

COURSE OUTLINE - MARKETING RESEARCH I (IBM 408)

Cal Poly, Pomona

College of Business Administration

Dr. Kirkpatrick

Fall 2009

Office Hours: 11:00 – 12:00 Monday/Wednesday, 10:30 – 12:00 Tuesday/Thursday  
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Required Text: *Marketing Research*, 7th edition, by McDaniel and Gates (SPSS 14.0 software, student version, is included in the text, or StatCrunch, available at StatCrunch.com)

**Prerequisites: IBM-320 and TOM-302**

	<i>Text</i>	<i>Date</i>
I. Introduction		
A. Marketing, management, and research		9/24
B. The research process	Ch. 1, 2	9/29
II. Problem Formulation	Ch. 3, Case 3.2 (p. 85), Case handout	9/29
III. Research Design		
A. Strategy: Exploratory or Conclusive	Ch. 5	10/1
B. Data Sources: Secondary or Primary	Ch. 4	10/6
	Exercises 1 and 2 due (census data and cross tabs)	10/8
IV. Data Collection Process		
A. Measurement and attitude measurement	Ch. 9, 10	10/8
B. Experimentation and test marketing	Ch. 8	10/13
	Exercise 3 due (comparing means), software demos	10/15
C. Data Collection Methods	Ch. 7, 6	10/15
D. Data Collection Forms	Ch. 11	10/20
	<i>Proposal, Worksheet, &amp; Quest. due Thurs., Oct. 20</i>	10/20
	Exercise 4 due (software exercises) (no class 10/27)	10/22

**MIDTERM EXAM: Thursday, October 29, 8:00 - 9:40 AM**

V. The Sample		
A. Sample designs	Ch. 12	11/3
	Exercise 5 due (Beer survey exercises)	11/3
VI. Collection of the data	p. 74	11/5
VII. Analysis and Interpretation of the Data		
A. Editing and Coding	pp. 432-46	11/5
B. Tabulation and basic statistics	pp. 446-64	11/5
C. Cross tabulation, chi-square, and t-test	pp. 450-54, 474-94, 499-500, 506-07	11/5, 11/10, 11/12
D. Correlation & regression analyses	Ch. 16	11/12
	Personal conferences on projects	11/17

	<i>Text</i>	<i>Date</i>
(V. - B. Sampling Continued)	Ch. 12, 13 Exercises 6 & 7, sample design and sample selection	11/19 11/24
E. Advanced analyses	pp. 542-68	12/1
VIII. The Research Report	Ch. 18	12/3

**RESEARCH REPORTS DUE: Thursday, December 3**

**FINAL EXAM: Tuesday, December 8, 7:00 AM – 9:00 AM**

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*Course grades* will be based on the two exams (weighted 25% each) and a term project, consisting of a proposal, research study, and final report (weighted 35%). The remaining 15% will be based on the required exercises. Out of fairness to those who attend the exams on the assigned dates, make-ups will not be given. Exams and exam dates should be considered a "death do us part" proposition. Late exercises are subject to a 1-point per class-day penalty. Late research reports are subject to the following penalty schedule: two-thirds of a letter grade (i.e., an "A" becomes an "B+," etc.) if handed in by Tuesday, December 8, and a whole letter grade (an "A" becomes a "B") if handed in by Thursday, December 10.

To determine your final course grade I convert all of your scores and letter grades to the 4-point system and weight each as indicated above. (A = 4.000, A- = 3.667, etc. See Cal Poly catalog for details.) For example, suppose you get the following scores and grades:

midterm	75	project	B+
final	85	exercises	10, 9, 10, 7, 0 (failed to hand in), 10, 8

The two exams average to 80 or a B- (80 and 81 are B-'s, 78 and 79 are C+'s); hence, your exam average is assigned a 2.667 and weighted 50%. Your project is assigned a 3.333 and weighted 35%. And your exercises, which equal 54 points out of 70, or 77 average, come up to a C and so are assigned a 2.000 and weighted 15%. Thus, your final course average equals:  $(2.667 \times .50) + (3.333 \times .35) + (2.000 \times .15) = 2.800$  or a B- for the course. But, say, you did the extra credit and did it well for an extra five-tenths of a letter grade. Now you go from 2.800 to 3.300, or a B+! I assign final grades, using the following ranges on the 4-point system, as follows:

A	= 3.833 to 4.000	C	= 1.833 to 2.166
A-	= 3.500 to 3.832	C-	= 1.500 to 1.832
B+	= 3.167 to 3.499	D+	= 1.167 to 1.499
B	= 2.833 to 3.166	D	= 0.833 to 1.166
B-	= 2.500 to 2.832	D-	= 0.500 to 0.832
C+	= 2.167 to 2.499	F	= 0.000 to 0.499

To trace your grade progress, download: [www.csupomona.edu/~jkirkpatrick/IBM408/408GradeCalc.xls](http://www.csupomona.edu/~jkirkpatrick/IBM408/408GradeCalc.xls). This will open in Excel. If for some reason it doesn't, open Excel, then open the downloaded file "408GradeCalc.xls."

**Note:** when turning in papers and exercises, the safest place to do so is *in my hands*. *Never* tape or in any other way try to attach papers to the door of my office (they'll disappear) or to slip them under the door (the weather strip won't allow it!). If you can't put the papers in my hands, then put them in the drop box outside room 105 in building 6 or in the one outside the IBM Department office; be sure my name is clearly marked on the paper. It will be put in my mailbox.

### *Term Project*

The purpose of the marketing research course is to familiarize you with the techniques by which data are collected, analyzed, and made available for decision-making use by marketing managers. One of the best ways to appreciate the research process is to conduct your own study, which is what this term project is all about.

Your assignment is to conduct a primary data, questionnaire survey. You are to write a questionnaire that will study some aspect of consumer behavior, administer it to at least 40–50 respondents, then analyze the data and write the research report. (Please note: these are individual—not group—projects.)

Begin by thinking of some *quantitative dependent variable* in the consumer that you wish to explain. That is, the purpose of your study is to explain why some aspect of consumer behavior occurs—in the quantity that it occurs. Hence, your dependent variable might be the number of diet soft drinks consumed per week or month, or the number of concerts attended. Or, for that matter, you might want to study the income that Cal Poly seniors expect to be earning five years after they graduate. Your questionnaire begins and revolves around this quantitative dependent variable.

Next, choose your potential independent or explanatory variables. That is, variables that you think might best explain why some respondents drink a lot of diet drinks and others do not. Gender, for example, might be one variable, weight might be another, etc. Choose at least four independent variables—at least one that is quantitative, the rest may be quantitative or categorical (qualitative). This will give you at least five questions for your questionnaire. In addition, include one open-end, non-quantitative variable (a "why" question here is usually the best choice) and one attitude scale (a 3-5 item Likert scale, paired comparison, rank-order, constant sum, semantic differential, or stapel scale. This will give you a minimum of seven questions. In any event, do not exceed ten or eleven questions on the questionnaire. Remember: it is easy to obtain tons of data, but what you want is useful information.

*Proposal, Worksheet, & Questionnaire due Thurs., Oct. 20.* Following the format handed out in class, write a brief proposal for your study. The purpose of proposal writing is to help you collect your thoughts and to organize your plan of action (and to convince management to fund your research). It also helps you write the draft of your questionnaire. In any event, *do not* collect any data until I have first approved your proposal and, especially, your questionnaire. The worksheet is designed to help you write your proposal; include at least *four dummy tables* in your worksheet.

*Research reports due Thurs., Dec. 3.* The final report should follow the format of the sample Beer Survey report included in the Term Project packet (a similar format is presented in Chapter 18, pp. 592-92, of the text). It should contain at minimum the following: one copy of your questionnaire, a spreadsheet of your data, one-way tabulations of all questions and a histogram (bar chart) of your dependent variable, confidence interval calculation on your dependent variable with interpretation, four cross-tabulations with chi-square analysis and interpretation, four t-tests with interpretation (preferably using different independent variables than used in the chi-square tests), one simple regression analysis including correlation coefficient and graph of the regression equation, and the results and interpretation of the attitude scale and open-ended question. Be sure that I can see and clearly understand your math (if analysis is done by hand). Neatness matters! Use presentation format for your data and tables. (Calculations and tables can go in the appendix of your report.) If you wish to do your tables in Excel, here are some templates you can download: [www.csupomona.edu/~jkirkpatrick/408Templates/](http://www.csupomona.edu/~jkirkpatrick/408Templates/). Instead of using Excel, you can copy the screen of each analysis in SPSS and paste in Word, but then you must edit to put into presentation format.

**Note:** SPSS is included in your text and is also available in several labs on campus. StatCrunch is available for \$12.00 for six months at StatCrunch.com.

*Exercises*

The following exercises are required and are to be handed in on the dates indicated. (All other cases and exercises listed in the course outline will be discussed in class, not handed in for grading.) The exercises will be graded on the basis of ten points each and your final score for all exercises will be weighted 15% of your final course average.

	<i>Date Due</i>
1. Exercise 1, analyzing census data, "Pop. Growth for Wash., DC MSA"	10/8
2. Exercise 2, cross tabulation	10/8
3. Exercise 3, comparing two means	10/15
4. Exercise 4, software exercises	10/22
5. Exercise 5, beer survey exercises using software	11/3
6. Exercise 6, sample design	11/24
7. Exercise 7, sample selection	11/24

## TEACHING METHOD

This is primarily a lecture course.

The purpose of formal education is to save you time—the time it would take you to learn marketing, finance, accounting, advertising, etc., on your own, by reading books and trying to find the right people to question. Lectures and the “3-Step Plan To In-Depth Learning” can save you that time.

### *The 3-Step Plan*

The acquisition and retention of knowledge is not automatic. It requires concentrated effort. The 3-Step Plan To In-Depth Learning is designed to help you understand marketing principles at a level that exceeds what can be achieved through other methods.

*Step 1 - Take Lecture Notes.* A well-organized lecturer presents his subject in terms of essentials. The spoken word, by its nature, cannot present the detail of the written word. Hence, these “essentials” give you the necessary foundation and superstructure on which to base your subsequent learning. Lectures, in other words, emphasize and reinforce key points from your reading and add new material. Note-taking helps to integrate or blend together these key points and new material with your current knowledge. The act of note-taking, however, requires mental focus and comprehension—an active, integrating mind during the process of note-taking. This integration, in turn, leads to retention (as opposed to rote memory).

I want to emphasize the value of good note-taking. Recent educational research shows that “notes containing more ideas and more words are related to higher achievement.” In other words, take down as much as you can. This research also shows that students think the purpose of note-taking is to be brief, taking down only the key ideas they think they might otherwise forget. This is a mistake. One study showed that only 60% of the ideas the professors considered important were taken down in notes by the students. When I was a freshman, I used to stop taking notes as soon as the professor said “for example”—on the premise that I already had written down the principle and that the examples are “just” illustrations. But when it came time to study for the exam, I didn’t fully understand the principle—because I couldn’t remember the examples.

*Step 2 - Read The Text.* Of course. But also: a good lecturer can separate what’s important from what’s unimportant. But only the written word can give you the details that are necessary for a thorough understanding of a subject. The details of the written word are, so to speak, the brick and mortar (added to the “superstructure”) of knowledge—the meat and flesh that are added to the skeleton of the lecturer’s essentials. A hallmark of professionalism is attention to details, especially the details of the written word. (Besides, studies show that successful people—such as CEO’s, who read six times as much as the average reader—are, indeed, heavy readers!)

*Step 3 - Write Answers To Review Questions.* The lecture contains material expressed in the words of the lecturer; the book contains material expressed in the words of its authors. With this step it is time for you to put the material into your own words. Two sets of essay-type review questions will be handed out during the course (one set about a week before each exam). Writing one- to two-paragraph answers to each of these questions, after thinking about the lecture notes and the book, will help tie many loose ends together and especially help you chew and digest the ideas. These answers to the review questions (assuming you have taken good lecture notes and have read the book) will also give you a solid set of study notes to use in preparation for the exams.

Conscientious practice of these three steps should give you in-depth knowledge and understanding. At the same time, it should keep rote memory to a minimum. It really depends on how you use your mind throughout the course.\*

\*Let me recommend a book that helped me a lot in graduate school: *A Guide to Effective Study* by Edwin A. Locke. This book discusses a wide range of study problems, including note-taking, coping with test-anxiety, how to study for multiple-choice exams, how to write essay exams, etc. There are, of course, other equally good study guides available in the bookstore.

### Extra Credit

Do either or both of the following for extra credit:

For 3% or three-tenths of a letter grade added to your final course average:

Take your simple random sample,  $n = 30$ , from Exercise 7, “Exercise on Sample Selection,” and analyze the data to test the following hypotheses:

- Weekly food expenditure increases as the number of persons in the household increases.
- Weekly food expenditure increases as the annual income of the household increases.
- Weekly food expenditure increases as the education of the head of household increases.
- Weekly food expenditure increases as the age of the head of household increases.

Analyze by constructing cross-tabulation tables (with chi-square significance tests), and interpret. Note that because of your small sample you will want to construct  $2 \times 2$  tables, i.e., you will want to put all your data into two categories for each of the independent and dependent variables. What do the tables tell you? Are they statistically significant (at a 70% confidence level)?

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For 2% or two-tenths of a letter grade added to your final course average:

Take your simple random sample,  $n = 30$ , from Exercise 7, “Exercise on Sample Selection,” and analyze the data to test the following hypotheses:

- Weekly food expenditure increases if children under 6 years old are present in the household.
- Weekly food expenditure increases if persons 6-18 are present in the household.

Analyze by conducting t-tests for the difference between two means, and interpret. (Use 70% confidence as your cut-off.)

- In addition, conduct correlation and regression analyses, including a scatterplot with regression line, on the relationship between number of persons in household (independent variable) and weekly food expenditure (dependent variable). In other words, calculate “ $r$ ” and the regression equation,  $Y = a + bx$ . Interpret. **Note: don’t forget to interpret!**

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DUE: All extra credit will be due on the day of the final exam.

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Professor Kirkpatrick received his BA degree in philosophy from the University of Denver and his MBA and PhD degrees in marketing from Baruch College of the City University of New York. He has worked as account executive for Public Relations Aids, Inc. in New York City and Smith-Hemmings-Gosden Direct Response Advertising in El Monte, CA; he has also worked as senior account executive for the Young and Rubicam Direct Marketing Group in Los Angeles. His publications have appeared in the *Journal of Advertising*, *Marketing Theory: Philosophy of Science Perspectives*, *Developments in Marketing Science, Vol. IX*, *Managerial and Decision Economics*, and *The American Journal of Economics and Sociology*. His book *In Defense of Advertising: Arguments from Reason, Ethical Egoism, and Laissez-Faire Capitalism* was published in 1994 by Quorum Books; in 1997, the work was translated into Portuguese and published in Brazil. His second book, *Montessori, Dewey, and Capitalism: Educational Theory for a Free Market in Education*, was published in February of 2008. Professor Kirkpatrick also publishes a blog at [jkirkpatrick.net/blog](http://jkirkpatrick.net/blog).