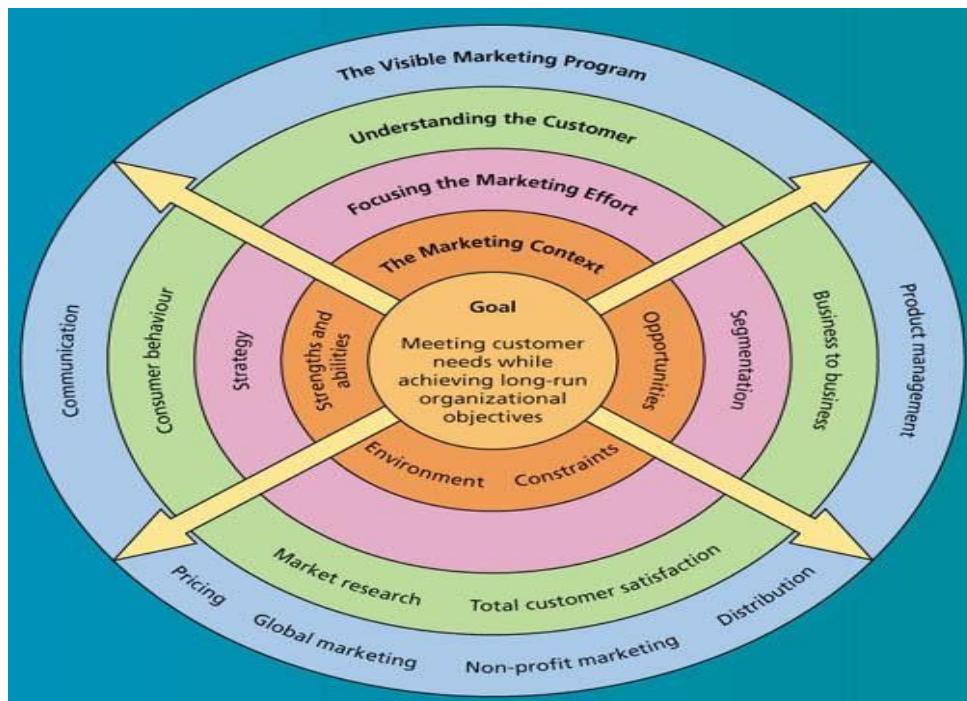


MKT500

Week 1

- Business Plan Components
 - External environment: CEPLTSC
 - Target Market and selection
 - Product, Price, Place, Promotion
 - Your competitive advantage: BCG Growth Matrix, SWOT
 - Financing
 - Long term and short term planning
- Research Framework



- Environmental Variables: CEPLTSC
 - Competition
 - Economic
 - Political-Legal
 - Technological
 - Social/Cultural
- Bases for Business Segmentation
 - Potential Markets
 - Descriptive
 - Demographic Segmentation
 - Gender
 - Age
 - Family life cycle
 - Race/ethnic group
 - Education

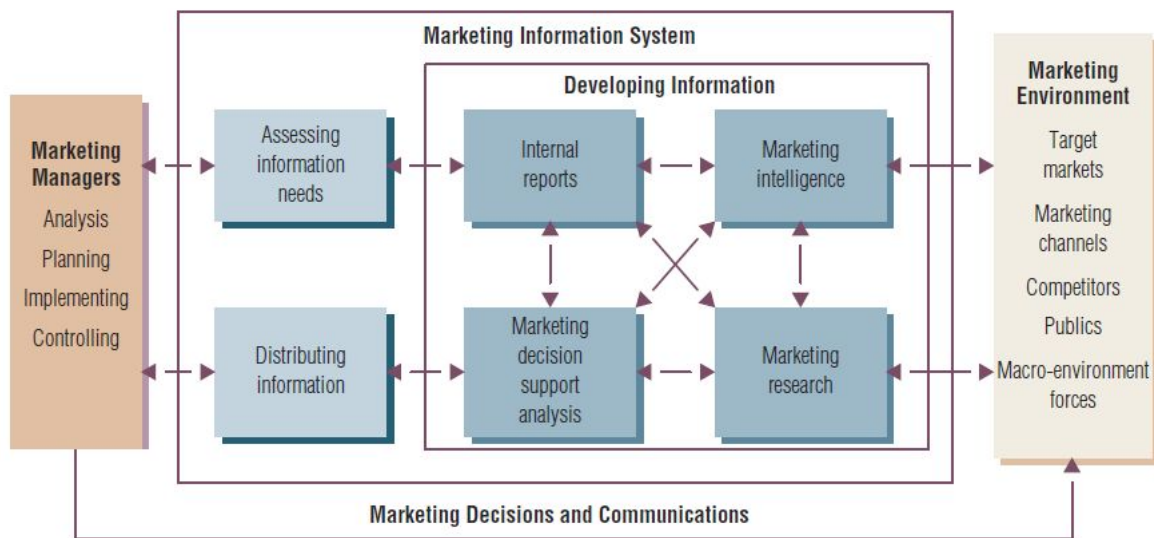
- Income
 - Occupation
 - Family size
 - Religion
 - Home ownership
- Geographic Segmentation
 - Country
 - Region
 - Urban/Suburban/Rural
 - Population density
 - City size
 - Climate
- Behavioural
 - Psychographic Segmentation
 - Lifestyles
 - Psychological variables:
 - Personality
 - Self-image
 - Benefit Segmentation
 - Expected benefits from product use
 - Usage Rate
 - Heavy users
 - Brand loyalty
- SWOT Analysis
 - The combined summary of the internal analysis and the environmental analysis. Stands for: Strengths, Weaknesses, Opportunities, and Threats
 - Strengths and Weaknesses are internal to the organization
 - Opportunities and Threats are external to the organization

Chapter 1 - Marketing Research

- What is Marketing?
 - Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large
- What is the Marketing Concept?
 - The marketing concept is a business philosophy that holds that the key to achieving organizational goals consists of the company's being more effective than competitors in creating, delivering, and communicating customer value to its chosen target markets
- What is a Marketing Strategy?
 - A marketing strategy consists of selecting a segment of the market as the company's target market and designing the proper "mix" of the product/service, price, promotion, and distribution system to meet the wants and needs of the consumers within the target market

- What is Marketing Research
 - Marketing research is the process of designing, gathering, analyzing, and reporting information that may be used to solve a specific marketing problem
- AMA Definition
 - Marketing Research: The function that links the consumer, customer, and public to the marketer through information: information used to identify and define marketing opportunities and problems; generate, refine, and evaluate marketing actions; monitor marketing performance; and improve the understanding of marketing as a process
- Marketing or Market Research?
 - Marketing Research:
 - A process used by businesses to collect, analyze, and interpret information used to make sound business decisions and successfully manage the business
 - Market Research
 - A process used to define the size, location, and/or makeup of the market for a product or service
- Uses of Marketing Research
 - Identify marketing opportunities and problems
 - Generate, refine, and evaluate potential marketing actions
 - Monitor marketing performance
 - Improve marketing as a process
- Identifying Market Opportunities and Problems
 - Some marketing research studies are designed to find out what consumers' problems are and to assess the suitability of different proposed methods of resolving those problems
- Generate, Refine, and Evaluate Potential Marketing Actions
 - Selecting target markets
 - Product research
 - Pricing research
 - Promotion research
 - Distribution research
- Monitor Marketing Research
 - Tracking data collected at point-of-sale terminals as consumer packages goods are scanned in grocery stores, mass merchandisers, and convenience stores
 - Tracking social media
- Improve Marketing as a Process
 - Basic Research
 - Is conducted to expand our knowledge rather than to solve a specific problem
 - Applied Research
 - Is conducted to solve specific problems

- Can We Determine If Something Is Wrong?
 - Most marketing research studies are trying to understand and predict consumer behavior, which is a difficult task
- The Marketing Information System
 - A MIS is a structure consisting of people, equipment, and procedures to gather, sort, analyze, evaluate, and distribute needed, timely, and accurate information to marketing decision makers
- Components of an MIS
 - Internal Reports System
 - Marketing Intelligence System
 - Marketing Decision Support System (DSS)
 - Marketing Research System



- Marketing Research System
 - It gathers information not gathered by the other MIS component subsystems
 - Marketing research projects are not continuous; rather, they have a beginning and an end

Chapter 2 - The Marketing Research Industry

- Who Conducts Marketing Research?
 - Internal suppliers: organizations that supply their own marketing research information
 - Client-side research: conducted by internal suppliers
 - DIY research: facilitated by Internet access to secondary data and better knowledge of data analysis software such as SPSS
- Who Conducts Marketing Research?
 - External suppliers: Outside firms hired to fulfill a company's marketing research needs
 - Agency: Firm specializing in marketing research and offer their services to buyers needing information to make more informed decisions

- Industry Structure
 - Types of firms and their specialties
 - Full-service supplier firms: have the capability to conduct the entire marketing research project for buyer firms
 - Limited-service supplier firms: specialize in one or, at most, a few marketing research activities

Chapter 3 - The Marketing Research Process and Defining the Problem and Research Objectives

- Step 1: Establish the Need for Marketing Research
 - Is there a real need for marketing research?
 - Research takes time and costs money
 - Value of information versus cost of information?
 - Marketing research is not always needed
 - We often have the information
 - When is marketing research not needed?
 - The information is already available
 - The timing is wrong to conduct marketing research
 - Funds are not available for marketing research
 - Costs outweigh the value of marketing research
- Step 2: Define the Problem
 - This is the most important of the 11 steps (assuming we've decided to do marketing research!)
 - If the problem is incorrectly defined, all else is wasted effort
 - The need to make a decision requires decision alternatives. If there are no alternatives, no decision is necessary
- Step 3: Establish Objectives
 - Research objectives, when achieved, provide the information necessary to solve the problem identified in step 2
 - Research objectives state what the researchers must do
- Step 4: Determine Research Design
 - Descriptive research
 - A set of methods and procedures describing marketing variables
 - Diagnostic research
 - Designed to determine sources of satisfaction and dissatisfaction
 - Perspective research
 - Provides information that allows the manager to best remedy the dissatisfaction
 - Exploratory research
 - Collecting information in an unstructured and informal manner
 - Descriptive research
 - Research that describes the phenomena of interest
 - Casual studies
 - Attempt to uncover what factor or factors cause some event

- Step 5: Identify Information Types and Sources
 - Primary information
 - Information collected specifically for the problem at hand
 - Secondary information
 - Information already collected
- Step 6: Determine Methods of Accessing Data
 - Secondary data is relatively easy to access; primary data is more complex
 - The most popular form of accessing data is online surveys. Traditional modes of data collection, such as telephone, mail, and face-to-face intercepts, still have a place in marketing research
 - Four main choices for primary data
 - Have a person ask questions
 - Use computer-assisted or direct questioning
 - Allow respondents to answer questions themselves without computer assistance
 - Use some combination of two or more of the previous methods
- Step 7: Design Data Collection Forms
 - The questionnaire must be worded objectively, clearly, and without bias in order to communicate with respondents
 - If we observe respondents, the form is called an observation form
 - Software programs are available to assist marketing researchers in preparing forms (e.g., qualtrics.com)
- Step 8: Determine Sample Plan and Size
 - The sample plan describes how each sample element, or unit, is to be drawn from the total population. Gives you representativeness!
 - Sample size refers to determining how many elements of the population should be included in the sample. Gives you accuracy!
- Step 9: Collect Data
 - Nonsampling errors in data collection will occur, so researchers must know the sources of these errors and implement controls to minimize them
 - Researchers aim to minimize this possibility by undertaking a control referred to as validation
 - Companies that specialize in data collection are referred to as field service firms
- Step 10: Analyze Data
 - Data analysis involves entering data into computer files, inspecting data for errors, and running tabulations and various statistical tests
- Step 11: Prepare and Present the Final Research Report
 - Reporting, the last step, is one of the most important phases of marketing research
 - Its importance cannot be overstated because it is the report, or its presentation, that properly communicates the results to the client

- Defining the Problem
 - Problems are situations calling for managers to make choices among decision alternatives
- The Importance of Properly Defining the Problem
 - When you define a problem incorrectly, there is nothing you can do in the research process to overcome this error. This makes defining the problem and research objectives the most important step in the marketing research process
- Role of Symptoms in Problem Recognition
 - Symptoms are not the problem but are the “signals” that alert us to the problem
 - Symptoms are changes in the level of some key monitor that measures the achievement of an objective
- Determine the Probable Cause(s) of the Symptom
 - It is crucial to determine all possible causes. If only a partial list of causes is made, it is possible that the real cause will be overlooked
 - When a probable cause of the symptom is identified, this triggers a decision to be made by management
- Specify Decision Alternatives That May Alleviate the Symptom
 - Once the decision alternatives are determined, a manager must try to determine the consequences of choosing each alternative
- Defining Research Objectives
 - Research objectives state specifically what information the researcher must produce so that the manager can choose the correct decision alternative to solve his or her problem
 - Hypotheses are statements that are taken as true for the purposes of argument or investigation
 - Criteria for writing research objectives
 - Specify from whom information is to be gathered
 - Specify what information (construct) is needed
 - Specify the unit of measurement used to gather the information
 - Word questions used to gather information using the respondents’ frame of reference
- Completing the Process
 - The research objectives specifies exactly what information the researcher must collect to fill the information gaps
 - Once this information is provided, the manager should be able to choose among the decision alternatives
 - But exactly how will that decision be made? What must the information look like for a certain alternative to be selected over others?

- Elements of the Market Research Proposal
 - The marketing research proposal serves as the basis of a contract as it documents what the marketing researcher proposes to deliver to the client for some consideration, typically a fee
 - Elements include the following
 - Statement of the problem
 - The research objectives
 - The research method
 - Statement of deliverables
 - Costs
 - Timetable

Week 2

Chapter 4 - Research Design

- What are you going to collect, how and the how are you going to analyze and get useful information from the data. Saves money and time if you do this step right
- Research Design
 - Research Design is a master plan specifying the methods and for collecting and analyzing the needed information
- Why is Research Design Important?
 - Good research design is the “first rule of good research”
 - Knowledge of the needed research design allows advance planning so that the project may be conducted in less time and typically at a cost savings due to efficiencies gained in preplanning
- Objectives of Research Design
 - To gain background information and to develop hypotheses
 - To measure the state of a variable of interest
 - To test hypotheses that specify the relationships between two or more variables
- Research Design: A Caution
 - In many cases research is an iterative process
 - By conducting one research project, we learn that we may need additional research, which may result in using multiple research designs
- Can be three types typically:
 - Exploratory: Secondary, experience/lead user/key informants, case analysis, focus groups
 - Unstructured, informal research usually conducted at the outset of research projects
 - It is usually conducted when the researcher does not know much about the problem
 - Uses of Exploratory Research
 - Gain background information
 - Define terms
 - Clarify problems and hypothesis
 - Establish research priorities

- Exploratory Research Methods
 - Secondary data analysis:
 - The process of searching for interpreting existing information relevant to the research topic
 - Experience surveys
 - Refers to gathering information from those knowledgeable on the issues relevant to the research problem
 - Key-Informant technique
 - Gathering information from those thought to be knowledgeable on the issues relevant to the problem
 - Lead-User Survey
 - Used to acquire information from lead users of a new technology
 - Case Analysis
 - A review of available information about a former situation(s) that has some similarities to the current research problem
 - Focus Groups
 - Small groups brought together and guided by a moderator through an unstructured, spontaneous discussion for the purpose of gaining information relevant to the research problem
- Descriptive: Who what where when how: cross sectional (snapshot) longitudinal (long time), continuous, discontinuous data
 - Is undertaken to describe answers to questions of who, what, where, when, and how
 - It is undertaken to collect data to examine characteristics of consumer and/or markets
 - It is desirable when we wish to project a study's findings to a larger population, if the study's sample is representative
 - Descriptive Research Classifications
 - Cross-Sectional Studies measure units from a sample of the population at only one point in time (or "snapshot")
 - Sample surveys are cross-sectional studies whose samples are drawn in such a way as to be representative of a specific population
 - These studies are usually presented with a margin of error
 - Longitudinal Studies repeatedly measure the same sample units of a population over time
 - Since they involve multiple measurements over time, they are often described as "movies" of the population

- Extraneous: Things that can mess up your results over which you have no real control. EXTRA to the results, could cause problems
 - Are those variables other than the independent variables that may have some effect on a dependent variable
- Experimental Design
 - Experimental design is a procedure for devising an experimental setting such that a change in a dependent variable may be attributed solely to the change in an independent variable
- Symbols of Experimental Design
 - O = Measurement, or observation, of a dependent variable
 - X = Manipulation, or change, of an independent variable
 - R = Random assignment of subjects to experimental and control groups
 - E = Experimental effect (change in the dependent variable due to independent variable)
- Typical Types of Experiments
 - Pretest, Post-Test: see how they do before the drug therapy and then after
 - Pretest refers to the measurement of the dependent variable taken prior to changing the independent variable
 - Post-Test refers to measuring the dependent variable after changing the independent variable
 - Two groups that you compare: control and experimental group
 - Control group: control of extraneous variables is typically achieved by the use of a second group of subjects
 - Experimental group: the group that has been exposed to a change in the independent variable
 - Before-After Testing
 - Is an experimental design in which the dependent variable is measured before and after an independent variable is changed
 - Before-After with Control Group design may be achieved by randomly dividing subjects of the experiment in two groups
 - Experimental Group (R) O1 x O2
 - Control Group (R) O1 x O2
 - $E = (O2 - O1) - (O4 - O3)$
- A/B Testing
 - Tests two alternatives (A/B) simultaneously to see which is better
 - Commonly done as online experimentation
- How Valid Are Experiments?
 - An experiment is valid if
 - The observed change in the dependent variable is due to the independent variable
 - The results of the experiment apply to the “real world” outside the experimental setting

- Two forms of validity are used to assess the validity of an experiment:
 - Internal Validity is concerned with the extent to which the change in the dependent variable is actually due to the change in the independent variable
 - External Validity refers to the extent that the relationship observed between the independent and dependent variables during the experiment is generalizable to the “real world”
- Lab Experiments, Test Markets (including standard and controlled), Field experiments, test market in cities (must be representative, isolated and ability to control distribution/promotion) (BUT this can turn out really badly too; crystal pepsi and coke) and there are pros and cons of test markets because although you might find out ‘sort of’ about a response to a new product or services, sometimes you can be wrong, your competitors can find out about your products and other problems
 - Laboratory experiments are those in which independent variable is manipulated and measures of the dependent variable are taken in a contrived, artificial setting for the purpose of controlling the many possible extraneous variables that may affect the dependent variable
 - Field Experiments are those in which independent variables are manipulated and the measurements of the dependent variable are made on test units in their natural setting
- Test Marketing
 - Is the phrase commonly used to indicate an experiment, study, or test that is conducted in a field setting
 - Main uses of test markets
 - To test sales potential for a new product or service
 - To test variations in the marketing mix for a product or service
 - Types of test markets
 - The standard test market is one in which the firm tests the product or marketing mix variables through the company’s normal distribution channels
 - Controlled test markets are conducted by outside research firms that guarantee distribution of the product through prespecified types and numbers of distributors
 - Simulated test markets (STMs) are those in which a limited amount of data on consumer response to a new product is fed into a model containing certain assumptions regarding planned marketing programs, which generates likely product sales volume
 - Selecting Test-Market Cities
 - Three main criteria
 - Representativeness
 - Degree of isolation
 - Ability to control distribution and promotion

- Pros and Cons of Test Marketing
 - Advantages
 - Test marketing allows for the most accurate method of forecasting future sales, and it allows firms the opportunity to pretest marketing-mix variables
 - Disadvantages
 - Test markets do not yield infallible results
 - Competitors may intentionally try to sabotage test markets
 - Test markets bring about exposure of the product to the competition
 - Test markets may create ethical problems

Chapter 5 - Secondary Data and Packaged Information

- What is “Big Data”?
 - Big data can be defined simply as large amounts of data from multiple sources
 - The term has been popularized in recent years in response to the numerous types and huge amounts of data to which companies now have access in real time
- Marketing Analytics
 - Marketing analytics is the management and analysis of data to improve marketing decisions
- Primary Data
 - Designed for real problem at hand, not just information that you have hanging around
- Secondary Data
 - Either “stuff” you have around already (internal secondary data which you can data mine) or information that other people or companies have collected and reported on (external secondary data). You can use the company data to identify potential customers (prospects), which customers might want what offer, enhancing loyalty, getting defected customers to come back and to avoid problems that are arising
 - Secondary data has many uses in marketing research and sometimes the entire research project may depend on the use of secondary data
 - Applications include determining lifestyle and purchasing habits, economic-trend forecasting, corporate intelligence, international data and public opinion
- Classification of Secondary Data
 - Internal secondary data are data that have been collected within the firm, such as sales records, purchase requisitions, and invoices
 - Internal secondary data is used for database marketing
 - A database refers to a collection of data and information describing items of interest
 - Database Marketing is the process of building maintaining customer (internal) databases and other (internal) databases for the purpose of contacting, transacting, and building relationships. Example: Data Mining

- Internal Databases
 - Internal databases consist of information gathered by a company, typically during the normal course of business transactions
 - Companies use their internal databases for purposes of direct marketing and to strengthen relationships with customers, which is referred to as customer relationship management (CRM)
 - Data Mining is the name for software that helps managers make sense out of seemingly senseless masses of information contained in databases
 - Micromarketing refers to using a differentiated marketing mix for specific customer segments, sometimes fine-tuned for the individual shopper
- Ways Companies Use Databases
 - To identify prospects
 - To decide which customers should receive a particular offer
 - To deepen customer loyalty
 - To reactivate customer purchases
 - To avoid serious customer mistakes
- External Secondary Data
 - External Databases are databases supplied by organizations outside the firm:
 - Published sources
 - Official data
 - Data aggregators
 - Published sources and databases, syndicated data, etc. and can be quick, cheap, available and may provide answers but... maybe the people who did the research were lousy, doesn't really apply to your problem, outdated, etc...
 - Published Sources
 - Sources of information that are prepared for public distribution by trade associations, professional organizations, companies, and other entities and can be found in libraries and online
 - Official Statistics
 - Are information published by public organizations, including government institutions and international organizations
 - Data aggregators are services or vendors that organize and package information on focused topics
 - Syndicated Services Data
 - Provided by firms that collect data in a standard format and make them available to subscribing firms - highly specialized and not available in libraries
 - External Databases
 - Databases supplied by organizations outside the firm such as online information databases

- Advantages of Secondary Data
 - Are obtained quickly
 - Are inexpensive
 - Are readily available
 - Enhance existing primary data
 - May achieve research objective
- Problems Associated with Secondary Data
 - Reporting units may be incompatible
 - Measurement units do not match
 - Differing definitions to classify data
 - Timeliness - may be outdated
 - May not be credible
- Evaluating Secondary Data
 - What was the purpose of the study?
 - Who collected the information?
 - What information was collected?
 - How was the information attained?
 - How consistent is the information with other information?
- Government of Canada is great for really good census type statistics and actually gives you some pretty refined and pretty specific materials about who lives where, how much money they make, education, household members, etc.
- If you look on the Ryerson website, there are many databases that have lots of articles on many topics and even if you are in a company trying to make some decisions, sometimes these articles, although likely not specific to your problem, give you some pretty good insights. You can talk to a research librarian, they are SUPER helpful if you need this type of information
- 'Packaged Information' is Also Available
 - Packaged Information is a type of secondary data in which the data collected and/or the process of collecting the data are prepackaged for all users
 - There are two broad classes of packaged information
 - Syndicated data
 - Packaged services
 - Syndicated: (a large company collects and sells this demographic and some usage data to you; typically more detailed than a government website) - but you have to sign a long term contract and really need to decide if this is the information you need
 - Are a form of external, secondary data that are supplied from a common database to subscribers for a service fee
 - Advantages
 - Shared costs,
 - Quality of data collected is typically very high
 - Speed

- Disadvantages of Syndicated Data
 - Buyers have little control over what information is collected
 - Firms often must commit to long-term contracts when buying syndicated data
 - Competitors have access to the same information
 - Packaged: things like Nielsen tracking studies, etc: could be useful for measuring consumer attitudes, demographics, media, consumer trends, print media, but also might not be what you need for a particular segment and they don't do it just for you: can't customize and its money
 - Refers to a prepackaged marketing research process that is used to generate information for a particular user
 - Advantages
 - Advantage of the experience of the research firm offering the service
 - Reduced cost of the research
 - Speed of the research services
 - Disadvantages
 - Inability to customize aspects of a project when using a packaged service
 - The company providing the packaged service may not be knowledgeable about the client's industry
 - Applications of Packaged Information
 - Measuring consumer attitudes and opinions
 - Identifying segments, often using geodemographics (classification of geographic areas in terms of the socioeconomic characteristics of their inhabitants)
 - Monitoring media usage and promotion effectiveness
 - Tracking sales
 - Maybe if you are a big company with lots of products and services and national/international distribution. This might be worthwhile, but quite useless for the little companies
- Digital Tracking Data
 - Point of sale (POS) data are automatically collected when consumers buy products
 - A cookie is a piece of data that is sent from a website to a user's computer by a web browser and is used to store the users browsing
 - A device ID is a unique identifier that can be traced back to a single mobile device, such as a smartphone or a tablet
 - Geolocation data is information that identifies the physical location of an electronic device

- Social Media Data
 - Social media data, also termed User-Generated Content (UGC), is any information that is created by users of online systems and intended to be shared with others
 - Examples: Reviews, tips, new users, competitors
 - Advantages
 - Currency
 - Relatively inexpensive
 - Unprompted and unfiltered voice of the consumer
 - Good means to trace trends and themes
 - Disadvantages
 - Audience may not be representative
 - Consumers not identifiable
 - Review websites subject to manipulation
 - Shallow content
- Monitoring Social Media
 - Social media marketing, or social media listening involves actively gathering, organizing, and analyzing social media data to gain consumer insights
 - Sentiment is the ratio of positive to negative comments posted about products and brands on the web
- The Internet of Things
 - The Internet of Things (IoT) is defined as the network of physical objects that are embedded with software or sensors that allow them to gather and distribute data
 - Passive Data are information that is collected without overt consumer activity
 - Wearables, or wearable technology, are clothing or accessories that are equipped with computer technology or sensors that allow the collection and sharing of data

Chapter 6 - Qualitative Research

- Quantitative and Qualitative
 - Quantitative research is numbers: QUANTITY: you can stick this into excel and spss etc. as pure numbers
 - Research involving the use of structured questions in which response options have been predetermined and a large number of respondents involved
 - Qualitative research is observing what people say or do in a much more complicated but not numbers oriented approach. You can't stick this information into a database like excel
 - Research involving collecting, analyzing, and interpreting data by observing what people do and say
 - Thick Data is a term used to emphasize the importance of gaining qualitative insights of phenomena to complement the quantitative knowledge provided by big data
 - E.g., focus group versus surveys

- Pluralistic Research: Mixture of both Quant and Qual
 - Mixed Method Research: Integration of both quantitative and qualitative research methods in order to gain the advantages of both
 - Three types of mixed methods research include
 - Qualitative before quantitative
 - Quantitative before qualitative
 - Qualitative and quantitative concurrently
- Qualitative Can Include
 - Observation Techniques: direct, indirect (archives, physical traces), overt, covert, structured, unstructured, in situ
 - May be limitations: (small number subjects, subjective, can't get to motivations, attitudes)
 - Good for short time interval, public behaviours, recall of what actually happens is no good
 - Direct Observation
 - Observing behaviour as it occurs
 - Indirect observation
 - Observing the effects of results of the behavior rather than the behavior itself
 - Archives: secondary sources, such as historical records, that can be applied to the present problem
 - Physical traces: tangible evidence of some past events
 - Covert observation
 - Subject is unaware that he or she is being observed, mystery shopping, as an example
 - Overt observation
 - Respondent is aware of observation, Nielsen's People Meters to monitor media to which a consumer is exposed, as an example
 - Structured
 - Researcher identifies beforehand which behaviors are to be observed and recorded. Often there is a checklist
 - Unstructured
 - All behavior is observed and the observer determines what is to be recorded (with no predetermined restrictions)
 - In Situ Observation
 - The researcher observes the behavior exactly as it happens
 - Invented Observation
 - The researcher creates a simulated situation

- Appropriate Conditions for use of observation
 - Short time interval... event must begin and end in a reasonably short time. You cannot “observe” a process of purchasing that lasts months
 - Public behavior... cannot observe private behavior
 - Faulty recall conditions... behaviors are so “automatic” that consumer cannot recall them
- Advantages of Observational Data
 - Insight into actual, not reported, behaviors
 - No chance for recall error
 - Better accuracy
 - Less costly
- Limitations of Observational Data
 - Small number of subjects
 - Subjective interpretations
 - Inability to pry beneath the behavior observed
 - Motivations, attitudes, and other internal conditions are unobserved
- Focus Group: small groups (6-12) sit around with a moderator (2 hours?) and discuss a designated subject: need to have some questions but can also largely ‘go with the flow’ as long as main ideas identified in advance. Could also be online (contemporary). Problems with online of anonymity, no body language, no physical senses involved for products/services, can become distracted. In traditional ones, could be problems of sample, moderator problems, interpretation problems. Good to use for fresh ideas, wide number/exploratory issues. Describe rather than predict, good to start surveys with as well.
 - Focus groups are small groups of people brought together and guided by a moderator through an unstructured, spontaneous discussion for the purpose of gaining information relevant to the research problem
 - Information from focus groups can be used to generate ideas, to learn the respondents’ “vocabulary” when relating to a product, or to gain some insight into basic consumer needs and attitudes
- Types of Focus Groups
 - Traditional focus group
 - Select 6 to 12 persons and meet in a dedicated room with one-way mirror for client viewing
- How a Focus Group Works
 - Moderator
 - Responsible for creating the correct atmosphere in the group and guiding discussion
 - Focus group report
 - Summarizes the information provided by the focus group participants relative to the research questions

- Newer Focus Groups
 - Online focus group: the respondents and/or clients communicate and/or observe by use of the Internet. Clients can observe the virtual chat
 - Advantages of Online Focus Groups
 - No physical setup is necessary
 - Transcripts are captured on file in real time
 - Participants can be in widely separated geographical areas
 - Participants are comfortable in their home or office environments
 - The moderator can exchange private messages with individual participants
 - Disadvantages
 - Observation of participants body language is not possible
 - Participants cannot physically inspect products or taste food items
 - Participants can lose interest or become distracted
- Advantages of Focus Groups
 - Can generate fresh ideas
 - Allow clients to observe their participants
 - May be directed at understanding a wide variety of issues
 - Allow fairly easy access to special respondent groups
- Disadvantages of Focus Groups
 - Representativeness of participants
 - Dependence on the moderator
 - Interpretation sometimes difficult
- When Should Focus Groups Be Used?
 - Focus groups should be used when the research objective is to describe rather than predict
 - How do consumers describe a better package?
 - How would they describe their satisfaction with our service?
 - How could they describe their ideas for an ad campaign?
- When Should Focus Groups Not Be Used?
 - Focus groups should not be used when the research questions require a prediction or when a major decision affecting the company's livelihood rests on the research results
- Some Objectives of Focus Groups
 - To generate ideas
 - To understand consumer vocabulary
 - To reveal consumer goods, motives, perceptions, and attitudes about products or services
 - To understand findings from quantitative studies

- Operational Aspects of Traditional Focus Groups
 - How many people should be in a focus group?
 - Who should be in the focus group?
 - How many focus groups should be conducted?
 - How should focus group participants be recruited and selected?
 - Where should a focus group meet?
 - When should the moderator become involved in the research project?
 - How are focus group results reported and used?
 - What other benefits do focus groups offer?
- Ethnographic Research
 - Ethnographic research is a term borrowed from anthropology to describe a detailed, descriptive study of a group and its behavior, characteristics, culture, and so on
 - Examples
 - Shopalongs
 - Are a type of research in which a researcher accompanies a shopper (with permission) on a shopping trip and observes and records the shopper's activities
 - Mobile Ethnography
 - Is a type of marketing research in which respondents document their own experiences through their mobile phones
 - Netnography
 - Is the name for the ethnographic study of online activities
- Marketing Research Online Communities
 - Marketing research online communities (MROCs) are groups of people that are brought together online to interact, provide ideas and opinions, and complete tasks
- Qualitative Techniques Can Also Include
 - In depth interviews (IDI)
 - Is a set of probing questions posed one-on-one to a subject by a trained interviewer so as to gain an idea of what the subject thinks about something or why he or she behaves a certain way
 - Laddering
 - Attempts to discover how product attributes are associated with consumer values
 - Protocol analysis: verbalize things in your head as making decisions
 - Involves placing a person in a decision-making situation and asking him or her to verbalize everything he or she considers when making a decision
 - Physiological: pupilometer (dilation), galvanometer (electric activity on skin like a like detector), and much more sophisticated techniques

- Projective techniques (Imagine you are buying a new pairs of shoes... how would you go about finding them, evaluating them, buying them, etc.)
 - Involve situations in which participants are placed in (projected into) simulated activities in the hopes that they will divulge things about themselves that they might not reveal under direct questioning
 - 5 Common Projective Techniques
 - Word-association test
 - Sentence completion test
 - Picture test
 - Cartoon or balloon test
 - Role-playing

Projective Techniques That Can Be Used With Focus Groups

Technique Name	Description	Application
Sort Me Up	Respondents are given products (or cards with product names) and asked to sort them into groups and provide a descriptive name for each group	Reveals competitive sets of products and brands Offers segmentation implications Shows how consumers perceive products and brands
Sort Me Straight	For each attribute, respondents rank cards with brand names from most to least	Identifies how the target brand performs on specific attributes with respect to competing brands
Picture This, Picture That	Respondents are given several pictures that represent a wide range of emotions and asked to select pictures that represent specific brand/category/situations	Reveals images and emotions that are associated with specific brand/category/situations
Color My World	Respondents are given several color swatches (paint chips) and asked to select color(s) that represent specific brand/category/situations	Offers insight into positive and negative imagery and associations for specific brand/category/ Situations
Dot, Dot, Dot	Respondents are given 10 dot-shaped stickers or tokens and asked to allocate them across flavors, brands, advertisements, etc.	Provides a relative ranking for each of the alternatives; follow-up probing reveals why certain alternatives are favored

- Neuromarketing
 - Neuromarketing is the study of an individual's involuntary responses to marketing stimuli, including eye movement, heart rate, skin conductance, breathing, and brain activity
 - Examples
 - Neuroimaging
 - Or viewing brain activity, may aid marketing researchers to better understand consumers' unconscious emotions
 - Eye Tracking
 - Is a technique for measuring eye positions and eye movement
 - Facial Coding
 - Is a system that is used to measure universal expressions of emotions, such as happiness, sadness, fear, and surprise, by their appearance on faces

- Thematic Analysis
 - Thematic analysis involves examining qualitative data to uncover themes or patterns which relate to the objectives of the research
 - A theme
 - Is a pattern that is found across data when conducting qualitative analysis that relates to the objectives of the research
 - A substantiating example
 - Is an example from qualitative data that provides evidence for a theme
 - A verbatim
 - Is a quote from a research participant that is used as a substantiating example of findings from qualitative research
 - A word cloud
 - Is a visual display of words and phrases in a text, with the size of the words and phrases representing the frequency of their occurrence in the text

Chapter 7

- Surveys: A survey involves interviews with a large number of respondents using a predesigned questionnaire
 - 4 types: (see tables attached: Burns and Bush)
 - Person administered:
 - People may feel intimidated face to face, time consuming but can be quality control and adaptability on the fly, slow and expensive. Includes in-home, mail-intercept, in-office, central location telephone. (know advantages and disadvantages)
 - Advantages
 - Feedback
 - Rapport
 - Quality control
 - Adaptability
 - Disadvantages
 - Humans make errors
 - Slow speed
 - High cost
 - Fear of interview evaluation
 - Computer assisted
 - Inexpensive, user friendly, not face to face (more refusals), must know computers: CATI, fully automated, online: respondents can pace themselves. Who is really answering?
 - Advantages
 - Speed
 - Relatively error-free interviews
 - Use of pictures, audiovisuals and graphics
 - Immediate capture of data

- Disadvantages
 - Technical skills may be required
 - Setup costs may be high
- Self-administered
 - Paper and pencil. Cheap but self-selected respondents and no monitoring/no explanations: types include group self-administered, drop off, mail: know advantages and disadvantages and table 7.4
 - Advantages
 - Reduced cost
 - Respondent control
 - Reduced interview evaluation apprehension
 - Disadvantages
 - Respondent control
 - Lack of monitoring
 - High questionnaire requirements
- Computer-Administered Surveys
 - Advantages
 - Breadth of user-friendly features
 - Highly efficient
 - Reduction of interview evaluation concern in respondents
 - Disadvantages
 - Requires computer-literate and Internet-connected respondents
 - Respondent misrepresentation
- Mixed Mode (hybrid): complex but perhaps getting benefits of each of the types used
 - Use multiple data collection methods
 - Advantages
 - Multiple advantages to achieve data collection goal
 - Example: Could use online survey to quickly reach portion of population with Internet access and telephone calling to reach those without Internet access
 - Disadvantages
 - Survey mode may affect response
 - Additional complexity
- In-Home Surveys
 - An in-home survey is conducted by an interviewer in the home of the respondent
 - Key advantage
 - Conducted in the privacy of the home, which facilitates interviewer-respondent rapport

- Mall-Intercept Surveys
 - The mall-intercept survey is one in which the respondent is encouraged and questioned while he or she is visiting a shopping mall
 - Key Advantage
 - Since mall-intercept interviews are conducted in large shopping malls they are less expensive per interview than are in-home interviews
 - Key Disadvantages
 - Sample representativeness may be an issues, as only mall patrons are interviewed
 - Respondents may feel uncomfortable answering the questions in the mall
- In-Office Surveys
 - In-office surveys take place in person while the respondent is in his or her office or other company area
 - Key Advantage
 - Useful for interviewing busy executives
 - Key Disadvantages
 - Relatively high cost per interview
 - Gaining access is sometimes difficult
- Telephone Surveys
 - Key Advantages
 - Reasonable cost
 - Good quality control
 - Fast turnaround
 - Key Disadvantages
 - Respondents can't be shown anything or physically interact with the research object
 - Telephone doesn't allow for observation of body language or facial expression
 - Limited in the quantity and types of information obtainable
 - Noncooperation is increasing
- Central Location Telephone Surveying
 - Involves a field data collection company installing several telephone lines at one location from which interviewers make calls
 - Key Advantages
 - Good and efficient quality control
 - Interviewing process can be monitored
 - Control over interviewer schedules

- Computer-Assisted Telephone Interviews
 - The most advanced telephone interview companies have computerized the central location telephone interviewing process with systems called computer-assisted telephone interviews (CATI)
- Fully Automated Surveys
 - Completely automated telephone surveys
 - Online surveys
- Group Self-Administered Surveys
 - A group self-administered survey entails administering a questionnaire to respondents in groups rather than individually for convenience and to gain economies of scale
- Drop-Off Survey
 - The drop-off survey, sometimes called “drop and collect”, in which the survey representative approaches a prospective respondent, introduces the general purpose of the survey to the prospect, and leaves it with the respondent to fill out on his or her own
- Mail Survey
 - A mail survey is one in which the questions are mailed to prospective respondents who are asked to fill them out and return them to the researcher by mail
 - Key Disadvantages
 - Nonresponse
 - Which refers to questionnaires that are not returned
 - Self-Selection Bias
 - Which means that those who do not respond are probably different from those who do not fill out the questionnaire and return it
- Panel Companies
 - An institution that recruits a large number of potential survey respondents who participate for compensation
 - Advantages
 - Fast turnaround
 - High quality
 - Database information
 - Access to targeted respondents
 - Integrated features
 - Disadvantages
 - Not random samples
 - Overused respondents
 - Cost
- General Survey Advantages: standardized, easy to use, can use stats programs, gets differences in groups, get to unseen (motives, beliefs, etc.)

- Surveys are most widely used for commercial marketing research, social trends, public opinion
 - Pros of surveys:
 - Standardization, easily administered, can ask what we want that would otherwise be unobservable, can easily analyze, and can find the type of subgroup that you want to ask questions from
 - When choosing what type to use, have to balance quality against cost and time. Also, are there other considerations, such as location, target, short attention spans, experts, etc.

TABLE 7.1 Five Advantages of Surveys

Advantage	Description
Provides standardization	All respondents react to questions worded identically and presented in the same order. Response options (scales) are the same, too.
Easy to administer	Interviewers read questions to respondents and record their answers quickly and easily. In many cases, the respondents read and respond to the questionnaires themselves.
Gets “beneath the surface”	While not as detailed as in-depth interviews or focus groups, it is common to ask questions about motives, circumstances, sequences of events, or mental deliberations, none of which are available in observation studies
Easy to analyze	Standardization and computer processing allow for quick tallies, cross tabulations, and other statistical analyses despite large sample sizes.
Reveals subgroup differences	Respondents can be divided into segments or subgroups (e.g., users vs. nonusers or age-groups) for comparisons in the search for meaningful differences.

TABLE 7.2 Data Collection and Computer Technology

	No computer	Computer
Interviewer	Person administered Interviewer reads questions and records the answers on paper.	Computer assisted Interviewer reads the questions and uses computer technology to record the answers and/or otherwise assist in the interview.
No interviewer	Self-administered Respondent reads the questions on a page and responds by writing on the questionnaire.	Computer administered Computer communicates the questions and records the respondent’s answers.

TABLE 7.3 Various Ways to Gather Data

Data Collection Method	Description
In-home interview	The interviewer conducts the interview in the respondent's home. Appointments may be made ahead by telephone.
Mall-intercept interview	Shoppers in a mall are approached and asked to take part in the survey. Questions may be asked in the mall or in the mall-intercept company's facilities located in the mall.
In-office interview	The interviewer makes an appointment with business executives or managers to conduct the interview at the respondent's place of work.
Telephone interview	Interviewers work in a data collection company's office using cubicles or work areas for each interviewer, usually reading questions on a computer monitor. Often the supervisor has the ability to "listen in" to interviews and to check that they are being conducted correctly.
Fully automated interview	A computer is programmed to administer the questions. Respondents interact with the computer and enter in their own answers by using a keyboard, by touching the screen, or by using some other means.
Online survey	Respondents answer a questionnaire that resides on the Internet.
Group self-administered survey	Respondents take the survey in a group context. Each respondent works individually, but they meet as a group, which allows the researcher to economize.
Drop-off survey	Questionnaires are left with the respondent to fill out. The administrator may return at a later time to pick up the completed questionnaire, or it may be mailed in.
Mail survey	Questionnaires are mailed to prospective respondents who are asked to fill them out and return them by mail.

TABLE 7.4 Major Advantages and Disadvantages of Common Data Collection Methods

Method	Major Advantages	Major Disadvantages	Comment
In-home interview	Conducted in privacy of the home, which facilitates interviewer–respondent rapport	Cost per interview can be high; interviewers must travel to respondent's home	Often much information per interview is gathered
Mall-intercept interview	Fast and convenient data collection method	Only mall patrons are interviewed; respondents may feel uncomfortable answering questions in the mall	Mall-intercept company often has exclusive interview rights for that mall
In-office interview	Useful for interviewing busy executives or managers	Relatively high cost per interview; gaining access is sometimes difficult	Useful when respondents must examine prototypes or samples of products
Telephone interview	Fast turnaround; good quality control; reasonable cost. CATI eliminates human interviewer error; simultaneous data input to computer file; good quality control	Restricted to telephone communication; CATI setup costs can be high	Long-distance calling is not a problem
Fully automated interview	Respondent responds at his or her own pace; computer data file results	Respondent must be willing to respond to a "robo-call" format	Many variations are emerging
Online survey	Ease of creating and posting; fast turnaround; computer data file results	Respondent must have access to the Internet	Fastest-growing data collection method; very flexible; online analysis available
Group self-administered survey	Cost of interviewer eliminated; economical for assembled groups of respondents	Must find groups and secure permission to conduct the survey	Prone to errors of self-administered surveys; good for pretests or pilot tests
Drop-off survey	Cost of interviewer eliminated; appropriate for local market surveys	Generally not appropriate for large-scale national surveys	Many variations exist with respect to logistics and applications
Mail survey	Low cost per respondent	Slow and suffers from nonresponse and self-selection	Probably the least used data collection method

- When You Are Choosing Which Survey Type
 - Time (How fast is the data collection?)
 - Money (How much will data collection cost?)
 - Type of respondents (person answering the survey)
 - Culture in which you operate
 - How good is the data quality?

Chapter 8

- In order to design a questionnaire, you have to decide what to measure: objective (physically verifiable: e.g., how many oranges do I have) or subjective (how much do you like the color blue)
- Basic Concepts in Measurement
 - Measurement
 - Determining a description or amount of some property of an object that is of interest
 - Properties
 - Specific features or characteristics of an object that can be used to distinguish it from another object
 - Objective properties
 - Are observable and tangible
 - Subjective properties
 - Are unobservable and intangible and must be translated onto a rating scale via scale development
- Important: three types of measures
 - Nominal: yes, no, other labels
 - Scales label objects
 - Ordinal: place in order
 - Scales indicate only relative size differences between objects
 - Scale Measures
 - Those in which the distance between each level is known
 - Interval: (distance between measures known)... 1-2-3-4-5 (ratio has true zero); can have both positive and negative with a neutral point (symmetric) or just positive or just negative (asymmetric)
 - Ratio scales have a true zero point
- Measurements have to be reliable (same person answers the same way even if question worded slightly different) and valid (if you want to know what color people like, you ask them about color, not about the type of coffee they prefer)
- There are lots of different types of surveys and survey questions
 - yes/no, male/female type questions (dichotomous; NOMINAL)
 - Ranking questions (rank these trucks number one, two and three: tundra, F150, Ram (ORDINAL)
 - Likert scales (rate from 1-7 from strongly disagree to strongly agree: very popular (INTERVAL/RATIO WHEN A ZERO THERE_

- Open ended questions: people are asked to write out their thoughts in their own words
- And others...
- REALITY CHECK
 - Nominal questions are okay for stats
 - Scale questions (e.g., 1-7) are okay for stats. Notice: must use odd number of points...
 - Questions that ask for a percentage or other numbers are okay for stats
 - But RANKING QUESTIONS ARE TERRIBLE for analysis so don't use them.
 - Open ended can't be used for stats almost at all without a LOT of work so don't use them too much
- Measurement
 - Basic questions response format
 - Open ended
 - No response options: unproved or probed
 - Close ended
 - Give response options: dichotomous (2 options) or multiple category
 - Scale response
 - "On a scale of 1-7 rate how much you like toothpaste" label or not except ends or numbers
 - How do you choose one over the other?
 - What type of data collected, other studies, type of survey, abilities of respondents, scale desired: yes/no, or something else
- Common scales
 - Likert: 1-5 or 1-7 strongly agree to strongly disagree
 - An interval scale commonly used by marketing researchers is the Likert Scale, in which respondents are asked to indicate their degree of agreement or disagreement on a symmetric agree-disagree scale for each of a series of statements. The Likert scale format measures intensity of agreement or disagreement
 - Lifestyle: measures consumer's unique way of living and again 1-5 or 1-7
 - A special application of the Likert Scale question form called the Lifestyle Inventory takes into account the values and personality traits of people as reflected in their unique activities, interests, and opinions (AIOs) toward their work, leisure time, and purchases. It measures a person's activities, interests, and opinions with a Likert scale

- Semantic differential: from black to white, good to bad, etc. and they put a mark where they agree
 - A Semantic Differential scale contains a series of bipolar adjectives for the various properties of the object under study, and respondents indicate their impressions of each property by indicating locations along its continuum. It is a good way to measure a brand, company, or store image
 - One concern with this type of scale is the halo effect, in which a general overall feeling about a brand or store could bias responses on its specific properties
- Sometimes you get a halo effect on all of these which is a general feeling about a store or brand that can bias a respondent's impressions on its specific properties, so you have to flip around the ends: sometimes have good on the right side of the page, sometimes on the left side of the page
- The Stapel Scale
 - The Stapel Scale relies on positive and negative numbers, typically ranging from +5 to -5. The scale may or may not have a neutral zero
- You may have to think through whether you want to include the 'no opinion' response, the choose not to answer response, and so on
- Two Issues with Interval Scales Used in Marketing Research
 - Should the scale include a middle or neutral point?
 - Should the scale be symmetric or non-symmetric?
- Interval Scales Used in Marketing Research
 - A symmetric interval scale is "balanced", as it has equal amounts of positive and negative positions, and typically it has "no opinion" or "neutral" separating the negative and positive sides
 - A non-symmetric (or asymmetric) interval scale has mainly degrees of positive positions, would be more appropriate because most people do not think in degrees of negative importance
- Reliability and Validity of Measurement
 - Reliability
 - Respondent responds in the same or a similar manner to an identical or nearly identical measure
 - Validity
 - Accuracy or exactness of the measurement

TABLE 8.5 Commonly Used Interval Scales for Selected Constructs

Construct	Response Scale
Brand/Store Image	Semantic differential (with 5 or 7 scale points) using a set of bipolar adjectives Example: <i>Refer to example on page ____.</i>
Frequency of use	Labeled (Never, Rarely, Occasionally, Often, Quite Often, Very Often) OR # times per relevant time period (e.g., month) Example: <i>How often do you buy takeout Chinese dinners?</i>
Importance	Labeled (Unimportant, Slightly Important, Important, Quite Important, Very Important) OR numbered rating using 5 scale points Example: <i>How important is it to you that your dry cleaning service has same-day service?</i>
Intention to purchase	Labeled (Unlikely, Somewhat Likely, Likely, Quite Likely, Very Likely) OR 100% probability Example: <i>The next time you buy cookies, how likely are you to buy a fat-free brand?</i>
Lifestyle/Opinion	Likert (Strongly Disagree-Strongly Agree with 5 scale points) using a series of lifestyle statements Example: <i>Indicate how much you agree or disagree with each of the following statements.</i> 1. <i>I have a busy schedule.</i> 2. <i>I work a great deal.</i>
Performance or Attitude	Labeled (Poor, Fair, Good, Very Good, Excellent) OR numbered rating scale using 5 scale points OR Stapel scale using -3 to +3 Example: <i>Indicate how well you think Arby's performs on each of the following features.</i> 1. <i>Variety of items on the menu</i> 2. <i>Reasonable price</i> 3. <i>Location convenient to your home</i>
Satisfaction	Labeled (Not at all Satisfied, Slightly Satisfied, Somewhat Satisfied, Very Satisfied, Completely Satisfied) OR 10-point satisfaction scale where 1 = "not at all satisfied" and 10 = "completely satisfied" Note: If there is reason to believe that an appreciable number of respondents are not satisfied, the recommendation is for a symmetric balanced scale to measure the degree of dissatisfaction (Completely Dissatisfied; Slightly Dissatisfied; Neither Dissatisfied nor Satisfied; Slightly Satisfied; Completely Satisfied) Example: <i>Based on your experience with Federal Express, how satisfied have you been with its overnight delivery service?</i>

- You decide what scale to use by thinking about what you are measuring
 - For example, it would be ridiculous to ask: 'what is your favorite color': strongly blue, moderately blue, somewhat blue, somewhat not blue, moderately not blue, strongly not blue
 - Similarly, it would not be smart to ask: 'how much do you like this doughnut', and the only options are yes or no
- Example of Survey Questions

1. The next time you purchase from our menu, how likely is it that you will buy a chicken entree?

very likely somewhat likely undecided somewhat unlikely very unlikely

2. In general, how satisfied are you with our menu selections?

very satisfied somewhat satisfied neutral somewhat dissatisfied very dissatisfied

3. Has the fact that food delivery service is available over the Internet changed the way you search for dining options? yes no

4. If the Internet has changed the way you search for information about dining options, please describe how it has changed.

- Watch out for these common problems
 - Question bias: wording can influence outcome: people can get embarrassed and exaggerate their knowledge
 - Trying to do too many things: when you do a questionnaire, if you try to get too much information, people will stop, get confused, or get angry
 - Be as brief as possible: get rid of as many questions as you can
 - Be careful of wording issues: don't use any words that can be subject to interpretation, use respondents core vocabulary
 - Use simple sentences and never ask compound questions (double barreled)

TABLE 8.6 Examples of Dos and Don'ts for Question Wording

Do or Don't Guideline	Problematic Question	Improved Question
Do: Be focused.	How do you feel about your automobile's GPS system?	Please rate your automobile's GPS system of each of the following features. (Features are listed.)
Do: Be brief.	When traffic conditions are bad, do you or do you not rely on your automobile's GPS system to find the fastest way to work?	Does your automobile GPS system help you arrive at work on time?
Do: Be simple and structured.	If you needed to find your child's best friend's house that was over 10 miles from your house for your child to attend a birthday party, would you rely on your automobile GPS system to get you there?	To what extent would you rely on your automobile GPS system to find a friend's house?
Do: Be crystal clear	Is your automobile GPS system useful?	How useful is your automobile GPS system for each of the following occasions? (Occasions are listed.)
Don't: Lead.	Shouldn't everyone have a GPS system in their automobile?	In your opinion, how helpful is an automobile GPS system?
Don't: Load.	If GPS systems were shown to help us decrease our depletion of world oil reserves, would you purchase one?	How much do you think an automobile GPS system might save you on gasoline?
Don't: Double-barrel	Would you consider purchasing an automobile GPS system if it saved you time, money, and worry?	Would you consider buying an automobile GPS system if you believed it would reduce your commuting time by 10%? (Separate questions for money and worry savings.)
Don't: Overstate	Do you think an automobile GPS system can help you avoid traffic jams that may last for hours?	To what extent do you believe an automobile GPS system will help you avoid traffic congestion?

- Designing a Questionnaire
 - A questionnaire is the vehicle used to present the questions the researcher desires respondents to answer

- Key Functions of A Questionnaire
 - Translates the research objectives into specific questions asked of respondents
 - Standardizes those questions and the response categories so every participant responds to identical stimuli
 - Serves as an enduring record of the research
 - Depending on the data collection mode used, such as online, a questionnaire can speed up the process of data analysis
 - Contains the information on which reliability and validity assessments may be made
- Questionnaire Design Process
 - Questionnaire design is a systematic process in which the researcher contemplates various question formats, considers a number of factors characterizing the survey at hand, ultimately words the various questions carefully, and organizes the questionnaire's layout
 - The researcher should strive to minimize question bias
 - Question bias is the ability of a question's wording or format to influence respondents' answers
 - 1. Determine what and how to measure
 - a. Identify constructs' properties and type of measure for each
 - 2. Decide on wording
 - a. Word each question using do's and avoiding dont's
 - 3. Organize questionnaire
 - a. Write introduction, put questions in order, use skip logic as needed
 - 4. Finalize and launch
 - a. Get client approval, pretest, code, launch
- When you design your survey
 - Think about what information you need from management to solve your problem/opportunity and decide how to ask for that information
 - You have a record of what people say, they respond in a standardized fashion, can help speed data analysis (compared to qualitative), and can make sure everything was valid and reliable
 - When you design the whole survey, you have to have an introduction, (sometimes with incentives), assurances of anonymity and confidentiality, have a really good question flow (e.g., put similar questions together: don't have one question about age, then the next question about menu preference, then the next question about how many kids in family etc.) as this is confusing
 - You want to follow steps, basically in the slide below
- Developing Questions
 - Questionnaire development is the practice of selecting appropriate response formats and wording questions that are understandable, unambiguous and unbiased
 - Marketing researchers take great care in developing research questions that measure
 - Attitudes
 - Beliefs
 - Behaviors
 - Demographics

- Four “Do’s” of Question Wording
 - Question evaluation is scrutinizing the wording of a question to ensure that question bias is minimized and that the question is worded so that respondents understand it and can respond to it with relative ease
 - The question should be focused on a single issue or topic
 - The question should be brief
 - The question should be grammatically simple
 - The question should be crystal clear
- Four “Dont’s” of Question Wording
 - Do not “lead” the respondent to a particular answer
 - A leading question gives a strong cue or expectation as what answer to provide
 - Do not use “loaded” wording or phrasing
 - A loaded question had buried in its wording elements a sneaky presupposition, or it might make reference to universal beliefs or rules of behavior
 - Do not use a “double-barreled” question
 - A double-barreled question is really two different questions posed in one question
 - Do not use words that overstate the case
 - An overstated question placed undue emphasis on some aspect of the topic
- Questionnaire Organization
 - Questionnaire organization pertains to the sequence of statements and questions that make up a questionnaire
 - Well-organized questionnaires motivate respondents to be conscientious and complete
 - Poorly organized questionnaires discourage and frustrate respondents and may even cause them to stop answering questions in the middle of the survey
- The Introduction
 - The introduction sets the stage; it is what a potential respondent reads or hears before he or she begins answering survey questions. What is the survey about?
 - Who is doing the survey? With an undisguised survey, the sponsor is identified, but with a disguised survey, the sponsor’s name is not divulged to respondents
 - The introduction should also indicate to respondents how they were selected
 - Incentives are offers to do something for the respondent to increase the probability that the respondent will participate in the survey
 - Other forms of incentives address respondent anxieties concerning privacy. Two methods tend to reduce anxieties and, therefore, increase participation. The first is ensuring anonymity. The second method is confidentiality. Anonymity means the respondent is not known and, therefore, may not be identified, while confidentiality means the respondent’s identity is not to be divulged to a client or any other third party
 - Screening questions are used to identify respondents who do and who do not meet the qualifications necessary to take part in the research study

- Question Flow
 - Question flow pertains to the sequencing of questions or blocks of questions, including any instructions, on the questionnaire
 - Warm-up questions are simple and easy to answer questions that are used to get the respondents' interest and to demonstrate the ease of responding to the research request
 - Transitions are statements or questions used to let the respondent know that changes in question topic or format are about to happen
 - Response to a skip question affects which question will be answered next
 - The more complicated and difficult to answer questions are placed deep in the questionnaire
 - Classification questions (typically demographics) are used to classify respondents
- Computer-Assisted Questionnaire Design
 - Computer-assisted questionnaire design refers to software that allows users to use computer technology to develop and disseminate questionnaires and to retrieve and analyze data gathered by the questionnaire
 - Use of computer-assisted questionnaire design is easy, fast, friendly, and flexible
 - They have question types, question libraries, real-time data capture, and downloadable data sets
- Skip and Display Logic
 - Computer-assisted surveys can use logic to display questions
 - Skip Logic lets the questionnaire designer direct the online survey to ask questions based on previous answers
 - Display Logic is similar to skip logic. The survey displays or asks questions that are appropriate based on the respondent's prior answers
- Coding the Questionnaire
 - Codes are numbers associated with question responses to facilitate data entry and analysis
 - The codes for an "all that apply" question are set up as though each possible response was answered with "yes" or "no"
- Pretesting The Questionnaire
 - A pretest is a dry run of a questionnaire to find and repair difficulties that respondents encounter while taking the survey

TABLE 8.7 Logical Sequence of Survey Questions

Question Type	Order	Examples	Rationale
Screens	First questions asked	“Have you shopped at Old Navy in the past month?” “Is this your first visit to this store?”	Used to select the respondent types desired by the researcher to be in the survey
Warm-ups	Immediately after any screens	“How often do you go shopping for casual clothes?” “On what days of the week do you usually shop for casual clothes?”	Easy to answer; shows respondent that survey is easy to complete; generates interest
Transitions (statements and questions)	Prior to major sections of questions or changes in question format	“Now, for the next few questions, I want to ask about your family’s TV viewing habits.” “Next, I am going to read several statements and, after each, I want you to tell me if you agree or disagree with this statement.”	Notifies respondent that the subject or format of the following questions will change
Complicated and difficult-to-answer questions	Middle of the questionnaire; close to the end	“Rate each of the following 10 stores on the friendliness of their salespeople on a scale of 1 to 7.” “How likely are you to purchase each of the following items in the next three months?”	Respondent has committed himself or herself to completing the questionnaire; can see (or is told) that there are not many questions left
Classification and demographic questions	Last section	“What is the highest level of education you have attained?”	Questions that are “personal” and possibly offensive are placed at the end of the questionnaire

Chapter 9 - Selecting The Sample

- Reasons for Taking a Sample
 - Practical considerations such as cost and population size
 - Inability to analyze huge amounts of data generated by a census
- Determining the sample plan
 - What is a sample plan?
 - Where you choose the folks (respondents) to ask your questions
 - You do this because you usually have too many customers to talk to, so you just use a subset. Also, less expensive, time consuming, and too much information generated by asking everyone
- Steps In Developing a Sample Plan
 1. Define relevant population
 2. Obtain listing of population
 3. Design sample plan; how many people and how you will select them
 4. Access population
 5. Draw sample: sometimes problems, so oversample, resample
 6. Validate sample (is it who you wanted)
 7. Resample if necessary
- Basic Concepts in Sampling
 - Population
 - The entire group under study as defined by research objectives
 - Census
 - An accounting of the complete population. It requires information from everyone in the population
 - The US census is taken every 10 years by the US Census Bureau
 - Sample

- Convenience Samples: Samples drawn from groups to which the researcher has easy access
- Purposive Samples: Unlike convenience samples, purposive samples require a judgement or an “educated guess” as to who should represent the population. Often the researcher or some individual helping the researcher who has considerable knowledge about the population will choose the types of individuals whom he or she feels constitute the sample. This practice is sometimes called a judgment sample or an exemplar sample . It should be apparent that purposive samples are highly subjective and, therefore, prone to much error.
- Chain Referral Samples: sometimes called “snowball samples”, chain referral samples require respondents to provide the names of prospective respondents. Such samples begin when the researcher compiles a short list of possible respondents that is smaller than the total sample he or she desires for the study. After each respondent is interviewed, he or she is queried about the names of other possible respondents. 21 In this manner, additional respondents are referred by previous respondents. Or, as the informal name implies, the sample grows just as a snowball grows when it is rolled downhill. They are the most appropriate when there is a limited or disappointingly short sample frame
- Quote Samples: When a researcher identifies groups in the population and sets the number of respondents (percentage of the final sample) for each group. Respondents are selected with convenience, purposive, referral, or some other nonprobability sampling method.
- Online Sampling Techniques
 - Online panels
 - Large numbers of individuals who have agreed to participate in online surveys
 - River samples
 - Created via the use of banners, pop-ups, or other online devices that invite website visitors to take part in the survey
 - E-mail list samples
 - Purchased or otherwise procured from someone or some company that has compiled email addresses of opt-in members of the population of interest

Chapter 10 - Sample Size

- Important Points about Sampling
 - Sampling method (not sample size) is related to representativeness
 - Only a probability sample (random sample) is truly representative of a population
 - Selection method not sample size determines sample representativeness
 - Sample size determines accuracy of findings
- Sample Accuracy
 - Refers to how close a random sample’s statistic is to the true population’s value it represents
- Sample Size and Accuracy
 - Which of these is more accurate?
 - A large probability sample, or
 - A small probability sample?
 - The larger a probability sample is, the more accurate it is (less sample error)
- Deciding on a sample size is complicated

- Important as it determines accuracy of data
- Two types of error
 - Nonsampling: pertains to all sources of error other than sample selection method and sample size
 - Sampling: involves sample selection and sample size
- You really need a probability random sample to be representative of population but normally this is not very likely for you to do...
- Advantages of Using Survey Methods
 - Standardization
 - Ease of administration
 - Ability to tap into the “unseen”
 - Suitability to tabulation and statistical analysis
 - Sensitivity to subgroup differences
- Variability
 - Variability refers to how similar or dissimilar responses are to a given question

TABLE 10.1 The Axioms of Random Sample Size and Sample Accuracy

1. The only perfectly accurate sample is a census.
 2. A random sample will always have some inaccuracy, which is referred to as *margin of sample error* or simply *sample error*.
 3. The larger a random sample is, the more accurate it is, meaning the less margin of sample error it has.
 4. Margin of sample error can be calculated with a simple formula and expressed as a $\pm\%$ number.
 5. You can take any finding in the survey, replicate the survey with a random sample of the same size, and be “very likely” to find the same finding within the $\pm\%$ range of the original sample’s finding.
 6. In almost all cases, the margin of sample error of a random sample is independent of the size of the population.
 7. A random sample size can be a tiny percent of the population size and still have a small margin of sample error.
 8. The size of a random sample depends on the client’s desired accuracy (acceptable margin of sample error) balanced against the cost of data collection for that sample size.
-

- Methods to determine samples size
 - Confidence interval: based on normal distribution curve
 - The confidence interval is a range whose endpoints define a certain percentage of the responses to a question
 - This approach is based upon the normal distribution
 - We can use the normal distribution because of the central limit theorem
 - The confidence interval = $p \pm$ margin of sampling error

Margin of sample error formula

$$\pm \text{ Margin of Sample Error} = 1.96 \times \sqrt{\frac{p * q}{n}}$$

TABLE 10.2 Sample Sizes and Margin of Sample Error

Sample Size (<i>n</i>)	Margin of Sample Error (Accuracy Level)
10	±31.0%
50	±13.9%
100	±9.8%
200	±6.9%
400	±4.9%
500	±4.4%
750	±3.6%
1,000	±3.1%
1,500	±2.5%
2,000	±2.2%
5,000	±1.4%
10,000	±1.0%

- Sample Size Formula
 - Need to know
 - Variability: $p \times q$
 - Acceptable margin of sample error: e
 - Level of confidence: z

Standard sample size formula
$$n = \frac{z^2(pq)}{e^2}$$

where

n = the sample size

z = standard error associated with the chosen level of confidence (typically, 1.96)

p = estimated percent in the population

$q = 100 - p$

e = acceptable sample error expressed as a percent

- Estimating Variability
 - How to estimate variability
 - Use data from a previous study on the target population
 - Conduct a pilot study of the target population
 - Assume worst case maximum variability (p and $q = 50\%$)
 - Estimate standard deviation by dividing range by 6
- Practical Considerations
 - How to determine the amount of acceptable sample error?
 - Researchers should work with managers to make this decision
 - What are the implications?
 - How much error is the manager willing to tolerate?
 - How to decide on the level of confidence to use?
 - Marketing researchers typically use 95% or 99%

- How to balance sample size with cost of data collection?
 - Researchers should work with managers to take cost into consideration in this decision
- Sample Size for Estimating Mean

$$n = \frac{s^2 z^2}{e^2}$$

- Sample size for estimating a mean requires a different
 - Z is determined the same way (typically 1.96 or 2.58)
 - S = variability indicated by an estimated standard deviation - can estimate through pilot study or look at previous studies
- Levels of confidence
 - 95% - z=1.96
 - 99% - z=2.58
- Other Methods
 - Rule of Thumb (Arbitrary Approach)
 - The arbitrary approach may take on the guise of a “percent rule of thumb” statement regarding sample size: “A sample should be at least 5% of the population in order to be accurate.” In sum, arbitrary sample sizes are simple and easy to apply, but they are neither efficient nor economical.
 - Conventional Approach
 - The conventional approach follows some “convention” or number believed somehow to be the right sample size. Managers who are knowledgeable of national opinion polls may notice that they are often taken with sample sizes of between 1,000 and 1,200 respondents.
 - Using conventional sample size can result in a sample that may be too small or too large
 - Conventional sample sizes ignore the special circumstances of the survey at hand
 - The conventional approach mistakenly uses a “cookie cutter” that results in the same sample size for every survey
 - Cost Basis (“All You Can Afford” Approach)
 - this method uses cost as an overriding basis for sample size. Returning to the eighth sample size axiom, managers and marketing research professionals are vitally concerned with the costs of data collection because they can mount up quickly, particularly for personal interviews, telephone surveys, and even mail surveys in which incentives are

included in the envelopes. Thus, it is not surprising that cost sometimes becomes the only basis for sample size.

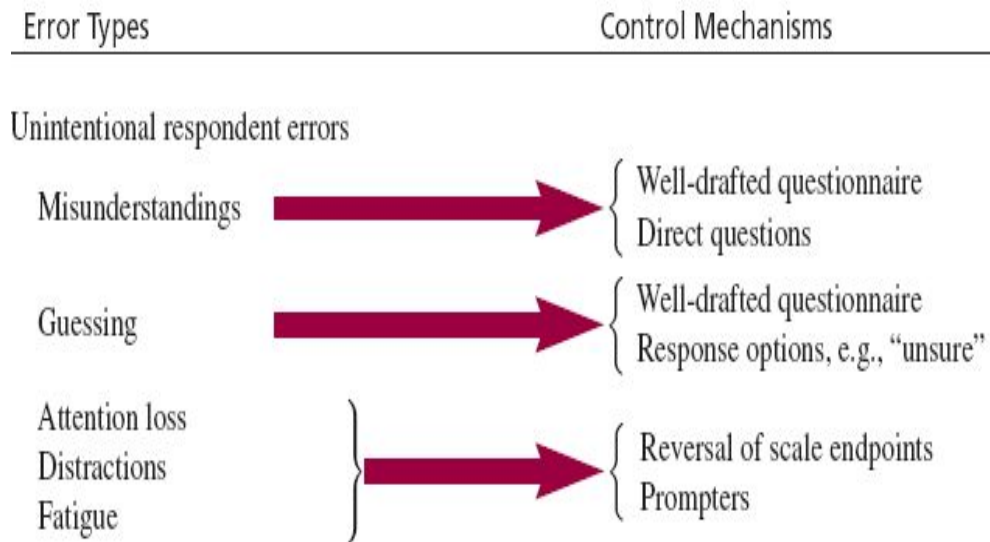
- Using cost as the sole determinant of sample size may seem wise, but it is not
- The appropriateness of using cost as a basis for sample size depends on when cost factors are considered
- Special Sample Size Determination Situations
 - Sample size
 - When sampling from small populations
 - Correction factor is used to modify sample size
 - When using non-probability sampling
 - Must weigh value of information against cost of gathering information
 - When sampling from panels
 - Panels are unique and may not be truly representative
 - Sampling from Small Populations
 - With small populations, use the finite population multiplier to determine small size

$$\text{Small Population Sample Size} = \text{Sample Size Formula} \times \sqrt{\frac{N - n}{N - 1}}$$

Chapter 11 - Fieldwork

- When you collect data, errors always arise: sampling and nonsampling
- Nonsampling errors include:
 - Data gathering, handling, analysis, or interpretation errors
 - Nonsampling errors are committed by fieldworkers and respondents
- Fieldworker Errors
 - Intentional
 - Interviewer cheating
 - Occurs when the interviewer intentionally misrepresents respondents
 - Leading respondents
 - Attempting to influence the respondent's answers through wording, voice inflection, or body language. In the worst case, the interviewer may actually reword the question.
 - Unintentional
 - Interviewer characteristics
 - Such as accent, sex, and demeanor. It has been shown that under some circumstances, the interviewer's voice, speech, gender, or lack of experience can be a source of bias
 - Misunderstandings
 - Occurs when an interviewer believes he or she knows how to administer a survey but instead does it incorrectly
 - Fatigue
 - Can occur when an interviewer becomes tired.
- Respondents Errors
 - Intentional

- Falsehoods
 - Occur when respondents fail to tell the truth in surveys
- Nonresponse
 - Includes failure on the part of a prospective respondent to take part in the survey, premature termination of the interview, and refusal to answer specific questions on the questionnaire.
- Unintentional
 - Misunderstanding
 - Occurs when a respondent gives an answer without comprehending the question and/or the accompanying instructions
 - Guessing
 - In which a respondent gives an answer when he or she is uncertain of its accuracy
 - Attention loss
 - Occurs when a respondent's interest in the survey wanes
 - Distractions
 - Such as interruptions, may occur while the questionnaire is being administered.
 - Fatigue
 - In which the respondent gets tired of answering questions
- How To Fix Errors



Error Types

Control Mechanisms

Intentional fieldworker errors



Unintentional fieldworker errors



- Can Use:
 - For fieldworkers:
 - Supervision
 - Consists of administrators overseeing the work of field data collection workers.
 - Validation
 - Verifies that the interviewer did the work.
 - Orientation sessions
 - Are meetings in which the supervisor introduces the survey and questionnaire administration requirements to the fieldworkers
 - Role playing sessions
 - Which are dry runs or dress rehearsals of administering the questionnaire, with the supervisor or some other interviewer playing the respondent's role.
 - For respondents
 - Anonymity
 - Occurs when the respondent is assured that his or her name will not be associated with his or her answers
 - Confidentiality
 - Occurs when the respondent is given assurances that his or her answers will remain private
 - Incentives
 - Which are cash payments, gifts, or something of value promised to respondents in return for their participation
 - Validation checks
 - In which information provided by a respondent is confirmed during the interview. For example, in an in-home survey on Leap Frog educational products for preschool children, the interviewer might ask to see the respondent's Leap Frog unit and modules as a verification or validation check

- Third-person technique
 - In which, instead of directly quizzing the respondent about a subject that might be embarrassing, the interviewer couches the question in terms of a third person who is similar to the respondent. For instance, a middle-aged man might be asked, “Do you think a person such as yourself uses Viagra?”
- Clear-cut questionnaire instructions and examples
 - Are commonly used as a way of avoiding respondent confusion.
- Reversals of scale endpoints
 - In which instead of putting all of the negative adjectives on one side and all the positive ones on the other side, a researcher will switch the positions of a few items
- Prompters
 - Such as “We are almost finished”, “That was the most difficult section of questions to answer”, or other statements strategically located to encourage the respondent to remain on track

- Response rate formula

CASRO Response Rate
Formula (simple form)

$$\text{Response rate} = \frac{\text{number of completed interviews}}{\text{number of eligible units in sample}}$$

- Online Problems Include
 -