall list the set of questions you intend to ask. The questions should be listed in the sequence you hope to follow. You also need to note the points of probing.

As you'll learn in class, you can only anticipate the sequence of first couple of questions. Afterwards, following the laddering technique, the specific questions will depend on the answer to earlier questions. Consequently, your interview guide could specify a structure of questions, but cannot include all the complete questions.

Step 3: Data Collection

You conduct two sessions of interview in this step. Here are a few considerations in preparing your interview:

- Find a location and time with no interruption.
- Record the interview session. Ideally, you should video tape the interview.
- Consider bringing physical products, or pictures of products or services. This may help communications between you and participants.
- Although the focus of this exercise is on interviewing, you should pay attention to facial expressions and physical moves, too.
- If you conduct interview through phone, try arranging video phones.

Step 4: Data Analysis

- Create transcripts for your interviews.
- Use the Language Analysis method to analyze the
- transcripts.
- Identify key constructs and their linkages.

- Map out the results.

Step 5: Write the Report

Write up your findings and implications. Total length of main report shall not exceed 5 pages, excluding the appendix.

1. (10%) Summary –
   a. Review in one or two sentences the main insight(s) gained from research.

2. (30%) Method –
   a. Describe market and competing brands being studied.
   b. Describe the people interviewed.
   c. Explain the interview process and key questions being asked.
   d. Attach the interview guide in the Appendix.

3. (40%) Findings -
   a. Describe main results you discovered.
   b. Explain the need map. (Map in the appendix)

4. (20%) Implications -
   a. What advices would you give to each of the two competing brand?

Report Due: November 20tth

Appendix 3: Group Survey Research Project (35 Points)

In this assignment, you will design and conduct a survey for a real-world marketing problem identified by your group. In this project, you will define a problem, collect secondary information, design field research plan, collect data, analyze data, and write a report. Groups will also present their projects at the last class.

Due: (1). **Group presentation** on **November 27th** in class,

(2). **Written Report** due on **November 27th .** Each group should submit a hard copy at the beginning of last class, and email an electronic copy to Instructor.

You are required to submit one progress report on November 6th . Each group should meet with Prof. before the end of October

Step-by-step Instructions

Preliminary: Groups

You must work in groups of 4~6 students for this project. **You need to inform the Instructor about your group/members via email by 5pm on October 20th**

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There will be a short peer-review sheet to ensure that all students do their fair share of the work. 10% of your grade for the group project will be based on this peer evaluation. You need to provide a peer evaluation for every member of your group (excluding yourself), rate your peer's contributions, using a scale of 0 (lowest) to 5 (highest). Suppose your group has five people (including yourself), and that you receive 4, 4, 5, and 5. Your average peer evaluation score will be (4+4+5+5)/4 = 4.5. Your final score for the term project will be (4.5/5)*10 points + (term project score/100)*90 points. **A hard copy of the peer review must be submitted at the beginning of last class.** A student who does not submit a peer review will receive a zero for his/her peer review grade.

You should start working on this term project right after groups are formed.

Step 1 Choose a topic/Problem definition

After groups are formed, each student should develop some ideas for the project. In your first formal group meeting, bring up all the ideas and vote for one. You may also use this meeting to brainstorm for new ideas and/or expand existing ideas. If necessary, take another round of "idea searching".

Once your group agrees on the topic, define "decision problems" and "research problems".

- You may expect to conduct the survey online, so the research question shall be applicable to an online sample.
- You are required to email Professor a one-page problem definition on Feb 14 and schedule a meeting with professor before end of Feb to ensure that the problem works well with survey.

Step 2 Conduct secondary research on product and market

You should always start a research by searching for secondary data about current knowledge on product and market. Following is a list of items you may look for – not all of them may apply to your project.

(1) Product/service
- What are the "Core Benefits" (to be) provided by your product/service?
- What product/service features support the core benefits?

(2) Customers
- Who are your target customers? Can you profile your target customer by demographics (age, gender, income, etc) and/or psychographics (activities, beliefs, lifestyles, etc)?
- How big is the target market?
- What motivates the target customers to purchase your product/service?
- Describe purchase decision process for your target customers.
- If your product studies an existing product/service, how does company communicate to consumers in each stage of consumer's purchase decision process?

(3) Competitive positioning
- Describe competitive positioning in the market. You may want to draw a positioning map.
- How would your target customers meet their needs if your product/service did not exist in the market? Is the core benefit (to be) offered by your product/service currently provided by any existing suppliers?

(4) Channel – how products are sold through to end users.

(5) Market analysis

- Market size, trends in the market, growth rates, new innovations, competitors and their shares, channel members and their relationship.
- Company analysis: cost structure, sales goal, etc.

It's time to update your progress report. You can combine secondary research with problem definition. If necessary, you can revise your problem definition.

Step 3 ***Develop research design***

In this step, you will design questionnaire, develop a sampling plan, work out data collection method, and anticipate data analysis plan. In a nutshell, you need a detailed action plan for the rest of project.

Make sure to consider **research ethics**.

Step 4 ***Conduct field work and collect data***

Data collection typically takes longer than you hoped. So make sure to budget enough time for this stage.

Step 5 ***Analyze data and write report***

You will be glad that your group has been updating progress reports!

Step 6 ***Reporting***

Oral Presentation (5 Points)

Date: November 27th

Email the instructor your presentation file (mshi@rotman.utoronto.ca) by noon.

Length of Presentation: To Be Decided.

Your presentation will be graded with the following criteria.

1) Articulate the key marketing decision problems and background of the project . **– Be brief.**

2) Formulate the key research problems. (Can the answers to these research problems help clients with marketing decision problems?) **– Be brief.**

3) Explain research methods. – **Be brief.**

- Explain field collection method. (For example, did you conduct personal interview, telephone interview, mail (email) the questionnaire, or a combination of these?
- Discuss sampling procedure and sample size.

4) Present your results. **– Need details**.
- Show the tables/figures and explain the results.
- Relate the results to research problem.

5) Conclusions. What are the major implications to marketing decision problems? Can you make any recommendations to clients based on your research? **– Need details.**

6) Quality of presentation: Persuasiveness and professionalism.

7) Quality of presentation: Group participation and time management.

Project Report (30 Points)

Due: November 28th . You need to submit a hardcopy of report in class and email an electronic copy to the instructor inezblackburn@rogers.com
Page limit: 13 pages – including cover page, content list, and executive summary. Main text will be no more than 10-page long. Tables, figures, and questionnaire included in Appendix (not counted in page limit).

Your report will be graded with the following criteria.

1) Format (title page -1st page, table of contents -2nd page, executive summary -3rd page, introduction, research methods, analysis and results, research limitations, conclusions and recommendations, appendix, references if there are any, minimum 11pt, 1.5 or double space)

2) Executive Summary: research objectives, key results, and recommendations. (=1 page.)

3) Introduction: background (be brief), marketing decision problems, and related research problems.

4) Describe your research methods:
- Data collection method.
- Questionnaire: Explain the contents of your questionnaire. (Attach a copy in Appendix) - The instructor will grade the design (wording, responses, sequence, and layout).
- Sampling: explain (1) sampling procedure: target population, and sample frame if applicable; and (2) sample size, by segments if necessary.

5) Data analysis and results:
- You may explain (a) method and results, and (b) interpretation and insights (related to your research questions).
- Any graphs/figures should be done professionally. .
- Summarize main implications.

6) Limitations of study: limitations of research and potential consequence to results.

7) Conclusions: a brief summary of research results, and recommendation to decision problems.

8) Quality of writing.